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National Assembly for Wales
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14 May 2014

The National Assembly for Wales' Enterprise and Business Committee Inquiry into Tourism

Introduction

National Parks were designated to protect and enhance the most beautiful and imposing landscapes in the UK. Each National Park is different in terms of their landscape character; historical and cultural heritage. The statutory designation recognises the national importance of such landscapes and gives them a high degree of protection. There are three National Parks in Wales covering an area of 4122 sq km. This represents approximately 20% of the land area of Wales. Snowdonia was designated in 1951 followed by Pembrokeshire Coast in 1952 and Brecon Beacons in 1957.

National Parks are of great importance to the Welsh tourism industry. The National Parks are also regularly cited as Wales' most recognisable destinations. The 2013 report by Arup 'Valuing Wales National Parks' advised that the tourism monitoring data showed the National Parks had over 12 million visitors. This equates to an annual injection of spending into the Welsh economy of around £1 billion with the Welsh Tourism Industry general accounting for £4.5 billion. The Report proposes that visitors to the National Parks represent a sizeable proportion of the Welsh Tourism industry.

National Parks Champion Sustainable Tourism

The principles of sustainable tourism guide the approach of National Park Authorities. These principles can ensure that growth in international and home market tourism in National Parks can be managed appropriately. We view sustainable tourism as the future of tourism, not an accessory; and we consider partnership working the most effective method of promoting this approach. Partnerships such as the Destination Management Partnerships (DMP) serve to promote the Parks to visitors, improve understanding of the importance of the natural environment to the tourism industry and to help Visit Wales deliver against national tourism targets. In addition, the National Park Authorities have



accessed Welsh Government partnership funding over a number of years with the aim of fostering partnerships based on delivering on the principles of sustainable tourism.

High Quality Environments Bring Value to the Tourism Brand

Visit Wales data affirms that the National Parks are hugely important to the tourism sector. In particular the 2012 Visit Wales Visitor Survey showing 'quality of the natural environment' is the trip asset which receives the highest satisfaction rating 9.5 for all three markets (day, domestic and international).

In the Welsh Government's Tourism Strategy, the distinctiveness of our Protected Landscapes has been recognised as a vitally important part of our product offer and 'brand'. This 'brand' of 'high quality environments, culture and heritage' has not appeared by accident. The 'brand' is the result of careful management, planning controls, development and promotion by National Park Authorities. Local Authorities, Welsh Government, Visit Wales and its agencies and the private and voluntary sectors. It is important to note that the funding and remit of National Park Authorities does not cover the direct marketing of tourism within National Parks,

The National Parks 'brand' is an internationally important one recognised the world over. Irrespective of the country of origin visitors understand that they will experience high quality, unique landscapes and natural features that are managed to a high standard. This means that National Park Authorities work with key agencies, such as Visit Britain to deliver against national tourism targets.

1. The clarity and strength of Wales's tourism "brand"

In 'Partnership for Growth' the Welsh Government Strategy for Tourism 2013-2029', the natural environment is identified as one of five areas of competitive advantage, pointing to 'a landscape of high scenic quality, a unique coastline and a diversity of experiences contributing to our visitors' mental and physical wellbeing. The report states that 'We need to take full account of the major asset represented by Wales Natural Environment and consider how to use its characteristics for growing tourism sustainably.'

The importance of a high quality environment, as is found in our National Parks, is vital to the Wales tourism brand as evidenced in Visit Wales research. Names like Snowdonia, Brecon Beacons, and Pembrokeshire Coast resonate with the customers and potential customers in our main market that is the UK, and increasingly in our overseas markets too.

With a focus on cultural, historic and natural assets, the current 'brand' promoted by Visit Wales and other marketing agencies aligns well with Wales's National Parks tourism offer, however we believe even more could be done to showcase National Parks as the jewels in the crown of Wales. National Parks are living and vibrant destinations offering a blend of adventure and tranquillity, and branding must reflect this diversity.

National Parks are high profile destinations with a clear, well-established tourism offer, and the branding of National Parks by Visit Wales should be based on existing strengths.



BRECON BEACONS NATIONAL PARK



PARR CENEDLAETHOL
Arfordir Penfro
Pembrokeshire Coast
National Park



SNOWDONIA NATIONAL PARK

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We support the marketing of a clearly defined brand, based on our variety of landscapes, nature, activity and cultural heritage. Within the Brecon Beacons National Park the local Destination Brand is being developed locally as a marketing partnership, resourced with money from the Interreg fund.

2. The effectiveness of Welsh Government attempts to maximise the value of the domestic tourism market

Ensuring that marketing activity appeals to the domestic market is crucial to the vibrancy of the tourism sector in localities increasingly dependent on income derived from tourism related activities. In all three National Parks the domestic market is crucial as it accounts for high percentage of visits both new and repeat. The effectiveness of the Welsh Government's attempts to maximise the value of the domestic visitor must be monitored to measure its effectiveness. The findings should then be shared among industry partners.

In Pembrokeshire Coast National Park, around 95% of visitors are from the domestic marketing (with the split between Welsh based visitors and those from elsewhere in Britain around 50:50); this trend is mirrored in both Snowdonia and Brecon Beacons National Parks respectively. Numbers have remained relatively stable over the past few years indicating that the Welsh Governments domestic marketing operations are largely effective.

Visit Wales should capitalise on findings in the Arup 2013 report 'Valuing Wales National Parks' highlighted that the National Parks have a 'halo' effect on the rest of the tourism industry in widely drawn, adjacent areas. Major resorts like Llandudno benefit in this way while Tenby has the good fortune to be within the Pembrokeshire Coast National Park and places like Abergavenny and Brecon both in and around the Brecon Beacons also benefit from the designation. More needs to be done to ensure that the private sector especially those in or near National Parks is aware of and able to capitalise on Visit Wales's marketing strategy especially that which relates to the tourism 'pull' of a high quality environment.

Snowdonia National Park Authority has cooperated with the developers of both Snowdonia Zip World and Surf Snowdonia (both outside the boundary), to ensure correlation with their marketing approach and that key messages are shared.

In the Brecon Beacons, the NPA co-ordinates the Sustainable Destination Partnership and plays a major role in supporting the private sector gain benefit from the landscape. It hosts the destination website and has managed the brand development process. It also acts as "treasurer" for the Partnership's joint marketing work.

3. The effectiveness of Welsh Government attempts to maximise the value of the international tourism market

Visit Wales should focus its marketing activities at those countries research shows are most likely to visit Wales, particularly those nearest and associated with a relatively smaller carbon footprint. We welcome a well-managed approach to increasing international



tourism to our National Parks. National Parks have a vital role integrating tourism growth and the needs of local communities.

Visit Wales may consider how it can attract international visitors to Wales through careful marketing of the National Parks as they provide ready-made and highly recognisable destinations. National Parks are widely recognised by people all over the World as encapsulating a nation's finest landscape(s) and cultural heritage, whilst usually offering opportunities for extensive recreation. For the overseas markets publicity being given through vehicles such as Lonely Planet Guides and through the proven success of the Wales Coast Path means that the attraction of our natural environment is now being recognised by our overseas visitors.

Maximising the value of international tourism is important as international visitors often have a higher spend profile than domestic visitors. New and innovative mechanisms for increasing the yield, for example by working with the cruise ship sector and approaching emerging markets with exiting propositions, will be required in order to achieve growth. Providing a compelling offer to international markets, partly based on our National Parks, also provides opportunities for attracting inward investment in other sectors. However we caution that 'sustainable tourism principles' do not always fit well with highly competitive price driven holiday destinations.

4. Performance of Visit Wales compared with tourism development agencies in the rest of the UK

The public sector cuts will have an impact upon the ability of Visit Wales to develop tourism and of the National Park Authorities in managing the pressures created by visitors.

Many Local Authorities have had to significantly reduce their tourism work, the provision of infrastructure and other services and facilities that support the tourism offer.

5. The success of Visit Wales marketing activities

As mentioned in Question 1, recent marketing activity highlighting outdoor recreation and cultural heritage sit well with the offer provided by the National Parks of Wales. A recent Visit Wales report states that outdoor activity provision contributes £480 million to the Welsh economy.

Empirical evidence, including that gathered by ourselves, Visit Wales, Natural Resource Wales, Destination Management Organisations, suggest that visitor numbers have remained at relatively constant levels. Although the research also shows that spend has decreased, largely due to factor beyond the control of the Welsh Government e.g. economic down turn, adverse weather, increased competition. We conclude that Visit Wales' marketing activities, given variables outside their control, have been successful.

The use of social media demonstrates how crucial the marrying of marketing activity and infrastructure investments need to be. The use of digital media for meeting visitor demand for online information', is essential - in Pembrokeshire the Coast to Coast Destination



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magazine is now downloadable and on-line, whilst in Snowdonia a smartphone app has been released, reflecting visitor needs. Changing needs are also found in demographics, in Wales and the UK as a whole people are getting older, facilities and services must reflect such as the provision of easy access sites as well as looking to how centres can cater for cross generational holidays. Once again, National Parks provide for varied visitor needs and cross generational experiences; more could be done to market this selling point.

'Future proofing' the tourism industry requires two key things. Firstly, to understand the needs of our visitors to our National Parks.; and secondly to understand and work within the capacity of National Parks key tourism resource, the natural environment. There must be research, funding and advice to the industry. Overall working with the private sector has been positive and the examples like Destination Pembrokeshire Partnership and the Brecon Beacons Sustainable Destination Partnership has helped in making this possible. Further positive relationships with the private sector have been found through the Welsh Tourism Alliance.

National Parks themselves have been responsible for successful campaigns to promote themselves to the domestic market. Pembrokeshire Coast National Parks retro-poster campaign has been award winning and was featured in the London Underground, and more recently Cardiff Airport – therefore also making an appeal to the international market. Pembrokeshire Coast National Park Authority has also developed a visitor website that enables users to select destinations, activities and other key features such as accessibility to help them plan their holiday and recreation. In addition to this Pembrokeshire Coast National Park Authority managed the marketing of the Wales Coast Path. Brecon Beacons as a destination manages its own marketing through a partnership based approach with strong input from the private sector.

Snowdonia National Park Authority has engaged with several private sector marketing companies, especially in the sustainable holidays marketing sector, to assist in the delivery of its relevant Destination Management Plans' actions. The latest project has seen access given to Visit Wales partnership funding and the Authority lead on a partnership between themselves and the Areas of Outstanding Natural Beauty of North Wales; this successful pilot is now seen as a potential model for regional marketing between designated landscapes. Linkages are also being forged with, Manchester, Liverpool and Birmingham Airports with Visit Wales and Visit Britain support.

All three National Park Authorities have been working in recent years with Visit Wales to develop and promote Wales' Green Tourism product – businesses that are managing their own local environmental impacts through schemes such as the Green Tourism Business Scheme. Brecon Beacons now have 50 green businesses certified and training courses for such businesses have been run in all three National Parks. Promotion has been via marketing channels such as Green traveller and the Our Land project.

6. The work of Visit Britain as it relates to Wales, and the extent of coordination between Visit Britain and Visit Wales



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As part of the UK family of National Parks, we do contribute to some marketing initiatives delivered by Visit Britain. We welcome opportunities to work more closely with both Visit Britain and Visit Wales and believe that such joint working adds value to the marketing messages and the work of the industry on the ground.

Greater clarity on the relationship between Visit Wales and Visit Britain would provide us with a better understanding of the work of Visit Britain and its relationship to Wales. Further clarity would help us develop better joint working and enhance applications to potential funding opportunities for National Parks and the tourism industries that operate within our boundaries.

7. The sufficiency and effectiveness of Welsh Government resources targeted at promoting tourism and supporting Welsh tourism businesses, and whether it represents good value for money

National Park Authorities are always open to discussions linked to increasing investment in sustainable tourism. Tourism is a key component of the economic wellbeing of our National Parks. The Welsh Government Tourism Strategy and changes to Visit Wales' governance reflect greater awareness of the economic importance of tourism. In addition to economic vitality, tourism can improve the quality of life for resident populations, for example by providing better access to green spaces, improved infrastructure and mechanisms that promote involvement in outdoor activities. If taken alongside economic indicators linked to assessing value-for-money is evident.

Early indications suggest that recent investment programmes, utilising EU funds, are attracting more visitors and improving the quality of their experiences. The Welsh Coast Path End of Project Report published in 2013 states that this Welsh Government and coastal Local Authorities funded infrastructure has attracted nearly three million visitors and was worth an estimated £16m to the Welsh economy over twelve months.

Over the past few years, we have seen significant investment of EU funds into the tourism sector, for example the Snowdonia Centres of Excellence, a project which has seen £4 million invested in the outdoor recreation sector across southern Snowdonia. Although many of these projects have been developed locally with the support of National Park Authorities, there has also been significant investment from the Welsh Government, both in terms of finance and officer support. Alongside significant capital investment, we have seen investment in appropriate business support and training which is helping the private sector strengthen its offer and capitalize upon investment. Although difficult to quantify (especially as these projects are only now reaching maturity), we are seeing new businesses being established on the back of this investment, in addition to existing businesses seeing an increase in turn-over. Feedback from bodies such as Wales Tourism Alliance also indicates that there has been a strengthening of business-to-business networking and activity being spurred on by business confidence in knowing there is structural, financial and strategic support.



In the Brecon Beacons, there have been two Interreg IVB NW E projects in recent years, aimed at developing tourism in the area. Both have been worth £1million over 3-4 years and the most recent, Rural Alliances, has brought an additional £800,000 into Wales as The NPA has acted as Lead Partner. Both have been aimed at developing tourism at the local/community level as well as supporting specific sustainability schemes. In addition BBNPA has been a key partner in the LEADER Cooperation project, Walking with Offa, with partners either side of the English-Welsh border from north to south. This project was worth £600,000 in Wales and has been based at community led development of walking tourism coordinating with the Offa's Dyke Long Distance Trail which links to both ends of the Coastal Path, making probably the longest circular walk in the world.

8. How the Welsh Government monitors and evaluates the effectiveness of its tourism support and marketing activities

All three National Park Authorities are included in relevant research and monitoring activity, with information made available on request. However, we do note that the data collated is not always available at National Park level; usually data is collated and presented at Local Authority level. This presents difficulty when progressing some funding applications and in developing business cases for investment.

Making data available at National Park level would reflect their importance in terms of their role as key destinations, assist in visitor capacity management, improve quality and increase investment.

With regard to projects funded or part-funded by the Welsh Government, the monitoring and evaluation seems to be in-line with the requirements of other funding bodies and appropriate to the grants provided.

9. The use made of opportunities for funding and other support from the EU

We welcome that Visit Wales has received significant Convergence funding at the all-Wales level. In general, EU funded projects have built upon the existing tourism offer in each National Parks (where funding has been available). This has strengthened the sector considerably and has largely seen appropriate investments (often informed by local organisations) being made. The National Parks of Wales welcome the fact that some projects which have benefited from EU funding have formed an integral part of Visit Wales' latest marketing initiative; this is seen to be making the most of the investment, although the success of the new advertising format is yet to be evaluated.

Looking towards future opportunities arising from EU structural funds; we would welcome efforts aimed at making application for small amounts being made easier and more streamlined. Quick project approval can sometimes be vital in the tourism sector to take advantage of fair weather or new / emerging trends. In addition, it is important to ensure that there are strategic links between structural funds (incl. Regional Development Partnerships) and Destination Management Plans. In doing so, we can further build upon previous rounds of EU funding and build a longstanding and identifiable rapport with new and existing visitors.



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In East Wales however the availability of EU funds is considerably more restricted. We are pleased that Visit Wales is increasingly recognising this but if tourism development in Wales is to remain balanced, funds must be found to assist East Wales to move forward together with the Convergence area. The availability of TMF to match fund programmes such as the Interreg projects within the Brecon Beacons remains of critical importance.

10. The success of Welsh Government efforts to increase the quality of Wales's tourism offer.

It is vital that efforts focusing on quality are retained and enhanced, with particular regard for training and mentoring for the SME/micro-businesses which make up the majority of operators within our National Parks. Destination Management and associated partnership working must focus on ensuring the best possible visitor experience. This agenda has clear linkages with ensuring the sustainability of tourism, particularly as it relates to the environment and community.

With regards to the quality of offer, developments such as the Wales Coast Path have built upon existing highlights (notably the Pembrokeshire Coast Path National Trail and the Offa's Dyke Long Distance Path) in a manner that adds to the quality of the visitor experience. This development has been mirrored in Snowdonia through the Princes of Gwynedd initiative which has seen existing cultural and historic locations being furnished with better interpretation and infrastructure. The Walking with Offa Project has achieved similar objectives in the east. These initiatives, and other besides, add quality to the visitor experience. In addition, many of these projects add value to visits in terms of enabling better enjoyment of our National Parks' special qualities.

The success of improving the quality of Wales' tourism offer has also maintained its value to the customer. Some of our greatest experiences are largely free or inexpensive at point of access, for example, mountain biking at Coed y Brenin in Snowdonia (among Europe's finest purpose built facilities), costs no more than a £4 parking fee. Maintaining value for money is vital in ensuring an increase in the market share and enabling the progression of cross-cutting themes such as improving health and wellbeing of the nation and reducing poverty. However, the absence of charging for most outdoor activities places a significant burden on public bodies like National Park Authorities, whose maintenance costs for trails, footpaths and public facilities rise with increasing use yet funding remains static or decreasing. These facilities provide the major attractors for Wales' tourism.

Further efforts are required to ensure that the private sector is part of delivering improvements in quality of the offer. In part this may be achieved through industry funding, however innovative methods are required to ensure industry buy-in and inclusion; there can be a sense that there is a disjoint between the national strategy and local delivery. There are concerns that the dissolution of the Regional Tourism Partnerships may compound the above.

Engagement of the private sector is critically important to the development of broadly based sustainable tourism. In partnership with Visit Wales, the three National Park



Authorities has been pursuing this for some time, based on the green tourism offer. In addition schemes like the Brecon Beacons' Ambassador programme, which educates businesses about the landscape that draws their guests, are becoming increasingly important.

11. The extent to which the marketing and development of tourism in Wales makes the most of Wales's cultural, historical and natural assets

The National Parks of Wales welcome the profile and prominence afforded to Wales's cultural, historical and natural assets with regard to marketing and development. It reflects well on the quality of offer in Wales and in particular within our National Parks, where the majority of their special qualities relate to landscape, culture, history and/or nature. The importance of the National Parks to the Wales tourism Brand is vital and has been consistently shown, in the Arup 'Valuing Wales National Parks' research. It is names like Snowdonia, Brecon Beacons, Pembrokeshire Coast, the Gower and the Wye Valley which resonate with the customers and potential customers in our current and potential markets.

More emphasis should be placed on the role of cultural heritage in the tourism offer. Our National Parks are home to some of Wales's finest cultural heritage and history – assets which are crucial in differentiating ourselves from other destinations. Visit Wales visitor surveys corroborates anecdotal evidence from visitors coming to enjoy outdoor activities, who believe a visit is enriched by exposure to the cultural heritage of an area. Such depth of experience promotes responsible tourism and a lasting relationship which promotes repeat visits and the sharing of positive experiences.

Given that these natural and historic assets already exist and are popular with tourists, the resources required to gain further economic benefits are minimal in comparison to the costs of developing new forms of offer. Capitalising on such assets also has the potential to create benefits beyond the economic, for example they offer opportunities for education and learning and improvements in health and wellbeing. The study conducted by the Wales Activity Mapping Project 'Economic Valuation of Marine Recreation Activity' published in 2013, provides robust evidence that the economic benefits of the current resources found in the pilot area of Pembrokeshire Coast National Park already bring the tourism economy significant economic benefits.

Given the extent to which the offer of our National Parks is dependent on culture, history and nature we believe that National Parks Wales could contribute more to develop the national offer if additional resources are made available. In addition, we have a proven track record – built up over decades – demonstrating how such assets can be exposed to market without being degraded; sustainable management of our core offer is vital in ensuring sustainable and high value growth. Examples such as Carew Castle and Tidal Water Mill in Pembrokeshire or the Waterfalls area in the Brecon Beacons, show how the primary responsibilities of a National Park can work in synergy with the tourism offer of a destination.



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12. The impact of major events on Wales's tourism economy, and the success of Welsh Government attempts to maximise this.

Overall the economic impact of major events on the Welsh economy and in particular our National Parks are positive. In Pembrokeshire, the National Park Authority has worked with the organisers of the International Ironman Triathlon to ensure they maximise its economic impact and exposure on the global stage. In addition, the event attracts competitors for training purposes away from the main event and often during shoulder-periods of the summer seasons. This technique of using large events to extend the season and attract new visitor (and their families/supporters) is echoed in both the Brecon Beacons and Snowdonia National Parks with such events as the Tour of Britain, WRC Rally Championship, the Brecon Jazz, Hay Literature, Abergavenny Food Festivals and the World Trail Running Championships offering similar opportunities for development. The Brecon Beacons NPA is currently developing a protocol for outdoor events organisers to follow to ensure negative impacts on the environment and local communities is minimised and that some form of payback is created.

As important as major events are, we must not underestimate the combined impact of smaller events. Our National Parks host numerous triathlons, road cycling races, mountain biking races and challenges such as the three peaks challenge, and Iron Man Wales (see above) all of which bring in great economic benefit and help develop the offer. These events usually organised by private companies or charities choose National Parks as venues because of the topography and brand of the National Park adding value to the event.

In addition we support and promote a wide array of local cultural events which also extend the season, create value from local natural and cultural resources and bring much needed profile and income into smaller communities. In the Brecon Beacons, events like Llandovery Sheep Festival, the 2014 Canalathon, Brecon Arts Festival and Dark Skies Experiences along with increasing numbers of walking festivals have emerged as excellent mechanisms for both delivering sustainable economic growth and engaging the whole community in their delivery, promoting community cohesion & vibrancy. The NPA's Interreg projects have enabled this growth in local events to develop to the point where many events are now self-sustaining.

A strategic approach to managing and hosting small/medium sized events would be beneficial. We would welcome organisers of events to work in closer partnership with National Parks to ensure that true costs of events are understood. In addition, our Authorities are well placed to ensure that events of all magnitudes provide benefit – beyond the economic – to host communities; engendering community support is vital in ensuring that all events can flourish.

Should you require further information concerning our contribution, please contact:

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