

Mwynhewch y Parc,
Gofalwch am y Lle

Enjoy the Park,
Protect the Place

Destination Management Strategy
Bannau Brycheiniog 2026–2031

Evidence, discussion and data

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Welcome to the evidence, discussion and data paper for “Mwynhewch y Parc, Gofalwch am y Lle/ Enjoy the Park, Protect the Place” Destination Management Strategy Bannau Brycheiniog 2026–2031.

The Strategy itself will direct both how we work as a National Park Authority, and how we work with our partners, to manage the National Park as a Destination for visitors in the next five years - 2026 to 2031.

Introducing the Strategy

The Strategy has been developed over two years - 2024 and 2025.

This paper gives more detail on the evidence, discussion and the industry standard data sets used to support the development of the aims and objectives

Sections 1, 2 and 3 describe and explore:

- Our aims and the rationale for moving towards regenerative tourism and improving the benefit from tourism to our local economy.
- How this Strategy fits in with our Management Plan and the missions it describes.
- The impact of weather on visitor choice of where to holiday and the potential effects of climate change.

Sections 4 to 11 outline the objectives the Strategy proposes. There are two core goals, and five objectives. Achieving many of the objectives depends on successfully achieving the two core goals. Sections 4 to 11 of the Strategy describes these, the data on which the rationale for proposing them is based, offers relevant case studies from other UK National Parks, and suggests the priorities to achieve them.

Sections 12 and 13 describe the policy background against which the Strategy has been developed for the Authority, the Sustainable Destination its partners, and for the businesses in the National Park. They also outline the current resources available to begin work on the Strategy and the next steps required to achieve the objectives.

Appendices 1 to 7 offer a more detailed dive into the data used to formulate the Strategy.

How was the Strategy developed?

The strategy has been in preparation since early 2024. Appendix 6 gives details of which organisations have been consulted. At its meeting 6 June 2024 the National Park Authority agreed the process, two workshops were held for the Authority’s Members in 2024 and in 2025.

Brecon Beacons Tourism (BBT) represent local businesses working in tourism and hospitality. Visit Wales recognised the National Park as a destination in 2009. The Authority and Brecon Beacon Beacons Tourism were established as the partners responsible for liaising with other stakeholders to create management and promotion of the destination. Usually, this role is taken by the Local Authority working with tourism organisations, but the Authority was selected instead, because of the Bannau Brycheiniog’s unusual situation with so many local authorities responsible for different places within it. The Sustainable Destination Partnership forum was set up with our key stakeholders to help oversee the delivery of the strategies in force at that time. It is composed of representatives from each of the unitary authorities, the National Park Authority and representatives from the Canal and River Trust, and Brecon Beacons Tourism (see Appendix 3.1.3 for further details).

Further details on BBT’s role and relationship with the National Park Authority are in Section 10 below. BBT were consulted on the priorities and different iterations of the Strategy at their AGM and at members meetings throughout 2024 and 2025.

A visitor survey was undertaken during the high season in 2024 which was used to inform the development of the Strategy.

As detailed in Appendix 6, consultees including BBT, Visit Wales, the Local Access Forum, town and community councils among others were given the opportunity to help shape and then comment on the Strategy as it developed.

Ongoing consultation will be required to create, define and deliver the action plan.

1. Our Aims

We aim to be leaders in ‘Regenerative Tourism’ which means striving towards tourism creating a net positive contribution to our National Park, rather than solely avoiding negative impacts. In this way regenerative tourism is more ambitious than sustainable tourism. We want to support tourism development that contributes to enhancing and regenerating places and communities, helps reduce carbon emissions, and increases nature recovery, whilst ensuring that the National Park is relevant to everyone’s needs.

We aim to provide greater economic benefit to the National Park’s communities from the roughly four million visitors we receive annually. We will work with partners and stakeholders to provide and/or improve infrastructure and information for visitors, while avoiding negative impacts to communities, nature and the climate.

The rationale for our aims

This section explains why the Strategy wishes to prioritise regenerative tourism and growing the economic benefit of tourism for the local communities.

1.1 Regenerative tourism

In 2024, the UK's National Parks announced their collective ambition to become leaders in offering opportunities for regenerative tourism. Bannau Brycheiniog National Park Authority has committed to working towards this aim alongside its sister parks. The term was defined as managing tourism to make a net positive contribution. The paper described the ambition as moving beyond sustainable tourism, which could be summed up as “tourism shall do no harm” towards regenerative tourism, which aspires to enable visitors to make a positive impact to the National Park they are visiting.

Bannau Brycheiniog National Park Authority want to enable visitors to understand and contribute to the Management Plan's missions. We propose as a priority, the development and delivery of a pilot project to engage visitors with regenerative action during the first years of the Strategy. This will offer a positive exemplar for the other National Parks

Visitor contributions

Identify and pilot opportunities for visitors to contribute positively to communities and nature in the destination.

1.2 Why Tourism is important to the National Park's local economy

Tourism is a vital component of the economy across Bannau Brycheiniog (Brecon Beacons) National Park. In Wales nearly one in 10 people work in tourism.¹ In 2024 the tourism sector provided 4,056 jobs within the National Park's boundaries. Visitors created more than £434m of economic benefit to the National Park.

Visit Wales 2024 survey for Wales showed:

- In 2024, UK residents took 7.61 million overnight trips in Wales with 22.30 million nights and £2.24 billion spent during these trips.
- 38% of overnight trips taken in Wales during 2024 were holidays. 34% were visits to friends and relatives
- Approximately 7% of all UK trips included an overnight stay in Wales. The shares of total UK nights and expenditure were also 7%.
- The average duration of Wales trips in 2024 was 2.9 nights with an average spend of £295 per trip.

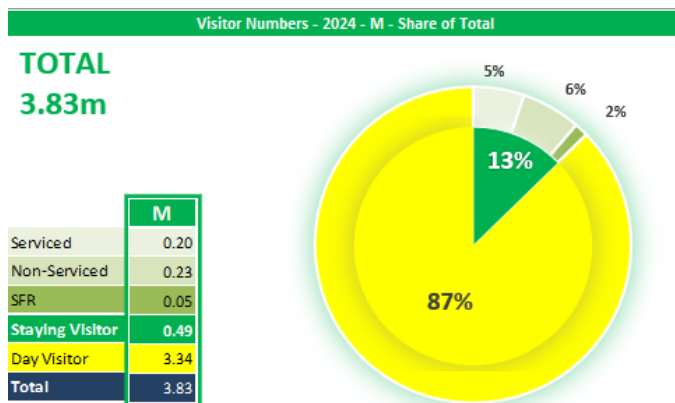
¹ [Exciting new vision for Welsh visitor economy | GOV.WALES](#)

- Compared to 2023, the volume of trips taken in Wales in 2024 was 10% lower, whilst expenditure was 11% higher.²

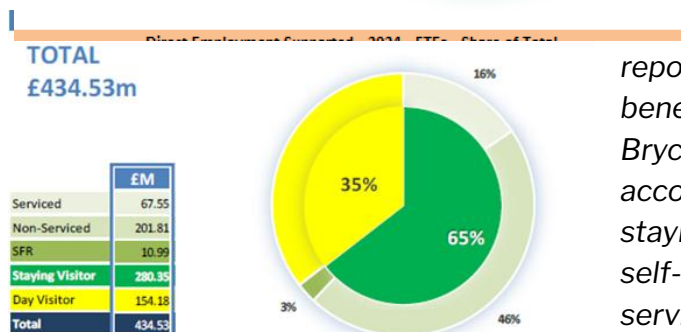
Hospitality and retail businesses in the National Park are dependent on seasonal footfall to top up their profit margins. Many local farm businesses diversified to offer self-catering accommodation (particularly after foot and mouth).

Reports relating to the proposed designation of a fourth National Park for Wales highlight the potential positive impacts of visitors to the local economy – offering chances for employment and opportunity for businesses. The “Economic Assessment Report”³ for the new National Park, prepared by Natural Resources Wales (NRW) states:

“Tourism and visitor economy – An estimated 3.3 million people visit the Candidate Area each year. International examples suggest that significant increases in visitor numbers can follow National Park designation. An uplift range of 15 – 30% is considered plausible for the candidate area, which would equate to an additional 500,000 to 1 million visitors per annum. This would have a range of impacts, one of which would be additional spend in the visitor economy, indicatively estimated at £8-15 million a year.”



This chart is from 2024 STEAM report and shows the breakdown of staying to day visitors in the Bannau Brycheiniog National Park, broken down by accommodation type (SFR refers to people staying with friends and relatives self-catering accommodation is labelled non serviced).



This chart, also from the 2024 STEAM report shows the percentages of economic benefit staying visitors provide in the Bannau Brycheiniog National Park, broken down by accommodation type. (SFR refers to people staying with friends and relatives self-catering accommodation is labelled non serviced).

² Domestic GB tourism statistics (overnight trips in Wales): 2024 [HTML] | GOV.WALES

³ https://ymgynggori.cyfoethnaturiol.cymru/north-east-gogledd-ddwyrain/proposed-national-park-statutory-consultation-2025/user_uploads/a-new-national-park-for-wales_arup-economic-impact-review_ju.pdf

The two charts from the STEAM report (always known by its acronym, and used by Local Authorities and National Parks as an industry standard) show only 13% of our visitors are staying visitors. However, they create 65% of the economic benefit, and the majority of the economic benefit (46%) is derived from the just 6% of visitors who choose self-catering accommodation.

The Local Authorities within the Brecon Beacons Destination Partnership support communities and businesses. Many of them recognise this enormous commercial potential as a resource to meet their aspirations for regeneration and growth.

The National Park Authority has been tasked to grow the visitor economy for the benefit of Wales in general and the local communities in particular. Increasing overnight stays makes tourism more lucrative for local communities – the STEAM data shows that local spend is nearly treble when people choose to stay the night. Encouraging overnight stays by offering a range of desirable visitor accommodation, is therefore a vital part of the picture. In line with the aspirations of our missions for the National Park, most of the accommodation on offer in the National Park is run by small and medium businesses, or is part of farm diversification, with owners often living at the business.

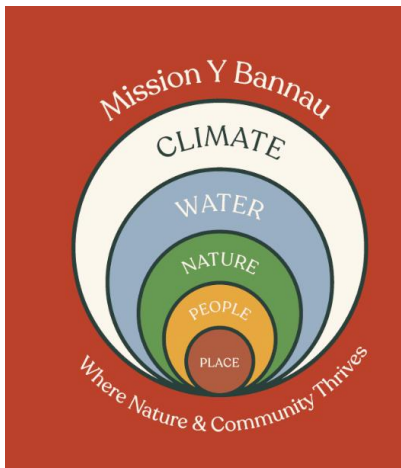
However, businesses engaged with tourism, particularly businesses which offer accommodation, have reported that they expect to be/are already being in some cases, negatively impacted by a series of policies – (described below in section 13).

Businesses tell us they want to see co-ordinated, impactful, positive, marketing campaigns which include the attractions and beauty spots that are available. Recreating and (vital) finding funding for partnership destination marketing is one of the key priorities for our partner Brecon Beacons Tourism. See section 11 for more detail.

2. National Park Management Plan 2023 -2028: achieving our missions

The National Park Authority and its stakeholders created the National Park Management Plan Dyfodol Y Bannau 2023-2028.

Dyfodol Y Bannau set out the Authority's vision for the National Park. Its focus is on how the Park can engage effectively with the impacts of climate change, and nature recovery, while enabling the people who live in and visit the National Park to thrive.



The Management Plan's imagines a future where:

“We will have become the torchbearers for sustainable tourism. Visiting Bannau Brycheiniog provides a unique experience, which enhances support for nature recovery, community wellbeing, and the local economy. Visitors will know our story and be motivated to help us respond to key challenges, especially through their own actions and behaviours.”

The Management Plan describes a future economy where:

Local communities and businesses will benefit from a vibrant and sustainable economy focused on local wealth generation and the foundational economy. Sustainable new investment will work alongside home-grown businesses to provide good quality employment opportunities.

Visit Wales proposes nurturing a boutique accommodation industry in its strategic vision “Welcome to Wales – priorities for the visitor economy 2020 to 2025”. Working with businesses and partners to develop the existing accommodation offer in the National Park further could match both Visit Wales’s goals and the aspirations of the Management Plan.

The aims and objectives within the Strategy are intended to contribute to the work of the Authority and its partners towards achieving the missions for the future the Management Plan perceives.

3. Weather and climate change - the impact on visitor numbers

Section 3 describes how important weather is in influencing visitor numbers and considers the need to plan for growth in numbers which could result from climate change.

Weather is already one of the most important variables influencing how many people visit Bannau Brycheiniog National Park. Millions of people from the UK choose to holiday in Southern Europe. The UK government published Tourism: Statistics and Policy in 2025 ⁴, it said:

⁴ <https://researchbriefings.files.parliament.uk/documents/SN06022/SN06022.pdf>

“Of the 91.4 million trips made abroad by GB residents in 2024, 70.6 million (77%) were to Europe, 4.7 million (5%) to North America, and 16.1 million (18%) to the rest of the world.

Spain was the most visited country, accounting for 17.8 million visits in 2024. The next most visited countries were France (9.3 million) and then Italy (4.8 million), Turkey (4.1 million), the United States (4.1 million), Greece (3.8 million), and Portugal (3.7 million).”

Global warming and climate change will make the holiday locations in southern Europe either uncomfortably hot and liable to fires, or flood. If predictions of a warmer, drier summer climate in the future are correct, the National Park could attract substantial numbers of new visitors. This strategy proposes we should plan for this eventuality.

3.1 Climate change could attract more visitors to Bannau Brycheiniog National Park.

The BBC and the Met Office have worked to create predictions on the impact of climate change.⁵ Going forward, summer temperatures in the National Park are likely to be cooler than the east of the UK and, though warmer, will be substantially more temperate than traditional holiday locations in southern Europe will become.

Global warming is also likely to diminish summer rainfall. Although reduced rainfall has negative impacts on the National Park’s habitats and rivers, it could also make the National Park a more desirable location for holiday makers.

In a survey published Jan 2026,⁶ Visit Britain identified weather as the key factor influencing British people choosing overseas holiday destinations, 47% choosing to go overseas mentioned weather as the key reason they would not choose to holiday in the UK

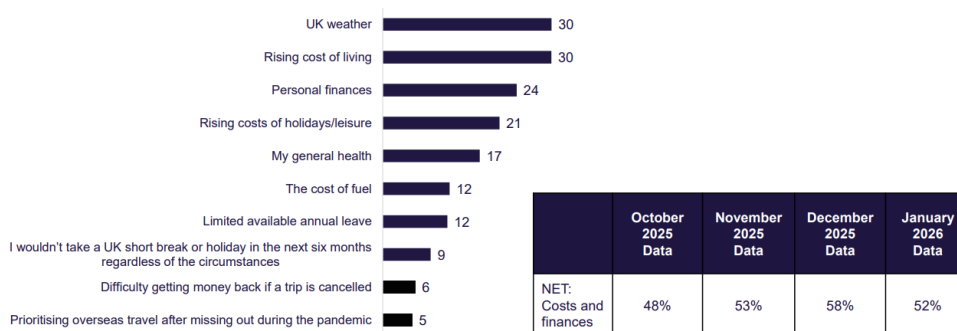
- TOP 5 reasons for UK preference**
1. UK holidays are easier to plan (51%)
 2. UK holidays are cheaper (49%)
 3. Shorter / quicker travel (49%)
 4. To avoid long queues at airports/ports or cancelled flights/voyages (31%)
 5. I want to take holidays in places I am familiar with (25%)

- TOP 5 reasons for Overseas preference**
1. Better weather (47%)
 2. I want to visit new places/experience new cultures (42%)
 3. Overseas holidays are cheaper (27%)
 4. To visit friends or relatives (19%)
 5. I'm prioritising overseas trips after missing out in the last few years (18%)

⁵ <https://www.bbc.co.uk/news/resources/idt-d6338d9f-8789-4bc2-b6d7-3691c0e7d138>

⁶ <https://www.visitbritain.org/research-insights/domestic-sentiment-tracker>

Figure 10. Top 10 Barriers to taking an overnight UK trip in next 6 months. Percentage, January 2026, UK



The BBC published an article on 18 June 2025 recognising the trend to staycations resulting from extreme weather in Southern Europe.⁷ According to the Office for National Statistics over 30 million headed for Southern Europe (17.8 million UK residents visited Spain in 2023, 9.2 million visited France, 4.2million to Italy and 4.5 million to Greece)⁸. Meanwhile, 15.9 million holiday visits were made to the UK. However, Wales received only 892,000 of these visits. It is conceivable that, in the future, the impact of climate change may encourage some of these millions of people to turn their attention to Bannau Brycheiniog National Park.

The UK Government announced (Nov 2024) its policy to increase international visitor numbers to 50 million by 2030.⁹ If achieved, this will result in increased carbon emissions as air travel is particularly carbon intensive. The environmental damage incurred by more international tourism to the UK could be partially offset by UK residents choosing to spend their holidays in Britain. This would be particularly effective if they travel by sustainable transport to and within the UK destinations.

3.2 Case study examining impact of weather on visitor numbers

STEAM recorded the highest ever visitor numbers to the National Park in 2018, at 4.3 million. The weather seems likely to have been the most important variable in creating this peak. An article written by the Met Office explains the weather that year¹⁰

2018 opened with snow, which brought many to enjoy the snowy mountains of Bannau Brycheiniog National Park.

⁷ [Extreme heat is starting to change the way we holiday - BBC News](#)

⁸ <https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/latest>

⁹ <https://www.gov.uk/government/news/new-ambition-for-50-million-annual-visits-to-uk-announced-by-tourism-minister>

¹⁰ <https://www.carbonbrief.org/guest-post-met-office-review-uk-weather-2018/>

Visit Wales reports most bookings to UK destinations are made 1 to 3 months ahead of the visit.¹¹

Hot and sunny weather characterised 2018's April and the May bank holiday weekends. We can speculate that the spell of very warm weather throughout the build-up to the key summer months encouraged potential visitors to book holidays in the UK - including Wales. Meanwhile, continental Europe was impacted by extremely high temperatures and droughts, with temperatures reaching 45° for the first time.¹² As a result of ongoing climate change, these record temperatures in continental Europe have continued to be broken.

This data suggests that periods of warm, sunny weather are likely to be a key factor in more visitors choosing Bannau Brycheiniog as a holiday destination. This could result in more visitors creating greater pressure in high season.

3.4 Considering an alternative climate change impact - flooding

However, the impacts of climate change are unpredictable. Alternative impacts of climate change already experienced in the National Park are torrential downpours, high winds and flooding. The summers of 2023 and 2024 were both overcast and wet. Attractions and accommodation providers told us that numbers of visitors declined in Summer 2024, and impacted booking numbers and takings for the following year.

The need to “weatherproof” attractions so they can attract visitors even in poor weather, has been recognised by Welsh Government. A grant in early 2025 and again in 2026 was given to help large attractions across Wales to create sufficient covered space to enable people to visit.¹³ This will provide shade for high temperatures, as well as rain shelter.

Providing things to do when it is raining is unlikely to encourage more people to choose Wales as a destination during poor weather. On the other hand, “weatherproofing” attractions will likely encourage people already on holiday in the Bannau Brycheiniog National Park to visit them.

As the Visit Britain research cited above shows, growing the economic benefit of tourism in the Bannau Brycheiniog National Park will be substantially more difficult if climate change creates wet weather in summer months, instead of sunshine.

¹¹ <https://www.gov.wales/sites/default/files/statistics-and-research/2023-06/tourism-barometer-may-wave-2023.pdf> page11

¹² <https://www.bbc.co.uk/news/in-pictures-45056991>

¹³ [Weather-proofing grants offered to tourism businesses in Wales - BBC News](#)

4. Our goals and objectives

Sections 4 to 12 below describe the objectives for this Strategy and the priorities we have identified in achieving them. The objectives broadly fit under the missions the Authority has committed to achieving. The objectives will benefit the communities of the National Park and sit under the “people” mission, they also contribute to our missions relating to “water”, “nature” and “place”

We have two core goals – and five objectives, these are important but for the most part hinge on the success of achieving the goals :

- Goal 1 Managing visitors at our existing natural attractions.
- Goal 2 Managing visitors for the benefit of our communities – a route to promote market towns culture and heritage.

Objectives

- Objective 1: Delivering an impactful online presence for the National Park as a visitor destination.
- Objective 2: Park wide guidelines for events
- Objective 3: Build the partnership approach with partners and stakeholders to manage and promote the destination throughout the year
- Objective 4: Creating opportunities for regenerative tourism
- Objective 5: Managing visitor activities on the ground

5. Goal 1: managing visitors at our natural attractions.

Section 5 describes the rationale for setting this as a core goal and explains why alternative options are less desirable.

The priorities for achieving core goal 1 are listed after Section 6

There are places within the National Park which experience overcrowding and sometimes are under great pressure from high numbers of visitors. This is especially the case on bank holidays, sunny weekends, and during the high season (school holidays and the weeks immediately around them). However, many other locations in the Park rarely or never suffer from overcrowding. For many more of our towns and villages, some extra visitors would help to support local businesses and benefit the vitality of their high streets.

We need to improve the experience for our local communities near the sites with overcrowding and encourage visitors to enjoy towns and villages which have businesses and infrastructure to welcome them.

5.2 Would improving infrastructure create more demand?

There has been much debate about the extent to which improving infrastructure at natural beauty spots in the open countryside is the most appropriate way to manage sites experiencing overcrowding. For example, several of our sites continue to grow in popularity – probably from the number of times they are mentioned on social media.

For the most popular rural visitor sites, single lane roads are regularly gridlocked in summer. The number of vehicles causes issues at the sites themselves and for the houses and farms along the entry roads. Nearby villages experience greatly increased traffic, and even gridlock as people queue to enter or leave the area. They often have extremely limited parking and no toilets.

The lack of infrastructure is now part of the problem. Engaging to manage the existing numbers of visitors to avoid the current problems is pressing. Future proofing for higher visitor numbers seems foresightful. We will continue to work to improve access for all our visitors, including working with our partners to install appropriate infrastructure.

5.3 Spread the load?

Is there an alternative? The idea of “spreading visitors around the National Park” is often mentioned when considering how to deal with the existing hot spots.

The statistics show that our visitors are often keen to visit new locations, however they also want to visit the key attractions at least once, targeting sites popular on social media. Our visitors typically expect to climb Pen y Fan and visit Waterfall Country. When they have seen these iconic sites, they are then likely to consider other options.

The infrastructure to receive visitors must be available at alternative destinations before we encourage visitors to go there. New sites we promote should include roads suitable to take an influx of visitors and infrastructure including car parks and toilets. By planning for the numbers a site could potentially attract, we have the potential to develop new opportunities to visit different sites. Without this insight, we risk creating new problems.

6: Encouraging visitors to use sustainable transport in the National Park.

Section 6 describes the Management Plan’s aspirations to engage with climate change, while detailing the data on visitor (and resident) preferences for private vehicles. It describes the advantages that could arise from creating a park and ride/better sustainable transport offer and gives a case study which has resulted in

improved use of sustainable transport in Eryri National Park. It also mentions the likely impact of UK government aspirations to grow international travel

Dyfodol y Bannau (the National Park's management plan) describes how:

“The Welsh Government has asked the Bannau Brycheiniog National Park Authority to become an ‘exemplar’ in responding to the climate emergency. We have been asked to engage with communities within the National Park, and with visitors to develop emissions reduction solutions that deliver benefits for people and the environment.”

The National Park Authority has published its ambition to reach net-zero greenhouse gas emissions across Bannau Brycheiniog National Park by 2035. In 2023 the Authority published its “Net Zero Sustainable Transport Strategy and Action Plan” to achieve this. Working with partners to consider sustainable transport alternatives for visitors and residents, at least during high season, would be an important step to achieving the goals in that Strategy.

6.1 The status quo

Like many rural areas in the UK, most people drive to get around. For example, 2021 census data for Powys showed 54% of residents drove to work (a further 3% were passengers), 30% worked from home, and 9% walked¹⁴. A tiny proportion used a bike (1%) or a bus (1%). Most of our visitors (87%) are day trippers. Our 2024 visitor survey showed that 82% of our visitors arrived at the destination by car or motorbike, then use that transport in the Park.

Cars feel like a safe and comfortable option to many. The car is often kitted out with the additional resources for example for children and dogs (with their toys, food etc.) and may feel like an extension of their homes.¹⁵ Transport for London published a report listing the myriad reasons people choose cars over public transport.¹⁶ They summarise these as follows:

The practical benefits of cars are that they provide a door-to-door service with no interchanges, available 24/7 and without having to wait; they can carry your luggage, shopping, or equipment; and they are easy to pay for, with the real costs not always evident to trip-makers. These factors all contribute to the car being convenient.

The emotional benefits of cars include providing a sense of freedom, independence, control self-worth/status, and personal safety/security. One reason young adults learn to drive and get a car in the first place is that it is seen as part of growing up and therefore a ‘social norm’.

¹⁴ <https://en.powys.gov.uk/article/13971/Wellbeing-Information-Bank-View-information-about-Travel-to-Work-CENSUS>

¹⁵ <https://www.sciencedirect.com/science/article/pii/S2214367X22000333>

¹⁶ <https://content.tfl.gov.uk/technical-note-13-what-are-the-motivations-for-owning-a-car.pdf>

If people in rural areas are not used to travelling on public transport, buses and trains may be seen as an option for school children and for those unable to access the more desirable benefits of a car. People from large towns, who may use public transport as a daily part of their lives, are used to service running times in minutes rather than hours. Long waits may impact their enthusiasm to rely on public transport. Other people - for example: the elderly, some people with disabilities, those who do not have a car, may rely on community transport and public transport. Improving the offer would benefit these groups and make the National Park more accessible for all.

Electric charging points: The National Park Authority is committed to the Race to Zero for carbon emissions by 2030. As part of this commitment, the Authority has installed car charging points at the visitor centres it owns. Meanwhile, as of Spring 2025, Transport for Wales has installed public, pay charge points¹⁷ in Crickhowell, Talgarth, Craig y Nos, and Sennybridge within the National Park, and Llandovery, just outside. Local Authorities have added charge points in prominent car parks.

Our Visitor Survey showed that 8% of visitors use electric cars. Electric cars made up 3% of all cars in the UK at the end of 2023 and accounted for 16% of new car registrations that year. Public use of electric cars is part of the UK¹⁸ Government's strategies to lessen dependence on fossil fuels. Installation of the necessary electrical infrastructure will be required to keep pace with the demand for charging electric vehicles

Rail travel: The National Park is served by railway stations along its fringes including those in Abergavenny, Merthyr Tydfil, and Llandovery. Abergavenny is the station most likely to be accessed from London, the south of England and the Midlands, while Merthyr is an option for people travelling from Cardiff and the Valleys. Visitors from Swansea and Gower also have the choice to take the Heart of Wales line to Llandovery.

The extension of the "Cardiff Metro" might result in further opportunities for sustainable travel to the Park, but no plans are currently available to consider. The improvements in 2026 to the frequency of trains along the southern border of the National Park may result in better connectivity.

Buses: It is possible to travel along the A roads in the National Park by bus, particularly during working hours. Buses run from south to north (and back) through the Bannau Brycheiniog National Park from Cardiff on to Hereford, and east to west (and back) with buses from Abergavenny to Brecon, and Brecon to Llandovery.

¹⁷ <https://tfw.wales/ways-to-travel/road/ev-charging-points>

¹⁸ <https://www.gov.uk/government/speeches/phasing-out-the-sale-of-new-petrol-and-diesel-cars-from-2030-and-support-for-zero-emission-vehicle-zev-transition>

There is also a service from Swansea to Brecon. Buses are the responsibility of the Local Authority (which tenders the contract) and the company running the contract.

Cycling: There are many, lovely, opportunities for leisure cycling in the National Park, with routes along former tramways, rail lines, and by the canal. Promoted mountain bike routes are popular in the countryside. Increasingly, visitors and locals are accessing the countryside using E-bikes. We will be assessing the legacy we can create from the promotion of and interest in cycling in the area which will likely arise from the Tour De France arriving in the Park in July 2027.

Few cycle lanes exist to travel around the National Park by bike. Country roads tend to be narrow and twisty. With a 60mph speed limit between villages, many drivers choose to travel at speed. Cycling off the main roads tends to involve very steep climbs and poor road surfaces.

Taxis there are limited number of taxis available in the National Park, and they are usually centred in bigger towns and villages.

6.2 The issue

Personal transport (cars, vans, motorhomes etc) is extremely convenient but causes some of the most serious problems that confront communities in the National Park. Apart from the pollution and the negative impact on climate change, increased traffic and inappropriate parking create friction. When vehicles arrive in large numbers, they can spoil the experience of visiting remote, rural locations. Solving these problems requires a collaborative approach involving a substantial commitment of resources, negotiated solutions with local communities, police, highways and Local Authorities.

Bus services exist on key routes, but timings and frequency may not meet the needs of users wishing to visit the National Park.

6.3 Park and Ride – a realistic scheme for the future?

During the consultation for this report, local community councils often proposed the introduction of park and ride schemes. They saw these as an ideal solution to the problems they were experiencing with vehicles. Park and ride offers potential commercial opportunities for the communities nearest to the car park. The owner of a local, large hotel explained that a park and ride scheme which used their hotel as a collection point during the Hay Festival attracted guests to stay there. It is clear why it could be an advantage to communities currently beset by traffic queues and parking problems to manage access and parking differently.

Achieving a successful park and ride scheme would require:

- Identifying sites near enough to the attraction and with sufficient parking.

- Substantial investment in infrastructure, including identifying sites for (and/or potentially building) car parking and toilets.
- Funding the associated costs.
- The provision of an (ideally electric), accessible shuttle bus service (regular enough to be acceptable for visitors),
- Energetic engagement from the police, the local highways authorities, and staff to discourage unauthorised parking outside the park and ride location.

The resources needed to maintain a park and ride are challenging. People will pay a car parking charge for the convenience of bringing their car to a site. The “ride” part of a park and ride – particularly shuttle buses - is usually offered “free” to the users. It is paid for in part by admission to the site or from the car parking and then subsidised. The car parking fees at Authority sites are currently used to support vital staffing and maintenance. It seems likely that a park and ride scheme could create a positive contribution in managing our visitors and supporting sustainable travel, however it would probably need to be subsidised or sponsored, particularly in terms of early capital investment in infrastructure.

The process of creating new infrastructure is subject to regulations and consultation and is likely to take years to complete. Nevertheless, this is an important option for Bannau Brycheiniog to engage with. There is evidence from other sites – including in Eryri (Snowdonia) National Park (see case study below) that taking steps to solve parking issues is vital to the communities impacted by traffic problems.

6.4 Case Study from Eryri National Park Authority, responding to parking issues

Eryri National Park Authority has been working on parking and transport at Yr Wyddfa (Snowdon) since 2019. Yr Wyddfa draws thousands of tourists and locals each year, which presents challenges.

Eryri NPA launched a plan in 2018 to bring together everyone involved in the management of Yr Wyddfa and arranged wide consultation to see how to address these challenges. Transport and parking were identified as key priorities.

In 2020, Eryri NPA commissioned another review to look at issues in Yr Wyddfa (Snowdon) and Ogwen. The review concluded that the public expected to drive there, and this was undermining bus services. The review recommended that substantial change was required. They felt that minor tweaks to parking, tariffs and bus services would not generate the change required. The best way to address the problem would be to change social norms and expectations.

With support from Transport for Wales, Eryri trialled some of the recommendations from the report. Sensors were installed in some car parks to share live information

about how busy they were. Transport for Wales trialled routing the T10 Bus through the Ogwen Valley. A pre-booking system was set up for the car park at Pen y Pass. In 2019, nearly 250,000 walkers took the path up Yr Wyddfa from Pen y Pass.

In 2020/21, following the lifting of covid restrictions, large numbers of visitors arrived by car exacerbating the parking problems. Visitor parking prevented the safe use of roads and access for emergency services. Aggression and frustration from residents and visitors put pressure on the staff on the ground responsible for managing the area. Local communities felt pressure from litter and were afraid of catching covid. Immediate action was required to address the unsustainable situation. The Authority worked closely with the police and Gwynedd Council. They wanted visitors to park and use public transport to access the site. To make this possible, there was a need to change the travel and parking in the area.

An online pre-booking system was implemented for the car park highest up the mountain - Pen y Pass. Parking prices for this car park were set relatively high. People were invited to park at sites lower down the valley and pay for tickets on the Sherpa bus service (cheaper than parking at Pen y Pass).

More buses were added, to provide a service every 15 minutes. Electronic signs were installed on the A55, as people drove into the area to encourage use of public transport and park and ride.

In 2021, the pre-book system was formalised using JustPark, enabling a bilingual service. The Sherpa bus service was rebranded, which encouraged its use. These improvements changed visitor expectations about using public transport to access Yr Wyddfa.

Recent figures from Gwynedd Council show that, during the busiest period of bus use, there has been a 75% increase in the number of passengers. There has been a substantial reduction in illegal parking at Pen y Pass, and an increase in the use of other car parks further down the valley.

The pre-booking parking system has broadly been a success. The system is welcomed by staff, who note that the public's attitude has improved. The automatic system frees up staff time and feedback from users is positive. On the other hand, it was challenging to provide a fully bilingual service to adhere to the Authority's language policy. Eryri National Park Authority leases the car park site which has meant it cannot install barriers and has had to hire security guards. The displacement parking to local towns has caused some parking issues, which are currently being monitored.

The overall success of the initiative in the Eryri National Park has been based on partnership with Local Authorities, the police, local communities, and other stakeholders. Partnership working has been, and will continue to be vital.

6.5 Overseas visitors travel

In November 2024, the UK Government announced its aspiration to grow the lucrative overseas visitor market from 38 million to a target of 50 million people.¹⁹ Research from Visit Britain shows that most overseas visitors only visit London. The average journey time they will consider within the UK is two to three hours to their destination. Visit Wales say:

“We need to do more to target international visitors considering Britain, harnessing digital partnerships to get Wales in front of those already searching for UK holidays. We will also continue to work with VisitBritain to build Wales' position on the international stage.”

“Rather than discouraging international travel – which makes an important long-term contribution to jobs and spend in Wales – we will work with Cardiff Airport and others to investigate new approaches to carbon offsetting that benefit Wales.”²⁰

Since overseas visitors usually stay longer, in local accommodation, they are a potentially important market for any destination. Visit Wales and Visit England both market to key audiences. They invite Welsh destinations to share details of product and offers. When the project identifying opportunities to engage with regenerative tourism mentioned at Section 11 has been developed, we can market these overseas as well as to UK audiences.

¹⁹ <https://www.gov.uk/government/news/new-ambition-for-50-million-annual-visits-to-uk-announced-by-tourism-minister>

²⁰ <https://www.gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf>

Priorities for Goal 1

Infrastructure

Visitors need toilets, and car parks, ideally popular sites would be served by sustainable transport. The Strategy suggests that ahead of any promotion, it is vital that infrastructure (car parks, toilets, hospitality offers, EV charging) is considered and if necessary, funding sought for it. We and our partners will collectively agree to promote beauty spots with parking, toilets, appropriate road access etc. – however we will engage in the online narrative relating to other sites to inform visitors about the limitations.

Access

We will continue to work to improve access for our visitors, including working with our partners to install appropriate infrastructure.

Sustainable Transport

We will work with partners on the provision of sustainable transport alternatives for visitors and residents where possible, at least during high season.

7. Visitor infrastructure and water quality

Protecting water in the National Park is one of our missions as an Authority – this section describes the need for appropriate infrastructure for visitors, including the need to work with partners to find funding for sufficient public toilets. It suggests a public campaign on appropriate behaviour toileting outdoors – following the example of a Scottish case study. The section also mentions Welsh Government’s request to provide inland water swimming opportunities.

Bannau Brycheiniog doesn’t just attract visitors from across the UK, it also provides communities with clean drinking water from its reservoirs. We intend to help visitors to keep the water running clean and clear in the National Park.

7.1 Visitor infrastructure - toilets

Most of our visitors (87%) are day trippers. This means that, on arrival at the National Park, they usually need somewhere to park and toilet facilities. This is particularly true for visitors who may have health conditions, are elderly, or very young. Unfortunately, not providing a toilet does not decrease the need to use one.

The lack of public toilets has increasingly become a problem across the National Park. Local Authorities are not required to provide public toilet facilities and the provision of these facilities have been a casualty of public spending cuts. Unfortunately, in an area with nearly four million visitors a year these closures are particularly problematic. Toilets are expensive to run and for context the National Park Authority is funded with £5.2m compared to Powys County Council's budget of nearly £370m

In the open countryside, the National Park's warden team reports that human excrement and tissues or wipes are often visible on paths and beside beauty spots. Communities complain about finding them in laybys, and even residents' driveways. Besides being unpleasant to clear up, the problem is a health hazard and a threat to the environment.

To address this issue, the provision of toilets at key sites must be a goal for the National Park's landowners, Local Authorities and its towns and villages. Improving the provision of toilet facilities will benefit visitors and address the concerns of local communities. A model to fund this provision needs to be identified – the National Park Authority does not have funds for them.

7.1.1 Case Study: Loch Lomond and The Trossachs National Park

In 2019 Loch Lomond and The Trossachs National Park created a series of interventions relating to toileting in the open countryside called "What to do when you need to poo - Here. Now. All of us". Their initiative included online information, a PR campaign, and last-chance loo stop reminders. Messages were (and remain) online and in the toilets themselves to reinforce a last chance to use a "proper" toilet. Trowel loans were offered at some of the worst-hit areas. In places where trowels could not be used, such as the shores of lochs, human 'poo bins' and 'poo packs' (modesty bags plus liner bags) were trialled.

All interventions were well received and used appropriately. For example, the poo bins were not targeted for other rubbish.

Cairngorms PR campaign won an award for the open and humorous approach to educating people how to go responsibly. Messages asked visitors not to leave toilet paper when going for a wee, and to carry small bags so that used toilet paper could be carried away. Most importantly, the campaign went a long way in shifting the public conversation around the subject. This work is continued and reinforced in seasonal messaging.

Relatively inexpensive and easy to maintain, trowel loans continued for a year or two after the project ended and had a positive impact on the sites locally.

Cairngorm Snow White Project offered a different version of a facilitated ‘pack it out’ campaign.²¹ Visitors were provided with bags and lidded ‘poo pots’. After use, visitors could drop the bags into poo bins in the car park before returning the pot. Introducing such a scheme would mean a commitment to providing pots and covering the costs of collecting the poo.

To tackle the issue of toileting in the open countryside and its highly detrimental impacts, many more toilets (including along trails) are required, supported by the introduction of a scheme such as that described above.

A proposal for this Strategy is to work with the other Welsh National Parks to instigate a national, public campaign around dealing with toileting outdoors. The case study below from Scotland provides a useful example of what such a campaign can achieve.²²

7.1.2 Toilets in towns and villages

Brilliant Basics grant funding has been used to support local community groups to provide public conveniences across Wales. These groups are then required to maintain the toilets going forward. We propose there should be a study in partnership with our Local Authority and community partners, and approaches made to grant giving organisations to provide both temporary and permanent toilets. Funding needs to be in place for installation, cleaning and ongoing maintenance of toilets. Surveying provision in the market towns identified for the network is proposed in Section 8 below.

7.2 Wastewater management at events

Events need to take account of the impact of wastewater and effluent on water courses and their catchments. For events using permitted development rights in river catchments designated as a Special Area of Conservation [advice is available here](#).

7.3 Enjoyment of water

The Welsh Government has asked the National Park Authority to support the designation of inland bathing waters.

Water based activities including fishing, kayaking and canoeing are already extremely popular across the UK. Growing interest in paddle boarding and wild swimming means identifying and promoting the appropriate and safe places to enter the water will require a project approach and partnership engagement.

²¹ <https://www.peakmountaineering.com/cairngorm-snow-white-project/>

²² <https://www.bbc.co.uk/programmes/articles/ChbSFJCXkRXWx4LZGw8pWl/what-are-the-dos-and-donts-of-going-to-the-toilet-outdoors>

The Monmouthshire and Brecon Canal is one of the most popular tourism and community assets in the National Park and provides a key venue for enjoying water activities. Outdoor pursuits instructors often teach skills in kayaking and canoeing, and in paddleboarding to small groups on the canal. Walking and cycling the canal towpath are also very attractive activities to our visitors as it is both flat and off road. While hiring canal boats supports not only the hire businesses but also the many pubs and cafés along the canal's 35 mile route. The canal is fed directly from the River Usk and water abstraction has been reduced to protect the health of the river²³, resulting in a threat to the long-term existence of the canal. The Canal and River Trust are working with Welsh Government and other stakeholders to find a sustainable long-term solution to the issue which will be vital to supporting the local tourism economy.

Objective 1 -Delivering an impactful online presence for the National Park as a visitor destination

Section 7.4 below describes the need for, and challenges in providing an appropriate and impactful online presence to help visitors enjoy the national park safely and responsibly. The priorities for achieving this objective are listed ahead of Section 8.

7.4.1 Managing demand

Often it is not possible to use law or statute to restrict visitor numbers at the sites experiencing overcrowding in the National Park. Sites are accessible from public roads and can be reached by public footpaths, or the public has the right to access them under the CROW act (Countryside Rights of Way Act 2000).²⁴

7.4.2 National Parks as a brand

We should not underestimate the impact of the global brand of National Parks. The existence of a National Park anywhere in the world implies both somewhere protected because it is special, and a place available to visit.²⁵ Consequently, the public expect that there will be important natural features to see within a National Park. Our National Park is no exception. Our visitor centres receive thousands of visitors each year who want directions to the key sites within the National Park. Global reports show that visitors choose recognised attractions to visit, with 80% of tourists visiting only 10% of the world's potential sites.²⁶

²³ <https://canalrivertrust.org.uk/wales/monmouthshire-and-brecon-canal-water-abstraction>

²⁴ <https://www.legislation.gov.uk/ukpga/2000/37/contents>

²⁵ <https://www.nationalgeographic.com/travel/national-parks>

²⁶ <https://www.mckinsey.com/industries/travel/our-insights/destination-readiness-preparing-for-the-tourist-flows-of-tomorrow>

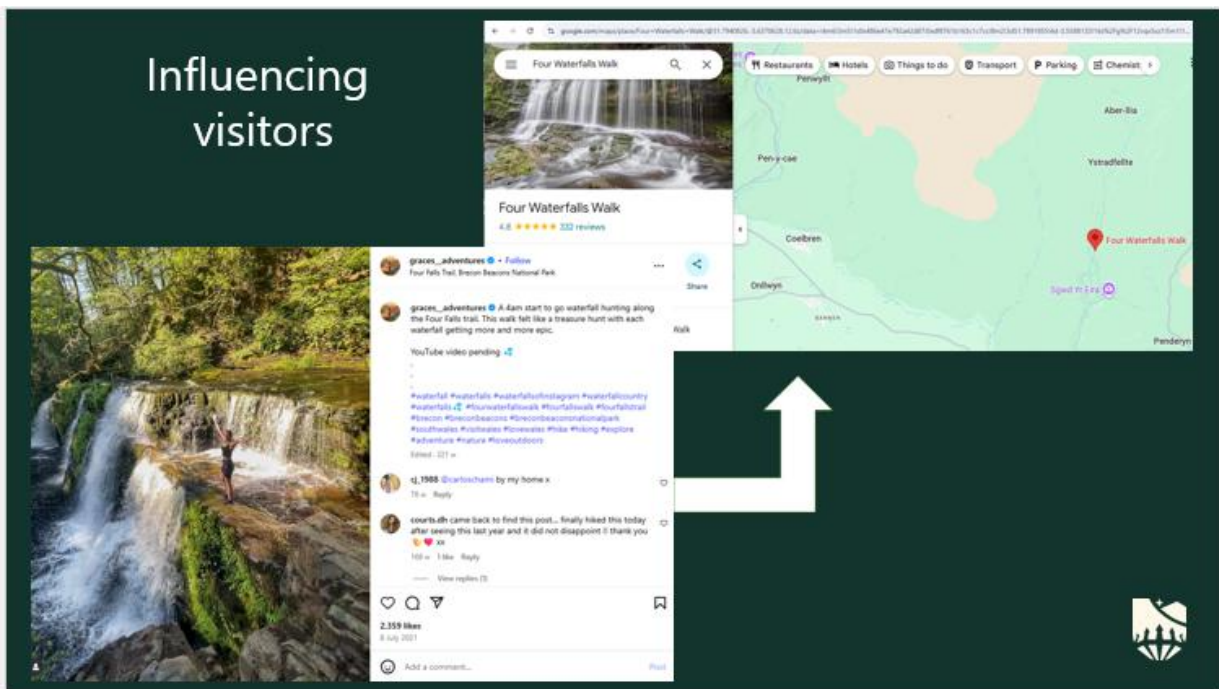
7.4.3 The impact of social media in creating demand

Over the last decade, the National Park Authority and other partners took a strategic decision not to actively market certain sites. This was intended to recognise concerns from local communities over visitor pressure. The expectation then, was that not marketing the sites would mean fewer visitors during high season, to places where the infrastructure could not support them.

Unfortunately, the explosion in social media meant this decision left a vacuum which social media soon filled. Social media has created an increasingly strong impact on visitor behaviour. Visitors now habitually use photography on social networking sites, or blogs from social influencers, to decide where to visit. Finding a “hidden gem” and sharing it to attract followers is particularly popular, but often results in attracting people to visit places with no parking or toilets. This has resulted in the public being directed to places in Bannau Brycheiniog National Park where there is no infrastructure to accommodate large numbers. For example, 200,000 people visited the Waterfalls in 2024, despite there being no proactive publicity for the region from the National Park or the relevant Local Authorities.

The use of social media has created some challenging situations in terms of visitors’ safety and expectations. For example, responses to Tripadvisor show how little information some visitors had before they arrived:

- The majority of Trip Advisor “reviews” are positive, but a minority regularly include complaints about visiting Waterfall Country. Most are not complaining about the crowds, instead visitors express surprise and sometimes horror that the walk takes several hours, up and down into steep ravines, using steps.
- A recent (straw poll) review of posts from social media influencers on Instagram revealed that 59% of the posts about Waterfall Country were actively promoting activity the landowners and land managers wished to discourage. Sometimes the activity in question, or the routes proposed, were places where people had suffered life changing injuries, and even died.
- Many people have got lost or broken their ankles visiting Pen y Fan. Many did not wear appropriate footwear or clothing, nor have map reading skills to find their way back when they strayed from the well-trodden paths, when the weather changed.



We have witnessed a closed social media circuit (an example is shown above) where visitors see a post on social media, type the name of the place mentioned into a mapping app and then drive to the nearest location it suggests. Visitors do not then search “official” websites for further information, and they do not see any messaging. Managing organisations, including the National Park Authority, NRW (Natural Resources Wales) and the National Trust, cannot advise visitors in advance about potential issues, nor alert them when parking at sites is particularly full. Finding a way to engage with our visitors in social media spaces is key.

Waterfall Country is a key visitor destination and will be a pilot for working in this way. Initially public bodies are re-engaging with how the site is promoted. It seems unlikely that they can use social media to substantially limit numbers during high season. However, they can offer information about the area and prepare visitors more effectively both for what to expect, and for parking issues. A dedicated section on the destination’s website – www.bannaubrycheiniog.co.uk will have a role to play in offering advice. Campaign work about the dangers waterfalls create for anyone entering the water will be helpful. Avoiding some of the risky behaviours which have caused death and life changing injuries to people who went to the site for a pleasant day out, is key.

Part of our work dynamically managing visitors, is to predict where they want to go now, and next. Going forward it will be vital to identify social media trends and growing interest in particular spots. The marketing group proposed at section 10.3 below could decide how partners will monitor and report on trends in social media. If they identify a budget and decide it is appropriate, they could also engage with influencers, bloggers etc.

Some sites, such as the National Park Visitor Centre – which offers advice to visitors (along with a shop and café) could benefit from being more visible. We will assess the way the National Park, its beauty spots and visitor centres is represented online, including in mapping applications.

Priorities for Objective 1

Pre-arrival engagement	Engaging with visitors before they arrive, especially in social media spaces, to ensure they know about the terrain, parking, toilets, hospitality, and are aware of any issues at the site they wish to visit.
Messaging	We will find successful methods to challenge unhelpful advice from influencers when talking about our sites and provide alternative helpful narratives.
Online presence	The destination website and social media feeds aimed at visitors are run in partnership with Brecon Beacons Tourism. These will be reviewed and updated to meet the objectives of the strategy.
Place monitoring	We will assess the way the National Park, its beauty spots and visitor centres are represented online, including in mapping apps. We will work with partners to find appropriate methods to identify social media trends and look for growing interest in particular spots to help us manage the National Park as a destination.

8. Goal 2 : managing visitors for the benefit of our communities – a route to promote market towns culture and heritage.

This section describes working closely with neighbouring authorities and other stakeholders to promote market towns, celebrating their unique culture and heritage and encouraging overnight stays. It notes existing strategies in neighbouring local authorities to benefit economically from welcoming more visitors. The priorities it identifies to achieve this are listed at the end of Section 8.

In 2024, Powys County Council approved a Cultural Tourism Study which proposed the creation and marketing of a network of market towns for visitors to enjoy.²⁷ Monmouthshire County Council also commissioned a Destination Management Strategy which similarly recommends promoting its market towns. Carmarthenshire County Council promote ten towns and are keen to be part of a promoted route. Herefordshire is in England but borders the Park. Herefordshire too has committed to promoting five market towns. Visitors are unlikely to be interested in which Local Authority a town sits within, being more interested in what the towns have to offer culturally and their unique heritage.

These proposals suggest that there are towns and villages in and around the National Park that have much to offer visitors both culturally and from the heritage sites they contain. Such towns could reap some of the economic benefit deriving from greater numbers of visitors. The Powys Study for example, proposes that some towns and villages have a strong, existing offer to attract and benefit from visitors. It mentions that other settlements could invest in building their capacity to create a similarly attractive offer to visitors and become part the network. Alongside opportunities to support retail and hospitality offers; this presents a chance to promote some less visited heritage sites in and near the promoted towns.

Visit Wales has identified a growing trend for visitors seeking authentic, local experiences. The study notes that $\frac{3}{4}$ of the UK market took a holiday in the UK during 2023. The Midlands is increasingly a source of new visitors for Powys destinations.

Encouraging more visits to towns and villages, by promoting their unique selling points, for example a heritage offer such as castles, relics of a droving past etc, and the retail and hospitality available. More visitors could provide local benefit for struggling high streets and markets.

Communities are more likely to welcome this opportunity if the infrastructure is in place to receive the visitors. Available parking, toilets, and sustainable transport will

²⁷ [PCTS Final](#)

need to be assessed and where appropriate, pilots developed to show interest from visitors wishing to enjoy the wonderful cultural and heritage offer available in the National Park.

8.1 Manage the now, invest in the future.

It is vital that we engage with existing issues, while planning for future growth. To protect communities and the landscape we need to work together to deliver bespoke solutions at key sites. Local Authorities, the National Park Authority and other stakeholders could collectively engage to develop solutions.

8.1.1 Creating and promoting a network of market towns

We propose that key partners work together to identify which towns would benefit from joining the network that the Powys, Monmouthshire, Herefordshire and Carmarthenshire Destination Management Plans propose. Initial work will be needed to identify the capital investment required to deliver a new network (car parking and toileting being the most likely requirements). New initiatives will take account of the need for training, product development, and business to business activity. It would be sensible to work with other Local Authorities bordering the National Park with a strong visitor offer and a wish to be included in a new network.

8.1.2 A driving experience with electric charge points

The opportunity would be supported by a marketing campaign to encourage electric car owners to visit the towns, staying in them and taking advantage of electric charge points. Going forward the provision of a full, national electric infrastructure will be vital for rural Wales, including the National Park.

Priorities for Goal 2

Stakeholders	We will work closely in partnership with key stakeholders to select towns and villages to promote in line with the priorities identified by the Local Authority and the communities that will benefit.
Cultural and heritage attractions	We will work with communities in the selected market towns, both within the park and in surrounding areas, to identify cultural and heritage attractions which would encourage our visitors to stay overnight and for longer, bringing economic benefit.
Infrastructure	We will assess infrastructure, toilets, public transport links, EV charging opportunities, signage etc. We will identify funding opportunities to make any necessary infrastructure changes to engage with visitors, for the benefit of communities and to minimise negative impacts.
Sustainable transport	We will work with partners to assess the viability of delivering sustainable transport alternatives for visitors and residents to access the towns – in line with the National Park Authority’s Net Zero transport strategy.

9. Objective 4 - achieve park wide event guidelines

This section describes the advantages for stakeholders of agreeing park wide guidelines for events management, the section ends with the priority to achieve the objective.

Visit Wales highlight the potential for events to attract visitors to Wales in their strategy Welcome to Wales: Priorities for the visitor economy 2020 to 2025.²⁸ A host of events takes place throughout the year in the National Park which include two large events – Hay Literature Festival and the Green Man Music Festival. Abergavenny, which is just outside the park boundary, hosts the popular Food Festival, Brecon and Crickhowell celebrate local food with events.

²⁸ <https://www.gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf> p18

Smaller, specialist music festivals take place in Crickhowell and Brecon. The National Park Authority organises a Dark Skies Festival. Walking festivals are popular, with existing events in Crickhowell and Talgarth.

Visitors to the National Park often stay overnight to take part in events. This increases the value of the event to the community, supporting local accommodation providers and the hospitality sector. The organisers can choose the timing of the event, for example arranging it when there are fewer visitors. Organisers can work with local businesses to make a strong offer for participants.

Park Runs, where participants run 5km in local parks at a weekly organised event, are popular across the UK. The National Park has park runs in Brecon and Hay on Wye with more events along the southern fringe of the park. Runners “collect the alphabet” and Brecon is known as Y Prom bringing many visitors across the year to find a run beginning with “Y”. After running, participants often go for brunch nearby, and the organisers encourage runners to go into town to support local businesses.

With its links to outdoor activities the National Park is a particularly popular destination for walking, running and cycling events. However, these events can be more problematic. The events are often organised to benefit a particular charity or for profit, and when widely publicised, can attract large numbers of participants. Organisers are often not local. Unfortunately, many of them do not obtain the appropriate permissions for the land their participants may cross, they fail to provide toilets, and do not clear up after the event. In 2025, the first time a local landowner and community discovered an event was happening on their land was when 300 cars drove into a field.

The National Park Authority has created general guidelines for event organisers. The National Access Forum for Wales is currently reviewing guidelines for event organisers from across Wales. The three Welsh Parks have a seat on the review panel – depending on the outcome of the review the National Park Authority may wish to establish a forum with other partners across the National Park to consider how to manage events. A code of conduct, developed with NRW for gorge walking in Waterfalls Country could offer one option for the Forum to consider whether a similar model is practical for managing events.

Priority for Objective 2

Guideline review

The National Park Authority has created general guidelines for event organisers. The National Access Forum for Wales is currently reviewing guidelines for events organisers from across Wales. The three Welsh Parks have a seat on the review panel, depending on the outcome of the review, the National Park Authority may wish to establish a forum with other partners across the National Park to consider how to manage events.

10: Objective 5 –build the partnership approach with partners and stakeholders to manage and promote the destination throughout the year

This section describes both our key partners and the approach needed to successfully deliver the Objectives for managing the destination. The priorities to achieve this are listed at the end of section 11.

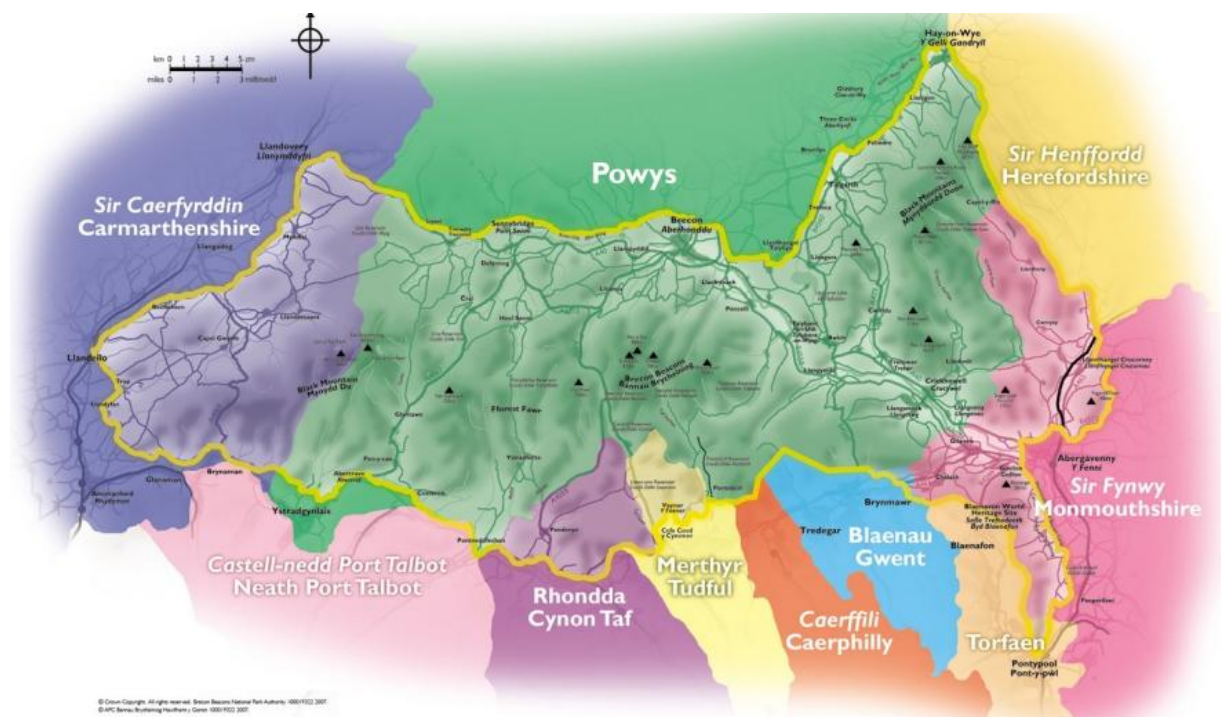
Our key partners to deliver the Strategy are:

10.1 Brecon Beacons Tourism (aka BBT)

Formed in 2006, Brecon Beacons Tourism (Twristiaeth Bannau Brycheiniog), is known locally as BBT. BBT is a business-led, not-for-profit organisation dedicated to strengthening and sustaining the visitor economy in Bannau Brycheiniog (Brecon Beacons) National Park and the surrounding areas.

As of 2026, BBT are growing their membership, which shrank after the pandemic. Membership is open to tourism-related businesses of all sizes, from independent accommodation providers and activity operators to visitor attractions, hospitality businesses and community-led initiatives. Supplier and Partnership membership is also available to businesses that support our visitor economy in the region. More details of the ways we propose to work with BBT and with businesses within the National Park are described in section 12 below.

10.2 Local Authorities



The map above shows the Local Authorities bordering the Park including those with responsibilities within the National Park boundary. Powys, Merthyr Tydfil and Neath Port Talbot Local Authorities in particular, see the National Park as an important resource to attract overnight tourists to stay within their borders (which may or may not be within the National Park boundaries). Each of their regeneration strategies mention the National Park as important in attracting visitors and include income generation targets from visitors. Monmouthshire promotes itself as part of the National Park.²⁹ While Carmarthenshire focuses on promoting its coastal assets, p11 of their visitor management plan mentions Bannau Brycheiniog as important in attracting visitors to Carmarthenshire and they are interested in our Market Town initiative.

Counties that include the value of tourism as part of their regeneration strategies want more visitors to stay overnight. Staying visitors not only pay for accommodation but are likely to buy groceries, meals out, drinks etc and may visit more attractions. Accordingly neighbouring Local Authorities hope to tempt visitors to remain within their geographical boundaries. As the above map shows, this will often mean staying outside the National Park.

²⁹ <https://www.visitmonmouthshire.com/>

11. People and communities: Supporting our businesses

Traditionally BBT and many tourism businesses have looked to the destination partnership for:

- Training
- Business to business networking opportunities
- Joint marketing opportunities

11.1 Training

The National Park Authority has often worked with partners including BBT and Visit Wales to help provide training for businesses. Working both on the areas they have identified would be useful, and on areas where we would like to support them to give messages about the special qualities of the National Park to Visitors.

11.2 Ambassadors

The Ambassadors scheme was originally set up as an in-person opportunity for tourism businesses to network, while learning more about the place they live, work in (and often love). The scheme enabled them to share the information with their visitors. Many who took part in the original scheme have continued to be active and constructive both in their engagement with Brecon Beacons Tourism and with the Authority.

Over time, the scheme has grown to include modules representing the Geopark, Dark Skies and Biodiversity.

When Covid impacted, it was decided to move the scheme online to make it more widely available to the many people working online, from home. The online scheme is popular and has been completed by people from all over the world. Its new audience are not required to engage with visitors to the Bannau Brycheiniog National Park.

11.2.1 Face to face ambassador module for businesses in the Park

The online version of the course is an asset to the National Park. However, completing online modules does not offer the same opportunities for tourism businesses to create relationships. During the consultation for this strategy, many of the participants from the original scheme mourned the loss of the benefits of face-to-face learning. If external funding is available we would like to re-introduce in person activity for tourism businesses in the Park, on top of the online options. This will enable us to continue to expand the local Ambassador network. If the Proposals around promoting Market Towns and their heritage are progressed, it may be possible to organise a project to create local champions with knowledge about their own towns and heritage to share with visitors, for example.

11.2.2 Holidays/events for Ambassadors not based in the Park

There may be an appetite for in-person activities from those completing the online course, who are not business ambassadors. We will explore the opportunity to create a product for them by working with businesses. For example, a tailored ambassador holiday experience (with walks and talks from wardens, officers, local guides and outdoor activity providers) could be developed.

11.3 Business to business networking

Brecon Beacons Tourism has worked closely with the National Park Authority to offer businesses the opportunity to network. For example, introducing hospitality venues and accommodation to local food producers with a view to developing a more sustainable local offer.

11.4 Joint Marketing and Communications

The bilingual destination website is a partnership site between the Authority and Brecon Beacons Tourism (currently hosted and maintained by the Authority). A new version of the site was launched in 2025. It was previously supported by a budget held by and contributed to from organisations which sent members to the Marketing committee. The site is a vital shop window for places to visit in the Park and to help visitors find businesses.

Actively marketing accommodation, attractions and events within the National Park will contribute to growing the economic impact of tourism and support local businesses. Brecon Beacons Tourism has proposed that we work in partnership to market the National Park and its special qualities, including green businesses. Budget and grants could be sought to enable effective marketing for the benefit of businesses and communities. This would be focused on extending the season and encouraging day visitors to stay overnight.

Priorities for Objective 3

Partnership development	Work closely with the Destination Management Partnership for the area to develop training, opportunities to network, and business-to-business promotion.
Towns and villages	Deliver benefit from a growth in the cultural tourism opportunities in our towns and villages.
Leverage designations	Maximise the opportunities of our international designations by working with the Dark Skies Board and the Geopark Partnership.

12. Resources to deliver the strategy

This section describes the resourcing needed for the strategy. The priorities are listed at the end of the section

Resourcing to achieve the strategy will require investment from Government, grant funding, partners and fund raising, there may be commercial opportunities resulting from infrastructure development but investment may be required up front to achieve these.

12.1 Resourcing within public bodies and charities

Over the last ten years, the impact of UK wide austerity measures on public services was followed by the global pandemic and subsequent cost of living crisis. Local Authorities tried to protect services they are bound to provide by statute. Visitor management is not a statutory service, and substantial cuts have been made to teams engaged with visitors.

Experience in Bannau Brycheiniog, and other National Parks, suggests that the most effective way to engage with people to encourage visitors to follow local guidelines and the countryside code, is face to face contact, however this is also the most resource heavy. Loch Lomond and the Trossachs National Park for example hires over 30 additional seasonal staff in the summer months to meet and greet visitors and to manage their camping sites – they receive funding from the devolved government to do this.³⁰

12.1.2 Wardens, Meet and greet staff and Volunteers

Organisations across the National Park have reduced wardens and visitor-facing staff, as have charities. This has impacted the resource to collectively engage with, inform and manage visitors. National Park Authority wardens report that they often find themselves as the only visible warden staff in the National Park. The Authority has supplemented warden staffing at its own key sites. Meet and Greet staff are employed during busy periods at the Waterfalls (Cwm Porth and Gwaun Hepste car parks) and the National Park Visitor Centre. The Authority benefits from a team of volunteers who undertake a wide range of tasks including litter picking and giving visitor information.

A larger team of volunteers on the ground during weekends, bank holidays and throughout high season would help deal with existing and future issues. Targeting visitors at the sites where for example Mountain Rescue are most often asked to attend, or particular issues need engagement. They could also be used as a dynamic taskforce to help direct visitors targeting a particular location promoted on social

³⁰ <https://www.lochlomond-trossachs.org/wp-content/uploads/2021/12/17.-Agenda-Item-12-zAppendix-1-Season-Review-2021.pdf> p13-14

media. . Volunteers need sufficient back up and on the ground management from staff and the Authority and its partners would need to resource this extra provision if they wish to reap the benefits of more engagement. Projects to fund such engagement may arise as the action plan is developed, if stakeholders agree this should be prioritised.

12.1.3 Visitor Centres

Visitor centres are a key resource for visitors to the area. The funding and staffing of these differs across each site, details are given in the table below.

Name	Staffing	Funded by
National Park Visitor Centre, shop and café	Authority led site Information staff, supported by collaboration with arts and crafts makers who provide representatives in the shop. Volunteers litter pick the site and offer information. The café is a franchise and employs its own staff.	National Park Authority with revenue from commercial activities on site.
Abergavenny Tourist Information Centre	Partnership site Information staff (and ticket staff from Abergavenny theatre?)	The National Park Authority and Abergavenny Town Council
Visit Brecon	Brecon town site with a small core of paid staff supported by volunteers	Brecon Town Council
CRiC	Crickhowell Town site Small core of paid staff, supported by volunteers	Management board Crickhowell Town Council and revenue
Talgarth Tourist Information Centre	Volunteers work in the shop and give information	Self-funded from revenue
Hay-on-Wye Tourist Information Bureau	Chamber of Commerce, run by Volunteers	
Blaenavon	Local Authority staff	Part of Blaenavon World Heritage Centre
Forest Holidays visitor centre at Garwnant	Staff at the site offer visitor advice	Forest Holidays employees
Cwm Porth and Gwaun Hepste	National Park led sites offering paid carparking, a shop at Cwm Porth and information about the waterfalls (on behalf of NRW) Full time staff are	National Park Authority, supplemented by revenue from sites.

	supported by paid seasonal staff and volunteers	
Merthyr online	No centre but online information	Online info run by Merthyr Tydfil CC

Visitor centres are an essential resource for visitors and enable visitor messaging to be coordinated, efficient and effective. The knowledgeable and experienced staff and volunteers in the centres are a vital part of understanding priorities for visitors. They are ideally placed both to advise how to engage with visitors and to pass on information about what to expect to them.

Priority for Objective 4

Visitor contributions

The National Park Authority will work with all our stakeholders to ensure the maximum benefit is derived from our collective, but limited capacity to engage with visitors. We know that face to face contact with our wardens, meet and greet staff, volunteers, and information teams is both valued by visitors, and is the most effective way of providing information and advice, and influencing their behaviour when they are in the National Park.

13 Background

This section includes information about the responsibilities the Authority has in relation to managing the destination for visitors, and the policy landscape impacting tourism businesses in 2025/2026

13.1 Bannau Brycheiniog National Park Authority responsibilities in relation to Destination Management.

13.1 Welsh Government guidance to National Park Authorities

The Welsh Government provides guidance to Bannau Brycheiniog National Park Authority about the priorities for the organisation during the term of government. The most recent of these letters issued in April 2025 is clear on the importance of tourism to Wales:

“Our ambition is to ‘grow tourism for the good of Wales’. People choose to visit Wales to enjoy our superb natural environment, as well as to experience our culture, including the Welsh language. The role of your bodies, in enabling better visitor

management to minimise the impact of tourism on the environment and on your communities is critical.”³¹

The National Park Authority is tasked with the following:

- “Support a shift away from private car use to more sustainable transport modes for the majority of journeys amongst staff, visitors and service users.
- Working with partners such as Local Authorities and Transport for Wales, implement solutions to the pressures of visitors on local infrastructure, including more sustainable transport systems and communication campaigns to ensure responsible recreation.
- Increase opportunities for people in vulnerable or disadvantaged groups and underrepresented communities to benefit from the landscapes you manage.
- Support the designation of inland bathing waters.”

13.2 Audit Wales Sustainable Tourism report

In 2022, Audit Wales published a report that addressed the question: “Is the Authority doing all it can to effectively manage sustainable tourism in the National Park?”³² Their audit recognised that the Bannau Brycheiniog National Park Authority has a unique status among the National Parks in Wales as one of the Destination Management Organisations. Usually, the Local Authority with responsibility for the land in the National Park has this status. Bannau Brycheiniog is surrounded by eight Local Authorities, five of which are responsible for land within the boundaries of the National Park (see p29 for the map of these). The National Park along with its partner Brecon Beacons Tourism, were collectively designated as the Destination Management Organisation and recognised by Visit Wales. The designation conveys recognition of a responsibility for branding the destination for example, and sometimes, the right to apply for grants.

The Audit Report made the following recommendations for the Authority

1. To define and agree a shared vision of sustainable tourism developed with staff, members and stakeholders
2. To re-build tourism staff capacity to deliver against goals
3. To improve stakeholder engagement

13.3 Policy Contexts – The background against which we manage the destination

13.3.1 Wider Welsh Government Policy

Dyfodol Y Bannau, the National Park’s Management Plan explains that the well-being of future generations (Wales) Act 2015 is ground-breaking Welsh legislation.

³¹ needs updating when published on Gov website

³² [Brecon Beacons National Park Authority – Sustainable Tourism | Audit Wales](#)

The Act defines a series of well-being goals for the nation. It requires public bodies to embed these goals into their own objective-setting and policymaking.

The well-being of future generations act includes the goal of becoming ‘globally responsible’. Our objective in implementing the National Park’s statutory purposes and duty is to contribute positively to this well-being goal. This Strategy sits within the policy structures for Wales and for the National Park.

13.3.1 Welsh Government policies relating to tourism

During 2024-25, the Welsh Government announced a number of statutes which (as of Summer 2025) are impacting businesses in the Tourism sector as follows:

182 days rule : The Welsh Government introduced a rule that self-catering holiday lets must be occupied for 182 nights to pay business rates. Originally set at 70 night’s occupation, the higher threshold was introduced to ensure that holiday lets were being occupied and not used as second homes. In November 2024, Monmouthshire County Council’s scrutiny committee added their voice to those asking the government to reconsider the threshold.³³ They argued that many self-catering holiday lets are struggling to fill their properties sufficiently to meet the higher threshold, which should be lowered.

Premium council tax payments on second homes: After the pandemic, Welsh Government introduced another measure to address local concerns over the impact of second homes. They wanted to address inflated house prices for local people in the property market. Their intent was to make more homes available for local people and, in particular, to provide affordable housing. Local Authorities can now charge up to three times as much council tax on second homes. The response from Councils with communities in the National Park has varied greatly. Powys, Monmouthshire and Carmarthenshire have taken different approaches to introducing the tax. Appendix 1 includes a table outlining the initial response from each Council. The policy has proved polarising throughout Wales. Some groups welcome the tax, while others have raised concerns that second homeowners are a crucial part of the visitor economy.³⁴ The Welsh Government has declined to review this policy on the grounds that they see it as a vital part of their commitment to provide affordable housing, by discouraging second home owning.³⁵

Visitor levy: Consultation on the introduction of a visitor levy in Wales was launched in 2024 with a view to becoming law in 2027. The levy was expected to generate an income to address the concerns of local communities and to improve infrastructure for visitors. All three National Parks in Wales, along with many tourism businesses,

³³ <https://www.monmouthshirebeacon.co.uk/news/community-news/self-catering-lets-rule-of-182-days-too-high-740751>

³⁴ <https://thenegotiator.co.uk/news/regulation-law-news/open-warfare-breaks-out-over-welsh-second-homes-tax/> (the negotiator is an online magazine aimed at estate agents)

³⁵ https://www.partyof.wales/2022_tai_housing

submitted evidence raising their concerns over the current proposals. In particular, they expressed concern that money raised from the levy within the boundary of the National Park would not be ringfenced to mitigate impacts from visitors.

Register – to support the introduction of the Visitor Levy, the Welsh Government intend to establish a register of visitor accommodation providers operating in Wales by 2027. The register will include the type of visitor accommodation and location of the premises they operate across Wales. All visitor accommodation providers will be required to register, regardless of whether the Local Authority area they are operating in has chosen to introduce a visitor levy. This will be followed by a licencing scheme.

Energy Performance Certificate for self-catering properties- The UK government is consulting on proposals to require self-catering properties which don't yet, to take measures to improve their efficiency rating (raising to EPC level C) by 2030.³⁶ Previously properties mainly used for short stays, or in warmer weather have not been required to meet the same levels of insulation etc as residential buildings.

13.3.2 Policy impacts conclusion

The announcement of these policies so close to each other has particularly impacted the visitor facing industry. They have reported feeling anxious, facing what some feel are a bewildering range of demands. The business organisation which supports self-catering property owners has created this graphic to indicate the number of policies impacting on them currently:



One of the goals for the Destination Partnership is to find ways to support our businesses. Visit Wales' paper "Welcome to Wales – priorities for the Visitor Economy 2020-2025" tells us:

"We want to put Wales in a strong competitive position for the future. Over the coming years, we need to sharpen our commercial focus and our ability to support the profitability of the industry."

The National Park Authority does not have a direct responsibility for regeneration. One of the most effective ways the Authority can support business is to ensure the sites and rights of way are managed effectively to be attractive to their would-be

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<https://rentsmart.gov.wales/en/energyefficiency/#:~:text=Changes%20ahead,2%20May%202025%20to%20respond.>

customers. Providing appropriate infrastructure and creating plans for managing growth will help businesses plan more effectively.

13.3 Impacts of the pandemic

Although it feels like history, the impacts of the pandemic are still unfolding in 2026.

Resources and businesses lost during the Pandemic have not been replaced. In 2020/21, the government instruction to stay at home meant that people who did not live in National Parks were forbidden to travel to them. The furlough scheme, and some grants offered support. However, many visitor facing businesses and organisations were heavily impacted by the pandemic. For example The National Trust announced the loss of over 1,200 jobs through voluntary retirement and redundancy at the end of the pandemic.³⁷

The pandemic impacted Bannau Brycheiniog National Park, as more people sought access to the outdoors to enjoy social activities, as described by the Welsh Audit Office report which said:

“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.”³⁸

³⁷ <https://www.nationaltrust.org.uk/who-we-are/news/weve-reduced-compulsory-job-losses-following-consultation>

³⁸ [Brecon Beacons National Park Authority – Sustainable Tourism | Audit Wales](#) p5

Appendices

Appendix 1: data

Below is more of the data which the author has relied on to create the report.

1.1 Where can visitors stay in the National Park?

STEAM REPORT FOR 2013-2024 - FINAL						
BANNAU BRYCHEINIOG NATIONAL PARK						
SERVICED ACCOMMODATION 2024	2024		Change on 2023		Change on 2013	
	Est.	Beds	Est.	Beds	Est.	Beds
Serviced Accommodation Total	156	1,970	0	-54	-13	-110
+50 room hotels	0	0	0	0	0	0
11-50 room hotels	21	933	0	0	-1	-48
<10 room hotels/others	135	1,037	0	-54	-12	-62

NON-SERVICED ACCOMMODATION 2024	2024		Change on 2023		Change on 2013	
	Est.	Beds	Est.	Beds	Est.	Beds
Non-Serviced Accommodation Total	439	10,856	+14	+282	+90	+2,976
Self catering	361	3,008	+15	+263	+76	+505
Static caravans/chalets	23	596	+3	+72	+20	+248
Touring caravans/camping	55	4,446	-4	-348	-6	-243
Not-for-hire statics	0	340	0	0	0	0
Airbnb	0	2,466	0	+295		

DISTRIBUTION BY TYPE OF ACCOMMODATION 2024	2024		Change on 2023		Change on 2013	
	Est.	Beds	Est.	Beds	Est.	Beds
All Paid Accommodation Total	595	12,826	+14	+228	+77	+2,866
Serviced Accommodation Share of Total	26%	15%				
Non-Serviced Accommodation Share of Total	74%	85%				

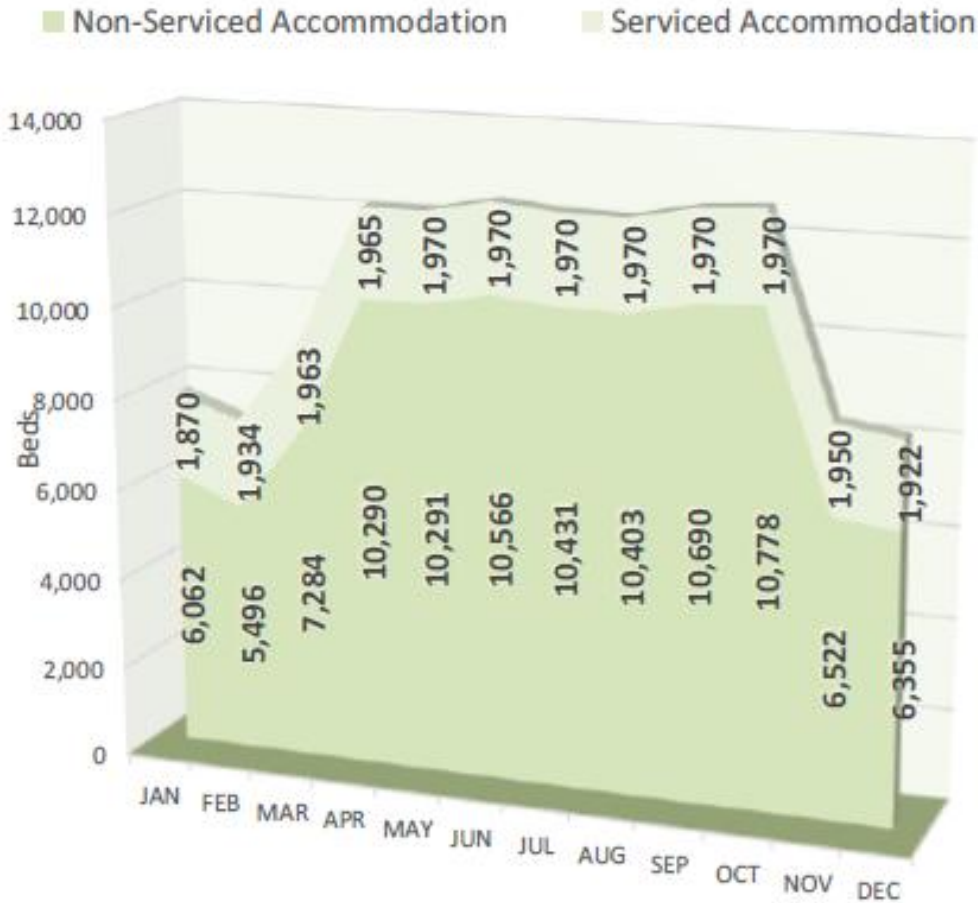
Table showing 2024 supply of bed stock – 1,970 in serviced and 10,856 in non-serviced accommodation.

Table showing numbers of visitors staying in which accommodation in 2023 (by million)

	M
Serviced	0.21
Non-Serviced	0.22
SFR	0.05
Staying Visitor	0.48
Day Visitor	3.52
Total	4.00

Key	
Serviced accommodation	Hotels and bed and breakfast
Non serviced accommodation	Self catering, statics and touring caravans and campsite pitches, Airbnb
SFR	Staying with Friends and Relatives

SEASONAL AVAILABILITY OF BED SUPPLY
2024



SEASONAL AVAILABILITY OF BED SUPPLY 2024	2024											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
All Paid Accommodation Total	7,932	7,430	9,247	12,255	12,261	12,536	12,401	12,373	12,660	12,748	8,472	8,277
Serviced Accommodation	1,870	1,934	1,963	1,965	1,970	1,970	1,970	1,970	1,970	1,970	1,950	1,922
Non-Serviced Accommodation	6,062	5,496	7,284	10,290	10,291	10,566	10,431	10,403	10,690	10,778	6,522	6,355

The chart and the table above show the supply of bed stock as listed in STEAM 2024 was near capacity from April all the way to the end of October, but there was capacity November to end March. This suggests that growing the accommodation offer for those months (ie high season) would be beneficial in offering visitors a range of accommodation to stay. It also suggests that there is room for more visitors in November through to March – although we do not have figures for which accommodation remains open during this period (Shepherds huts, yurts etc may not be suitable in the colder months).

Powys County Council published an update to inform their Local Development Plan in Jan 2024³⁹ The following tables include some towns within the National Park boundaries – they list the number of properties to let rather than the number of beds.

Number and proportion of short term holiday lets by locality

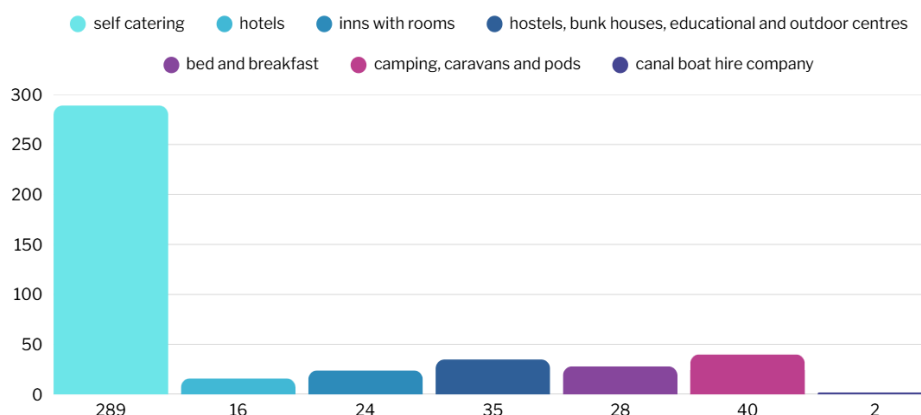
Locality	Total number of holiday lets	Total Number of Residential Properties	Percentage
Brecon	161	7275	2.20%
Hay and Talgarth	109	4565	2.40%
Crickhowell	72	3545	2.00%

The table shows ‘Brecon’ and ‘Hay and Talgarth’ localities have the highest number and proportion of short-term holiday lets in all Powys although it remains around 2-3% of all residential properties. The average for all Powys is 1.3% of all residential properties used as short-term holiday lets. The higher proportions are within or near Bannau Brycheiniog National Park.

Number of short term holiday lets by Community Council area or on the boundary of the National Park Data from Powys CC.

Town/Community Council Area	Number of short term lets
Talybont on Usk	33
Hay	33
Brecon	27
Ystradgynlais	20
Clyro	19
Llanfrynach	18
Llangors	15
total	165

This bar chart shows that substantially more self catering accommodation businesses (289) are paying business tax in 2025 compared to other

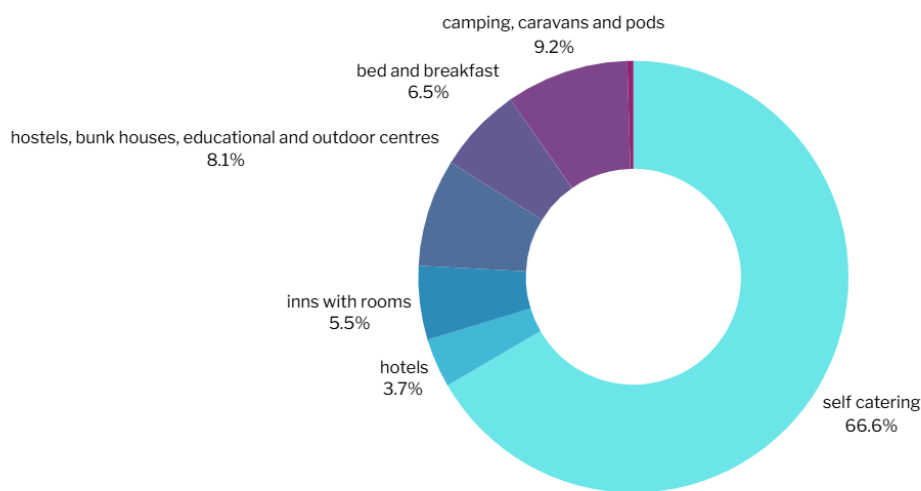


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<https://ldp.powys.gov.uk/docfiles/36/3.%20Replacement%20LDP%20Second%20Homes%20and%20Short%20Term%20Holiday%20Lets.pdf>

accommodation businesses (next largest is 40 camping).⁴⁰

Pie chart showing percentages of types of accommodation businesses paying business rates within the National Park boundaries



It seems likely that a broad range of

accommodation will attract a broad range of visitors to stay in the National Park. Country hotels, bed and breakfast, yurts, self catering accommodation etc each have a role to play for different demographics.

Ahead of the introduction of a Visitor Levy, Welsh Government are introducing enforced registration for all self-catering accommodation. The levy will be collected by the Welsh Revenue Authority (WRA). The WRA intend to make the publicly available data they collect available to the National Park Authority. They will provide data for businesses within a post code inside the Park Boundaries. This will help create a more effective picture of the offer within the National Park.

⁴⁰ The data is taken from business rate payment data made in 2025 for Powys, Monmouthshire, Carmarthenshire and Torfaen. The data is filtered for postcodes within the National Park boundaries.

STEAM data for Bannau Brycheiniog National Park - most recent 2024 figures compared to 2023



1.2. Our Visitors

The number of staying visitors in the National Park has grown over the last 10 years. In 2015, the number of visitors was around 4.1m with 92.1% being day visitors.⁴¹ In 2024, the percentage of day visitors stood at 87% of the 3.83m visitors to the National Park.

The economic impact of 4.1m visitors in 2015 was £239m (equivalent of approx. £319m in 2024 taking account of inflation rates⁴²) economic impact nine years later, in 2024 for 3.83m visitors stands at £412m. The growth is attributable to the number of self-catering spaces on offer – serviced accommodation has stayed at the same level over the last decade, while self-catering accommodation has grown substantially

1.2.1 Visitor Survey 2024 – findings.

In Summer 2024, two members of staff helped by volunteers surveyed visitors at key locations across the National Park. 629 responses were collected between May and end of August 2024.

46% of our visitors come from Wales and 48% from the rest of the UK (Mainly England) with about 6% overseas visitors.

⁴¹ Figures derived from STEAM data, a nationally recognised system used across the UK for comparisons relating to visitor numbers, behaviours and economic impacts

⁴² <https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator>

82% of our visitors get to the destination by car (or motorbike), and use that transport to travel around on arrival, 9% of these vehicles are electric (higher than the national average for electric vehicle use.

41% of our visitors are families with children/teenagers.

20% of those we interviewed chose self-catering - the most popular accommodation. Camping was also popular (14%) among our interviewees. 11% chose serviced accommodation in a bed and breakfast or hotel.

Visitors told us the principal reason they come to the Bannau Brycheiniog National Park is to go walking in the beautiful scenery, and mentioned they liked getting exercise.

While they are here, about half of our visitors told us they ate out in a cafe pub or restaurant and visited a town or village. Many mentioned that they had enjoyed the opportunity to stargaze in the National Park which is also an International Dark Sky Reserve.

We invited our visitors to tell us what we could change to make their visit even better and majority who answered, replied “nothing!”. 5% told us that parking was an issue for them.

These answers are consistent with findings from the last visitor survey undertaken by a private company on contract to the National Park Authority in 2019, and similar to findings from previous surveys.

1.3 Steam Data

Comparative Steam Data – headlines from 3 National Parks of Wales

STEAM Data Summary 2023			
	Bannau Brycheiniog	Eryri	Pembrokeshire
Total economic impact of tourism £M	412.03	822.49	558.31
Total Visitor Days (millions)	5.39	12.2	7.87
Staying visitor days (Millions)	1.87	9	6.8
Total Visitor numbers (millions)	4	4.89	2.41
Number of staying visitors (millions)	0.48	1.69	1.34
Number of day visitor days (millions)	3.52	3.21	1.08
Number of FTE jobs supported by tourism	4,118	7,569	6,593
% of visitor days which are staying	35%	74%	86%

% of no. of visitors staying	12%	35%	56%
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Appendix 2: Council tax premiums in the Park boundaries

	Second homes	reference
Powys	<p>At the Cabinet meeting held on the 4 February 2022 it was determined to vary the premium rate and to charge a Council Tax premium of 75% for the financial year 2023/2024, and that this decision shall remain effective each financial year thereafter unless varied or revoked.</p> <p>At the Council meeting held on the 9 March 2016 it was determined to charge a Council Tax premium of 50% for the financial year 2017/2018 and that this decision shall remain effective each financial year thereafter unless varied or revoked.</p>	Council Tax Premiums - Powys County Council
Monmouthshire	<p>Introduced a 100% premium for second homes, although businesses moving from the commercial list (business rates) to the domestic list (council tax) will be exempt from the premium for 12 months. During which time standard council tax will still be payable.</p>	https://www.monmouthshire.gov.uk/where-your-council-tax-goes-2024/#:~:text=For%20second%20homes%20a%20100,tax%20will%20still%20be%20payable.
Carmarthenshire	<p>Charge Second Homes a 50% premium to start, raised to 100% in April 2025,</p>	https://democracy.carmarthenshire.gov.wales/documents/g6253/Printed%20minutes%2008th-Mar-2023%2010.00%20County%20Council.pdf?T=1
Torfaen	<p>Torfaen were considering whether to introduce a council tax premium on long-term empty properties and second homes, as part of an overall strategy to reduce the number of</p>	https://www.torfaen.gov.uk/en/CouncilTaxAndBenefits/CouncilTax/Council-tax-premiums/Council-Tax-premiums-for-long-term-empty-

	empty properties and increase local housing opportunities.	properties-and-second-homes.aspx
RCT	From 1st April 2024 all second homes will be subject to a 100% council tax premium.	https://www.rctcbc.gov.uk/EN/Resident/CouncilTax/Counciltaxpremiums.aspx
Blaenau Gwent	Only one second home registered but from September 1, 2025. A premium on 2nd homes of 100% be implemented	https://democracy.blaenau-gwent.gov.uk/ieListDocuments.aspx?CId=1134&MId=2739&Ver=4&LL=0
Merthyr Tydfil	Merthyr Tydfil County Borough Council - At present, second homeowners are liable for 100% Council Tax (i.e. the standard rate), and this will continue until the 31 st March 2024. There are currently 266 second homes in the county borough. At the Full Council meeting held on the 8 March 2023 it was determined to charge a Council Tax premium of 100% for the financial year 2023/2024.	https://www.merthyr.gov.uk/resident/council-tax/council-tax-premiums/

Information derived from Local Authority websites.

Appendix 3: Previous Strategies relating to tourism

The key strategies written on behalf of the destination which directly related to Visitors and preceded this strategy are:

- **Brecon Beacons Sustainable Tourism Strategy 2017-2022** including the Destination Action Plan 2017-2020
- **Brecon Beacons Visitor Management Plan** (2015)
- **Sustainable Transport Strategy 2022**

Appendix 3.1 Brecon Beacons Sustainable Tourism Strategy 2017-2022

The **Brecon Beacons Sustainable Tourism Strategy 2017-2022** including the **Destination Action Plan 2017-2020** is the most recently produced strategy relating to partnership working and sustainable tourism to the Bannau Brycheiniog (Brecon Beacons) National Park. This strategy was written by members of the partnership between Authority staff and Brecon Beacons Tourism (a paid membership organisation representing the interests of tourism businesses within and along the boundary of the National Park). The strategy took account of consultation with stakeholders and within the Authority.

Appendix 3.1.1 The priorities for Brecon Beacons Sustainable Tourism Strategy 2017-2022

The key challenge the strategy identified, was to create a more joined-up offer to visitors effectively packaging activities, attractions, hospitality, transport and accommodation. Widespread take up of the new “destination brand” (which had been released before the strategy) was seen as a key driver to achieve this – linking the businesses to the destination and offering free to use photography, and a specifically designed logo, to help achieve a stronger visual identity for the destination as it was marketed by the businesses within it. Unfortunately these aspirations were overtaken by a series of events including public finance issues and the global pandemic which meant some could not be fulfilled.

The Strategy outlined a series of key engagements and activities it intended to deliver and these are listed in the Appendix below along with commentary on the extent to which they were achieved.

The success of the 2017-22 strategy was partly predicated on winning grants through Visit Wales. As mentioned above (under impacts) the resources steadily dwindled and then were impacted by Covid.

The strategy laid out four clear aspirations for Tourism in the Brecon Beacons as

- 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

To take these in order:

- **A proud exemplar of a sustainable destination supported by its communities** –Achievements relating to this laudably ambitious goal are outlined below but efforts were hampered by lack of funding and the impacts of the pandemic.

- **A ‘good neighbour’ adding significant value to the regional offer and economy–**

Local Authority neighbours

Powys strategy for cultural tourism was created in 2024. It recommends encouraging visitors to enjoy visiting the market towns and villages for an authentic and positive experience which could benefit the businesses and possibly the transport options. Consultation with those communities and identifying provision of suitable parking and toileting options will be important ahead of implementation.

- **Vibrant private and voluntary sectors taking a lead in tourism delivery and visitor welcome:** during the time covered by the strategy, the private and voluntary sectors moved to the forefront of delivering tourism and visitor welcome since resources in the public sector had shrunk substantially. The new order requires even greater partnership working and careful use of ever decreasing grant pots to create the maximum impact for the sector.

- **More reasons to visit, more often, across the National Park and across the year.** Some initiatives which were begun in this regard before the pandemic could be restarted (using the work already completed) – Great Days Out for example.

Appendix 3.1.3 Committee structures

A forum, originally called the Sustainable Destination Partnership Working Group remains from the original Strategy – now known as the Sustainable Destination Partnership, its membership is composed of representatives from each of the unitary authorities, the National Park Authority and representatives from the Canal and River Trust and Brecon Beacons Tourism. It has continued to meet at least annually.

The previously very active marketing group which was attended by representatives from the Authority tourism and the communications teams, BBT and Powys lapsed in roughly 2020.

The partnership agreement between BBT and the Authority which stood behind the destination promotion website needs to be revisited and reworked as the updated site is released in 2025.

Appendix 3.2 Brecon Beacons Visitor Management Plan 2015

The **Brecon Beacons Visitor Management Plan** was written by external consultants (funded through Collabor8) and adopted in 2015 by the National Park Authority.

This plan uses a variety of data to assess the impact of visitors on the National Park. The analysis of stakeholders' concerns is more or less the same today as it was ten years ago.

For Farming and Land Management the impacts from cars and dogs were the key issues raised (and continue to be key issues) as negative problems. Those with farm diversification projects reported less negative views. Graziers impacted by visitors, dogs and traffic felt that their concerns were not being heard and suggestions were made about enforcing regulations relating to traffic and dog control.

Local residents' views

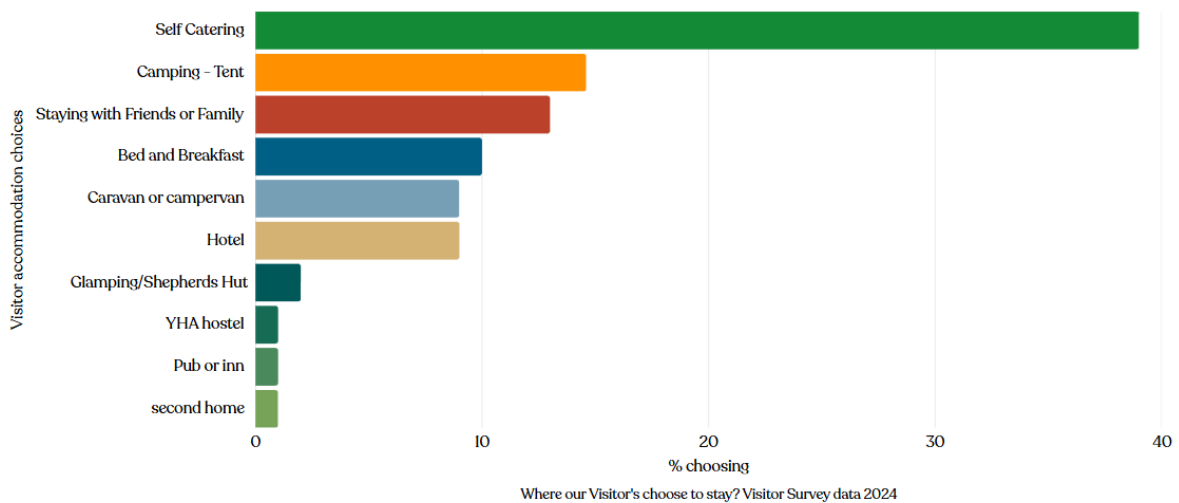
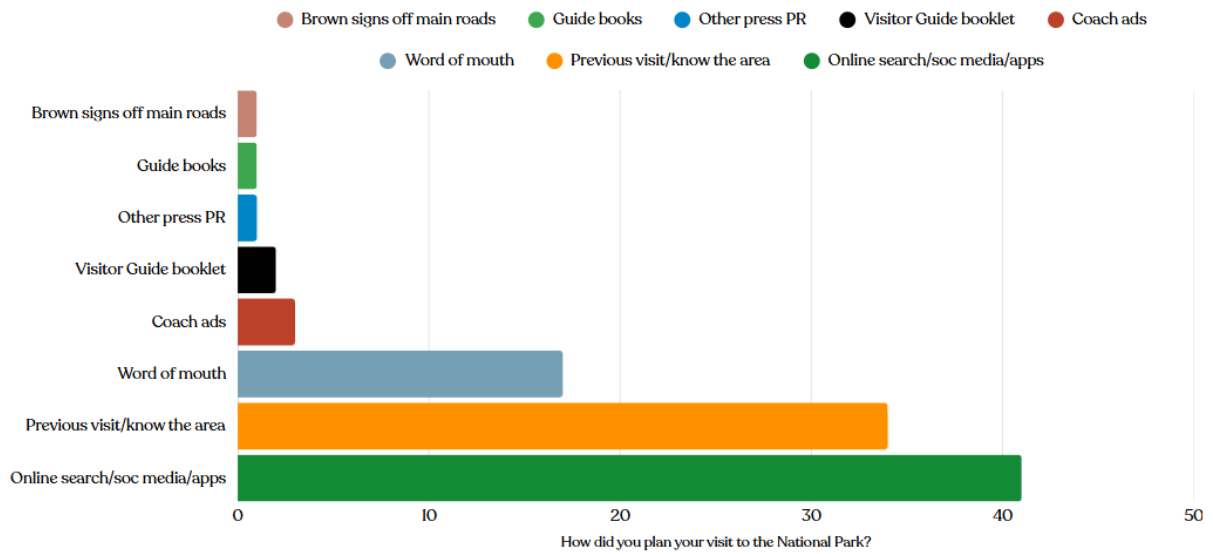
The plan mentions that in the 2013 park wide survey of homeowners, the majority of residents saw tourism as a positive source of income for individual businesses and the area. Some however are directly impacted by negative issues arising from car parking in particular.

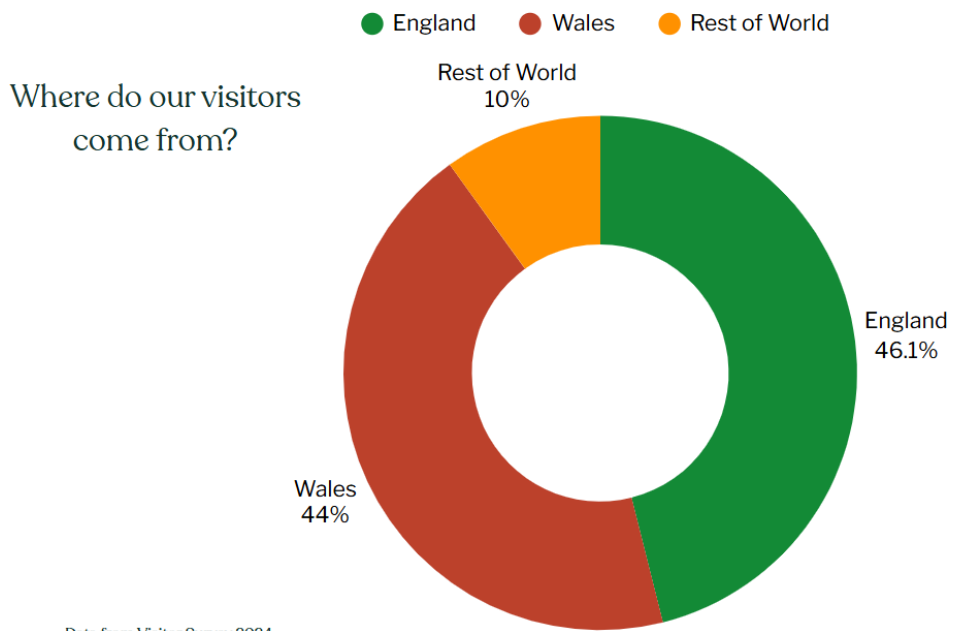
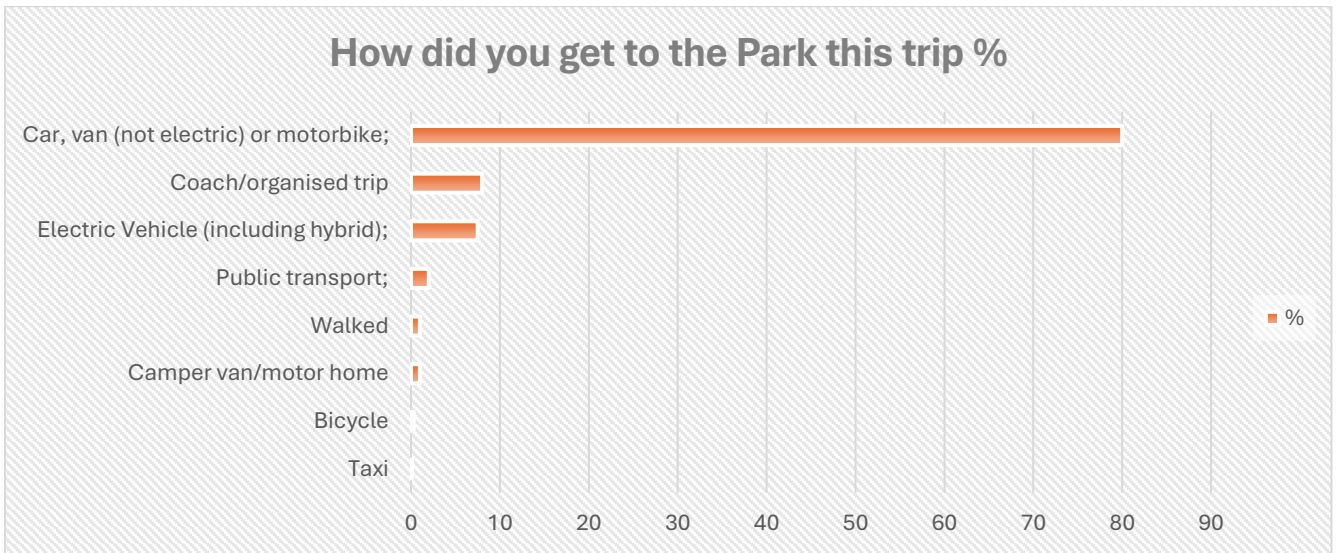
The plan describes a conception that jobs in tourism are seasonal and low paid. Although true for some staff, this was challenged by the tourism sector in 2015. Businesses pointed out that the picture was more complex, with accommodation often owner being owned operated. The business may not directly employ other staff but owners may draw a reasonable income from the business.

Appendix 3.3 Net Zero Sustainable Transport Strategy and Action Plan Sustainable Transport Strategy Feb 2023

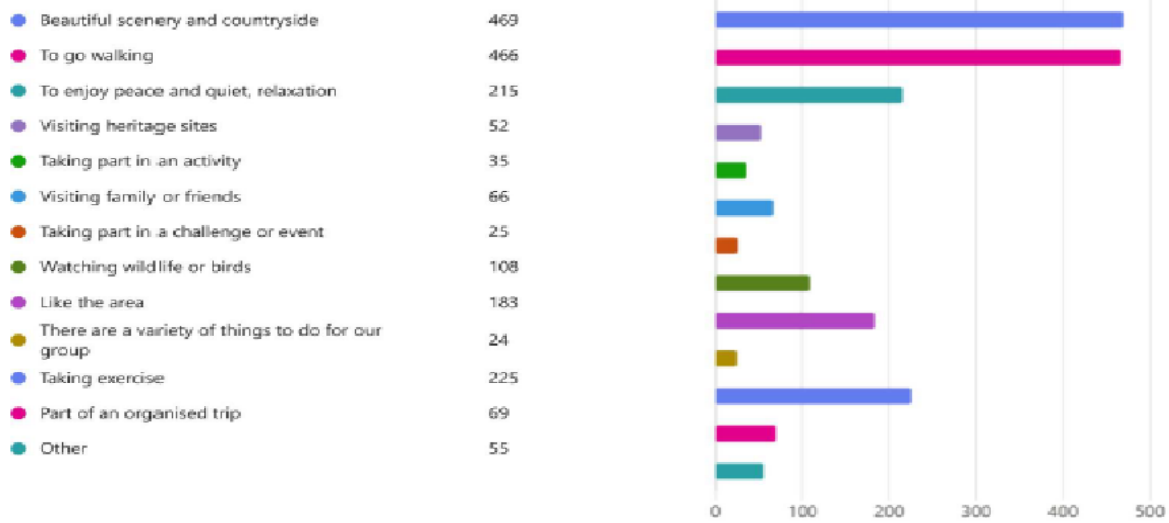
The strategy recommends working initially on the Southern edge of the National Park. The strategy recognised stronger existing public transport links and lower car ownership to the South. The National Park Authority are in the second year (2025) of offering subsidised bus fares from Brecon or Merthyr Tydfil to or from Pen y Fan. During the first year (2024) over 1000 subsidised trips were made. The Authority also funded extra buses on the routes. The bus routes concerned - T4 and T14 - have been passed back to Transport for Wales as of 2026. The full park and ride experience that the Strategy originally envisaged has not materialised because the necessary infrastructure changes, including signage from the A470 and dedicated parking could not be organised or funded within the original project.

Appendix 4: Visitor survey 2024

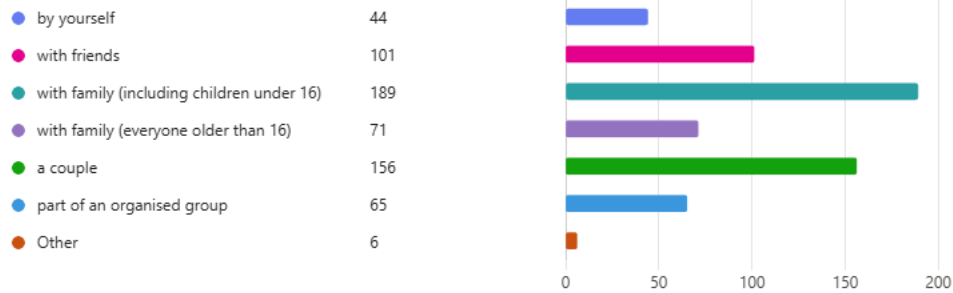




What are the main reasons you have chosen to visit? (please tick any that apply to you)

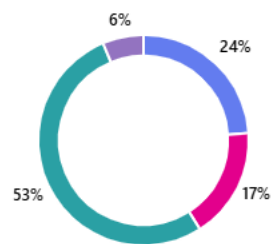


8. Tell us about who came with you today - are you



9. Could you please tell us a bit more about the make up of your group

Age group	Count
are you with anyone aged under 16	228
are you with anyone aged over 16 to 24	163
are you with anyone aged 25 to 66	503
are you with anyone aged 67 or older	60



11. Tell us about anything you wish had been different during your visit?

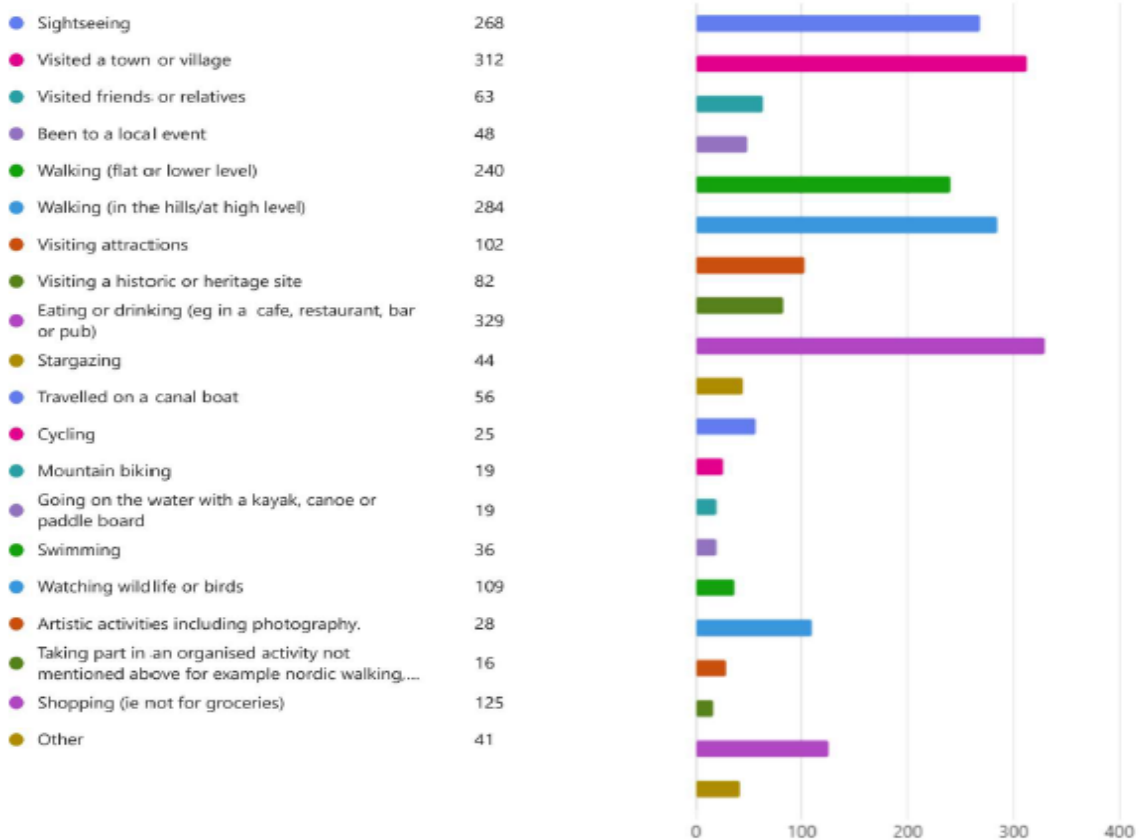
399
Responses

Latest Responses
 "Nothing"
 "Nothing - everything was perfect (even the weather)"
 ...

19 respondents (5%) answered parking for this question.

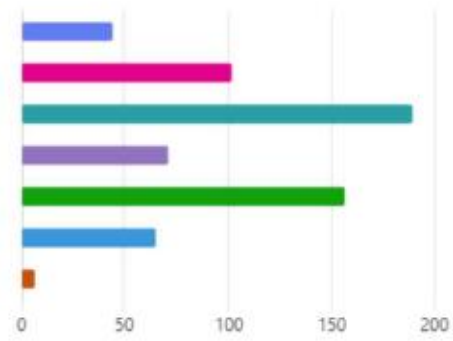


Please tick any of these you will do, or have done, during this trip to the National Park?



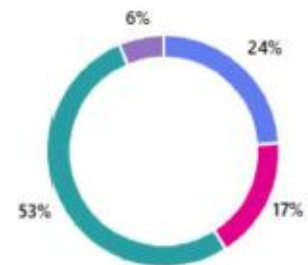
Tell us about who came with you today - are you

● by yourself	44
● with friends	101
● with family (including children under 16)	189
● with family (everyone older than 16)	71
● a couple	156
● part of an organised group	65
● Other	6



Could you please tell us a bit more about the make up of your group

● are you with anyone aged under 16	228
● are you with anyone aged over 16 to 24	163
● are you with anyone aged 25 to 66	503
● are you with anyone aged 67 or older	60



Appendix 5 – comparative Visitor data for UK’s National Parks (sorted in ascending order of average, annual, visitor numbers).

National Park	Population	Visitors (m)	Visitor Days (m)
Northumberland	1,848	1.62	1.88
Exmoor	10,192	1.98	2.7
Cairngorms	17,000	2.14	4.16
Pembrokeshire Coast	20,922	2.41	7.87
Dartmoor	34,124	2.57	3.7
Loch Lomond and the Trossachs	15,600	2.76	4.53
Bannau Brycheiniog	33,485	3.99	5.39
New Forest	34,166	4.15	6.27
Eryri	24,416	4.89	12.20
Yorkshire Dales	22,798	5.08	6.66
Broads	6,275	7.36	9.61
North York Moors	22,935	7.77	10.19
Peak District	35,901	13	12.64
Lake District	38,993	16.4	27.21
South Downs	113,339	19.51	20.37
Exmoor	10,192	1.98	2.7

Population data from <https://www.nomisweb.co.uk/query/asv2htm>
 Visitor data from Steam

Appendix 6 -consultation

The preparation of this Strategy drew on consultation with

Sustainable Destination Partnership – 8 Local Authorities

Brecon Beacons Local Access Forum

Brecon Beacons Tourism (ie conference, networking and business familiarisation trips)

Brecon Beacons Ambassadors’ training events

Town Council meetings:

- Crickhowell
- Penderyn and Hirwaun
- Brecon

- Talgarth
- Llandovery

Representative of Llangattock Community Council

Town Plans – Brecon, Crickhowell

National Park Authority Members and staff

Powys County Council transport and tourism sectors

Monmouthshire Tourism Team

Herefordshire BID

Carmarthenshire Tourism Team

Waterfall Partnership

Natural Resources Wales Waterfalls team

Timetable

At its meeting 6 June 2024 the National Park Authority agreed the process, two workshops were held for the Authority's Members one in 2024 and the second in 2025.

Brecon Beacons Tourism represent local businesses working in tourism and hospitality. Details on their role and relationship with National Park Authority are in Section 10. BBT were consulted on the priorities and different iterations of the Strategy at AGM and at members meetings throughout 2024 and 2025.

A presentation was made to the Mid Wales Tourism Forum in Sept 2025, attended by representatives from businesses, Mid Wales Tourism, BBT and Visit Wales, the presentation was well received and constructive feedback was offered.

Presentations have been made for consultation at:

- Waterfalls partnership meetings (NRW and local Community reps) in April and Oct 2025
- South Wales Outdoor activity provider group AGM in Dec 2024
- To tourism teams in our local authorities and the Canal and River Trust through the Sustainable Destination Partnership.

Invitations to engage were sent to town councils, and taken up by:

- Brecon Town council
- Crickhowell town council,

- Llandovery Town Council
- Hirwaun and Penderyn Town Councils
- Talgarth Town Council

With the officer attending their meetings during 2025 to discuss their aspirations for tourism and talk about the priorities for the Strategy.

The Local Access Forum was consulted in Dec 2024, and Oct 2025.