



Report No. **01/2015** Scrutiny Committee

REPORT OF THE SCRUTINY PANEL

SUBJECT:

The socio economic benefit of the Geopark designation and the opportunities for tourism and access

Purpose of Report

- To consider the evidence presented and make recommendations to the National Park Authority;
- Agree an action plan be drawn up to implement the recommendations once approved.

I. Introduction/Background

The Brecon Beacons National Park Authority initiated an application to the European Geopark Network (EGN) in 2003 and gained membership in late 2005 as the 24th member territory.

The Fforest Fawr Geopark was established in order to focus regeneration effort, particularly through sustainable tourism, into the west of the National Park. While it covers 62% of the total area of the National Park, this area is comparatively less well off in terms of tourism income because of the general paucity of attractions (other than the landscape), accommodation and visitor facilities. This is particularly true as you travel west from Brecon and it is here that the majority of the work has been undertaken.

The vision for the Geopark is:

By 2020, Fforest Fawr Geopark will be recognised as a world class Geopark which is using its designation to generate social, environmental and economic benefits. Working with and for its local communities, it will achieve this by focusing on the geological, cultural and biological heritage and by involving a wide range of agencies, businesses and visitors.

The boundary enclosing its 300 square miles / 763 square km is coincident with that of the National Park in the north, west and south and running along the Brecon Mountain Railway and the 'Gap Road' in the east. All parts of the boundary are treated as 'fuzzy' to enable inclusion of communities and attractions 'beyond the line' – see Fig. 1 below.

Fig. 1



National Park: 5m visitors p.a. 75% day visitors
Fforest Fawr Geopark: 1.8m visitors p.a. >75% day visitors

The Geopark is managed by a Management Group and an Implementation Group comprising a range of partner organisations. See Fig. 2 below:

Fig. 2

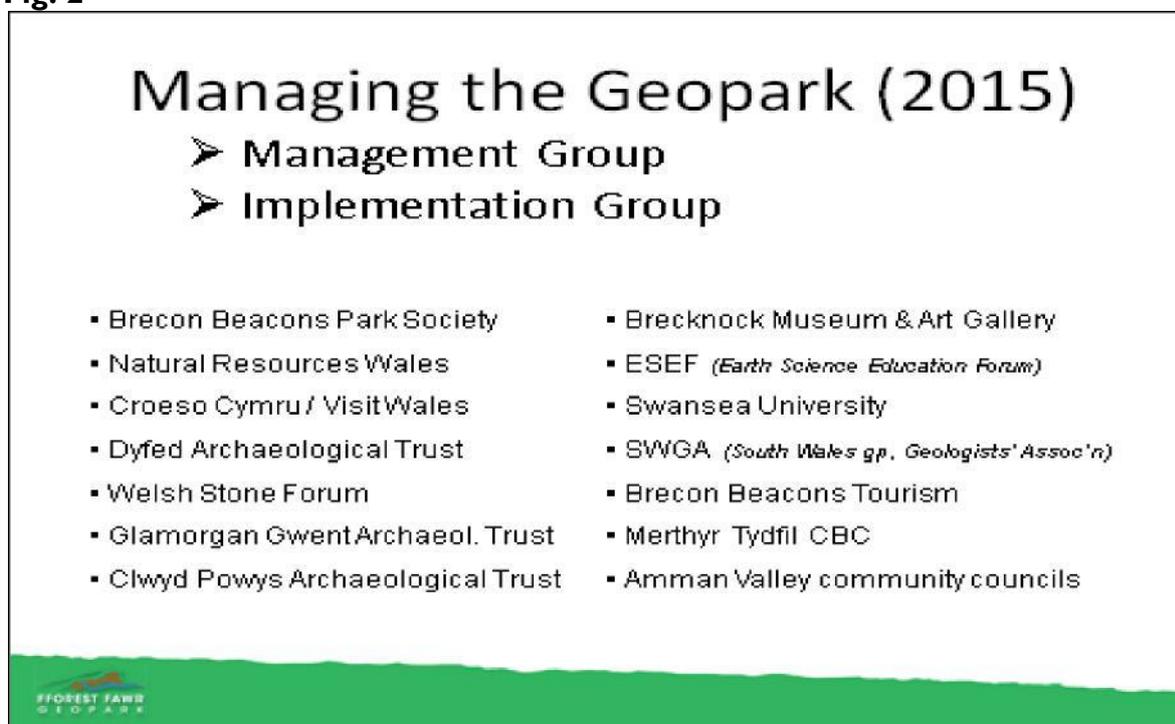


Fig. 3



From Fig. 3 above it can be seen that the Geopark remit spreads across a range of the Authority's goals and involves staff across several service areas. The current Geopark Action Plan can be found at **Annex 12**.

In deciding to carry out a scrutiny review the National Park Authority recognised that the Geopark had not been the subject of scrutiny to date and that with the revalidation process due in 2016, this would be a timely study in order to present to the Panel. It also comes at a time when the Authority is focusing far more on regeneration and the economic benefits of protected landscape designation. At the time of writing the Welsh Government had just published its review of designated landscapes.¹ With its current level of visitors we might expect the Geopark designation to have a positive effect on the local economy.

2. Scope of the Study

The Scrutiny Panel (a list of the panel is attached at **Annex 1**) noted a range of evidence that was already available, such as the Geopark revalidation reports from previous years, visitor figures/questionnaire survey results from recent Geopark events, the Brecon Beacons Visitor Survey and the results of the Residents' Survey, carried out in spring 2013.

¹ <http://gov.wales/topics/environmentcountryside/consmanagement/review-designated-landscapes-wales/?lang=en>

They recognised the importance of this review to assess the level of awareness of the Geopark designation amongst residents of and visitors to the Brecon Beacons National Park. Although it could be difficult to gather quantitative data, they felt that anecdotal evidence via interviews and focus groups was potentially useful.

Essentially, the group established that there should be two main strands to this study: to assess the level of awareness of the Geopark designation amongst communities and visitors and also to assess the economic impact the designation provides for the Park's businesses/residents/communities. They confirmed the following framework questions as a focus on the economic benefits, although in the event it proved difficult to differentiate between direct and indirect economic benefits:

- Does the Geopark provide direct economic benefits to specific communities? If so what are these and how can they be quantified?
- Does the Geopark provide indirect economic benefits? If so what are these and how can they be quantified?
- Are the economic benefits identified above being fully developed? If not, what are the constraints and can they/should they be addressed?
- What evidence is available concerning other studies of the economic benefits of Geoparks?

3. What the Authority currently provides

The Authority employs one full time Geopark Officer who works to the Sustainable Tourism Manager within the Sustainable Tourism section in the Countryside and Land Management Directorate. Other staff who contribute to Geopark objectives include:

- Sustainable Tourism Manager
- Tourism Officer
- Sustainable Transport Officer
- Wardens Manager and warden team
- Centres staff
- Interpretation Officer
- Education Manager and Education Officers
- Archaeologist
- External Funding Manager
- Commercial Manager
- Ecologist

As a local I value the Geopark festival, especially the lectures and events. I have a professional input in delivering walks etc.

A range of staff work together to put on an events programme during the year, timed to coincide with school holidays, with activities aimed at families. These have attracted a high level of interest, with over 1000 people attending a one day event in May 2015.

4. Level of Awareness of Geopark Status

A questionnaire aimed at **visitors** (including local visitors) was posted online and promoted through social media. Hard copies were placed in visitor and information centres throughout the Park. 63 responses were received. Of these, 59% had heard of Geoparks generally (and specifically Fforest Fawr) before their visit: 21% because they lived in or near a Geopark, 15% through tourism publications, 11% through website, 11% through word of mouth, and 9% through social media.

59% had visited Fforest Fawr – 20% heard of through publications, 21% living in or near, 12% internet, 10% social media, and 10% word of mouth.

The fact that it's a Geopark did not influence my visit. I see the area as part of the BBNP

I think that few people know what a Geopark is - I just know it as an interesting landscape to walk in.

Interestingly, 13% planned to visit the Geopark if they hadn't already, 5% not, 2% possibly and 1% didn't know. 6 respondents had visited other Geoparks: Ynys Mon, Abberley and Malvern Hills, North Pennines, NW Scotland, Dali Mt Cangshan, NW Highlands and Odsherred

Some of the comments received indicate that there is still a lack of awareness of the Geopark status despite the large amount of information available for visitors, both hard copy and online.

I think it's very confusing and ineffective to have the Geopark nestled within a National Park.

Tell me what it is I have absolutely no idea

For those who are aware it is clear that the area is valued and enjoyed:

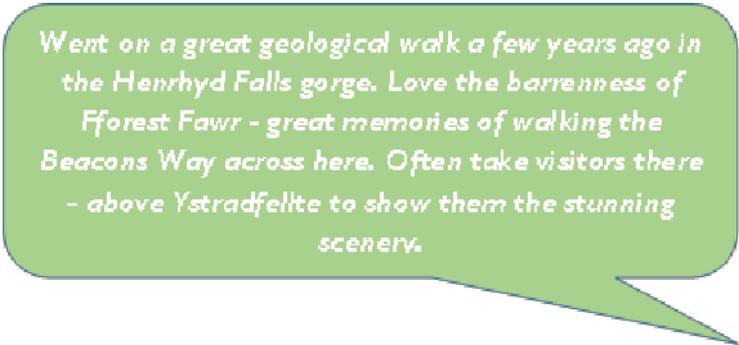
Apart from geological interest it's stunningly beautiful and there is a sense of calm, space and wildness. :-)

Some fantastic information leaflets available

The guided walks on geology and botany were excellent - long may they continue.

During a focus group of **accommodation providers**, some of whom were also Geopark Ambassadors, (see **Annex 2** for all feedback from the group) it was noted that:

- Guests to the accommodation providers at the focus group are generally not aware of the Geopark before they arrive.
- The Geopark boundary is not marked so visitors are often unaware that they are in or entering the Geopark area. This is an issue of cost compounded by trunk road agencies (A40 and A470 key entry routes) and the Local Authority Highways' safety restrictions on road signage
- A National Park Ambassador present highlighted the difference to her attitude towards the Geopark after having attended the Geopark Ambassador course. She is now more aware of what and where it is and is an enthusiastic advocate for it as a destination. She and another NP Ambassador present praised this system of Ambassadors spreading the word.
- In early November UNESCO met and agreed that the Global Geopark Network is to be included in their initiatives. The Fforest Fawr Geopark may benefit from a UNESCO badge – perhaps UNESCO will be more of a draw, with the designation could be included in guide books.



Went on a great geological walk a few years ago in the Henrhyd Falls gorge. Love the barrenness of Fforest Fawr - great memories of walking the Beacons Way across here. Often take visitors there - above Ystradfellte to show them the stunning scenery.

Throughout the entire evidence gathering stage there was high praise for the Ambassador scheme as an effective way to help tourism providers raise awareness of the Geopark and be able to give advice on what to see. Crucially this included Ambassadors in the east of the Park who were willing to encourage visitors to travel a little further to add to their experience. To date there are 50 trained Geopark Ambassadors, with a further 12 booked onto the next training course to be held in February 2016.

In a focus group held with local businesses (see **Annex 3** for full report), there was similar feedback on the level of awareness by visitors (and even residents):

- Visitors to the popular sites of Craig y Nos Country Park and the Waterfall Country are generally unaware that they are within the Geopark.
- Visitors to the area from say, London, the Midlands and Cardiff generally come for the iconic/well known sites such as the caves/waterfalls without realising that the area has so much more to offer.
- It is possible that residents within and around the Geopark are aware of the Geopark designation.
- It appears that people living around 15-20 miles away from Craig y Nos Country Park particularly in Swansea haven't visited the area at all.

- The Geopark Festival event held annually over 2 weeks in May/June is generally very successful and there were around 1200 visitors to festival events over the course of the fortnight in 2015. The festival utilises local venues for events/walks and talks. Increasing familiarity and awareness of these venues and anecdotally, encouraging return visits.

My 'interpretive' type of guided walks are particularly popular and I am sure that the Geopark designation encourages people to visit.

I haven't had any of my guests ask directly about the Geopark and as far as I know nobody has stayed with me who is specifically visiting the Geopark. Some people express interest in the geology of the Beacons as a general part of their interest in the walking landscape.

- Interpretation boards generally go unnoticed unless people are specifically looking for them. Priority is given to getting visitors to the area and enhancing the visitor experience of the Geopark. There is less emphasis on interpretation and its inherent costs/highways implications.
- There are some interpretation and orientation boards and maps at laybys etc but no 'You are now entering the Fforest Fawr Geopark'.
- Geopark leaflets and marketing brochures are widely available (see below).
- At the West Highland Geopark there is a stone at the side of the road which indicates to visitors that they are entering the Geopark but there is nothing similar here at Fforest Fawr Geopark.

The feedback from the questionnaire and the focus groups bore out the conclusion that printed leaflets and the internet are the preferred method of research and for information once in the area. The sale of leaflets over the last three years remains healthy, with a slight downward trend in the current year which may indicate an increase in internet use. The A5 Geopark guide (which costs 50p) has been very popular this year.

Leaflet	2013 -14	2014 - 15	April - Oct 2015
Mynydd Illtyd	48	53	33
Brecon Geotrail	51	57	35
Pen-y-Crug Geotrail	50	57	39
Henrhyd Falls	46	47	52
Garn Goch Geotrail	34	44	21
Fforest Fawr Geopark Map	4	59	62
A5 Geopark Guide	N/A	N/A	65

Amongst **local businesses** a wide range of views were expressed in their response to the questionnaire, from the very positive:

Generally it brings people to the area, who love and want to protect beautiful places. It is a breakaway from their busy lives, hopefully they will talk about what a great place it is to visit? So in lots of ways it helps the economy.

Gives people a reason to visit. Provides businesses with resources to share with visitors. Enriches a visitor experience. Differentiates us from other 'wild places'.

...to the opposite extreme where businesses were either not aware of the designation and/or did not feel it was relevant in bringing visitors to the area:

I have never had any customers come and stay with me specifically saying that they want to visit the Geopark, many want to visit the Brecon beacons but don't specifically mention the fact it is a Geopark.

Many visitors to our holiday cottage do not know about the Geopark until they arrive and are shown the geopark walk leaflets etc.

I have not heard of the FForest Fawr Geopark or what it does.

What was very apparent from the survey and from the focus groups was the role of accommodation providers in drawing attention to the Geopark designation and the types of activity available. The enthusiasm and the expertise of these providers were felt to be crucial to raising awareness, with the resulting positive impact on income generation locally.

A full list of these comments can be found in **Annexes 9 and 10**.

A compelling point that was raised in all focus groups was that visitors are drawn to the Geopark for ***an experience*** rather than because of its designation, and that this should inform all work to enhance awareness in future.

Key Findings: Awareness

- Many visitors are unaware of the Geopark status until they arrive
- Local people are often unaware of what is on their doorstep
- The importance of printed leaflets as well as the internet
- The branding can be confusing – a Park within a Park
- Publications and website are the most popular research methods
- Visitors are drawn to the area for an **experience** rather than because it is a Geopark
- Accommodation providers (through the Ambassador Scheme) have proved an effective way of encouraging visits and providing information

5. Economic Benefits

5.1 Background: STEAM Data

The Scarborough Tourism Economic Assessment Model (STEAM) is derived from methodology pioneered in Canada and is one of the few methodologies available for estimating the value of tourism to specific destinations and its change over time. While there are flaws these are consistent over time which enables year on year comparison. Data is analysed then released in the calendar year after the reference year – so the latest figures we have relate to 2014 not 2015.

Fig. 4 STEAM Output 2014

Measure	National Park	Geopark
Total Economic Impact (£M)	£219M	£137M
% change on 2013 (£'s 2014)	-1.7%	-1.5%
Total Visitor Days (M)	4.81	3.26
% change on 2013	-1.4%	-1.6%
Staying Visitor Days (M)	1.09	0.54
% change on 2013	-2.6%	-1.7%
Total no of visitors (M)	4.01	2.88
Staying Visitor Numbers (M)	0.30	0.16
% change on 2013	0.3%	1.7%
Day Visitor Numbers (M)	-1.0%	-1.6%
Number of FTE Jobs supported by tourism	3783	2239
% change on 2013	-1.2%	-1.2%

These figures indicate that the Geopark is actually suffering a little less financially from the recession than the National Park as a whole and that this is primarily as a result of fewer day visitors. Day visitors tend to contribute least to the local economy and therefore this is less of a problem than it might otherwise be and the fact that staying visitors are actually increasing is a good news story (as far as these two years are concerned). The Geopark experience is one that is attractive to self-catering visitors especially and much of the Authority's effort is about providing a depth of experiences which will encourage people to explore different parts of the area, rather than just the high profile, well known places. If there is a sense that there is more to see and do than you can achieve in a long weekend or a week, then we can hope that visitors will return. The data seem to support this, as well as feedback from accommodation providers and local businesses (see below).

Annexes 5 and 6 show more detailed data and graphs which indicate trends over the period 2005 – 2014.

The Sustainable Tourism Manager has analysed the data as follows:

National Park Analysis

The graphs clearly show the National Park performing well financially (in fact better than Wales' average) up to the financial crisis in 2008 which itself was an exceptional year. The drop to 2009 was probably inevitable but was followed by a few years of no growth and for the period 2012-14 a small but steady drop. This is not unusual in rural Wales (especially mid

and South West Wales) and is better than many places. The trend on the 12 year basis is largely one of maintaining value over that whole period although with some concern as to what the next few years may experience.

The picture on visitor numbers is one of more or less steady growth, primarily driven by very significant increases in day visitors (see second table) accompanied by significant declines in both serviced and non-serviced (self-catering) sectors. There is a concern that the decline in non-serviced sectors may be linked to the exclusion of Brecon Beacons Holiday Cottages data which has increased its share of the market significantly over that period but nonetheless officers feel that there are serious issues for us there. Not surprisingly the sectors that are doing well over this period are those that day visitors and staying visitors both use – food and drink, recreation, shopping and transport. All these trends inevitably impact on the employment figures but it is good to see that these have not fallen to below 2003 levels.

Geopark Analysis

It is worth pointing out that this covers the period 2005-2014, two years less than the data provided for the National Park. We therefore miss two years of what was strong growth and have more of the post-recession years in the percentages. It should therefore look worse than the National Park when comparing end to end figures. In fact the picture in the west is more encouraging, although starting from a lower base. The overall trend is however the same – growth in income to 2008 then a period of flat-lining followed by slow decline. Equally however visitor numbers are continuing to grow as are visitor days and employment, if slowly.

What the detail says to us however reinforces the points made in the analysis of the 2013-14 figures. Day visitors have grown but not to the extent that they have across the Park, whereas staying visitors have not been hit so hard. Serviced accommodation is under pressure but self-catering is not in decline in the same way as it is further east. Allowing for the fact that the western figures are part of the overall Park figures, it means that the situation in the east is getting worse at a much faster rate than in the Geopark.

Conclusions

Notwithstanding a note of caution in reading into the figures the effect of public sector intervention, the data seem to bear out that the Geopark is doing relatively better than the east of the Park and therefore significantly better than the rest of Mid and SW Wales. For the purposes of this scrutiny study this gives food for thought in addressing the need for more access to experiences and activities that can be provided in the west and working with self-catering operators to get that message across.

5.2 Background: What visitors want and what they currently do

From the Residents Survey² commissioned by the Authority in 2013 it is clear what residents want from their local environment:

² <http://www.beacons-mpa.gov.uk/www2/wp-content/uploads/13017-Brecon-Beacons-Residents-Survey-Final-Report-PDF-for-email.pdf>

The most popular leisure activity undertaken by residents is enjoying nature and wildlife; 88% of residents indicate they participate in this activity. Almost eight in ten (79%) also enjoy walking for pleasure, while six in ten (60%) enjoy sightseeing and visiting places of special interest. Visiting food festivals and farmers markets is enjoyed by almost six in ten (57%), while attending festivals and special events appeals to just under one-half (46%) of residents.

The Brecon Beacons Marketing and Co-ordination Group carried out a visitor survey³ recently and this showed that 94% of visitors were visiting for leisure purposes, with self-catering accommodation being the most popular for 87%. Overnight visitors stayed for an average of 5.8 nights and over two thirds of these were repeat visitors. Principal reasons for visits were given as scenery/landscape, peace and quiet, and a previous visit. Staying visitors did the following while they were here:

- Visiting towns and villages (68%)
- Low level walking/rambling (61%)
- Visiting restaurants/pubs (56%)
- Hill walking/hiking (55%)
- Visiting attractions (42%)
- Shopping (40%)

Families with children had a higher interest in visiting attractions (51%). For day visitors the most popular activity was hill walking/hiking, low level walking and visiting towns and villages, with less interest in attractions or shopping. While the most popular towns to visit were all in the east (Abergavenny, Brecon and Crickhowell) the west can supply much of what visitors want, with a little signposting, and this means there is potential to grow the market for businesses in the Geopark.

A member of the Panel has done an analysis of this survey – this is at **Annex II**.

³ Brecon Beacons Visitor Survey –January 2015

5.3 The effect of transport links on economic benefit

The panel looked at transport links in the Geopark area of the Park and in particular Passenger Surveys for 2012-14 in order to examine information on visitor spend. Current routes are:

- T4 Brecon to Merthyr
- 63 Brecon to Ystradgynlais
- 80 Brecon to Llandovery

All Surveys were done at the end of August in warm and dry weather. Part of the survey looked at visitor spend in the area:

Fig. 5 Visitor Spend by bus passengers

	2014	2013	2012
	All/ Visitors	All/Visitors	All
Shopping	15.30 / 14.20	13.80 / 11.30	8.91
Food & drink	8.05 / 9.50	7.35 / 9.20	4.50
Bus fares	3.75 / 4.50	4.10 / 4.90	4.81
Other	1.85 / 2.20	2.55 / 1.90	0.71
Entrance fees	0.40 / 0.60	0.45 / 0.40	0.11
Souvenirs	0.45 / 0.40	0.75/ 1.40	0.50
TOTAL	£29.77/31.36	£28.95/£29.00	£21.00

Averaged over 3 years, 33% of passengers were visitors, spending £30 per day

Bus users per year = 1,000,000 x 33% = 330,000

330,000 ÷ 3 as surveys were taken in the summer = Visitors on buses 111,000 x £30 spend

Therefore: Income into area = £3,300,000 per annum

This is a significant spend and shows the commercial value of local bus routes to local businesses over and above the obvious accessibility/sustainability benefits.

However, feedback from the focus groups with ambassadors and businesses confirmed that the lack of public transport for visitors to move between attractions was a major obstacle for local businesses, apart from those actually on a bus route. To offset this the Visitor Transport Officer contributes to the ambassador training by highlighting all the activities that can be done along the Swansea to Brecon route. In mid November a decision was due to be taken on whether to upgrade this route to be part of the Traws Cymru network which would put it on a par with the T4 service – this would provide an opportunity to work with Traws Cymru to develop the service. At the time of writing the Authority was not aware of any decision having been taken.

5.4 Economic Benefits to the west of the National Park

The following data was collected from the survey of businesses in and around the Geopark, which elicited 65 respondents. Of these:

48% lived in Geopark, 14% not and 32% near, and 86% had heard of Fforest Fawr and 55% of the global network.

86% ran a business in or near the Geopark (12% activity provider, 9% catering and hospitality, 51% accommodation, 18% other)

65% felt that designation benefited the area economically a little, 5% a lot and 25% not at all

28% felt status benefited their business or other businesses in the area, and 58% not

43% felt that UNESCO status would benefit their business and 45% not (benefit BBNP 80% yes, 15% no) (benefit the region – 66% yes, 25% no) (benefit Wales 75% yes 17% no)

It isn't a destination for visitors ie they don't stay with me in order to visit the Geopark, though that may be one of the things that they do when they get here, so is of minor 'soft' benefit.

The designation is pro-active in directly attracting visitors to the area

The focus groups held with ambassadors, accommodation providers and local businesses were helpful in highlighting some of the initiatives which, in their opinion, had had a positive impact on the local economy. These included:

- The Dark Skies designation – visitor numbers had increased (evidence and anecdotal)
- The ambassador scheme had led to tourism providers having more knowledge and confidence to promote sites of interest, particularly those less visited sites
- This knowledge had enabled providers to devise a programme for their guests with recommended walks and information on parking and cafes, which was proving very popular with visitors
- The word 'Geopark' does not feature in the responses to the Brecon Beacons Visitor Survey but the sites do, such as the Waterfalls
- The importance of film and TV locations such as Dr Who and in particular the Secret Britain series which had a huge impact on visitor enquiries and visits in 2015
- Communities on the border of or outside the Geopark also benefit from any increase in visitors and the Authority should continue to work with 'flexible borders'

5.4 Visitor Spend

Welsh Government Research⁴ carried out in 2012 has shown that a visitor will spend an extra £12.89 after a visit to a Tourist Information Centre or Visitor Centre. If we take this figure to use with visitor figures in the National Park over the last three years it is a significant spend and may assist decision makers in future provision of such services.

Fig. 6 Visitor Spend after a visit to an Information Centre

Year	No. of visitors	Spend @ £12.89
2012	20,882	£269,168
2013	22,687	£292,435
2014	24,509	£315,921

Key Findings: Economic Benefit

- There is a need for better provision and promotion of activities in Geopark to encourage visitors to stay for longer
- Accommodation providers would welcome 'packages' of activities for 2, 3 or 4 days to promote the area and generate income – including via websites
- The Geopark is doing relatively better than the east of the Park and therefore significantly better than the rest of Mid and SW Wales.
- The important of local transport links in encouraging visitors to visit attractions
- The role of visitor centres in increasing visitor spend in the National Park

⁴ <http://gov.wales/statistics-and-research/economic-impact-tourist-information-centres-wales/?lang=en>

6. What can be done to increase awareness/economic benefit?

There were many positive suggestions from all focus groups on how to increase the level of awareness of the Geopark, some of which officers were already doing, but others that could be explored further. Many of the awareness raising suggestions could potentially lead to income generation for local businesses and also for the Authority.

Category / Details	Source	Economic Benefit or Awareness?	Resource Implications
Quick Wins			
FYI websites to promote Geopark and events	Focus Group 2	Awareness / Economic	Free
Make as much use as possible of the Year of Adventure 2016 to promote the Geopark and events	Staff Focus Group	Awareness / Economic	Might be opportunity to add events to a Wales wide list for the YoA if there is one?
Good Ideas			
Build on links with universities, particularly Swansea and Cardiff (geology / earth sciences)	Focus Group 1	Awareness / Economic	
Work with bunkhouses and universities to offer a package of field work and accommodation	Focus Group 1	Awareness / Economic	Geopark Officer and Education Team but provides potential income stream
Geopark marketed as 'home of geology' but marketing to be carefully targeted and limited to, say, three	Focus Group 1	Awareness / Economic	
High profile media items can result in sharp rise in visitors (eg. Secret Britain, Weatherman Walking) - potential to attract more children's interest eg. Blue Peter	Focus Group 1 / Staff Focus Group	Awareness / Economic	
Draw people in via iconic sites (eg. waterfalls) and then give them wider experience	Focus Group 2	Awareness / Economic	Marketing
Use of QR codes on posters and photographs showing where it is and	Focus Group 2	Awareness / Economic	

Make more use of DofE groups using the Geopark - can we give them information for future visits with	Focus Group 2	Awareness / Economic	
Devise heritage trail by linking sites of historical / cultural / archaeological interest with input from other organisations	Focus Group 2	Awareness / Economic	Officer time and cost of materials (could do online as well)
Make more use of Instagram - photographs are very	Focus Group 2	Awareness	
Visitors are likely to be drawn in by the 'experience' rather than the designation of a National Park or Geopark so important to package the experience correctly	Staff Focus Group	Awareness / Economic	
Highlight any Geopark events to town and community councils to put on their local notice boards	Cllr John Morris (Glangrwyney Community Council – Panel	Awareness / Economic	
Draw up a route round the Park which highlights the attractions and facilities and gives distances and estimated time between locations	Cllr John Morris (Glangrwyney Community Council – Panel member)	Awareness / Economic	
For future consideration			
Research and anecdotal evidence suggests that apps are less popular than written material	Focus Group 1 / sale of Geopark publications (A5 Geopark Guide - see WL's sales figures for last three years)	Awareness	Continuing publications is going to have heavy resource implications
Evidence that people (particularly urban dwellers) need a package of information including walks, cafes, toilets, parking etc)	Focus Group 1 (Accommodation providers)	Awareness /Economic	Cost to providing a package unless done on website

Important to brand Geopark in simple terms - what it is and where it is - also integrate brand with Park brand but differentiate	Focus Group 1	Awareness	Marketing
Make more use of locations eg. Dr Who locations to attract children	Focus Group 1	Awareness / Economic	Marketing
Brand Geopark as a 'stop off point' as well as a destination	Focus Group 1	Awareness / Economic	Marketing
Can we make more of the archaeological heritage of the Geopark (prehistoric, Roman, industrial)?	Focus Group 1	Awareness / Economic	Working with Natalie Ward (NP Archaeologist)
Is our approach sometimes too highbrow, particularly for school groups for whom English is not their first language - produce simpler information suitable for children	Focus Group 1	Awareness	
Sheep/wool heritage growing but under-promoted in Wales	Focus Group 1	Awareness / Economic	Would need to work with others
Website must be kept updated as main source of research both for visitors but also for guide books	Focus Group 1	Awareness	
More children's events could expand the demographic - anecdotal evidence is that the dominant group is couples at present	Focus Group 1	Economic	Putting on events is resource heavy
Success of Geopark event this year suggests there is a market for more events like this in the west (to complement walking festivals in the east)	Focus Group 2	Awareness / Economic	Putting on events is resource heavy

Consider ways of highlighting Geopark as you approach and enter	Focus Group 2	Awareness	Highways signs expensive
More pressure on BT re wifi coverage in the west of the Park as this is a barrier to effective use of social media as marketing tool	Focus Group 2	Awareness	
British tourism current drive is 'something' is great eg. Geopark is photography / geology / geography	Focus Group 2	Awareness	Marketing
Explore options of linking up with Swansea City Region - headed up by Terry Matthews - increasing local markets	Focus Group 2	Awareness / Economic	Marketing
Encourage communities to work together to develop joint funding bids for projects to increase the economic benefits - NPA officers to take advisory role	Focus Group 2	Awareness / Economic	Might need to involve SDF/Community team
At the Ystradowen Community Centre Geopark brand is more successful than the National Park brand as events are localised and communities have ownership and interest - this in turn increases awareness of Geopark	Focus Group 2	Awareness	
Potential to exploit the health and wellbeing agenda to promote Geopark and events (Wellbeing of Future Generations Act and appointment of Commissioner)	Focus Group 2	Awareness	

Seek contributions from the Geopark Partnership (subject of contention amongst officers)	Staff focus group	Economic	
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The online survey of visitors drew the following suggestions as to how the Geopark designation could benefit local communities:

Put the logo on all the welcome village signs? Or add a sign that 'you are in a Geopark'.

Raise the profile of the area – albeit to quite a niche/small market. Encourage more educational visits.

Always more advertising. We have leaflets to show guests, these need to be in all public places. Social media promotions, website promotions. Make links between accommodation/activity providers and Geopark events/ attractions.

Increased tourism will increase the financial stability of businesses. We need to always be looking ahead at ways that we can expand our businesses in a sustainable way.

Use information, leaflets and associated information as part of our school educational programmes.

Give a better understanding of a Geopark and the benefits people get from visiting it.

Grant money

I don't think it would take much. Llandovery is fortunate to have tourist information from knowledgeable individuals who readily explain to people where they can go. The fact that the area is in two counties should be an opportunity especially as collaboration has an important part to play in applying for funding etc. It is making more people aware of what is on our doorstep.

More visits from professional and amateur geologists eg University of the Third Age Special Interest Groups. However, more elderly visitors require disabled access, good sound presentation and good toilets. Maybe also access to disabled scooters. Growth I think is in students and mature people. Is there a disabled trail?

Link it more integrally with marketing the area and run more events reflecting this status for visitors and locals. Events throughout the year which appeal to all ages. I have never seen a stand or exhibition about the Geopark at Llandovery Sheep festival or events in Llandeilo for instance. Perhaps some celebrity endorsement and TV coverage. The Geopark status all feels very high brow, make it more accessible and fun.

Raising awareness of an area's special or in some cases, unique characteristic can only be of benefit and encourage the more curious visitor. This then has a knock-on effect within the local economy.

If it increases awareness and the perception that the area is an even more 'special' place to visit then that would be good.

Key Findings: Raising Awareness to increase Economic Benefit

- The important of marketing the area as a special place to visit – draw people in
- Working with communities to run Geopark events aimed at families
- Visitor expectation is high in terms of quality accommodation
- Potential for working with constituent authorities to market the area – increases the target audience
- Still potential for more schools and university visits (particularly once the Gunpowder Works project develops)

7. Partnership Working

The Geopark has been founded on partnership principles with a Partnership Management Group acting as the steering group for the project and partners working together on specific projects. For instance, this has led to the forestry arm of Natural Resources Wales implementing interpretation projects on their own land working closely with the Geopark Development Officer and cooperative research being undertaken with Cardiff University.

From its inception, the Geopark Development Officer and Sustainable Tourism Manager have worked with local businesses to raise the profile of the Geopark and training people to be able to offer expertise and use their knowledge as a tool for growing their business. This has been successful and led to the Ambassador Scheme being established, which is now so popular that the Geopark element has been increased and is now run over two days, once ambassadors have completed the initial core three days training. A greater proportion of the ambassadors are now in the west of the Park, not just accommodation providers but cafes, walking guides and photographers, for example.

Suggested potential partnerships could include working more closely with the Swansea based City Region to raise awareness of the Geopark and encourage more visits/spend, encouraging village and town initiatives to promote their local area (possibly through the use of websites), and packaging activities and events under the Welsh Government's Year of Adventure 2016.

Discussion in the focus groups also highlighted the willingness of local businesses to work with the Authority in future, either on joint funding bids (Ystradowen Community Centre), or using the expertise of Authority officers to set up initiatives or events.

8. Conclusion

The Panel congratulated officers on the significant amount of work that had taken place in relation to the Geopark designation with often very limited (and dwindling) resources and concluded that the evidence gathered showed that this had had a positive effect on local communities, particularly through the additional resource of the Geopark Ambassadors throughout the Park, which had proved an effective way of encouraging visits to local attractions and services, and providing information. In some areas of evidence the Panel felt that the Authority's perception of the benefits to communities did not seem to align with the view of the Ambassadors and for this reason it is important to listen to, and acknowledge, feedback, which is mostly very positive. It was noted, however, that the sample group of Ambassadors (and indeed other focus groups) was small and might not be proportionally representative of the whole.

Despite this, it was clear from feedback received that there was still limited awareness of the Geopark designation amongst visitors, and also amongst some local people. The Panel noted the amount of comments on the need for marketing and agreed that there were opportunities for raising awareness which would not incur large resource: these are captured in Section 6 above. One panel member commented that ironically there seemed to be more awareness of the Geopark in the east of the Park (particularly through Ambassadors and accommodation providers) than in the Geopark area itself.

The recent UNESCO endorsement of the Geopark network is welcome news and its full potential should be explored and exploited for marketing of the Fforest Fawr Geopark.

While the economic benefit of the Geopark brand was considered and data such as tourist spend in the area is useful, it is suggested that the social benefit of the Geopark is equally important and should be factored into any future evaluation, although it was agreed that the measurability of social benefits and the availability of data on this is limited. The panel felt strongly that community support was the prerequisite to any future action.

The Panel also recognised the need for better provision and promotion of activities in order to increase the number of visitor overnight stays. They suggested that working with accommodation providers and tourism operators to develop itineraries suitable for two or more days would meet the needs identified in the focus groups. They noted the very strong feeling that people come for an experience and that there is potential to draw visitors in to other experiences while they are here. The potential to target more academic groups was also highlighted, which could build on work previously done with schools and universities.

It is recognised that resources are limited but those recommendations not immediately achievable should be included as 'future considerations' in the event that shared working or sponsorship enables them to be implemented.

9. Recommendations

- (a) The Authority should work with local communities, accommodation and tourism providers to develop itineraries for two or more days in the Geopark, to include information on parking, catering outlets, shopping opportunities and children's activities, the Authority**

should seek to increase the number of overnight stays and therefore the economic benefit to the community.

- (b) That the UNESCO endorsement and the developing Gunpowder Works project should be used as catalysts for marketing the Geopark as a destination for School visits, University visits and Welsh culture, taking into consideration the ideas highlighted in the scrutiny evidence.**
- (c) That the Authority should build on the positive relationships developed by officers to explore the potential for joint funding bids to raise awareness through community events or other ideas highlighted in the scrutiny evidence.**
- (d) To increase awareness of the Geopark's geological, cultural and historical importance through the UNESCO endorsement and using the ideas highlighted in the scrutiny review.**

List of Annexes

- ANNEX 1 - List of Panel members
- ANNEX 2 - Notes of Geopark Focus Group No. 1 - Mon 28th Sept 2015
- ANNEX 3 - Notes of Geopark Focus Group No. 2 - Tues 29th Sept 2015
- ANNEX 4 – Notes of the Staff Focus Group - 19th October 2015
- ANNEX 5 - National Park STEAM data 2005 – 2014
- ANNEX 6 - Geopark STEAM data 2005 – 2014
- ANNEX 7 – Questionnaire Responses & Summary – Businesses
- ANNEX 8 – Questionnaire Responses & Summary – Residents & Visitors
- ANNEX 9 - Examples of comments from questionnaires - businesses
- ANNEX 10 - Examples of comments from questionnaires - visitors
- ANNEX 11 – Panel Member's analysis of Brecon Beacons Tourism Visitor Survey
- ANNEX 12 - Geopark Action Plan for 2015-16