

Tourism Marketing Strategy for the Brecon Beacons

Prepared by Yellow Railroad
International Destination Consultancy

(November 2010)



CONTENTS

	<u>Page</u>
1. INTRODUCTION	3
1.1 Purpose	3
1.2 Context	4
1.3 Methodology	7
2. EXECUTIVE SUMMARY	9
2.1 Marketing Recommendations.....	9
2.2 Roles and Responsibilities	11
2.3 Resource Implications	12
3. OBJECTIVES	14
3.1 Aim	14
3.2 The Challenge	14
4. SITUATION ANALYSIS	16
4.1 Definition of the Brecon Beacons	16
4.2 PESTEL Analysis	17
4.3 SWOT Analysis	21
4.4 Current Marketing Status	26
4.5 Brecon Beacons' Image	29
4.6 Market Profile	32
4.7 Competitors	36
4.8 Product Gaps	36
5. MARKETING STRATEGY – RECOMMENDATIONS	37
5.1 Marketing Objectives	37
5.2 The Opportunity	38
5.3 Market Segmentation	40
5.4 Image and Positioning	48
5.5 Marketing Infrastructure Development	53
5.6 Marketing Communications	54
5.7 Product Development	60
5.8 Roles, Responsibilities and Partnerships	62
5.9 Conclusion and Summary	68
5.10 Monitoring and Evaluation	73
6. ACTION PLAN	74
Appendix 1: Consultees	
Appendix 2: List of Documents & Information Sources	

1. INTRODUCTION

1.1 Purpose

Purpose and Contents

The Brecon Beacons Sustainable Tourism Partnership wishes to develop tourism to the Brecon Beacons that is economically, socially, culturally and environmentally sustainable. The purpose of this marketing strategy is to set a direction for marketing the Brecon Beacons over the next three years (2010-2013) in order to help achieve this aim. It includes an action plan with a series of recommendations to achieve this. It also identifies who should undertake each action.

Those who wish to go straight to the recommendations, bypassing the rationale and background analysis, will find the following sections most relevant:

- Section 2, *Executive Summary*
- Section 5, *Marketing Strategy - Recommendations*

This document comprises:

- **Marketing strategy:** The marketing strategy identifies and prioritises the **market segments** that offer the greatest potential for the Brecon Beacons. It highlights the area's **competitive strengths and weaknesses** in relation to these market segments and in light of current **travel trends**. It suggests a **draft brand position**, based on local stakeholder consultation (but not on research amongst visitors), which should underpin, and run through, all Brecon Beacons marketing – both by official organisations, such as Brecon Beacons National Park Authority and Brecon Beacons Tourism, and by local tourism businesses.

It identifies **product gaps** that, if addressed, might increase the area's appeal amongst potential segments. It also identifies some key **knowledge gaps and research needs**.

It identifies the type of **marketing activities and channels** that will be most cost-effective for the Brecon Beacons, as well as the most appropriate **partner organisations** to implement each activity.

Finally, it proposes methods of **measuring the impact** of this marketing investment, where possible.

- **3-year action plan:** The action plan outlines a range of cost-effective marketing activities. These flow from the strategy and are aimed at growing tourism to the Brecon Beacons.

The action plan is slightly front-end weighted in favour of the first year, in which the marketing infrastructure (particularly research and a digital marketing framework)

will need to be developed. Once a marketing infrastructure is in place, marketing activities can be up-weighted or scaled down according to budget availability in subsequent years (e.g. Research is required to understand the profile and motivation of visitors, in order to enable effective targeting of the Brecon Beacons' best prospects and development of the most compelling marketing messages. Once investment has been made in developing the functionality of a website to the required level, on-going funding requirements mostly relate to content development, distribution/links and maintenance, whose costs are likely to be more modest than development costs. Similarly creative costs, such as photography, should be incurred in year 1 for on-going, and modest or cost-free, subsequent usage).

1.2 Context

Strategic

Brecon Beacons as a Destination Area:

The Brecon Beacons is nationally iconic – both as a name and a place. However, up until now, it has not been marketed to the extent that its iconic status and visitor appeal warrant.

Until recently the Visit Wales structure meant that tourism marketing was not organised at a Brecon Beacons level and as a result no coordinating marketing strategy was developed. Following the Visit Wales Destination Management Review in 2008 an opportunity was identified to develop a robust marketing plan at the level of Brecon Beacons.

This Destination Management Review identified the Brecon Beacons as warranting special treatment – both as a destination in its own right and as a potential “attack brand”¹ to attract visitors to Wales.

The cross-boundary nature of the Brecon Beacons has necessitated a holistic partnership approach to the development of tourism in the Brecon Beacons National Park. The Brecon Beacons Sustainable Tourism Strategy was launched in 2007 under the aegis of the Brecon Beacons Sustainable Tourism Partnership (BBSTP). It covers the whole span of destination management, from landscape conservation through product development to marketing.

The Brecon Beacons Sustainable Tourism Strategy (BBSTS):

BBSTS marketing objectives are to:

- Undertake collaborative marketing activities based upon the brand values of the Brecon Beacons but reflecting the positioning opportunities created by being a member of the family of National Parks, as well as playing an iconic role within tourism in Wales.
- Ensure widespread use and recognition of the National Park brand.

¹ “Attack brand” is a term used by Yellow Railroad in this context, not by Visit Wales.

- Develop widespread understanding and awareness of the National Park as a sustainable tourism destination.
- Communicate effectively with customers.

This marketing strategy flows from the overall BBSTPS and is driven by the Brecon Beacons Marketing Coordination Group (BBMCG).

Core Organisations

Key organisations who have an interest in the success of this marketing strategy and who will be key drivers of it are:

- **Brecon Beacons Marketing Coordination Group (BBMCG):** This is the marketing sub-group of the Sustainable Tourism Partnership. It currently comprises: Brecon Beacons National Park Authority (BBNPA), Brecon Beacons Tourism (BBT), Powys County Council, Monmouthshire County Council, Carmarthenshire County Council, Tourism Partnership Mid-Wales (TPMW), and Capital Regional Tourism (CRT), South West Wales Tourism Partnership (SWWTP). The group acknowledges that it also needs to develop a relationship with the Valleys as a destination and that representation from that area is desirable.

This is the key group, which has commissioned and overseen the development of this Tourism Marketing Strategy for the Brecon Beacons. This group will drive its implementation and monitor its impact.

- **Brecon Beacons Sustainable Tourism Partnership:** The Partnership's role is evolving with the new designation but this is the main coordination/ decision making body for the destination. It has a series of sub-groups of which the Marketing Coordination Group is one.

This partnership meets quarterly and comprises 27 partners from:

- 10 Local Authorities
- 3 Regional Tourism Partnerships
- Brecon Beacons Tourism
- Other Tourism Associations
- COLLABOR8 Cluster representatives
- Community bodies
- Welsh statutory conservation agency
- Forestry Commission
- Brecon Beacons National Park Authority

The Partnership's Sustainable Tourism Strategy (2007) states that its vision for the destination is that:

"By 2020 the area will be an exemplar of sustainable tourism in protected areas, building on:

- *A strong sense of place*
- *The indigenous natural and cultural heritage of the Brecon Beacons and*
- *A reputation for quality built upon communities, public sector and business interests working closely together to exceed the expectations of visitors."*

- **Brecon Beacons National Park Authority (BBNPA):** Set up by statute to manage the National Park, the Authority's role is to implement the National Park statutory purposes which are:
 - to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park;
 - to promote opportunities for the understanding and enjoyment of the special qualities of the Park by the public;

together with a duty to

- foster the economic and social well-being of local communities within the National Park by working closely with the agencies and local authorities responsible for these matters.

- **Brecon Beacons Tourism (BBT):** The group's role is to *"To facilitate the marketing and development of the Brecon Beacons National Park and immediate surrounding area as a strong and sustainable quality tourism destination"*

BBT is the representative body for tourism businesses in the area. BBT's role is to enable business networking and collaborative marketing, ensure coherent policy development and a strong voice for the trade, based on a common understanding of sustainable tourism. BBT has a current membership of 184, which is growing. Its voice is increasingly heard locally, regionally and nationally.

- **BBNPA and BBT** have played a key role in driving the development of tourism in the Brecon Beacons area: they were instrumental in the Brecon Beacons being awarded "destination area" status by Visit Wales; they developed an initial business plan and action plan for tourism; and they jointly managed development of this marketing strategy under the auspices of BBMCG.
- **Local businesses and organisations offering experiences for visitors:** Clearly local businesses will be the main beneficiaries of tourism growth within the Brecon Beacons. While not directly drivers of this strategy themselves, local businesses and other organisations offering experiences for visitors have a major interest in the successful implementation of this strategy and are linked to its implementation through their membership of BBT. Many have been consulted in preparing this strategy.

Strategic Documents

A large number of national, regional and local strategic documents² provide useful information, which has contributed to the framing of this strategy. However, few contain sufficient information that is specifically relevant to the Brecon Beacons, other than the South East Visitor Survey (2005); they mostly cover the wider region or the whole of Wales. This information deficit has been identified within this strategy; and suggestions

² See Appendix 2 for list of documents and information sources

have been made to address the need for Brecon Beacons-specific insights (e.g. visitor profile, motivation and behaviour).

1.3 Methodology

The following steps were undertaken in developing this strategy:

- Review of current marketing activity by organisations promoting the Brecon Beacons (e.g. Brecon Beacons National Park, Brecon Beacons Tourism, Powys County Council, Monmouthshire County Council, Carmarthenshire County Council, Tourism Partnership Mid-Wales, Capital Regional Tourism, and Visit Wales).
- Analysis of relevant domestic and international trends that might affect demand for travel to the Brecon Beacons.
- Market assessment, based on data and intelligence gained from strategic documents (see next item) and stakeholder discussions.
- Review of national, regional and local strategic documents (c. 70)³.
- Stakeholder consultation as follows⁴:
 - Workshop with attendees of Brecon Beacons Sustainable Tourism Conference (March 2010)
 - Discussion with BBT Board members at AGM
 - Individual stakeholder meetings – face to face and by telephone (with businesses, local authorities, Regional Tourism Partnerships, Valley regeneration companies, Visit Wales, and others)
 - Meeting with BBNPA TIC and local authority TIC staff.
- On-line survey of c. 600 Brecon Beacons businesses.

Data and intelligence gathered from this process were then distilled to develop a marketing hypothesis, which would answer the following fundamental questions:

- ***Who are Brecon Beacon's best prospects?***
This meant identifying the most potentially valuable market segments for the Brecon Beacons.
- ***What are the core competitive appeals of the Brecon Beacons?***
This required the development of a brand hypothesis for the Brecon Beacons, taking the area's main competitors into account.
- ***How can the Brecon Beacons reach these people cost-effectively?***
This meant identifying the most appropriate and cost-effective marketing channels and marketing communications methods for reaching these target segments, and including them in the action plan.
- ***What new information is required to enable the Brecon Beacons to target the area's best prospects with the most compelling marketing messages?*** This meant identifying any information deficit that needed to be

³ See Appendix 2 for list of documents and information sources

⁴ See Appendix 1 for list of consultees

remedied through research to get a better understanding of the profile, motivation and behaviour of visitors.

- ***What developments or improvements in product or infrastructure are needed to enable the Brecon Beacons to compete effectively for visitors?*** This meant identifying any product gaps that might be preventing the Brecon Beacons from maximising its potential in light of current market trends.

2. EXECUTIVE SUMMARY

2.1 Marketing Recommendations

This strategy sets out an approach to marketing the Brecon Beacons that aims to develop tourism to the area that is economically, socially, culturally and environmentally sustainable.

The priority in year 1 is for the Brecon Beacons to understand its visitors and potential visitors in more detail, clarify its core appeal, and to develop targeted methods of communicating the most compelling messages to its best prospects.

This means investing in developing its marketing infrastructure (i.e. consumer research, brand image testing, website development) and then focusing on PR and digital marketing as the most cost-effective marketing channels.

Once this infrastructure has been developed, the focus in both the current and subsequent years should continue to be on PR and digital marketing as the most cost-effective marketing techniques. Although the digital platform will require on-going maintenance and creative development, this is then about turning the taps on and using the system to maximise the constant flow of appropriately crafted messages to key audiences (through whom they will reach many others). This is recommended as the most appropriate balance of targeted and cost-effective marketing communication, in light of limited budgets.

Traditional marketing, such as advertising, might also be considered to appropriately targeted niche audiences, subject to budget. But this should be considered only after core PR and digital marketing channels have been sufficiently developed and exploited. This is because advertising is an ephemeral and relatively expensive method of communication, whose value is generally secondary to the more credible, longer-lasting, and more cost-effective tactics of PR and digital marketing.

The following specific marketing activities are recommended:

- **Consumer research** to establish the profile of Brecon Beacons visitors, and particularly to understand the potential of different family segments Dialogue with businesses is also recommended to elicit information on visitor behaviour and preferences, where possible.
- Test the current “**brand hypothesis**” to establish the core emotional appeals of the Brecon Beacons, understand visitor motivation, define competitors, and identify barriers to visiting the Brecon Beacons.
- Much of the **visitor-profiling information** sought from consumers can be obtained through cost-effective methods, such as the inclusion of appropriate questions in on-going research by BBT and in Visit Wales surveys.

- Appoint a **PR person/agency** to generate tourism stories and push them out through traditional & on-line media and encourage travel writers to visit the Brecon Beacons. (See also under *2.2 Roles and Responsibilities* below).
- Develop an inspirational and comprehensive **website** for tourism in the Brecon Beacons area, with stimulating themes and links to commercial products.
- **Digital marketing:** a digital marketing strategy needs to be developed and implemented (e.g. content development, social media, user-generated content, search engine optimisation, e-crm), through an external agency/person.
- An **on-line photo library** should be developed and continually updated as a valuable resource for local tourism operators, external tour operators, and travel journalists.
- **Niche marketing** (e.g. advertising in walking magazines, on-line sites etc.) is both expensive and ephemeral. It is therefore only recommended where it is highly targeted on a niche market of considerable potential, and where additional editorial coverage can be negotiated to accompany the advertising.
- Encourage businesses in the Brecon Beacons to work together and to provide stimulating ideas for visitors, to enhance the appeal of a visit to the Brecon Beacons (e.g. around activities, events etc.) and, where appropriate, to compile elements of a commercial package for tour operators.
- Businesses should also be encouraged to reflect the **Brecon Beacons' brand values** in their own marketing communications to strengthen the overall marketing impact of the area.
- **Guerrilla/opportunistic marketing:** Identify appropriate cost-effective opportunities to target key audiences, using innovative methods and unorthodox channels, such as the 2010 photography exhibition at Canary Wharf. This should be part of the brief to the PR agency/person to identify suitable opportunities. N.B. This will be largely opportunity-driven and therefore reactive.
- **TICs:** Must be strategically positioned & integrated into the marketing process.
- **Themed marketing:** Develop themes and promote the area on a themed basis, particularly through PR and digital channels, based on:
 - Brecon Beacons' main appeals (e.g. outdoor activities, freedom and fresh air, and relaxation – all in a tranquil scenic environment)
 - Niche activities (e.g. hiking, cycling, kayaking, horse-riding, fishing)
 - Aspects that complement the main reason for visiting the Brecon Beacons, which contribute towards the tapestry that is the Brecon Beacons (e.g. culture, history, heritage)
 - Elements that support/reassure potential visitors (e.g. food, stylish accommodation, interesting/little-known/quirky facts and legends related to the Brecon Beacons).

- **Brecon Beacons area brand:** Develop a Brecon Beacons area brand, which incorporates all key sectors (e.g. tourism, farming, forestry, natural produce, culture), in order to leverage the Brecon Beacons brand values for the good of all sectors. This should strengthen market impact and enhance consumer recognition of all products associated with the Brecon Beacons, thereby raising the area's profile and using the area's core values to increase sales in all sectors.
- **Dark Sky Status:** BBNPA could, if successful, enhance awareness and the appeal of the area by bidding for International Dark Sky status. As well as contributing towards BBNPA's environmental objectives, this this would appeal to niche markets, such as stargazers, astronomers and photographers. It would also reinforce the area's natural brand values and commitment to environmental sustainability.
- **Product developments** that would improve Brecon Beacons' competitiveness and potential to attract increasingly discerning and higher-spending visitors include:
 - More small boutique-style hotels
 - More "signature restaurants"/bistros/gastropubs
 - Encouraging niche tour operators (such as walking and cycling tour operators) to include the Brecon Beacons in their programmes.
 - Identify and develop a programme of local "sub-festival" events, which might attract visitors outside the main season.
 - Identify and target appropriate nationally mobile events that are compatible with the Brecon Beacons' brand, whose organisers might be persuaded to stage them in the Brecon Beacons.

2.2 Roles and Responsibilities

- Wide-ranging **partnership** across several different organisations with an interest in the Brecon Beacons, as well as with businesses in the area, is essential for the success of this marketing strategy. A clear leadership role is also required to deliver the recommendations outlined in this strategy.
- This leadership role should be undertaken by the **BBMCG**, which should be responsible for the overall programme of activity undertaken by the Brecon Beacons as a "destination area".
- However, a review is required of the BBMCG role, membership and governance in order to equip it to undertake this larger leadership and management role, with attendant financial management responsibility, on behalf of the Brecon Beacons as a "destination area". This should include a **formal constitution for the BBMCG**.
- A **Strategy Coordinator** is required to implement these proposals. This person/agency should report to the BBMCG, as the most representative and independent tourism organisation in the Brecon Beacons.

- This person/agency should be responsible for **implementing the actions** proposed in this strategy, as well as for supplying the **PR and digital marketing services** required – either directly if he/she is suitably qualified, or by subcontracting them.
- In the interests of pragmatism and effectiveness, day-to-day performance management of the Strategy Coordinator should be delegated by the BBMCG to a small **steering group** comprising a representative from each of the following organisations: BBNPA, BBT, Powys CC.

2.3 Resource Implications

Undertaking these recommended marketing activities will require the following human resources and marketing budget:

- **Strategy Coordinator:** A person (part-time) to drive and implement the strategy, monitor its effectiveness, and recommend changes in emphasis/direction to the BBMCG in light of changing market circumstances and on-going evidence of marketing impact.
- **PR and digital marketing agency/freelance:** 1-2 days per week to:
 - Develop and promote tourism stories through traditional and on-line media, and encourage targeted travel writers to visit the Brecon Beacons.*
 - Develop and manage on-line content, keep the Brecon Beacons digital presence fresh and active, develop and manage the Brecon Beacons digital marketing strategy.*

[* PR and digital services might be found in one agency/person, or they may require to be sourced from separate agencies/people. This should be explored through an invitation to tender for these services.]

- **Marketing budget:** Investment to fund the marketing activities outlined above (i.e. strategy coordinator, PR agency/freelance digital marketing web development, niche marketing/advertising, on-line marketing campaigns, event development and marketing etc.).
- It is recommended that these **human resource requirements be outsourced**, rather than employed within an existing organisation in the area, in order to ensure they are scalable according to changes in market demand and budget availability, and to enable efficient cost control.

N.B. As the table below shows, significant development costs are anticipated in year 1 to establish a marketing infrastructure. However costs will decrease in year 2 and settle into a pattern of on-going marketing activity.

This is intended as a menu of activities, from which the BBMCG can select the activities they wish to undertake.

Activity Area	Year 1 £ *	Year 2 £	Year 3 £
Marketing Infrastructure Development			
Strategy coordinator (p/t person) **	11k	23k	23k
Visitor profile and brand perception research	N/A - Ongoing via BBT		
Digital marketing strategy	3-5k	-	-
Marketing Communications			
Digital marketing & web development	18-23k	12k	12k
PR agency/freelance	15k	15k	15k
Guerilla/opportunistic + contingency	5k	5k	5k
BB area brand development	-	10k	-
Product Development			
Advice & information dissemination only	-	-	-
TOTAL	52-59k	65k	55k

Assumptions

* Year 1 costs are based on the remaining 22 weeks of 2010-11.

Years 2-3 reflect a full 52 week year.

** Strategy Coordinator costs are based on £250 per day x 2 days per week x 46 weeks per annum.

Ideally there might be some cost saving on these figures if the Strategy Coordinator, PR, and digital marketing services could be sourced from the same person/agency.

3. OBJECTIVES

3.1 Aim

The Brecon Beacons Sustainable Tourism Partnership (BBSTP) commissioned this marketing strategy through its marketing sub-group, the Brecon Beacons Marketing Coordination Group (BBMCG).

Its desired aim is to:

“Strengthen and secure the sustainable marketing of the Brecon Beacons National Park area as a tourism destination in its own right through creative and innovative marketing and the development of partnership working and optimising shared resources”.

3.2 The Challenge

In light of the aim of *strengthening and securing the sustainable marketing of the Brecon Beacons National Park area as a tourism destination in its own right through creative and innovative marketing and the development of partnership working and optimising shared resources*, three major challenges were identified at the outset of the development of this strategy and addressed as follows:

- **Marketing and Image:** The Brecon Beacons National Park has a distinctive identity – both throughout the UK as a widely known name and closer to home as a National Park. However the area has not been coherently marketed, as it spans several local authority areas, three regional tourism partnership areas and two countries (England and Wales). Local marketing has not, up until now, been a priority within the national strategic approach to marketing Wales.

A need was identified to establish Brecon Beacons’ brand identity, its main target markets and the most cost-effective opportunities to reach these markets; and then to apply the brand in underpinning the marketing messages to these markets.

Although the budget did not extend to consumer research to elicit perceptions of the Brecon Beacons brand amongst visitors and non-visitors, research and consultation was undertaken amongst local businesses and stakeholders to establish a working brand hypothesis, on which this strategy and recommendations for marketing action have been based.

- **Sustainability:** Tourism must both benefit the local community and contribute to the conservation and, ideally, enhancement of the natural and cultural heritage of the Brecon Beacons. These two aims can sometimes be in conflict with each other. The marketing strategy therefore bears these twin aims in mind.

Market segments have been selected and prioritised not just on the basis of their growth potential for the Brecon Beacons, but also taking their motivation and likely behaviour with respect to the natural environment into account. To some extent these are mutually compatible and self-selecting in terms of the nature of the destination's appeal in attracting the type of visitors who are more likely to appreciate and respect the natural environment. Nevertheless the market segmentation analysis focuses on the type of tourism and visitors who will both appreciate the unique natural and cultural character of the area and who will consequently be more likely to tread lightly and respect the environment.

- **Partnerships:** The Brecon Beacons National Park spreads over several local authority areas. It has an iconic status at national level and contains a plethora of stakeholders from different sectors with different interests, ranging from conservation (environmental, cultural, architectural) to economic development (tourism, agriculture, forestry, small businesses etc.) and social coherence (communities). These are all important stakeholders, with a strong interest in the future of the area.

Many of these stakeholders have been consulted for their views in the development of this strategy. The draft strategy was also made available on-line to a wide range of stakeholders for their comments before being finalised.

- **Relationship with the Valleys and South East Wales:** Much of the Brecon Beacons “faces” down the Valleys towards South East Wales. The area's infrastructure, and particularly its major road network, points this way. Most of the Brecon Beacons' day visitors come from this area. The Brecon Beacons has been identified as an “attack brand” for South East Wales, meaning that the Brecon Beacons can attract visitors, who might then also visit South East Wales.

This highlights the need for synergy between the Brecon Beacons and South East Wales and the Valleys, whereby all areas benefit from each other in terms of attracting and, ideally dispersing, visitors between these areas. This requires dialogue and links in marketing communications between these areas, to emphasise their proximity and respective appeals to potential visitors.

4. SITUATION ANALYSIS

4.1 Definition of the Brecon Beacons

Rather than defining the Brecon Beacons area in specific geographical terms, it is more helpful to define it in terms of the overall objective of attracting tourism into the area – i.e. in terms of visitor perceptions. This enables a broad definition that recognises the iconic appeal of the National Park as the core attraction – or more accurately, the appeal of the type of landscape that the image of a National Park represents, which spreads over a wider area than just the Park itself. This recognises the potential benefit that a broader geographical interpretation can bring to businesses on the periphery of the National Park and beyond.

The National Park can attract people into the broader area, who may nevertheless stay outside the borders of the Park – in Carmarthenshire, Herefordshire, Monmouthshire, Cardiff, South East Wales, and even Pembrokeshire. Regardless of where they are staying, they are still likely to spend money in the National Park – on activities, food, in bars, restaurants, cafes, shops etc. And they may return at a later date for a break in the Park area, having been exposed to it on such a visit.

Similarly, people who stay within the boundaries of the National Park may travel and spend money outside the National Park. But the overall tourism offer - of the scenic landscape defined by the National Park boundaries and the gateway towns of Abergavenny, Hay-on-Wye and Llandeilo, the two main attractions at opposite ends of the Park - Big Pit and The Dan-Yr-Ogof Show Caves, and even places further afield such as the Gower peninsula, Cardiff, the Valleys, Swansea, and the Pembrokeshire coast – may have contributed to the overall appeal of the Brecon Beacons and influenced a decision to visit the area.

In other words, the definition of the Brecon Beacons lies broadly in the eyes of the beholder. It is defined for the visitor by the tourism experience on offer within a convenient radius and within the time that the visitor has available, of which the Brecon Beacons forms a significant element. This underpins the need to take an enlightened approach to working with, and co-promoting, other areas where they may add to the overall appeal of the Brecon Beacons in potential visitors' eyes.

To illustrate this, it would fly in the face of common sense not to consider some of the successful “bookends” of the National Park, , such as Llandeilo , Hay-on-Wye and Abergavenny, as integral to the Brecon Beacons, even though they are physically located outside the National Park boundary.

Llandeilo attracts a considerable number of high-spending visitors, not least because it is the original home of the fashionable *Toast* clothing range, with a store that contains their only archive of previous collections, as well as *Peppercorn*, an exclusive independent kitchenware/cookshop, both of whom have loyal clients from all over Wales and England. Abergavenny has a growing reputation as a “food town”. And Hay-on-Wye has a reputation that has become bigger than its reputation as just a town of books.

These “bookends” all add considerably to the Brecon Beacons product offer. They complement the Brecon Beacons’ natural environment and, significantly, fill gaps in terms of gastronomy, retail and culture at a high standard. It would be counter-intuitive for the Brecon Beacons not to capitalise on these powerful complementary assets in marketing the area, which considerably enhance the Brecon Beacons’ tourism offer and vice versa, particularly in relation to short break market segments.

4.2 PESTEL Analysis

This political, economic, social, technological, environmental, and legal analysis looks at the main issues likely to affect the development of tourism in the Brecon Beacons specifically – both positively and negatively.

Political

- Uncertainty over implications of local authority budget cuts. This may affect the funding and structure of local authorities within which the Brecon Beacons sit, and therefore their commitment to developing tourism in the area.

Economic

- Reduced consumer spending power as a result of recession, an increase in VAT, and anticipated tax increases, is likely to reduce the number of short breaks taken.
- On the other hand, there is some evidence that this might increase the number of main holidays taken in the UK (“staycation”), primarily at the lower end of the market. This could benefit those catering for family holidays.
- Potential fuel cost increases are likely to impact on the number of day trips and short breaks.
- Recession-driven cost-cutting may result in reduced funding for tourism development and marketing by local authorities.

Social

- The following trends reflect motivations that the Brecon Beacons is well placed to fulfil:
 - o search for authenticity in holiday experiences – in terms of culture, people, the built and natural environment;
 - o desire for physical and emotional escape from frenetic business life for a quick, relaxing break;
 - o increasing interest in, and concern for, the natural environment;
 - o growing desire to spend more quality time and reconnect with family and friends.

Technological

- Constant innovation in, and widespread adoption of, digital technology offers a significant opportunity for businesses in the Brecon Beacons to communicate with many more customers and potential visitors more frequently and at lower cost than ever before (e.g. social media, user-generated content etc.).
- Mobile technology is likely to become increasingly used, particularly by visitors after they arrive in a destination, to search for places to go, things to do, places to eat etc. In future, increasingly intuitive mobile applications will also provide detailed information to visitors on attractions, interesting sites and buildings, restaurants, petrol stations, banks, and even natural phenomena, through GPS and photo-recognition software (e.g. Foursquare and Around Me). However, signal reception in the Brecon Beacons is currently patchy, making this a less effective tool for Brecon Beacons' businesses to use in the immediate future than it is likely to become elsewhere. Steps therefore need to be taken to encourage environmentally and visually sensitive mobile receptors in the landscape in order to enable visitors to access this rapidly developing technology, which will shortly be capable of significantly enhancing the visitor experience. This could be of particular significance in boosting the lesser known cultural appeals of the area, which are currently under-appreciated by visitors.
- People are increasingly expecting to be able to search websites on an intuitive basis; and the opportunities for businesses to reach both a volume audience and targeted audiences are multiplying. Web4U offers a valuable community-based online information and booking system. However the UK National Tourism Operating Platform (NTOP), which links accredited and graded businesses (i.e. activity operators and accommodation providers) via Guestlink, Visit Wales, and Visit Britain offers significant distribution potential through a wide range of search and booking engines with whom Visit Britain has negotiated global distribution (e.g. Trip Advisor, Google, Expedia etc.). There is an opportunity for the Brecon Beacons to take advantage of this for local businesses by upgrading the current Web4U system to NTOP standard, subject to the caveat articulated in the following paragraph.
- Caveat: At the time of writing this strategy, public sector cuts were looming with the impending outcome of the Comprehensive Spending Review to be announced by the coalition government in Oct 2010. This could have implications for the future roles of Visit Wales and Visit Britain and the programmes they fund or support. The future commitment to NTOP is therefore not yet clear. Consequently Brecon Beacons businesses are advised to await clarification on NTOP's future before investing in upgrading Web4U systems to NTOP compatibility.
- Visit Wales is developing a national digital marketing strategy. This may provide opportunities for Brecon Beacons businesses when it is launched.

Environmental

- An increasing interest in and concern for, the natural environment may bring more visitors to the Brecon Beacons. But it could also increase pressure on the landscape in sensitive areas, with the attendant risk of erosion and landscape degradation. Good management of visitors and their impacts are needed but it is not thought that implementing this strategy will lead to unacceptable environmental risks.
- Surveys tend to show that people don't act as they say: a large number indicate a willingness to alter their behaviour in favour of reducing their carbon footprint; however the number that actually do is considerably lower than those who say they will.
- One of the biggest impacts of tourism on the global environment is transport. The continued development and encouragement of low impact transport opportunities for visitors will be important in ensuring these impacts are minimised in areas that are particularly environmentally sensitive. This will be particularly important for the short break market where research tends to show that the large majority of domestic short-breakers in the UK prefer to travel by car. This is therefore about improving accessibility in an environmentally accessible way, rather than restricting access, as evidence suggests that most short break visitors will use a car to reach their chosen destination.

Legal

- Proposed legislation raising the UK retirement age is on the horizon. Businesses will need to be aware of this and take steps to ensure compliance, just as with existing UK and European legislation affecting their premises, employment practices and business procedures (e.g. Employment Equality (Age) Regulations 2006, Disability Discrimination Act 1995, Race Relations Act 1976 (and Amendment Act 2000), Sex Discrimination Act 1975, Employment Equality (Sexual Orientation) Regulations 2003, Employment Equality (Religion or Belief) Regulations 2003, and Rehabilitation of Offenders Act 1974, Data Protection Act 1998 etc.).
- The repeal of the Furnished Holiday Lettings Rules from the Finance Bill, announced in the June 2010 budget has removed the prospect of significant additional tax liability - and Capital Gains Tax in particular and a reduction in capital expenditure relief - for self-catering operators, which was proposed by the former government.

Nevertheless, the new government has confirmed in the Coalition Programme that it will *“take measures to fulfil our EU treaty obligations in regard to the taxation of holiday letting that do not penalise UK-based businesses”*⁵ and is currently in the process of developing proposals for consultation on how this might be achieved.

⁵ Per Tourism Alliance bulletin June 2010

- With the increasing opportunities associated with digital technology, and the consequent ability to reach many more people through many different channels, the legal landscape can be opaque. Businesses will therefore need to be careful to comply with privacy regulations, such as those enshrined in the Data Protection Act 1998.
- The review of the Licensing Act (2003) and possible devolution of licensing laws to Wales, following a Welsh Assembly Government (WAG) call for control over minimum pricing of alcohol, advertising and licensing in Wales⁶, may change licensing regulations. This needs to be monitored by rural businesses, as new legislation designed to address what is primarily an urban problem may have disproportionately adverse implications for licensed premises in the Brecon Beacons.
- Businesses should also be aware of the potential risk of offering business incentives, which might previously have been considered acceptable business practice, being interpreted as criminal behaviour under the impending UK Bribery Act, scheduled for introduction in April 2011.
- The EU Package Travel, Package Holidays and Package Tours Regulations 1992⁷ require a travel organiser/packager to provide evidence of bonding and financial security to protect passengers in the event of a travel organiser's insolvency. This applies to any organiser of a package. The definition of a package can bring many people, including local businesses, within the scope of these regulations: a package consists of the pre-arranged combination of at least two of the following components when sold or offered for sale at an inclusive price and when the service covers a period of more than twenty-four hours or includes overnight accommodation:
 - o transport
 - o accommodation
 - o other tourist services not ancillary to transport or accommodation and accounting for a significant proportion of the package,

The European Union is currently reviewing these Regulations in light of changes in technology and “dynamic packaging” since the Regulations were introduced. Proposals for revising the Package Travel Directive are expected in the autumn of 2010.

⁶ <http://www.bbc.co.uk/news/uk-wales-10975796> , 14 Aug 2010

⁷ See http://www.opsi.gov.uk/si/si1992/ukxi_19923288_en_1.htm; <http://www.bis.gov.uk/files/file35634.pdf>; <http://www.fto.co.uk/operators-factfile/legal-requirements/>; <http://www.holidaytravelwatch.net/tag/the-package-travel-regulations/>; http://www.abta.com/about/lobbying_and_government_affairs/package_travel_directive

4.3 SWOT Analysis

As with the PESTEL analysis above, this SWOT analysis identifies the main strengths, weaknesses, opportunities and threats of specific relevance to the Brecon Beacons.

Strengths

- **Recognition:** Brecon Beacons is an iconic, well-known name
- **Landscape:** a mix of wild, scenic beauty, tranquil, uncongested, open space and gentler, rural, rolling hills, fields, farms, small settlements and villages.
- **National Park** status conveys a special image on the area in the popular imagination, associated with scenic beauty and a protected natural environment
- Commitment by all **BBMCG** partners to marketing the Brecon Beacons.
- **Outdoor activity** offer: hiking (from gentle to more adventurous), cycling, horse-riding, kayaking, including facilities (e.g. businesses and courses) and skills (e.g. instructors) related to outdoor activities.
- **Fishing:** good fishing in a scenic and tranquil environment.
- Brecon Beacon's **proximity** to its major markets (i.e. London & South East, M4 corridor, Bristol & South West, Cardiff & South Wales and, to a lesser extent, Birmingham and the Midlands). This is a major competitive advantage over some of Brecon Beacon's closest competitors (e.g. Snowdonia, Dartmoor etc.).
- Proximity to Brecon Beacons of **other attractive destination areas** in Wales (e.g. Pembrokeshire coast, Cardiff etc.)
- Small, but outstanding, selection of **high quality tourism products**, such as: award-winning self-catering cottages and quality bunkhouse accommodation in the Brecon Beacons, high quality restaurants, bistros, (e.g. Abergavenny) small hotels, independent shops (e.g. Toast-Llandeilo), and culturally iconic destinations (e.g. Hay-on-Wye) at the gateway points of the Brecon Beacons as well as within it, which contribute to an attractive and well-rounded product offer, particularly for short-breakers.
- **Strong festival cluster:** Significant high profile events and festivals that are among the best of their kind in the UK – in and around the area (e.g. Brecon Jazz Festival, Green Man Festival, Hay-on Wye Festival, Abergavenny Food Festival, Crickhowell Walking Festival etc.)
- **People** - who contribute to a special Brecon ambience: a mix of rural farming communities and outdoor-oriented, slightly alternative, “environmental entrepreneurs”. While this is hard to quantify objectively, it is a spirit that visitors are likely to feel, which makes the area distinctive, engaging, and appealing for its authenticity and adventurous energy.

- Excellent range of **local produce** (e.g. meat, vegetables, fruit, jams, chutneys, Brecon Carreg water, Penderyn whisky, Breconshire Brewery, Black Mountain Smokery, Welsh Venison Centre, Blaenafon Cheddar Company, and various artisan products etc.), which can be used in providing high quality fresh food for visitors, as well as in highlighting the special nature of the natural environment of the Brecon Beacons.
- Significant **commitment by BBNPA** to, and investment in, the marketing and development of the National Park for visitors.

Weaknesses

- Limited number of good quality “**signature**” **restaurants, bistros and small characterful hotels**⁸, of the standard required to attract a higher-spending short break market, within the Brecon Beacons (although there are several around the edges of the National Park, as identified under *Strengths* above).
- **Potentially unclear identity**: i.e. Is the Brecon Beacons well-enough known for the true nature of its landscape, or is it confused with other, more rugged landscapes such as Snowdonia (e.g. as a result of its reputation as an army survival training area), which may deter people seeking a gentler active break? (N.B. This needs to be tested through consumer research amongst non-visitors in relevant target segments).
- The **indigenous cultural product** in the Brecon Beacons is not perceived to be as strong, nor is it as visible to the visitor, as in many other parts of Wales. This was highlighted in the on-line stakeholder research⁹: few visitors currently come to the Brecon Beacons seeking a cultural experience. Nevertheless, there are significant items of cultural and historical interest that, if interpreted more creatively and promoted adequately within websites and brochures, could add another dimension to the Brecon Beacons offer, particularly for the “active senior/empty-nester” and “freedom seeker” segments identified below as having the greatest growth potential (See 5.3. *Market Segmentation*).
- Limited approach to “**packaging**” the Brecon Beacons. This is less about commercial packages for tour operators, than it is about the way in which tourism businesses, and particularly hotels, in the Brecon Beacons fail to convey the spirit of the area and opportunities for activities and places to see in their marketing. Many accommodation establishments might inspire more interest and encourage people to stay longer in the area if they focused on creative “information packaging” by highlighting the opportunities available in the area, in addition to the assets of their properties (e.g. through brief descriptions and web links to other sites of interest), as well as reflecting the Brecon Beacons brand more consistently in their own marketing communications (e.g. websites and brochures/leaflets).

⁸ The *Powys Hotel Needs Study* (MPA, July 2010) identified the need for an improvement in hotel quality in Powys, but not quantity.

⁹ Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

- There is no **comprehensive “official” website** covering all aspects of visitor information on the area. e.g.:
 - While the **BBNPA** website <http://www.breconbeacons.org/visit-us/things-to-do-and-see> covers an extensive selection of things to do and see within the National park, and some outside the Park too, it contains a selective range of accommodation establishments, whose inclusion is determined by their ability to meet specific environmental accreditation criteria. It does, however, have links to many other useful local and regional sites.
 - The BBNPA is about to launch a new “**Park Explorer**” website. This should be assessed to see whether it could fulfil this role as the “official” website covering all things to do with tourism from a visitor perspective in the Brecon Beacons – i.e. as a de facto “official” destination management organisation website.

In making this assessment, any restriction on the type of information or tourism products that BBNPA may or may not legitimately feature should be taken into account. It should also include a risk analysis, which assesses the likely long-term commitment to tourism promotion by BBNPA under potentially different future scenarios.

- The **BBT** website <http://www.breconbeaconstourism.co.uk> covers a range of things to see/do, places to stay/eat etc. The site has a variety of search elements, but they are not as intuitive or immediately visible to new visitors as they could be (e.g. requiring the visitor to commit to an “advanced search” before the full range of searchable options is apparent). Nevertheless, the range of accommodation is more extensive than the BBNPA site, and these accommodation establishments and tourism operators achieve considerable distribution through the Web4U platform, which is based on a tourism community network model, and through its link to the Visit Wales website.

However, the content management system that drives the BBT website (Web4U) does not at the moment feed through to the National Tourism Operating Platform (NTOP), although this is currently being explored. This would give local businesses much wider distribution through third party sites and platforms such as Google, Trip Advisor, as Visit Wales and Visit Britain negotiate future distribution and links to these sites at national and international levels.

On the other hand, this is not currently a significant issue for most Brecon Beacons businesses as, if they are officially graded by Visit Wales (accommodation operators) or accredited (activity operators), they are linked via Guestlink to NTOP, thereby achieving the widespread distribution offered through global distribution platforms and booking engines negotiated by Visit Britain.

- The **BBT “Get Active”** website <http://www.getactive-beacons.co.uk/> currently contains information on activities and accommodation that is product-based, rather than experience-driven. The site is about to be fundamentally changed and updated to be the association’s member website rather than a visitor-facing one
- The **profile of visitors** to the Brecon Beacons requires further clarification – particularly that of different family segments (e.g. pre-school, school age and teens). So too do their motivation, satisfaction and any obstacles to visiting the Brecon Beacons.
- Limited **funds** for tourism development and marketing.
- **Fragmentation** of marketing effort by various players in the area, which this strategy aims to address, by recommending the potential for areas of greater cooperation, integration, clarification of roles, and marketing synergy between organisations and tourism businesses in the Brecon Beacons.

Opportunities

- Growth of interest in, and concern for, the **natural environment**. This is an opportunity for the Brecon Beacons to attract more people interested in outdoors – whether to participate in activities or just relax in tranquil scenery.
- **Travel motivation trends**: The search for an escape from busy metropolitan life; for emotional, spiritual and physical regeneration; for reconnecting with partners, friends and family; to learn new skills; for authentic experiences; and to participate in outdoor activities. The Brecon Beacons is well-placed to fulfil all of these.
- **National Tourism Operating Platform (NTOP)**: The NTOP platform offers BBT and BB businesses an opportunity to achieve significantly greater distribution through third party websites and platforms, as a result of negotiations concluded by Visit Wales and Visit Britain.(e.g. via Google, Expedia, Bing, Trip Advisor etc.). This should also minimise on-going administration for businesses, by enabling businesses to input data into one content management system only – ideally still via the current Web4U platform, which will, hopefully, soon link to NTOP.¹⁰

The respective benefits of Web4U and NTOP are:

- **Web4U** offers individual websites for small businesses and is a community-based website, which has considerable information on things to do and see in the local area. It also offers a booking facility.
- **NTOP** provides the link (from Guestlink) to the national tourism board sites (Visit Wales and Visit Britain), thereby enabling businesses to achieve global distribution through the platforms and booking engines with whom Visit Britain has negotiated distribution, such as Google, Trip Advisor, Bing, Expedia etc.

¹⁰ N.B. See Caveat regarding NTOP’s future in chapter 4.2 *PESTEL Analysis -Technological* above [Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

- Potential of all BB businesses to reflect the **Brecon Beacons brand** in their own marketing communications, and thereby maximise synergy and impact for the area. This will require a clear articulation of the BB brand and training/explanation for BB businesses, so that they understand its value and how to apply it.
- Possible availability of **Rural Development Plan** resources to help develop tourism in Brecon Beacons and the surrounding area.
- Opportunity to optimise market impact and increase sales of local produce, goods and services from all sectors through the development of a **Brecon Beacons area brand** incorporating all key sectors (e.g. tourism, farming, forestry, natural produce, culture).
- **Proximity of main visitor markets:** short break visitors from London and the M4 corridor, Bristol and the Southwest; “staycation” families from South Wales, Bristol and the Southwest and the M4 corridor; and day visitors from Cardiff and South Wales.
- Opportunity to increase awareness of the **cultural offer** available in the Brecon Beacons.
- Opportunity to **optimise day visitor spend** in the Brecon Beacons, particularly through the development and promotion of local produce and products that reflect the area’s sense of place.
- Opportunity to **attract visitors beyond the main season**, by promoting events and appropriate tourism products/experiences through PR, e-CRM and social media to targeted segments – and particularly to previous visitors.
- **Events and festivals:** potential to associate the current cluster of significant festivals in the area more with the Brecon Beacons, and thereby to raise the profile of the Brecon Beacons amongst a wider audience.
- **Capitalise on memories** of people who visited the area on youth trips, field studies, and family holidays.
- Cost-effective opportunities to reach an increasing number of relatively targeted potential visitors, year-round, through **social media and digital marketing** at a fraction of the cost of conventional marketing.
- Designation of the Brecon Beacons by Visit Wales as a “**destination area**”.

Threats

- Growth of interest in, and concern for the **natural environment**. While this is largely an opportunity, it also represents a potential threat at certain times of year (e.g. warm holiday weekends) and if tourism was to grow excessively in peak periods.

Potential **erosion** of sensitive landscape at peak periods.

- **Recession**, and reduced spending power as a result of impending increases in VAT, tax and fuel etc. This is likely to result in a reduced demand for travel, particularly the number of short breaks taken in the UK. Specifically, where people who took several short breaks a year, of which the first one or two may have been to international short-haul destinations on low cost carriers with a domestic break as a third or fourth choice, the domestic break may drop off their list as they pull their financial horns in.
- Potential **reduction in resources** devoted to the development and promotion of tourism as a result of public sector, and particularly local authority, cutbacks.
- Potential **drop in tourism product quality** as a result of a possible recession-induced reduction in travel spend, which could undermine businesses' profitability and therefore their ability to reinvest to appropriate quality standards to compete effectively for visitors.

4.4 Current Marketing Status

Market Presence

The Brecon Beacons has not been marketed as a distinct area to the extent that its iconic status and visitor appeal warrant. The Visit Wales Destination Management Review in 2008 signalled a watershed: an opportunity was identified to develop a robust marketing plan at the level of Brecon Beacons. This provides the opportunity to attract new visitors to The Brecon Beacons, as well as to Wales in general, through the promotion of the Brecon Beacons as an "attack brand" within its wider Welsh context.

The Brecon Beacons' greatest market presence has to date been delivered through the Brecon Beacons National Park Authority's marketing activities (e.g. brochures, website, Collabor8 programme etc.), through local authority marketing publications and websites (Powys and Carmarthenshire), and on the Visit Wales website, which also links to the BBNPA and BBT websites. The in-area Brecon Beacons Holiday Cottages agency also does significant work on this front, with PR and regular ads in travel and "coffee table" magazines, weekend newspapers and with the National Trust – this latter organisation also contributing to the awareness of the landscape.

General consumer awareness of the Brecon Beacons National Park and of the Brecon Beacons' name has been of major significance to Brecon Beacons' market presence. However, the greatest contribution to the Brecon Beacons market penetration appears to be the National Park's marketing activities and the Brecon Beacons inclusion in the

Powys and Carmarthenshire annual visitor brochures. Currently, the only print items that are specific to the Brecon Beacons are produced by the National Park.

Pro-active vs. Reactive Promotion

The Brecon Beacons has a high profile in the Powys and Carmarthenshire annual visitor brochures, in which it features in the title on the front covers and in editorial coverage within these brochures (i.e. Powys 2010 brochure - "Explore Mid Wales and the Brecon Beacons", and the Carmarthenshire 2010 brochure – "Carmarthenshire Featuring the Brecon Beacons National Park").

However the distribution of these brochures is largely restricted to visitors to these areas and to respondents to a Visit Wales advertising campaign, in which people are offered the opportunity to say which geographical areas they are interested in (e.g. Mid Wales, Carmarthenshire, South West Wales etc.).

This is an important and valuable means of targeting "warm prospects" - people who have expressed an interest in the wider geographical region, who are already considering a visit, or who may already be within the wider region. But this presupposes a reasonable a priori knowledge amongst respondents of these areas and what they offer. It does not offer an opportunity to stimulate an interest in the Brecon Beacons on the basis of the area's image before respondents receive these brochures at a point when they may still be considering a wider competitive set of destinations.

Nor does it offer the Brecon Beacons an opportunity to target people according to their interests and motivation for travel, as these brochures are primarily offered on a geographical basis, with people being asked to select which region of Wales they are interested in. For instance those who are interested in hill-walking and are familiar with the Brecon Beacons might select one of these brochures on the basis of their knowledge of the area. But they do not offer the Brecon Beacons an opportunity to draw the attention of other hikers to the area, who might be unaware of the opportunities for great hill-walking in the Brecon Beacons.

In other words, the Brecon Beacons has had to rely largely on reactive marketing – to people who express an interest in these areas of Wales, or who decide to visit the National Park or Visit Wales websites – rather than being able to stimulate demand through proactive marketing to people who may not yet have considered the area, but who might be persuaded to consider visiting.

That is not to belittle the value of these brochures or the advertising campaign through which they are distributed. These brochures perform a valuable function in presenting a positive image of the Brecon Beacons to "warm prospects". And they achieve a significant distribution amongst potential visitors to the wider area. This is important for many visitors, particularly repeat visitors to Wales, who are more likely to be in a position to make an informed choice about the areas they would like to visit - and therefore the Brecon Beacons - when selecting the brochures they would like to receive. This is an important step in attracting Brecon Beacon's "warmest prospects", who have already expressed an interest in the broader area around the Brecon Beacons within Wales.

However, with this “low-hanging fruit” already being targeted through these brochures, this marketing strategy is also concerned to address an important opportunity gap: the need to stimulate fresh demand for the Brecon Beacons – and thereby also for Wales in general – amongst a wider audience of potential visitors who may not yet have considered the Brecon Beacons, in order to grow tourism in the Brecon Beacons.

Other factors contributing to an awareness of the Brecon Beacons include people’s experience of a previous visit, word-of-mouth from previous visitors, including a significant number of people who once visited the area on a school or youth group trip or family holiday, general awareness of the National Park, BBNPA website and Facebook page, BBT Facebook page, website and blog, and other “official” web presence (e.g. www.visitwales.com; www.visitbreconbeacons.com; <http://breconbeacons.wordpress.com/>, Explore Mid Wales & Brecon Beacons Facebook page, various Twitterers, such as twitter.com/bbparkwarden), and “unofficial” Brecon Beacons sites listed on Google etc.

The nature of Brecon Beacons’ current web presence, however, depends on being “pulled” by interested potential visitors from a search on Google or Visit Wales; with the exception of the Facebook and Twitter platforms mentioned above, it is not “pushed” proactively at targeted consumers.

Again, the National Park Authority website delivers the highest on-line profile for the Brecon Beacons.¹¹ However, when searching for tourism-specific items, such as “accommodation (in the) Brecon Beacons” the BBT website comes up as the first area-specific site - after universal booking engines such as www.LateRooms.com, www.Booking.com, and www.BookingAngels.com and just before <http://www.brecon-beacons.com/where-to-stay-overnight.htm>

However an opportunity exists to attract more visitors by creating greater awareness of what the Brecon Beacons stands for and by stimulating demand for what it offers. The Brecon Beacons is a significant “attack brand” for Wales – i.e. a known name that can pull people into the country on the strength of its destination appeal.

But, in order to be able to do this, three conditions need to be satisfied:

- The Brecon Beacons needs a **clear identity** in the eyes of potential visitors.
- The **profile** of Brecon Beacons’ potential visitors and their **motivation** for travel need to be clearly understood, so that they can be effectively targeted with the most compelling marketing messages.
- The Brecon Beacons needs to undertake **proactive destination marketing** to attract visitors who might be considering visiting competitor destinations.

¹¹ A Google search for “Brecon Beacons” reveals 5 entries for the National Park out of 11 on the first page (i.e. 45% optimisation), with the first two being for the National Park

4.5 Brecon Beacons' Image

The Brecon Beacons is a much-loved area by those who know it, and a widely recognised name amongst many people who have never been. But, even though it has a nationally iconic name, it is nevertheless an unknown quantity for many: people may know of the Brecon Beacons, but not necessarily know about the area and what it offers.

Research¹² amongst stakeholders (businesses and organisations within the Brecon Beacons), which was undertaken during the development of this marketing strategy, indicated a relatively coherent view of the Brecon Beacons' main appeals for visitors. This was largely defined by the Brecon Beacons' scenic natural environment, epitomised by the National Park, and opportunities for outdoor activities, particularly hiking.

Specifically, the following responses indicate how Brecon Beacons stakeholders believe their visitors perceive the area:

Brecon Beacons' Appeal and Visitor Benefits

Dramatic landscape, mountainous, and peaceful were the words most associated with the Brecon Beacons, which were seen as offering a **relaxing, rejuvenating, and refreshing** experience.

This emphasis on peaceful, relaxing and rejuvenating aspects of the Brecon Beacons clearly distanced the area from more rugged and wild landscapes (e.g. such as Snowdonia and the Scottish Highlands), while still evoking the scenic drama of the area.

Emotional Associations

In an attempt to elicit further feelings and understand the mood and character of the Brecon Beacons, respondents were asked to say which animal and vehicle they most closely associated the Brecon Beacons with.

Animal association:

The most commonly mentioned animal with which respondents associated the Brecon Beacons was a dog, and mostly a **Labrador**, followed by a **horse**, particularly a **Welsh mountain pony**, and then a **mountain goat**.

Few respondents gave their reasons. However from those few who did, and based on widely recognised characteristics of Labradors, the associations with the Labrador appeared to be related to being trustworthy, reliable, friendly, energetic; but not wild, unruly or extreme in character.

The Welsh mountain pony and mountain goat are perhaps more obviously resonant of the Welsh outdoor experience that the Brecon Beacons offers. They conjure up an image of

¹² Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010); & workshop held during Brecon Beacons Tourism in Action Conference on 03 March 2010, Theatr Brycheiniog, Brecon

toughness, resilience, independence, dependability, adventurousness, robustness, long-standing character, elegance and self-confidence.

To some extent these characteristics are more in tune with the values of Wales as a “challenger brand”, and less resonant of the Brecon Beacons as a distinctive area. Nevertheless they indicate a certain consistency in perceptions of the area’s character as quite rugged but not extreme, friendly, welcoming, reliable and resilient.

Vehicle association:

The **Land Rover** was by far the most commonly mentioned association, followed by similar, but possibly slightly more comfortable vehicles, including **Range Rover**, Landcruiser, Jeep, and 4x4 in general.

Clearly these associations suggest the natural outdoor characteristics of the area. They contain a certain suggestion of ruggedness, but with a leaning towards the “softer” more comfortable side of outdoor activities (e.g. Range Rover).

It is hardly surprising that these types of vehicles spring to mind for a national park and outdoor recreation area such as the Brecon Beacons. They are regularly mentioned in this type of research in many countries as being associated with such landscapes as the most representative type of vehicle. However, again, these responses indicate a degree of consistency in respondents’ perceptions of the area as **“outdoorsy” without the extreme context, practical and down-to-earth, but still friendly, comfortable and accessible** – as opposed to the more rugged associations associated with more remote, wilder and more physically challenging landscapes.

Nevertheless, there is a hint of wildness and ruggedness as well as comfort and accessibility. It is not comfortable in the way that the South Downs is; but equally, it is not rugged in the way that Snowdonia is. The Brecon Beacons is an accessible, wild¹³ landscape that offers people a choice as to how challenging they want to make it – in low ratio or high ratio gear.

Clearly, in asking local stakeholders what they thought their customers thought of the Brecon Beacons, this could only be a proxy for visitors’ own opinions. There is a significant risk in basing a marketing strategy on second-hand opinions, even though they are likely to be very astute and based on considerable experience of many visitors over several years. But understanding how visitors themselves (and especially non-visitors within Brecon Beacons’ target segments) truly feel about the Brecon Beacons in relation to its competitors (and who they perceive as competitors), and what motivates them to choose one destination over another, is fundamental to the ability to develop an effective marketing approach. An in-depth understanding of visitor motivation and perceptions of the Brecon Beacons is therefore required to enable the most appropriate marketing messages to be developed and targeted at the most potentially valuable visitors.

In particular, given an awareness of the Brecon Beacons as a scenic, natural environment, it will be important to understand how people perceive the Brecon Beacons

¹³ Not “wild” in a technical geophysical sense of pristine wilderness free from human intervention, but in a lay emotional sense - reflecting the way that dramatic landscapes and open space evoke a relative feeling of wildness in comparison to urban life and more populated rural areas.

in relation to other scenic natural environments (e.g. Snowdonia, Dartmoor etc.) e.g. Is the Brecon Beacons perceived as wilder, or “gentler”? Does this have an impact on people’s choice of other areas rather than the Brecon Beacons for a relaxing break or an active holiday? What kind of experience are they seeking?

More specifically, does the image match reality? For instance, does widespread awareness of the fact that the army uses the Brecon Beacons for survival training exercises convey an impression that the landscape is inhospitable, intimidating or wilder than it actually is? And does this deter “softer” adventurers, who might consider a visit if they were aware of the Brecon Beacons’ true nature? Conversely, do people come expecting a more rugged outdoor experience of the sort they might find further north in Snowdonia, but then return home disappointed because the Brecon Beacons is “gentler” and less rugged than they had been led to expect?

Further Perception Research

These responses from Brecon Beacons’ stakeholders give a clear and reasonably consistent insight into what they think visitors think of the Brecon Beacons. Nevertheless, it would be useful to ask visitors themselves - and non-visitors - how they perceive the Brecon Beacons, what motivates them when they consider travelling to a destination like the Brecon Beacons, who they see as the Brecon Beacons’ main competitors, and how they perceive the differences between them – in order to establish the Brecon Beacons’ competitive advantage.

The main question, which needs testing in consumer research, therefore remains: *“What is the dominant perception of the Brecon Beacons, and how does this relate to its main competitors, in the eyes of its most potentially valuable visitors?”*

This will provide a clear understanding of how visitors and non-visitors perceive the core appeals of the Brecon Beacons. It will help refine the Brecon Beacons’ marketing messages to target potential visitors. Answers to these questions should enable a coherent presentation of the Brecon Beacons’ brand, by differentiating the Brecon Beacons from other natural scenic areas such as Snowdonia and Dartmoor, which might also be in the potential visitor’s competitive set when considering a domestic break.

4.6 Market Profile

Market Segmentation Models

Recent trends in market segmentation in the UK have focused on a values-based approach, rather than merely a socio-demographic approach. This is helpful in defining people in terms of their attitudes, interests and travel behaviour. Combined with socio-demographic analysis, which defines people's age, sex, social class, income, and area of residence, values-based analysis helps differentiate people of similar socio-demographic status who may have completely different interests. This is important for tourism destinations when identifying whom to target, as different people within the same socio-demographic group invariably have significantly different interests and take very different types of holiday. For a destination such as the Brecon Beacons, for instance, it would be wasteful to target people on a purely demographic basis, when many of them might seldom consider a domestic break. Identifying target segments in terms of their travel motivation and behaviour can therefore help target the best prospects for a destination such as the Brecon Beacons.

Various values-based segmentation models are used by different tourism marketing bodies in the UK, but not all are able to quantify the number and location of people in each segment¹⁴. Values-based segmentation is an inexact science. There are frequent overlaps between segments in existing models, which tend to sit on a behavioural spectrum, rather than being genuinely discrete segments that precisely define people's attitudes. Consequently, the risk in using such segmentation models, which are proprietary models and therefore need to be purchased, is that potentially valuable visitors in segments other than those selected may be excluded. Their main value lies in clarifying the most appropriate marketing messages to target these segments, and in defining the best communications channels for reaching them. For this reason, this marketing strategy proposes a broader approach to segmentation than is enabled by these segmentation models (See 5.3. *Market Segmentation* below).

The following gives an insight into the values-based segments employed by different tourism marketing bodies in the UK, which most closely correspond to segments offering potential for the Brecon Beacons¹⁵.

- Visit Britain (England)

Segmentation model: ArkLeisure, as redefined by Visit Britain for England.

Key segments:

- *Cosmopolitans*
- *Discoverers*

Cosmopolitans were defined by ArkLeisure as: "Strong, active confident. Style and brand important, but as an expression of their self-made identity. High spenders, especially on innovation and technology. Looking for new challenges, new experiences. Globetrotters".¹⁶

¹⁴ Arkenford's ArkLeisure segmentation model does quantify numbers and location of people within its core segments

¹⁵ An Exploration of the Possibilities for Segmenting the Brecon Beacons' Visitor Market by The Tourism Company, Jan 2008

¹⁶ Insights – Visit Britain (March 2004), Understanding the Marketplace – A New Customer Segmentation
[Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

They were redefined by Visit Britain¹⁷ as:

- Core Values: “Independent, individual risk-takers, who seek new experiences and challenges – both physical and intellectual.”
- Market Size & Life Stage: “15% of the population, with high ethnic representation. Relatively young, average income is £26k and over a third of them are post-family.”
- Holiday Habits: “On average take over 4 short breaks a year. Enjoy wide variety of types of holiday, especially activity/themed holidays”.

Discoverers were defined by ArkLeisure as: “Independent in mind and action. Little influenced by style or brand but interested in new options. Buy on function and value to them. Looking for new and educational experiences.”¹⁸

They were redefined by Visit Britain¹⁹ as:

Core Values: “Independent of mind and keen on value for money. Little influenced by style or brand but value good service.”

Market Size & Life Stage: “12% of the population. Predominantly C1 with average income of £25k. Most likely to be aged 26-35, with kids at home, and high internet users.”

Holiday Habits: “Likely to take bargain break/late deal than package holiday. Much more likely to weekend in England than abroad.”

- Visit Scotland

Key segments:

- *Affluent Southern Explorers*
- *Younger Domestic Explorers*
- *Mature Devotees*
- *Affluent Active Devotees.*

- Visit Wales

Key segments:

- *Personal Explorers*
 (“I am interested in the arts” ...or...“I enjoy other cultures”)
- *Active Explorers*:
 (“I enjoy activities on holiday” ...or...“I regularly take part in”)

The following statements defined the overall attitudinal characteristics of independent explorers:

- *“I enjoy discovering new experiences and places to visit within the United Kingdom”*
- *“I prefer to be independent and do my own thing when taking holidays and breaks”*
- *“I get a real sense of achievement and satisfaction planning and organising my own trip”*

¹⁷ Destination England – How Well Does it Deliver? England Research, 2004

¹⁸ Insights – Visit Britain (March 2004), Understanding the Marketplace – A New Customer Segmentation

¹⁹ Destination England – How Well Does it Deliver? England Research, 2004

- "I like to learn about the local way of life and culture of the places I visit"
- "I like to visit places that are still undiscovered by tourists"

- BBNPA

Key segments proposed²⁰:

- Active seniors / empty nesters
- Early retired
- Young couples without children
- Social groups including young professional, early retired, lifelong learning groups and field study groups

- UK National Parks²¹

Key segments:

- *Independent Doers*
- *Reflective Enrichers*

- Brecon Beacons Tourism Marketing Plan (2009)

Primary Target Segments (UK):

Profile:

- Affluent early retired
- Affluent empty nesters / active seniors
- Families with pre / school children
- Young activity seekers
- Social groups: including young professional, early retired, lifelong learning and field study groups

Holiday choice:

- General short & extended leisure breaks
- Activity holidays including organised formal activities, as well as informal activities such as walking, cycling, horse riding and fishing
- Special interest breaks especially wildlife, heritage & culture, geology, food /drink, art /craft and conservation
- Short breaks for business and management training / team building

Visitor Attitude: Independent minded

- Shun over-commercialised tourist honey pots
- Look for places that allow them to be themselves, that enrich and challenge them
- Like to meet people and understand local culture
- Appreciate honesty and value authentic experiences

Secondary Target Market Segments (International):

Although small, the main source markets from website statistics are:
USA, Germany and the Netherlands

²⁰ Brecon Beacons National Park Management Plan 2010-2015 (draft version 2, June 2009)

²¹ Segmentation analysis by Corporate Edge - in developing the "Breathing Spaces" brand model for the Association of National Park Authorities (per An Exploration of the Possibilities for Segmenting the Brecon Beacons' Visitor Market by The Tourism Company, Jan 2008)

- USA - Seniors, Boomers
- Germany – Dinks, Empty Nesters
- The Netherlands – Empty Nesters

Current Visitor Profile

On-line research²² amongst Brecon Beacons businesses suggested the following profile of current visitors to the Brecon Beacons:

- **Age, Party Size, and Period of Visit:**
Most visitors were thought to be **middle-aged** (36-55), travelling as a **couple** or with a friend on **day trips** or staying around **1-3 nights** in the **April-September** period.
- **Day visitors:**
Unsurprisingly, respondents thought that most day visitors came from **Cardiff and South Wales**, followed by **Bristol and the Southwest**; then from the rest of Wales, followed by Birmingham and the Midlands.
- **Staying visitors:** The largest number of staying visitors were believed to come from **London and the Southeast**, followed by **Bristol and the Southwest**; then from Oxford, Swindon and the Cotswolds (i.e. **M4 corridor**), followed by Birmingham and the Midlands.

This has significant implications for marketing the area to attract higher-spending staying visitors from London and the Southeast and the M4 corridor.

It also emphasises the need to nurture the local day visitor market from Cardiff and South Wales.

- **Frequency of Visit**
There was a fair balance between **first-time visitors and those who had visited previously**. Around half of visitors who returned on a staying visit were thought to have visited the area before – on day trips, staying visits or a school trip.

This indicates the importance of the impact and impression made on visitors during their first visit, which currently appears to be quite positive and influences people's decision to return, even if that may be years later.

Reasons for Travel

“Soft adventure”, particularly **hiking, rambling and relaxing in a scenic environment**, were considered by respondents to be the main reasons for visiting the Brecon Beacons; while **cultural activities** and interests were seen to be amongst the lowest motivators for travel to the area. This was considered equally true for both staying and day visitors, although a slightly higher priority was given to attending festivals amongst day visitors.

²² Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

4.7 Competitors

Snowdonia and the **Lake District** were considered by respondents to be the most significant competitors for potential visitors to the Brecon Beacons. This is not surprising, given these national parks' relative proximity to most of the markets identified above, their "similar but different" mountainous topography, dramatic scenery and relaxing, rejuvenating, refreshing impact on the visitor.

Nevertheless, for those markets identified as offering Brecon Beacons' largest visitor flows – Cardiff and South Wales, London and the Southeast, Bristol and the Southwest, as well as, to a lesser extent, Oxford, Swindon and the Cotswolds and Birmingham and the Midlands - the Brecon Beacons has a significant competitive advantage in its proximity to these markets. The Brecon Beacons may score lower in terms of scenic drama; but its competitive advantage appears to be emerging as a **scenic environment that offers a relaxing, rejuvenating, peaceful experience and soft adventure closer to home** for most of these markets.

4.8 Product Gaps

The current tourism product offering in the Brecon Beacons was assessed in light of current market demand and travel trends, in order to identify where improvements or new products might enable the Brecon Beacons to compete more effectively to attract visitors who might otherwise choose to go elsewhere.

While there are a handful of strong, quality establishments within the Brecon Beacons, there is less provision in such an iconically scenic area than might be expected - or warranted in terms of market potential - of good quality, characterful 3-4 star serviced accommodation (e.g. stylish small hotels) and "signature restaurants"/bistros/gastropubs serving high quality food made with fresh local ingredients.

There is, nevertheless, in addition to those few within the National Park boundaries, a considerable cluster of these types of establishment at the gateways to the National Park (e.g. in Abergavenny, Llandeilo, Hay-on-Wye etc.).

5. MARKETING STRATEGY - RECOMMENDATIONS

5.1 Marketing Objectives

Main Objective

The key marketing objective has been identified as:

- **To grow the total value of tourism to the Brecon Beacons area in a way that meets sustainability objectives**

This means ensuring that marketing is integrated with visitor management and other sustainable development work.

Tourism needs to grow during the peak periods but it is vitally important to increase tourism during shoulder months because, for many businesses, this can mean the difference between profitability and merely covering costs. It is important also to look at ways to increase the value of the visitor's stay.

Sustainability Aims

At first glance, the drive to increase the year-round value of tourism may look like an unquenchable appetite for growth and seem to pay little heed to environmental issues. However, as part of an overall sustainable development and management strategy, marketing has a key role to play.

This view is based on the following propositions:

- In order that visitors contribute to the socio-economic interests of **local communities**, businesses need to be financially healthy and the sector needs to be growing in a sustainable way.
- In order to attract those people to visit the area who will enjoy its special qualities and therefore be motivated to **protect the environment**, marketing is vital.
- By using marketing to increase the value of tourism rather than concentrating on volume, the area has the opportunity to derive a larger **economic benefit** per unit of environmental impact whether this be local landscape erosion or global pollution.

This marketing strategy therefore aims to support the Brecon Beacons National Park Sustainable Tourism Strategy and to be mindful of the National Park's core function of protecting the landscape, while at the same time providing the basis for attracting visitors, whose spending will benefit local businesses and so support local communities within the wider Brecon Beacons area.

Sustainability is a significant part of the Brecon Beacons brand. It is important that marketing does not damage the perception of the area as a clean, green, environmentally

sensitive destination, but at the same time these are not values to be sanctimonious about.

Exactly how the brand can express these concepts in a positive market-conscious manner is part of the brand development process; but it is a matter of ensuring, firstly, that no contrary messages are communicated and, secondly, that best advantage is taken of opportunities to celebrate the green and community credentials of the area as well as stimulating economic growth.

Marketing communications should therefore specifically seek opportunities to highlight the Brecon Beacons' sense of place, locally distinctive food and culture, specifically green products such as GTBS members and wildlife experiences, low impact recreation, links to information on use of public transport, visitor payback, etc. The concept is one in which the destination is caring for the environment and communities just as much as it is caring for the visitor.

It is proposed that a workshop exploring ways in which sustainable values can be incorporated into destination marketing is developed as an early part of the Strategy Coordinator's role – partly as a briefing for that role but also as means of developing the Brecon Beacons brand.

5.2 The Opportunity

Based on the on-line research described above²³ and a stakeholder workshop in Brecon²⁴, and taking current travel trends, market potential, and budget limitations into account, the Brecon Beacons' greatest opportunity appears to lie largely in UK niche segments, who fall within all life stages of Visit Wales's "independent explorer" segment. Subject to testing the Brecon Beacons' brand hypothesis, which is articulated below, the Brecon Beacons' best prospects therefore appear to be as follows:

Travel Motivation

The motivation for travel amongst people, who offer an opportunity for the Brecon Beacons to attract, can be broadly characterised as follows:

- **Activity enthusiasts** – covering the range from "soft activists", such as weekend strollers, to "committed adventurers", such as hardcore hikers, with more emphasis on the former "softer activists".
- People who are looking for a **refreshing, but at the same time invigorating, experience**, which may involve just relaxing in a scenic environment, or it may take the form of participation in outdoor activities.
- People who are looking for interesting, challenging, or just different, **experiences that are available in short bursts**, which can punctuate their frenetic daily lives and send them home refreshed.

²³ Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

²⁴ Workshop held during Brecon Beacons Tourism in Action Conference on 03 March 2010, Theatr Brycheiniog, Brecon

- People who are increasingly seeking **cultural authenticity** – whether in relationships with people they meet, in history, landscape and architecture or local traditions, legends and cuisine.

These trends are particularly evident amongst younger people who are looking for a refreshing short break (e.g. DINKS – double-income no-kids, SINKS- single-income no-kids), older people who are seeking a relaxing break (empty-nesters), and families who are looking for an active, modestly energetic outdoor experience – both in the UK and, to a lesser extent, amongst international visitors.

More specifically, the predominant motivation for travel to the Brecon Beacons appears to be:

- **Hiking/rambling in a scenic environment.** This appeals to people who are seeking an invigorating outdoor experience, but in a “gentler” environment than that of more rugged mountain terrain, such as Snowdonia, with its more extreme weather, which demands greater mountain skills.
- People who want a **relaxing break in a scenic environment.** But there are many competitors for this type of break - from Pembrokeshire to Cornwall and many other places. Therefore the specific appeal (brand image) of the Brecon Beacons and its proximity are particularly significant for this market.
- People wanting to pursue **specific hobby activities** such as mountain biking, caving, or have a go at an adventure activity for the first time – particularly families and youth groups.
- **Field studies** groups from educational institutions.
- High profile **events**, such as the Brecon Jazz Festival, Hay-on-Wye Festival, Green Man Festival, Crickhowell Walking Festival etc., which clearly bring a large number of visitors into the area.
- There is an opportunity to develop a programme of **smaller more local, “sub-festival” events** aimed at attracting people outside the main season. This should include mounting events that reflect the area’s character and **sense of place**. By being locally distinctive, they would provide a unique reason to visit.
- There may also be an opportunity to attract appropriate nationally **mobile events**, such as mountain biking and orienteering championships etc.
- Significantly, while **cultural activities** and interests were seen to be amongst the lowest motivators for travel to the area amongst respondents to the on-line stakeholder survey, the area is not as devoid of places of cultural interest as this might suggest – whether they be places of historical interest, architectural and archaeological sites, or merely places associated with local legends and significant historical figures.

The Brecon Beacons’ indigenous cultural attractions (i.e. other than festivals etc.) are still likely to play second fiddle to its natural appeal; but there is nevertheless an

opportunity to highlight items of cultural interest, in order to provide more texture to the area, particularly for older short-breakers (“independent explorers” 36-55+). By adding another dimension, and therefore greater appeal, to the Brecon Beacons’ offer, this could help in attracting more visitors outside the main season as well as extend their length of stay in the area²⁵.

5.3 Market Segmentation

Target Segments

A segmentation approach, based on the Visit Wales “independent explorer” model, complemented by the National Park’s own proposed marketing segmentation²⁶ and segments identified in the Brecon Beacons Tourism Marketing Plan, with some modifications, is proposed as the most appropriate for the Brecon Beacons.

This also takes into account responses to the on-line survey of Brecon Beacons stakeholders²⁷ and an analysis of how the Brecon Beacons can deliver against certain current market trends that favour the Brecon Beacons – most particularly a desire for authenticity, emotional recharge, relaxation and activity, as well as space, and a sense of freedom and fresh air in a natural environment, as an antidote to the frenetic pace of life in congested urban environments, where the majority of travellers live.

Segments have been identified according to their growth potential. Segments that need to be nurtured and maintained, but which have less volume growth potential, have also been identified, albeit with a lower priority for marketing investment.

The following market segments appear to offer the best prospects for the Brecon Beacons.

These have been prioritised according to the following criteria:

- Growth potential
- Size
- Spend
- Propensity to travel outside the main season
- Match between Brecon Beacons’ product offer and visitors’ motivation
- Sustainable behaviour

This segmentation hierarchy should determine the priority for marketing investment.

²⁵ The potential for extending visitors’ length of stay in the Brecon Beacons by giving a higher profile to the area’s cultural attractions was also highlighted in a 2007 report – *Developing the Brecon Beacons’ Sense of Place*, by Angharad Wynne Marketing and Communications (July 26 2007): “The average number of nights spent in the region overall was 4, rising to nearly 6 in Brecon town. An average 2 nights was spent elsewhere in Wales. This pinpoints the role the Park has in being an ambassador for both the Park and the rest of Wales, while more showcasing of the depth of cultural activity and attraction available within the park area could help to lengthen the average stay.”

²⁶ Brecon Beacons National Park Management Plan 2010-2015 (draft version 2, June 2009)

²⁷ Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

Priority 1 (Greatest growth potential)

The greatest potential to grow tourism to the Brecon Beacons lies in attracting staying visitors living along the M4 corridor and in London and the South East for short breaks (1-3 nights, and occasionally longer), in the following segments:

- **“Freedom seekers”** / “personal independent explorers” (36-55), who want a short escape from their frenetic metropolitan life in a tranquil, scenic natural environment, with good food and comfortable/stylish accommodation. They may also be interested in the opportunity to participate in a range of other outdoor activities, such as horse-riding, kayaking etc., but this is not the sole or primary purpose of their visit.

There is also an opportunity to appeal to the considerable number of people who spent some of their youth on a field trip or family holiday in the Brecon Beacons to return with their partner and/or family.

- **“Outdoor activists”** / “active independent explorers”, particularly **hikers**, followed by cyclists, with an emphasis on a younger age group (20-35) – groups of friends and couples (DINKS = double income/no kids, and SINKS = single income/no kids)
- **Active seniors/”empty-nesters”** (55+) – couples with no children/post family seeking a relaxing quality break in a scenic environment, with a cultural interest.

The longer-staying family market, from a wider area, is also important to nurture and develop, for the following reasons:

- **Families** – camping, caravanning, and self-catering for 1-2 weeks. Existing market research tends to suggest that families are not a major market, particularly amongst staying visitors. This may be due to the relatively small number of family attractions within the immediate area, particularly indoors, making it a difficult area to entertain children in the event of bad weather. It may also reflect an over-reliance on previous qualitative research, which, as it is not designed to deliver quantitative analysis, may have inadvertently underestimated current business (e.g. where one response from a holiday park operator with 100 caravans x 4 beds might have the same status as a response from a B & B owner with 3 beds).

However, this market is particularly strong in terms of the main summer season and is especially important for caravan, camping, and self-catering providers. Family-friendly products are increasing, with recent developments such as the Brynich Play Barn and Cantref Adventure Farm, and the long-established Dan-yr-Ogof Caves. There is also some evidence to suggest that this market now includes the additional holiday (spring and autumn) and involves extended breaks. The core markets are families with younger children, and the Brecon Beacons provides good opportunities for families to participate in a range of outdoor activities in a safe and, relatively, non-extreme environment with ease of access and value the key²⁸.

²⁸ Per Brecon Beacons National Park Management Plan 2010-2015 (draft version 2, June 2009)
[Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

The disproportionate contribution that families make during the main season to certain sectors, such as camping, caravanning, holiday parks, self-catering and visitor attractions is significant. Therefore, while percentage growth potential may be limited compared to other market segments, there appears to be considerable volume potential, particularly during the main season and at Easter and half-term periods. The recession and emerging evidence of a “staycation” trend, particularly amongst lower income families, point to the possibility of higher growth in this market over the next few years. So, whether this segment offers significant growth potential or may remain static, the volume of visitors in this segment, whose spend is important to other tourism businesses in addition to accommodation providers, such as attractions, restaurants and shops, makes it an important segment to maintain – especially when it is understood that these families could choose to go elsewhere. This segment therefore needs to be nurtured and maintained.

There is also potential to attract people with families who first experienced the Brecon Beacons in their youth on a field trip, educational group visit, or family holiday.

Priority 2 (Modest growth potential)

These segments offer modest growth potential, either because of their relatively limited overall size or because they may be approaching saturation levels.

- **Youth groups** (e.g. schools, youth organisations, clubs and societies)
The existing size of the market in the Brecon Beacons suggests further growth may still be possible but is unlikely to be massive.
- **Management and team-building**
The overall size of the market is not large and is currently shrinking as a result of the recession.

Priority 3 (Maintenance/low growth potential/limited opportunity to influence)

- **Other special interest** (e.g. conservation volunteers, geologists – Geopark)
These are quite specialised in their interest and reason for travel, and therefore comprise relatively small numbers.
- **Day visitors (general)** from Cardiff and South Wales, Bristol and the South West – couples, groups of friends, and families. Day visitors are an important source of revenue, particularly for attractions and cafes, restaurants etc., mainly during the main season. They can contribute particularly to cash flow for smaller businesses, as they have a greater propensity to visit throughout the year than staying visitors, even though their spend per head is quite low.
- **Day visitors (outdoor activists)** – people who are probably relatively regular visitors to the area for activities. Their passion for their sport/activity drives their destination decision, which is also influenced by proximity, and therefore less open to influence. They tend to spend little while in the area.

- **Fishing enthusiasts**
Fishing has a reputation as the most popular participative sporting activity in the UK after walking²⁹. However, the number who travel to participate in fishing is a small percentage of this total. Nevertheless many of those who do travel, tend to stay several days and spend on accommodation, food and drink.
- **Irish, German and Dutch** independent tourers offer the greatest international potential, by virtue of their propensity to tour independently - largely by car - and English language proficiency. But they are relatively expensive to reach.
- **Visiting friends and relatives** (VFR). Their trip is determined by the location of their friends/relatives. So there is limited opportunity to influence their decision to travel.

The relative potential of these segments in relation to each other is shown on the **Market Priority Matrix** below. This illustrates the relationship between each segment's:

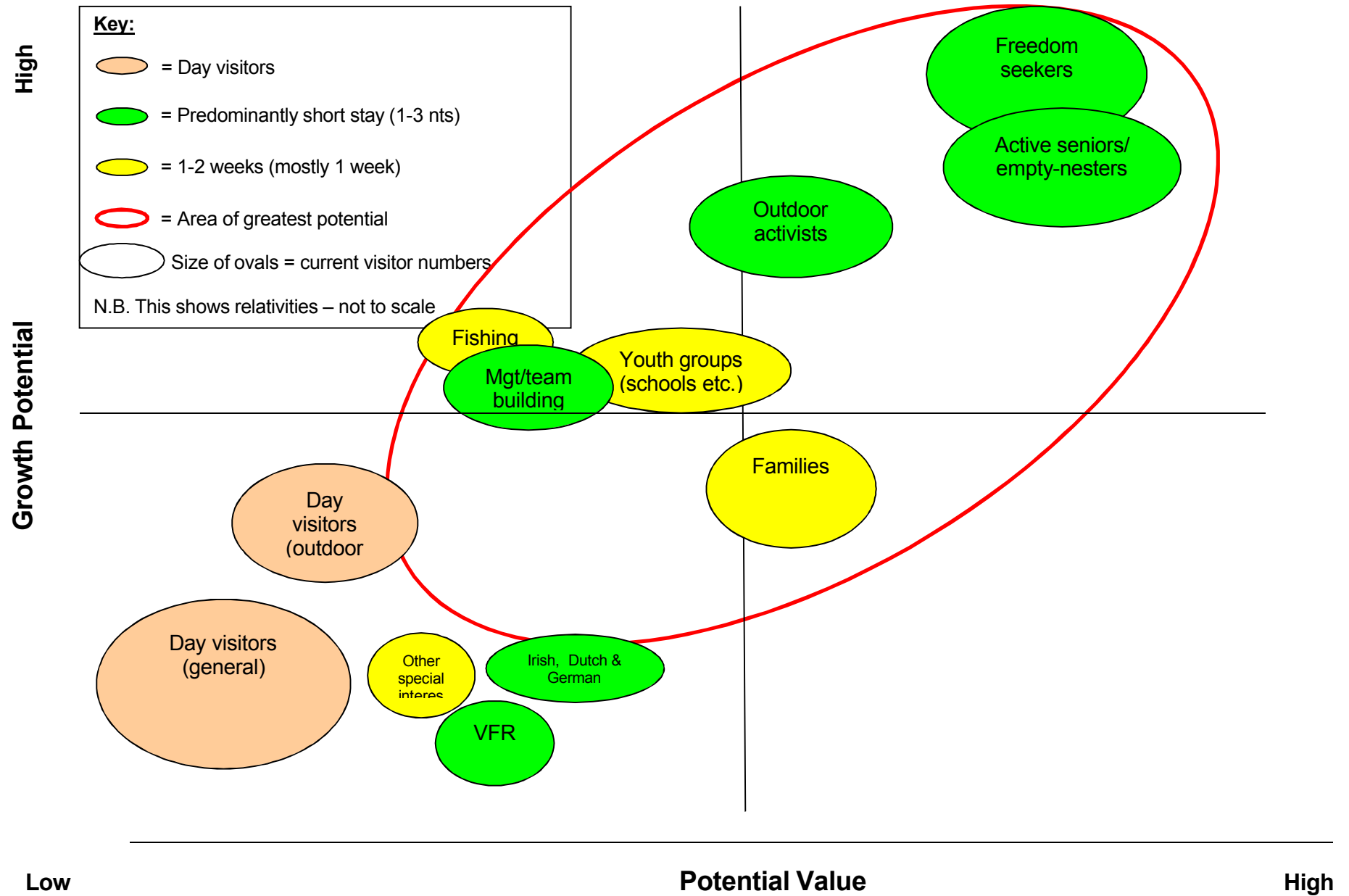
- potential value
- growth potential
- size, in terms of numbers of visitors

i.e.:

- The size of the overall shapes represent the overall size of the current market - in relative terms, but not to scale (i.e. the larger the oval, the larger the market, and vice versa).
- The higher a segment lies on the Growth Potential axis, the greater growth potential it offers.
- The further a segment lies to the right on the Potential Value axis, the more this segment is likely to spend in the Brecon Beacons.
- Segments are colour-coded according to day visitors, short-staying (1-3 nts) and longer-staying visitors (1-2 weeks).
- The red ring encircles the segments offering Brecon Beacons' greatest growth potential.

²⁹ <http://www.realbuzz.com/articles/top-10-most-popular-sports/25/7/10>

Market Priority Matrix



Segment Characteristics and Marketing Approach

The characteristics of these segments are further broken down on the **Segment Characteristics** table, below. This identifies each segment's main product/interest, area of residence, length of stay, etc. It also identifies the core marketing messages appropriate to each segment and the most cost-effective marketing channels recommended to reach them.

Segment	Motivation (Product/Interest/Activity)	Area of Residence	Length of Stay	Core Marketing Message	Marketing Channels
Priority 1: Greatest Growth Potential					
1. Freedom Seekers ("Personal explorers")	Relaxation/soft activities: scenic natural environment, with good food and comfortable /stylish accommodation	London & South East, M4 corridor, Bristol & South West	1-3 nts	Escape: change of pace from frenetic metropolitan life - chill out / tranquillity / activities (Also: "Return to the scene of your youth - field trip") + proximity	- Digital marketing - PR - Ads in niche websites & magazines
2. Active Seniors / Empty - Nesters	Relaxation/soft activities/culture: scenic, tranquil, uncongested, natural environment, with good food and stylish / comfortable accommodation	London & South East, M4 corridor, Bristol & South West	1-3 nts	Indulgence: Scenic, cultural/heritage, stylish & tranquil + gastronomy + proximity	- Digital marketing - PR
3. Outdoor Activists ("Active explorers")	Activity: hiking/cycling/kayaking etc. in uncrowded, scenic natural environment	London & South East, M4 corridor, Bristol & South West	1-3 nts	Freedom & space: adrenalin burst, then relaxation in tranquil natural environment + proximity	- Digital marketing - PR - Ads in niche websites & magazines - Niche tour ops
4. Families	Active family holiday	South Wales, London & South East, M4 corridor, Bristol & South West	1-2 weeks	Plenty to do: come rain or shine – in the wider area (i.e. well beyond the BBNP area)	- PR

Segment	Motivation (Product/Interest/Activity)	Area of Residence	Length of Stay	Core Marketing Message	Marketing Channels
Priority 2: Modest Growth Potential					
5. Youth Groups	Activities, Personal Development & Bonding; Field Studies: Communal accommodation	South Wales, London & South East, M4 corridor, Bristol & South West	1 week	Challenging but safe: gently challenging environment & skilled instructors + proximity	- Direct to group /educational organisers
6. Team Building	Team building & management skills development	South Wales, London & South East, M4 corridor, Bristol & South West	1-3 nts	Inspirational environment: sufficiently isolated environment, conducive to team interaction without distraction + proximity	- Direct to HR staff organisers - Via intermediaries, such as event/mgt operators

Segment	Motivation (Product/Interest/Activity)	Area of Residence	Length of Stay	Core Marketing Message	Marketing Channels
Priority 3: Low Growth Potential/Maintenance					
7. Irish, German & Dutch independent tourers	Scenic beauty /soft activities/culture: scenic natural environment + local heritage	Ireland, Netherlands, Germany	1-3 nts	Scenically beautiful & culturally interesting	- Website: distribution via VW & VB (otherwise v. costly)
8. Other special interest	Motivated by specific interest (e.g. geology – Geopark; conservation volunteers)	South Wales, London & South East, M4 corridor, Bristol & South West	1 week +	Appeal directly to relevant interest	- Niche websites & magazines - Group organisers (e.g. NPs, Nat Trust etc.)
9. Day Visitors (general)	Individual tourism attractions/National Park	South Wales	1 day	BB is your back garden	- PR
10. Day Visitors (outdoor)	Regular activity: in the nearest place that offers the right environment/facilities	South Wales, Bristol	1 day	Indulge your passion: in the closest place to your home	- PR
11. Fishing	Fishing	South Wales, London & South East, M4 corridor, Bristol & South West	1 week	Good fishing in scenic environment + proximity	- Niche websites & magazines - Fishing journalists Fishing operators
12. VFR	Friends & family	Global	Varies	N/A – immune to marketing messages	N/A

5.4 Image and Positioning

Image

The image of the Brecon Beacons is influenced primarily by the following factors:

- The iconic status of the **Brecon Beacons National Park**, which conveys an impression of a wild, beautiful, tranquil, and well-cared for scenic environment.
- The **surrounding area** within which the National Park sits (i.e. Mid Wales and the Valleys), which is also primarily rural.
- The opportunities for **outdoor recreation in a tranquil scenic environment**. This includes a range of activities on the energy-pumping to relaxation spectrum. But what they all have in common is the relatively tranquil scenic environment in which they take place and, for many people, the relative proximity to their homes.

*“Whether you are simply looking for somewhere to draw breath away from the city, an action-packed adventure playground or simply an antidote to the traditional bucket-and-spade summer break, the Brecon Beacons fit the bill. Leave behind the annual seaside squabble over a few feet of overcrowded sand and lace up the walking boots to roam the mountain moorlands and verdant valleys, Norman castles and neolithic stone circles, meandering rivers and traditional market towns that characterise this national park. For those who prefer their heart rates to rise a little higher, mountain biking, horse riding, climbing, caving, kayaking and gliding are just a few of the adrenalin-packed pursuits on offer among these 520-square miles of diverse Welsh landscape”.*³⁰

In defining the character of the Brecon Beacons, it is useful first to consider how these factors contribute towards the image of the Brecon Beacons:

Brecon Beacons National Park

Having the National Park as the core of the area is immensely valuable. As well as defining the area’s character for most people, the implications of a National Park - in terms of scenic landscape, relative remoteness, tranquillity, and conservation – are significant. The concept of a National Park exudes the values that drive many people to seek a temporary escape from their frenetic business lives in metropolitan areas to a fresh, wild, natural uncongested area of scenically beautiful open space that will help recharge their emotional batteries and send them back home refreshed, re-energised and, often, having reconnected on an emotional level with their partner. This can take the form of sheer relaxation in a quality hotel with good food, or it can involve participation in activities from gentle rambling to adrenalin-pumping adventure.

These motivating values of fresh air and open space have been recognised in previous image-related work:

³⁰ Daily Telegraph on-line, 28 July 2010:

<http://www.telegraph.co.uk/travel/destinations/europe/uk/7914039/Brecon-Beacons-Wales-the-perfect-break.html>

- The National Parks of Wales “**Breathe Easier**” branding. This flows from the UK National Parks’ “Breathing Spaces” branding.³¹
- A suggested positioning for the Brecon Beacons as a “**Breath of Fresh Air** (i.e. easy scenery and easy activities)”³², in the Regional Tourism Strategy Review. This was based on the National Parks of Wales “Breathe Easier” concept.

Mid Wales

The Brecon Beacons form a significant part of the area defined as Mid Wales. The Tourism Partnership Mid Wales (TPMW) has developed the idea of “balance” as a “core thought” in positioning Mid Wales.

While this does not particularly differentiate Mid Wales from the Brecon Beacons, it nevertheless conveys a sense of the emotional and spiritual benefit that both the Brecon Beacons and the surrounding area of Mid Wales offer.

This is consistent with the “real”, “human” and “magical” brand values of the overall Welsh national brand articulated by Visit Wales:³³

Mid Wales: Core thought

What is it that’s special about Mid Wales? Well yes, we’re blessed with some beautiful scenery, some big mountains and some fine coastlines. And yes, we’ve got a bit more space and freedom than the more populated and congested areas of Britain. And yes, we do our bit for the environment too - in fact we like to think we’re a bit pioneering in that field. And our people are pretty friendly too.

But, what’s really different about Mid Wales is our **healthy attitude to life**. What we call **balance**.

Whilst most of the rest of the world is running around chasing its tail, we have managed to retain a down-to-earth perspective on what’s important in life - and what isn’t. In many ways we’re a bit counter-intuitive in our thinking, a bit alternative if you like. We believe there’s more to life than just earning a pay packet and watching endless hours of Celebrity Big Brother.

Don’t get us wrong, we’re not a bunch of spaced-out hippies, we just value a sense of balance between our work lives, our family lives and not forgetting a bit of time for ourselves.

If we spoke in sound bites we’d probably call it a sense of wellbeing.

³¹ *National Parks: Britain’s Breathing Spaces*, Corporate Edge; and *Breathe Easier*, Brand Design Guidelines - National Parks Wales

³² Regional Tourism Strategy Review presentation by Blue Sail, Chepstow Racecourse (16 Jan 2008)

³³ Mid Wales Brand Guidelines

Activities, Scenery, and Tranquillity

The most cited reasons for travelling to the Brecon Beacons in the survey of Brecon Beacons businesses³⁴ and Brecon Beacons Tourism in Action conference workshop³⁵ were **hiking, rambling and relaxing in a scenic environment** - hiking/rambling (soft), landscape – scenic sightseeing and just relaxing/chilling out/escaping. These “gentler” activities were followed by more energetic activities - **cycling, other outdoor activities, canoeing, horse-riding and hiking (extreme)**.

Dramatic landscape, mountainous and peaceful were the words most associated with the Brecon Beacons, which were seen as offering a **relaxing, rejuvenating, and refreshing** experience.

This emphasis on the peaceful, relaxing and rejuvenating aspects of the Brecon Beacons clearly distances the area from more rugged and wild landscapes (e.g. such as Snowdonia and the Scottish Highlands), while still evoking the scenic drama of the area.

While not necessarily exclusively “soft” adventure, activities in the Brecon Beacons seemed to be perceived as less extreme, and the environment less challenging, than more mountainous areas such as Snowdonia. This, along with the Brecon Beacons proximity to its main markets (which was mentioned as a significant advantage), characterised the Brecon Beacons experience for many people.

The Brecon Beacons landscape was critical from two perspectives:

- **Active pursuits:** as somewhere for activists to climb, hike, cycle, kayak, ride etc.
- **Passive observation:** as somewhere to be observed and enjoyed from below, as a stimulating scenic backdrop for a relaxing break by less active “freedom seekers”.

And finally:

“The Brecon Beacons doesn’t have the over the top landscape bling of places like the Lake District. But it is still an extremely beautiful place, which keeps on rewarding you the more you get to know it.” (Jon Dixon, local resident and outdoor enthusiast)

Competitive Positioning

The Brecon Beacons’ competitive position was explored in the survey of Brecon Beacons businesses³⁶ and Brecon Beacons Tourism in Action Conference workshop³⁷.

Snowdonia and the **Lake District** were considered to be the most significant competitors for potential visitors to the Brecon Beacons. This is not surprising, given

³⁴ Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

³⁵ Workshop held during Brecon Beacons Tourism in Action Conference on 03 March 2010, Theatr Brycheiniog, Brecon

³⁶ See note 30

³⁷ See note 31

these national parks' relative proximity to most of the markets identified by respondents, their "similar but different" mountainous topography, dramatic scenery and relaxing, rejuvenating, refreshing impact on the visitor.

However, there appears to be a distinction between the "softer" activities and "gentler" landscapes of the Brecon Beacons compared to the more mountainous landscapes and harsher weather conditions of Snowdonia in particular. This is clearly the case amongst those who have visited the Brecon Beacons. But what is not clear is whether people who have never visited perceive the Brecon Beacons in the same light as Snowdonia – i.e. more rugged than they actually are. The question is then, would they be more likely to visit the Brecon Beacons if they realised the true "softer", "gentler" nature of the landscape and activities on offer?

Another question is: would they be more likely to visit if they knew the extent of indigenous (i.e. as opposed to temporary events and festivals) sites of **cultural** interest?

Crucially, for those markets identified as offering Brecon Beacons' largest visitor flows – Cardiff and South Wales, London and the Southeast, Bristol and the Southwest, as well as, to a lesser extent, Oxford, Swindon and the Cotswolds and Birmingham and the Midlands - the Brecon Beacons has a significant competitive advantage in its **proximity** to these markets.

The Brecon Beacons may score lower in terms of scenic drama; but its competitive advantage appears to be emerging as a scenic environment that offers a relaxing, rejuvenating, peaceful experience and softer adventure closer to home for most of these markets.

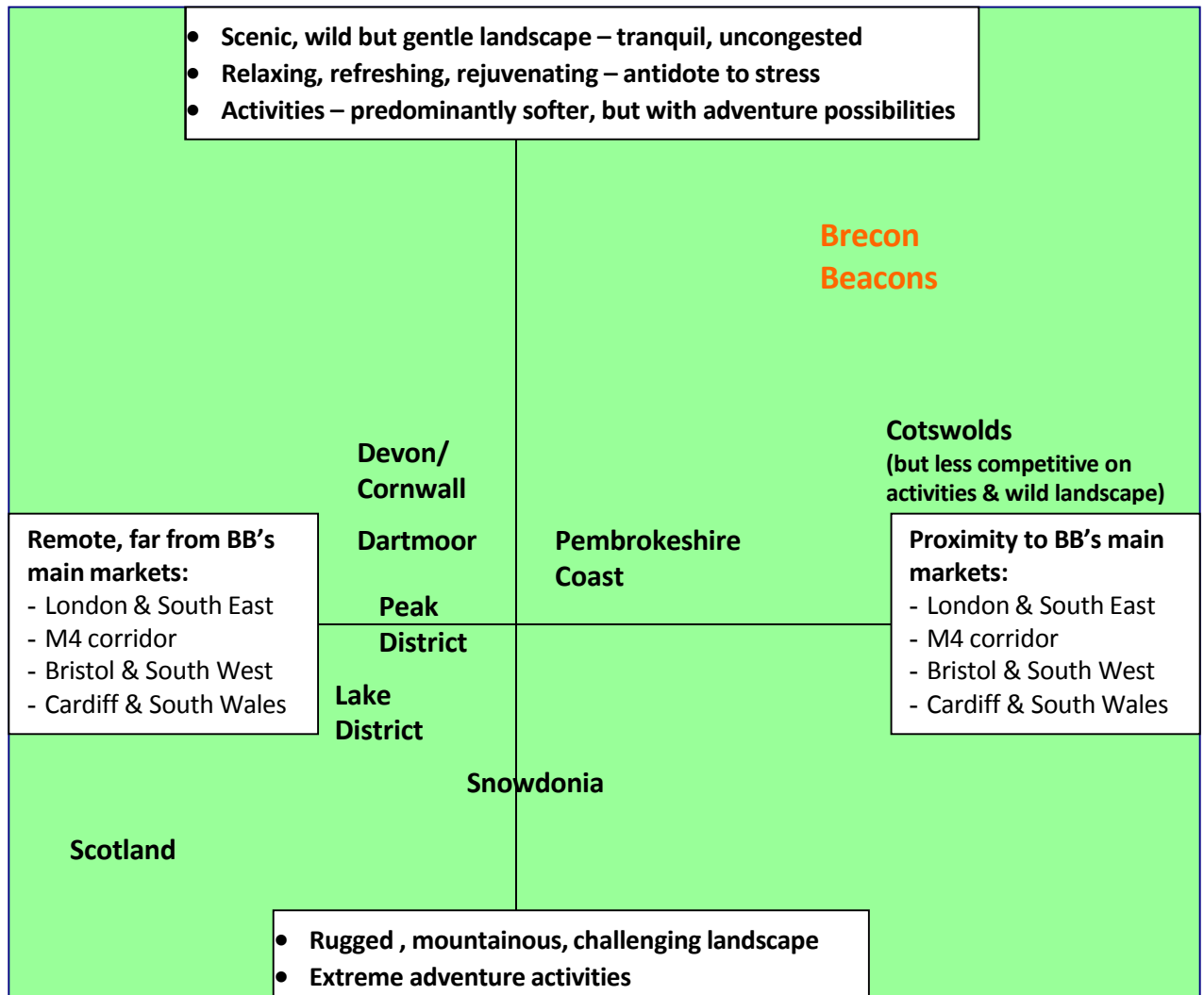
Only the Cotswolds is closer to the Brecon Beacons' main markets; but the Cotswolds experience is much lower on wild landscape, tranquility, lack of congestion, and activities, particularly outdoor and adventure activities.

In fact, the Competitive Position table below shows that the Brecon Beacons occupies an enviable position, with considerable differentiation between itself and its main competitors for "scenic and wild but gentle landscape", once its proximity to its main markets is taken into account.

Therefore the Brecon Beacons' core competitive advantages are:

- **Scenic, wild but gentle landscape – tranquil, uncongested**
- **Relaxing, refreshing, rejuvenating – antidote to stress**
- **Activities – predominantly softer, but with adventure possibilities**
- **Proximity to its main markets** (London & South East, M4 corridor, Bristol & South West, Cardiff & South Wales, followed by Birmingham and the Midlands)

Brecon Beacons' Competitive Position



Possible positioning statements for key segments:

(N.B. These are not consumer-facing slogans; they are basic positioning statements to guide the development of marketing messages aimed at these segments)

- “*Your nearest outdoor playground*”
- for outdoor activists
- “*Your nearest scenic, tranquil, rural escape*”
- for freedom seekers
- “*The scenic ‘alternative’ festival destination – for the cognoscenti*”
- for discerning festival-goers

5.5 Marketing Infrastructure Development

It is important to develop a marketing infrastructure to guide the Brecon Beacons' promotional activities in the right direction. This is fundamental to enable the Brecon Beacons' best prospects to be identified and targeted with the most appropriate messages through the most cost-effective channels.

- **Visitor profile research:** Undertake research amongst visitors to identify the profile of current visitors to the Brecon Beacons:
 - in **demographic** terms (i.e. age, gender, income, area of residence, life stage, educational level)
 - **travel behaviour** (e.g. period of visit, length of stay, size and nature of party – i.e. relationships between travelling companions)
 - and, most importantly, their **attitudes and values** that underpin their travel motivation (e.g. reason for travel, likes/dislikes/satisfaction levels)

This can be done relatively cost-effectively through the inclusion of questions in on-going BBT and Visit Wales research amongst previous visitors to establish: visitor profile, key motivation, travel behaviour, BB competitor destinations considered, visitor satisfaction & dislikes/obstacles (Caveat: In order to maximise the number of responses, this should not make the questionnaire over-long or complex; otherwise it will jeopardise recipients' willingness to respond).

- **Family segment-specific research:** Undertake research to establish the profile of the current family market for the Brecon Beacons (e.g. pre-school, school age/teens) and product/experience preferences by each family segment.

This can be done relatively cost-effectively by talking to major operators of tourism products in the area who cater for families (e.g. accommodation: camping and holiday park sites, self-catering, bunkhouses; visitor attractions; activity operators).

- **Brand perception research:** Undertake qualitative consumer perception research to identify visitors' and, ideally also, non-visitors' perceptions of, and emotional associations with, the Brecon Beacons and, in particular, what other destinations they see as Brecon Beacons' closest competitors for their holiday/short break, how they perceive the differences between them, and any barriers to travel.

As with the visitor research proposed above, this can be done relatively cost-effectively through:

- The inclusion of questions in on-going research by BBT amongst previous visitors to establish: people's perceptions of BB - positive, negative - & emotional associations/ feelings generated by the Brecon Beacons (Caveat: In order to maximise the number of responses, this should not make the questionnaire over-long or complex; otherwise it will jeopardise recipients' willingness to respond).
- The inclusion of questions in Visit Wales research surveys to elicit the same info on a broader comparative basis in relation to the rest of Wales.

N.B. These relatively cost-effective survey methods have been proposed in light of likely limited budgets, existing understanding of customer behaviour, results from the recent on-line research amongst Brecon Beacons businesses, and local knowledge amongst current business in the area³⁸. More detailed consumer research (e.g. focus groups amongst previous visitors and non-visitors in target segments) is not believed to be warranted, in light of the extent of existing knowledge amongst tourism operators, BBNPA and Powys TIC staff, and TPMW. It is not felt that any additional insights that might be gained from such research would justify the necessary investment. Rather, an astute approach to identifying knowledge gaps and addressing them on an on-going basis through on-line research and social media monitoring, BBT research amongst previous visitors, and consultation with Brecon Beacons tourism operators, plus any other information that can be gleaned from organisations such as Tourism Partnership Mid Wales and Visit Wales, would provide a sufficiently clear picture of visitor perceptions, likes, dislikes, travel motivation, travel behaviour, emotional associations with - and attitudes towards - the Brecon Beacons and its nearest competitors, to guide Brecon Beacons' future marketing planning.

5.6 Marketing Communications

- **Brecon Beacons website:** Develop an inspirational website for the wider Brecon Beacons area. This should aim to become the “official” main source of visitor information on everything to do with tourism experiences and facilities in the Brecon Beacons area.

It should be theme-based (See *Themed Marketing* below) and contain comprehensive information on what to see, do, where to go, getting there, getting around, where to eat, stay etc.

It should be visually inspirational, engaging, easy and quick to navigate. It should offer the potential for user-generated content. It should include links to other interesting sites related to the area (e.g. BBNPA) and, very importantly, to commercial tourism products for visitors to book. It should also be linked to the Visit Wales www.visitWales.com website, and provide the core data for the Brecon Beacons on www.visitWales.com, as this offers a significant opportunity to drive traffic from the national website to the Brecon Beacons level. This data should be searchable on an interactive basis, and ideally based on the NTOP system³⁹.

While both the BBNPA (<http://www.breconbeacons.org/visit-us/things-to-do-and-see>) and BBT websites (<http://www.breconbeaconstourism.co.uk>) provide a range of good information, the ideal “official” comprehensive Brecon Beacons destination website would selectively merge the content of these websites, add other items, be structured on a themed basis, include the potential for posting user-generated content (incl. comments, photos and videos (e.g. link to Flickr, YouTube etc.)), and be searchable on an interactive basis.

³⁸ Yellow Railroad on-line survey of Brecon Beacons businesses (March 2010)

³⁹ N.B. See Caveat regarding NTOP's future in chapter 4.2 *PESTEL Analysis -Technological* above
[Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

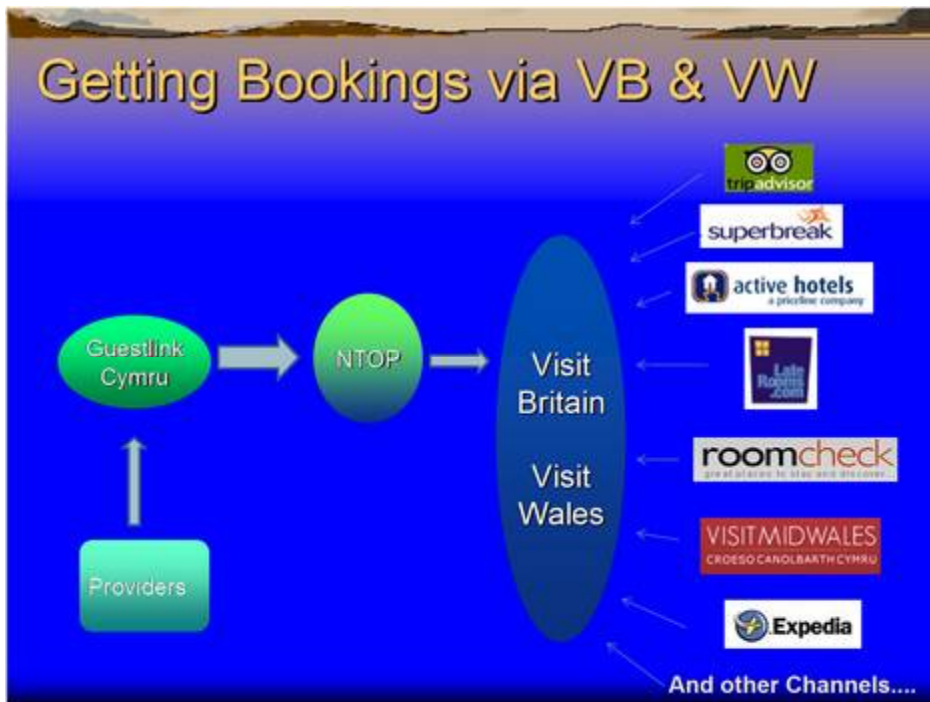
All such sites operated by Brecon Beacons area partners should be assessed with a view to identifying the most suitable solution: i.e. whether to create an entirely new website (costly and time-hungry) or to adapt an existing site to become comprehensive and accepted as the “official” website for ‘all things tourism’ within the Brecon Beacons (likely to be more practical, easier to implement, and less expensive - as long as it can be made sufficiently comprehensive and agreement can be reached on content, structure and navigation).

- **Themed marketing:** Develop a theme-based approach to marketing particularly in a comprehensive visitor-oriented website for the area, as well as through PR and digital channels, based on:
 - Motivational themes - reason for visit and Brecon Beacons’ main appeals: e.g. outdoor activities, freedom and fresh air, relaxation, family fun etc.
 - Niche activities: e.g. hiking, cycling, kayaking, horse-riding, fishing.
 - Complementary themes - elements that complement the main reason for visiting the Brecon Beacons and contribute towards the tapestry that is the Brecon Beacons: e.g. culture, history, heritage.
 - “Reassurance” themes - important ingredients, without which a visit might not be considered, but which are unlikely to be prime motivators of the visit: e.g. food, stylish accommodation, interesting/little-known/quirky facts and legends related to the Brecon Beacons.

- **Accommodation database:** Key priorities for an effective database are to:
 - Be fully searchable on a visitor-intuitive basis, using visitor-relevant and map-based search criteria.
 - Offer bookability, either direct and/or via intermediate booking engines (e.g. Laterooms.com, Expedia, Trip Advisor etc.).
 - Optimise distribution to targeted audiences via major global distribution systems (e.g. Google, Bing, Expedia, Trip Advisor etc.)

Currently the Web4u system offers a good and simple method for tourism businesses to achieve a basic web presence, within a community network, which provides a wealth of local information; whereas those businesses linked via Guestlink through NTOP to Visit Wales and Visit Britain (i.e. accommodation operators officially graded by Visit Wales and accredited activity operators) are able to take advantage of the wider distribution negotiated by Visit Britain with global distribution systems, such as Google, Bing, Expedia, Trip Advisor etc. The opportunity to enable businesses to enter their data once only and take advantage of the benefits offered by both Web4U and NTOP systems is currently being investigated. This would offer the best of both worlds, if commercially feasible.

The diagram below illustrates the route via Guestlink/NTOP/Visit Wales/Visit Britain to global distribution systems, and thereby ultimately to a vast number of potential customers:



Slide courtesy of Mid Wales Tourism, with amendments.

- **Digital marketing strategy:** Digital marketing offers a major cost-effective opportunity to reach large numbers of potential visitors year-round. The cost of this lies more in the expertise and time (i.e. human resource) required to ensure that content is always fresh, lively, targeted, stimulating and up-to-date, than in space/distribution costs. This requires a person/agency dedicated to maximising the opportunities for BB on an on-going basis in the following areas:
 - content development
 - social media (e.g. Facebook, Twitter, TripAdvisor etc.)
 - user-generated content
 - search engine optimisation

N.B. It cannot be stressed enough that, once a digital marketing strategy has been developed, this is a **time/person cost**. It is not a one-off investment in development. The benefits of reaching potential visitors with targeted messages on a year-round basis at low distribution cost will only be realisable if constant attention is paid to making the most of these opportunities for BB. Otherwise there is a serious risk that BB will not only miss business opportunities, but it will look inefficient and out-of-date. This would not only ensure BB failed to achieve its potential; it would also reflect poorly on the image of the destination.

The slide below illustrates a range of digital distribution opportunities. The Brecon Beacons should aim to achieve good coverage of key target markets in the “owned” and “earned” media spaces.

Distribution | the 3D media landscape



Slide courtesy of Visit Wales

- E-CRM (electronic customer relationship marketing):** Before the advent of social media, it was always easier and more cost-effective to retain and appeal to existing customers or “warm prospects” than to find new ones. They still offer a fertile and cost-effective audience to reach, particularly via CRM. CRM depends on building a well-profiled database, which identifies people (usually previous visitors and enquirers) by demographic profile, area of residence, and interests. It can be as specific as necessary; but the level of detail requested needs to be balanced with customer tolerance levels when soliciting the profiling information. Identifying people’s interests and obtaining their permission to contact them (e.g. via e-newsletter/e-mailshot on subjects that interest them), as well as their e-mail contact, are the most important elements. This will enable prospects to be e-mailed with information and relatively personalised offers related to their specific area of interest (e.g. cultural events, hiking festival, new restaurants or hotel offers, special food weeks, art shows etc.). The more directly these e-communications are targeted to each person’s particular interests, the more chance there is of inspiring another visit – marketing to “mass markets of one”. This can be particularly effective in stimulating visits outside the main season – e.g. to local events etc.

Currently there appears to be no database at a Brecon Beacons (as opposed to individual business) level, through which a regular e-newsletter on activities and events in the area could be sent. The BBNPA has some names, but they appear not to be profiled according to visitor interest, which is important.

Consideration needs to be given as to how such a communal database could be developed and used for the benefit of the entire area (e.g. Would individual businesses be prepared to collect and pool information on their visitors for a neutral organisation such as BBT to use on a confidential basis?). N.B. In developing any new database, it will be important to understand and comply with data protection legislation⁴⁰, particularly where different organisations might wish to pool their data

⁴⁰ E.g. Data Protection Act 1998

or entrust e-communications, such as a Brecon Beacons newsletter, to an independent intermediary such as BBT.

- **Media/public relations (PR):** The Brecon Beacons has received considerable coverage in traditional media (e.g. newspapers in particular) in 2010. PR is a highly valuable form of marketing. As it is written by independent journalists and not paid for, it is credible and persuasive. However, a destination such as the Brecon Beacons can optimise such coverage by employing the services of a professional PR person or agency, who can identify a wide range of targeted traditional and on-line media outlets for tourism-related stories, who knows how to write stories that appeal to readers of each specific media outlet, who understands what kind of articles have the best chance of being published in which media, and who has good contacts with key journalist and travel writers. This expertise is important in both placing stories and in attracting travel writers to visit the destination.

This person/agency would also be expected to generate and manage travel writers' familiarisation trips to the Brecon Beacons, ensuring the most appropriate itinerary was prepared for each travel writer, according to the market for whom they were writing.

This requires the appointment of a PR person/agency to generate stories and push them out through traditional & on-line media, build relationships with journalists and respected bloggers on behalf of the Brecon Beacons, and encourage travel writers to visit the Brecon Beacons.

N.B. This person/agency would need to liaise very closely with the BBNPA press office to ensure that all new activity added value to what BBNPA already does, complemented and did not duplicate BBNPA's press activity or compete with BBNPA stories for media space. All such media activity must be additional to that undertaken by BBNPA, and it must extend the coverage and exposure in the Brecon Beacons' target visitor markets.

- **Niche advertising** (e.g. advertising in walking magazines, on-line sites etc.). This is probably the most expensive and ephemeral marketing activity recommended. Therefore, while worthwhile if sufficient weight can be achieved through adequate frequency and, more appropriately, if editorial coverage can be negotiated, it is only recommended as one of the last marketing activities that should be considered in light of the cost of advertising and limited budget likely to be available. It should therefore only be considered after other, more cost-effective activities have been undertaken to a satisfactory level – and then only in highly targeted niche media.
- **Guerrilla/opportunistic marketing:** Keep an eye out for appropriate cost-effective opportunities to target key audiences, using innovative methods and unorthodox channels, such as the 2010 photography exhibition at Canary Wharf. This should be part of the brief to the PR agency/person to identify suitable opportunities. (N.B. This will be largely opportunity-driven and therefore reactive.)
- Develop an **on-line photo library** for the Brecon Beacons as a resource for travel journalists, local tourism operators and hotels et al, and external tour operators to

use in their publications, blogs, brochures and websites. These should be grouped according to Brecon Beacons' marketing themes. Ideally this should also feed into Visit Wales's photo library.

- All marketing communications, whether undertaken by local authorities, BBT, BBNPA, or local businesses, should convey the **spirit of the Brecon Beacons brand** (once it has been clarified through the perception research proposed above). This means reflecting the area's core characteristics in terms of tone of voice and choice of imagery to convey the area's special nature that differentiates it from everywhere else.

Similarly, every effort must be made to ensure that this spirit of the Brecon Beacons is conveyed in all other, extra-regional marketing communications that feature the Brecon Beacons (e.g. Visit Wales et al).

- **Tourist Information Centres (TICs):** Both the BBNPA information centres and the local authority TICs perform a valuable role in dispensing useful information to visitors to help them make the most of their visit.

They can also play a significant part in either retaining visitors longer in the area or in encouraging them to return, through the quality of information and ideas they provide. And, through the provision of this information and knowledgeable advice, they can also contribute towards a higher spend in the area by visitors.

The critical issues for TICs in relation to this marketing strategy are, therefore:

- TICs should be strategically located where they can serve the largest number of visitors who would benefit from using their services.
 - TIC staff training should ensure that they are fully equipped to answer questions on the wider area, as well as the Brecon Beacons National Park.
 - TIC staff should be brought up to speed with the decisions that will be made about implementing this marketing plan, so that they are fully integrated into the marketing and visitor-servicing process. This should help them understand the rationale behind certain decisions as well as identify how they can serve visitors better.
 - Invite one representative from the TIC Coordination Group to become a member of the BBMCG to contribute towards the annual planning process. N.B. This invitation should be subject to the effective operation of this embryonic group, which aims to bring BBNPA information centre staff and local authority TIC staff closer together.
- **Brecon Beacons area brand:** Develop a Brecon Beacons area brand, which incorporates all key sectors (e.g. tourism, farming, forestry, natural produce, culture). Leveraging the Brecon Beacons brand essence to strengthen market impact and enhance consumer recognition of all products associated with the

Brecon Beacons should help raise the area's profile and, over the long-term, contribute towards increased business in all sectors.

Seek opportunities to work with locally iconic and compatible **non-tourism products**, and particularly food and natural produce such as Brecon Carreg water, Penderyn whisky, Breconshire Brewery, Black Mountain Smokery, Welsh Venison Centre, Blaenafon Cheddar Company, and various artisan products etc.

- **Dark Sky Status⁴¹**: BBNPA could, if successful, enhance awareness and the appeal of the area by bidding for International Dark Sky status. Currently Galloway Forest Park in Scotland is the only International Dark Sky Park in the UK and only the fourth in the world to have been awarded this status. "Dark Sky" aims are to reduce light pollution, conserve energy, look after the natural environment and spread awareness of the benefits of these measures. As well as contributing towards BBNPA's environmental objectives, this would appeal to niche markets such as stargazers, astronomers and photographers. It would also reinforce the area's natural brand values and commitment to environmental sustainability.

5.7 **Product Development**

- While there are a handful of strong, quality establishments within the Brecon Beacons, improvements in the following areas would strengthen the Brecon Beacons' ability to attract people from some of the segments identified as offering the greatest growth potential, particularly sort-breakers:
 - Good quality, characterful 3-4 star serviced **accommodation** (e.g. stylish small hotels).
 - **"Signature restaurants"/bistros/gastropubs** serving high quality food made with fresh local ingredients.

However, the current investment climate is unfortunately not conducive to the development of new businesses of this nature, not just in terms of the difficulty in obtaining credit finance, but also in light of an anticipated weakening of demand for travel in general and additional domestic short breaks in particular.

Such new investment is likely to be dependent on an end to the recession and a return to growth and, possibly, investment incentives at a national level. However, demonstration of a sustained commitment to marketing the area can also encourage investor confidence, once market growth projections have been taken into account.

- Encourage businesses in the Brecon Beacons to develop **tourism information and products that can be packaged** in a customer-friendly way. This involves three elements:

⁴¹ International Dark Sky Association website: www.darksky.org/mc/page.do?sitePageId=118976&orgId=idsa
[Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

- Firstly, this means encouraging businesses in the Brecon Beacons to **work together to provide elements of a package** for potential visitors – such as accommodation and activities. N.B. If businesses wish to avoid the relatively onerous bonding requirements of the European packaged travel regulations, these elements should be provided to visitors in the form of information, or as single products to tour operators, rather than as a coherent commercial package⁴² (e.g. commercial accommodation offer with links to activity operators provided by accommodation suppliers and vice versa by activity operators).
- Secondly, it is about businesses providing **tourism products for niche tour operators**⁴³, who can then develop a package selling travel to the Brecon Beacons. N.B. Niche tour operators are recommended, as they offer the best potential distribution in both the UK and overseas. Most domestic travellers don't use tour operators to book a general trip or weekend away, so a focus on specialist tour operators is recommended, as they tend to have a relatively loyal clientele and can offer a specific type of product (e.g. hiking) to a special interest niche market to whom the Brecon Beacons can appeal.
- Lastly, it is about encouraging businesses in the Brecon Beacons and beyond (i.e. on the periphery of the National Park) to provide **stimulating ideas** in their brochures, websites, and other marketing communications, in order to stimulate trips to the Brecon Beacons and give visitors more information on what there is to do and see in the area, rather than just presenting their accommodation on the assumption that people already have a wide knowledge of the area (which may often be quite limited). This might inspire more interest and encourage people to stay longer in the area if they focused on the opportunities available in the area, in addition to the assets of their properties (e.g. through brief descriptions and web links to other sites of interest).
- **Local “sub-festival” events:** Consider developing an annual programme of smaller events, which should ideally reflect the Brecon Beacons essence and sense of place (e.g. based around music, activities, natural environment, cultural and historical interest etc.), to complement the existing programme of large events such as Brecon Jazz Festival, Green Man Festival, Hay-on-Wye Festival, Crickhowell Walking Festival, Abergavenny Food Festival etc. These could be promoted via low cost channels, such as Facebook, e-newsletters/CRM (once a database had been developed) and PR.

⁴² Providing single products for tour operators, rather than two or more elements that might constitute a “package”, is generally preferable, because of the Package Travel, Package Holidays and Package Tours Regulations 1992, which impose relatively onerous legal and financial conditions on travel organisers/packagers, including provision of a bond as security to protect passengers in the event of insolvency etc. If only one element of the package (e.g. accommodation) is supplied by a local business, the external tour operator becomes the “organiser” and is subject to these regulations, not the local business. Many small business will find it preferable for the external tour operator to take the commercial risk as the organiser, rather than putting the package together themselves – thereby avoiding the onerous conditions and associated risk. See footnote #5 above

⁴³ E.g. specialist hiking and other tour operators such as Inntravel, www.responsibletravel.com et al.

- **Mobile events:** Identify nationally mobile events that might be attracted to the Brecon Beacons, especially those that reflect the Brecon Beacons' sense of place (e.g. mountain-biking, orienteering championships etc.)

5.8 Roles, Responsibilities and Partnerships

This chapter addresses who should undertake which elements of this strategy. In some cases legal and administrative issues will need to be clarified before certain roles can be assigned.

Partnership Working

Partnership working is the fundamental basis for success of this strategy. It is inconceivable that it would be either practical or desirable for any one organisation to undertake all the marketing activities recommended in this strategy to grow tourism to the Brecon Beacons.

Based on the broad definition of the Brecon Beacons area articulated above (4.1. *Definition of the Brecon Beacons*), this marketing strategy takes a holistic view of the area. This takes into account the considerable marketing activities of the BBNPA. But it also acknowledges the need to encompass a wider range of businesses and undertake a broader approach to marketing the destination than the BBNPA is able to do.

Nevertheless, it is assumed that, in light of its national and natural iconic status as the core of the Brecon Beacons area, and the considerable skills and experience of its staff, the BBNPA will remain a major force in the marketing of the re-defined Brecon Beacons area, within the limit of its permitted activities. It is also envisaged that the BBNPA will be a key player in implementing significant elements of this marketing strategy, along with BBT, Powys, Carmarthenshire and Monmouthshire councils, Mid Wales Tourism, Tourism Partnership Mid Wales, Capital Region Tourism, and South West Wales Tourism Partnership, as well as the Valleys Regeneration Company and the Western Valleys SRA, and Visit Wales.

However, in view of the wide range of stakeholders affected by these marketing proposals and the associated financial and management responsibilities, an independent and more broadly representative body is required to lead, guide and oversee the future strategic direction of the Brecon Beacons as a "destination area".

In addition to these core stakeholders, it will also be important to engage a wider group of tourism stakeholders, who may have an interest in the Brecon Beacons but a broader or national focus (e.g. National Trust, CADW et al), as well as local non-tourism interests, in the farming, forestry, natural produce, and culture sectors.

BBMCG Role and Governance

“Destination Area” activity: The BBMCG is considered the most appropriate vehicle for guiding the future strategic direction of the Brecon Beacons as a “destination area”. However, in view of the significant additional financial and strategic responsibility that the BBMCG will have in doing this - including also overseeing the Strategy Coordinator’s performance (see below) - it is recommended that BBMCG role be made more specific and its governance more robust.

BBMCG Role: It is recommended that the BBMCG formally articulate its leadership role, which should cover the following:

- Goal⁴⁴:

To increase the sustainable value of tourism to the Brecon Beacons through:

 - **Effective communication** between all Brecon Beacons organisations with an interest in tourism.
 - **Greater market impact** from coordinated strategic decisions on destination marketing throughout the Brecon Beacons.
 - **A strong and sustainable BBMCG** with appropriately senior levels of representation across all tourism sectors.
- Functions and delegated authority:
 - **Strategic oversight:** The BBMCG’s main responsibility should be the strategic oversight of tourism marketing in the Brecon Beacons, with a view to increasing the overall value of sustainable tourism to the area.
 - **Action Plan:** Oversee the implementation of a strategic action plan for developing tourism in the Brecon Beacons (prepared by the Strategy Coordinator to implement this Marketing Strategy).
 - **Task and Finish Groups:** Specific groups may be established by BBMCG to deal with specific issues as the need arises. Membership of these groups will be at the invitation of the BBMCG.
 - **Corresponding members:** Organisations should be identified as corresponding members, who may be delegated to attend BBMCG meetings when the main representative for that sector is unavailable (e.g. RTPs).
 - **Invited specialists:** Specialists may be invited to contribute to BBMCG discussion, whenever an issue arises that is outside the remit or expertise of the core group members.

BBMCG Governance: Details should be agreed by the BBMCG. However, a clear constitution should be developed and kept on record, covering issues including: role, status, governance, membership, representation, delegated authority, size, management, chair, method and frequency of election of chair and any other key positions, funding and expenditure etc.

BBMCG Membership: For the reasons stated above, the composition of the BBMCG should be reviewed to ensure that it is sufficiently representative and that members are

⁴⁴ These goals are similar to those identified for the Destination Pembrokeshire Partnership, as the “destination area” roles are similar and similar terminology is helpful in the interests of consistency across Wales.

empowered with the appropriate level of decision-making authority that will be required under the new circumstances, which include the development of a coordinated strategic action plan by, and oversight of, the strategy coordinator.

In order to be more representative of the area's tourism economy, it is recommended that greater representation be sought from the commercial sector.

Therefore, in terms of representation and authority, it is recommended that core BBMCG membership be comprised of senior tourism representatives from the following organisations:

- BBNPA x 2 (Tourism Manager and Communications Manager)
- BBT x2 (Director and Chair)
- Powys CC x1
- Carmarthenshire CC x1
- Monmouthshire CC x1
- Valleys Regeneration Company x1
- RTP representative x1, representing all RTPs (To be decided by RTPs - currently Tourism Partnership Mid Wales)(Trade representatives – to be nominated by BBT x3. (N.B. These representatives should be marketing-literate and therefore capable and willing to contribute on a pan-Brecon Beacons basis, rather than representing an individual business or sector)
- TIC Coordination Group x 1(N.B. subject to effective progress being made by the embryonic TIC Coordination Group, which is attempting to bring the BBNPA information centre staff and local authority TIC staff closer together).

Additionally, the core BBMCG should enshrine its right in its new constitution to co-opt any appropriate person or representative of any other organisation as it sees fit.

Strategy Coordinator Role

Independent Instigator and Coordinator of Pan-Brecon Beacons Marketing

Activity: In order to propel the Brecon Beacons forward by undertaking the activities recommended in this strategy, which are additional to those currently undertaken by any current organisation, a Strategy Coordinator/Driver is required to make this happen. This recognises the difficulty that existing organisations would have in appointing such a person, on account of both resources and regulations. The nature of this role, which requires effective working across all organisations to generate synergy and coordinate marketing activities across the Brecon Beacons, requires this person to be independent of any individual organisation.

The core strategic functions of this role, which could be project-based and, if desired, time-limited, are proposed as:

- **Stakeholder Coordination:** To pull all organisations together that are currently promoting tourism to the Brecon Beacons and act as the key point of contact and strategic driver of marketing activities aimed at generating synergy and optimising the overall impact for the Brecon Beacons.

- **Marketing:** To identify marketing gaps/new opportunities and implement additional marketing activities that would add value to the existing portfolio of marketing by Brecon Beacons organisations.
- **Action Plan:** To agree a timed action plan with the BBMCG to deliver activities proposed in this strategy.
- **Resource Management:** To collate and manage the necessary resources from partners to implement such additional activities.
- **Subcontractors:** To recruit, manage and monitor the performance of any outsourced sub-contractors, and particularly the PR agency/person and digital marketing agency/person, if these functions are not provided directly by the Strategy Coordinator himself/herself.

Performance Management: As an independent “broker” acting across all Brecon Beacons organisations, the Strategy Coordinator should ultimately report to a similarly pan-Brecon Beacons organisation that has widespread buy-in from Brecon Beacons stakeholders and is representative of Brecon Beacons’ tourism interests and businesses. Consequently it is proposed that the Strategy Coordinator should report to the Brecon Beacons Marketing Coordination Group.

However, as this group meets relatively infrequently, it is recommended that the BBMCG delegate authority to a **small steering group** to manage the Strategy Coordinator’s performance on a day-to-day basis – or at least to direct and ensure effective on-going performance. In the interests of efficiency and speed of decision-making, this should ideally be a 3-person group comprising the following key players: BBNPA – Tourism Manager; BBT – Director; Powys CC – Tourism Manager.

Key procedural requirements that should be written into the Strategy Coordinator’s contract include:

- Commitment to independence and impartial cooperation with all Brecon Beacons-relevant organisations;
- Close liaison with BBNPA Communications Manager on media strategy and press release distribution;
- Managing the effective performance of any outsourced subcontractors (e.g. PR and digital marketing).

Legal/Administrative: BBNPA and BBT need to establish the most appropriate procedure for recruiting/appointing and remunerating the Strategy Coordinator within the terms of their constitutions, procurement and regulatory structures, as an appropriately authorised legal entity is required to disburse and manage public money allocated for this role (N.B. This role is proposed as a time-limited project, rather than an employee of either organisation, and is therefore likely to be a freelance/agency role).

VAT implications will also need to be taken into account in reaching this decision.

Wider Stakeholder Engagement

It is important to engage with national tourism stakeholders, such as the National Trust and CADW, and local non-tourism sectors, such as farming, forestry, natural produce and culture sectors. The first step is to open dialogue with them, and then to involve them as appropriate in marketing discussions and planning. They should also be invited to the annual tourism conference for Brecon Beacons tourism businesses, whose scope could be widened to encompass all relevant tourism interests in the Brecon Beacons.

Initial engagement with non-tourism sectors might best be undertaken through a separate workshop, organised by the strategy coordinator on behalf of BBMCG.

Promotional Integration of Local Towns and Areas

Many local towns and areas in and around the Brecon Beacons have understandable aspirations to promote themselves to attract visitors, and indeed the COLLABOR8 project encourages and funds this sort of approach. For most towns and areas, many of their visitors may be relatively local and know them already. However, there are also opportunities to attract visitors from further afield. These opportunities are likely to lie in two areas:

- Visitors who are already staying in the wider area, who visit the local town or area by chance or as a result of word-of-mouth recommendation (e.g. from friends or local people such as their B & B host, publican, Facebook etc.), by picking up a local brochure, or seeing the town/area on a website.
- Those who come across information on the local town/area before they leave home (often by similar word-of-mouth recommendation and on-line methods as described above for visitors already in the area).

The less the local town/area is known amongst its potential visitors (and very often this means that the further away it is, the less well-known it will be amongst its potential audience), the more helpful it will be **to identify its location in relation to the Brecon Beacons**. By setting a lesser known town or area in its wider geographic context - and particularly within such an iconic well-known area as the Brecon Beacons - this will increase its chances of recognition and interest amongst potential visitors. This can be done through text mentions in brochures and websites and, ideally also, through usage of the **Brecon Beacons logo** in any printed or on-line publications. Configuration of websites to allow visitors to move seamlessly from the wider area destination to more local destinations and back again will be important to achieve this.

Even more important than consistent and ubiquitous application of the logo is the issue of local destinations taking on the **Brecon Beacons brand** – in terms of its values, tone of voice and imagery guidelines. In this way every local destination promoting tourism within the Brecon Beacons can project a consistent message about the area, appeal to the visitors it is trying to attract, and achieve greater recognition and impact from its association with the Brecon Beacons brand. By setting a lesser known town or

area in its wider Brecon Beacons National Park context, this will increase its chances of recognition and interest amongst potential visitors.

Encouraging local towns, areas and businesses to project Brecon Beacons brand values in their marketing communications and, ideally, to use the Brecon Beacons logo (as appropriate), should be the responsibility of the Strategy Coordinator.

5.9 Conclusion and Summary

This chapter summarises the activities recommended to develop tourism in the Brecon Beacons, in a way that is economically, socially, culturally and environmentally sustainable. Indicative costs and methods are provided for these in the Action Plan below (Section 6).

Marketing Infrastructure Development and Marketing Communications

- A better understanding is needed of the following:
 - **Current visitor profile** and motivation.
 - The **family market**, and specifically the appeal of the Brecon Beacons to different family stages.
 - **Brand perceptions** – how people perceive the Brecon Beacons in relation to its closest competitors.

Much of this can be established through the judicious and cost-effective use of research, such as the inclusion of questions in on-going BBT research amongst visitors, by talking to local tourism operators and, possibly, through purchasing questions in Visit Wales research surveys. Although research amongst previous visitors and local tour operators will not cover non-visitors and their reasons for not visiting, it should nevertheless be possible to glean reasonably robust information from these sources which, when combined with existing knowledge of visitor behaviour, should enable sufficiently sound marketing planning.

- Development of an inspirational and comprehensive website, which is perceived as the “**official**” **authoritative destination website** for the Brecon Beacons. This should cover all major visitor information needs, be easily navigable and contain links to bookable tourism products.
- The website should include an **accommodation database**, with visitor-intuitive and map-based search criteria and on-line bookability - direct with businesses and/or through global distribution systems, such as Expedia, Google, Bing, TripAdvisor et al. (N.B This extent of global distribution will rely on distribution deals being negotiated via organisations such as Visit Wales/Visit Britain using platforms such as NTOP/Guestlink etc.).
- **PR** and **digital marketing** are recommended as the most cost-effective means of marketing communication for the Brecon Beacons, particularly in light of likely limited budgets. This requires the appointment of an external person/agency to develop and implement a PR communications plan and digital marketing strategy.
- A **digital marketing strategy** must be developed as a matter of urgency. This should address the potential of, and requirements for, content development, user-generated content, social media, valuable links, search engine optimisation, and e-CRM.

- **Traditional above-the-line advertising** is not recommended, because it is one of the most expensive forms of marketing communication. It is ephemeral and, unless enough is invested to create sufficient campaign weight to achieve adequate market penetration, it is mostly wasted. Nor is advertising appropriate in general media, which don't have a sufficiently targeted audience for the Brecon Beacons.
- The only exception might be advertising in **niche magazines and websites** that target special interest visitors, who might be disproportionately open to Brecon Beacons' messages – such as hikers and outdoor activists living in the Brecon Beacons' main market areas within a few hours' drive (i.e. London & South East, M4 corridor, Bristol & South West, Cardiff & South Wales).

But even then, such advertising should only be considered after other, more cost-effective activities such as PR and digital marketing have been undertaken to a satisfactory level. If such advertising is considered, the opportunity to achieve editorial coverage within the special interest media should be explored and negotiated as part of the advertising package. Conversely, it can sometimes be possible and cost-effective to stimulate editorial coverage in an appropriately targeted magazine by supporting it with limited advertising.

- A **theme-based marketing approach** is recommended, in order to inspire and reassure potential visitors. This should be reflected in the website and in all marketing communications.
- An **on-line photo library** should be developed for external tour operators, travel writers and local tourism operators to use free of charge. This should, ideally, feed into Visit Wales' photo library.
- All marketing communications, whether undertaken by local authorities, BBT, BBNPA, or local businesses, should convey the **spirit of the Brecon Beacons brand**. This will increase marketing impact and consumer recognition of the area.
- BBNPA should consider applying for “**Dark Sky**” **status**, in order to reinforce the special quality of the Brecon Beacons, to highlight the need to conserve the natural environment, and to raise the profile of the area amongst potential visitors whose footprint will be lightest.
- A **Brecon Beacons area brand**, covering all sectors (e.g. tourism, farming, natural produce, forestry, and culture), should be developed to help leverage the values of the Brecon beacons for all sectors.
- Opportunities should be identified by all who promote the Brecon Beacons to **work together** with each other – both within the tourism sector (e.g. accommodation, attractions, and activity operators) and with compatible partners in other non-tourism sectors.
- **TICs and BBNPA information centres** need to be strategically located and their staff involved in the development of marketing plans for the Brecon Beacons.

- A weather eye should be kept out for unplanned but targeted and potentially valuable, cost-effective **ad hoc/guerrilla marketing opportunities**.

Product Development

Key developments that would improve the Brecon Beacon's competitiveness and ability to attract increasingly selective and higher-spending visitors, whose footprint would be lighter, include:

- More **small, distinctive, high-quality or boutique-style hotels**.
- More **“signature restaurants”/bistros/gastropubs**.
- Encouraging **niche tour operators** (such as walking and cycling tour operators) to include programmes in the Brecon Beacons.
- Encouraging **local tourism operators**, and particularly accommodation operators, to promote the appeals of the area and to reflect Brecon Beacons' brand values in their own marketing communications.
- Encouraging **local tourism operators** to work together in providing information to visitors about complementary tourism products, such as accommodation, outdoor activities and events (particularly for those that do not wish to develop commercial packages that require bonding in compliance with European packaged travel regulations), or to provide individual tourism products that a tour operator can combine with other elements and sell as a commercial package.
- Identify and develop a programme of **local “sub-festival” events**, which might attract visitors outside the main season.
- Identify and target appropriate **nationally mobile events** that are compatible with the Brecon Beacons' brand, whose organisers might be persuaded to stage them in the Brecon Beacons.

Roles and Responsibilities

Detailed proposals for the roles and responsibilities of respective organisations are outlined in *5.6 Roles, Responsibilities and Partnerships* above. Key elements are:

- Wide-ranging **partnership** across several different organisations with an interest in the Brecon Beacons, as well as with businesses in the area, is essential for the success of this marketing strategy. However, a leadership role is also required to deliver the recommendations outline in this strategy.
- This leadership role should be undertaken by the **BBMCG**, which should be responsible for the overall programme of activity undertaken by the Brecon Beacons as a “destination area”.
- The **BBMCG role, membership and governance** need to be formalised, in order to equip it to undertake this larger leadership and management role, with attendant financial management responsibility, on behalf of the Brecon Beacons as a “destination area”. This should include a formal constitution for the BBMCG.
- A **Strategy Coordinator** is required to implement these proposals. This person/agency should report to the BBMCG, as the most representative and independent tourism organisation in the Brecon Beacons. However, in the interests of pragmatism and effectiveness, day-to-day performance management of the Strategy Coordinator should be delegated by the BBMCG to a small **steering group** comprising a representative from each of the following organisations: BBNPA, BBT, Powys CC.
- Engagement with a **wider stakeholder group** (e.g. with national tourism and heritage bodies and local non-tourism sectors, such as farming, forestry, natural produce, and culture sectors) should be undertaken on an ad hoc basis as appropriate, as well as through their involvement in an annual Brecon Beacons tourism conference. Initial engagement with non-tourism sectors might best be achieved through a separate workshop, organised by the strategy coordinator on behalf of BBMCG.

Resource Implications

Undertaking the marketing activities recommended above will require the following human resources and marketing budget:

- **Strategy Coordinator:** A person or agency (part-time, 1-2 days p. week) to:
 - Drive the **marketing strategy**, oversee its implementation, monitor its effectiveness, and recommend changes in emphasis/direction to the BBMCG in light of changing market circumstances and on-going evidence of marketing impact.
 - Recruit, manage, and monitor the performance of the **sub-contracted PR agency/person and digital marketing agency/person** - if this role is not performed by the Strategy Coordinator himself/herself. (N.B. If these functions are carried out by the Strategy Coordinator, their cost should be added to that of the Strategy Coordinator's, as outlined below, which will require more than 1-2 days per week).
 - Coordinate **consumer research** and apply the results in determining future marketing strategy direction.
 - Undertake an audit of current Brecon Beacons imagery and develop a Brecon Beacons **on-line image library**.
 - Work with key partners to develop a comprehensive "**official**" **Brecon Beacons tourism website**.
 - Encourage local tourism businesses to develop "**information packages**" to enhance the appeal of their products with information about the Brecon Beacons, and to reflect Brecon Beacons brand values, on their websites, in brochures and other marketing communications.
 - Establish links with **niche tour operators** and encourage them to develop packages in the Brecon Beacons (e.g. activities, walking).
 - Develop and publicise a calendar of **local events**.
 - Identify **nationally mobile events** that might be attracted to the Brecon Beacons and develop a plan to attract targeted events.
 - Explore the opportunities for integrating **Web4U and Guestlink/NTOP** databases, so that tourism businesses, ideally, need only enter their data once to gain the benefits offered by both systems (i.e. website, community-based network, booking facility, and global distribution)⁴⁵.

⁴⁵ Subject to caveat regarding NTOP's future in chapter 4.2 PESTEL Analysis -Technological above
[Brecon Beacons Tourism Marketing Strategy – Yellow Railroad \(Nov 2010\)](#)

- Identify highly targeted **niche advertising opportunities** in specialist media, subject to budget, and negotiate editorial coverage wherever possible.
 - Explore the possibility of developing an **E-CRM** system with key partners, with a view to disseminating e-newsletters to targeted prospects.
 - Keep an eye out for valuable but unplanned **guerrilla marketing opportunities**, and implement them where agreed by the BBMCG or its delegated steering group.
- **PR and digital marketing agency/freelance to:**
 - Source, develop and promote tourism stories through traditional and on-line media; encourage appropriately targeted travel writers to visit the Brecon Beacons and manage their itinerary. *
 - Develop and manage on-line content; keep the Brecon Beacons digital presence fresh and active; develop and implement the Brecon Beacons digital marketing strategy. *

[* PR and digital services might be found in one agency/person - or in the Strategy Coordinator or they may require to be sourced from separate agencies/people. This should be explored through an invitation to tender for these services.]
 - It is recommended that these human resource requirements are **outsourced**, rather than employed within an existing organisation, in order to ensure they are scalable according to both market needs and budget availability and to enable efficient cost control.
 - **Marketing budget:** The investment required to fund the human resource requirements outlined above (Strategy Coordinator, PR and digital marketing agency/freelance, web development, niche marketing/advertising, on-line marketing campaigns, event development and marketing etc.) is outlined in Section 6 *Action Plan* below.
 - **Total costs** are estimated at:
 - £52-59,000 in year 1
 - £ 65,000 in year 2
 - £ 55,000 in year 3

5.10 Monitoring and Evaluation

Methods for monitoring and evaluating the success of these activities are identified in Section 6 *Action Plan* below.

6. ACTION PLAN

Item	Activity	Year 1 * £ Cost (approx.)	Year 2 £ Cost (approx.)	Year 3 £ Cost (approx.)	Target (All TBA)	Evaluation method	Who
Marketing Infrastructure Development							
Strategy Coordinator**	Appoint someone on a p/t basis to oversee the implementation of this strategy	11,000	23,000	23,000	Effective implementation	Appraisal by BBSTPMG	BBMCG
Visitor profile research	Include questions in on-going BBT previous visitor research to establish: <ul style="list-style-type: none"> ◦ Visitor profile, key motivation, travel behaviour ◦ BB competitor destinations considered ◦ Visitor satisfaction & dislikes/obstacles 	On-going BBT & VW research			Results by Sept 2011 (i.e. after 2011 main season)	Evidence of research findings	BBT
	Establish current family segment profile (e.g. pre-school, school age/teens) and product/experience preferences by segment	-	-	-	Results by March 2011		Strategy Coordinator
Brand perception research	<ul style="list-style-type: none"> - Establish perceptions of BB: positive, negative & emotional associations/ feelings generated – Consider including questions in BBT previous visitor research - Include questions in VW brand research to elicit the same info on a comparative basis 	-	-	-	Results by Sept 2011 (i.e. after 2011 main season)	Evidence of research findings	Strategy Coordinator
Digital marketing strategy	Develop digital marketing strategy	3,000 - 5,000	-	-	DMS produced by Dec 2010	DMS in place	BBMCG (BBNPA/BBT to initiate; Strategy Coordinator to pursue)
S/T Marketing Infrastructure Development		14-16,000	23,000	23,000			

Item	Activity	Year 1 £ Cost (approx.)	Year 2 £ Cost (approx.)	Year 3 £ Cost (approx.)	Target (All TBA)	Evaluation method	Who
Marketing Communications							
“Official” Brecon Beacons website	Develop site, incorporating “best bits” of several existing sites + extra – use existing web platform (e.g. Wordpress)	5,000 – 10,000	-	-	New website by 2011	On-line satisfaction survey	BBMCG (Strategy Coordinator w BBMCG reps)
	On-going maintenance & development	-	2,000	2,000	-	-	Strategy Coordinator
Themed marketing	Structure all marcomms on a theme-based approach	-	-	-	All marcomms to be themed by 2011	Improved theming in all BB marcomms	Strategy Coordinator
Accommodation database	Upgrade to searchable/interactive – NTOP basis (subject to caveat expressed above)	3,000 ?	-	-	Upgraded to NTOP by Dec 2010	Evidence of upgrade & integration w VW site	BBMCG (Strategy Coordinator w BBMCG reps)
Digital marketing	Search engine optimisation (SEO). Maximise social media opportunities	10,000	10,000	10,000	- BB in 1 st pg for all key word searches - Number of followers	Quality of messages, SEO, & penetration of target market	Strategy Coordinator
Media relations / PR	On-going development & distribution of stories in traditional & electronic/on-line & social media	13,000	13,000	13,000	X stories placed p mth	- No of articles published; - Advtg value equivalence	Strategy Coordinator
	Produce & disseminate e-newsletters				X newsletters p.a.	Publication of e-newsletters	
	Generate & arrange journalists’ visits				6 journalists p.a.	Number of journalists	
	Encourage hotels & tourism operators to provide inspirational information on BB in their marcomms – & to supply stories to SC				Improved inclusion of BB info in ops’ marcomms	Evidence of information in marcomms	
	Hosting journalists’ visits	2,000	2,000	2,000	Hosting covered by BBT members	Cost of hosting	

Item	Activity	Year 1 £ Cost (approx.)	Year 2 £ Cost (approx.)	Year 3 £ Cost (approx.)	Target (All TBA)	Evaluation method	Who
Marketing Communications (cont.)							
E-CRM	Develop database	???		-	10,000 names profiled by 2012?	Database in place	Strategy Coordinator
	Database maintenance	???	???	???	Keep up to date	D-base cleaned every x years	
	E-newsletters (part of PR role above)	See Media relations / PR above					
On-line photo library	Audit existing BB photography. Develop on-line photo library for journalists & tourism operators	Part of Strategy Coordinator costs above			300 photos, corresponding to BB themes by 2011?	Photo library accessible on-line	Strategy Coordinator
Niche advertising	Advertising in special interest magazines & websites (e.g. hiking etc.)	5,000	5,000	5,000	N/A	N/A	Strategy Coordinator
Guerilla / opportunistic marketing	Contingency				Dep on opportunity	Dep on opportunity	Strategy Coordinator
TICs	Ensure TICs are strategically positioned and staff integrated into the marketing process	On- going: Powys CC & BBNPA	On- going: Powys CC & BBNPA	On- going: Powys CC & BBNPA	- TICs strategically located - Staff aware & involved in marketing	- Evidence of best/ most cost-effective available location - Staff appraisal	BBMCG
Stakeholder engagement	Workshop with non-tourism sectors.						Strategy Coordinator
	Annual BB tourism conference	On- going: BBT	On- going: BBT	On- going: BBT	Attendance – numbers and calibre	Attendance and resultant partnerships	BBT
S/T Marketing Communications		38,000 - 43,000	32,000	32,000			

Item	Activity	Year 1 £ Cost (approx.)	Year 2 £ Cost (approx.)	Year 3 £ Cost (approx.)	Target (All TBA)	Evaluation method	Who
Product Development							
“Signature” hotels & restaurants	Disseminate market intelligence on visitor needs (VW, RTPs + BB?)	-	-	-	Improved food & accom quality	Evidence of improvement	BBMCG
Information packaging	Encourage hotels & tourism operators to provide inspirational information on BB in their marcomms (Part of PR role above)	-	-	-	Improved inclusion of BB info in ops’ marcomms	Evidence of information in ops’ marcomms	Strategy Coordinator
Local events	Develop a programme of smaller local events	-	-	-	X new events p.a.	New event/s mounted	Strategy Coordinator
	Decide on organisers locally for each event	-	-	-			BBMCG & individual event “owners”
Mobile events	Identify approp. mobile events	-	-	-	X mobile events identified		Strategy Coordinator
	Bid for targeted events	???	???	???	1 mobile event attracted every 2 yrs	Mobile event/s attracted	Strategy Coordinator with BBMCG
Brecon Beacons area brand	Develop a comprehensive area brand (i.e. not just tourism – incorporating key sectors incl. farming, forestry, natural produce and culture)		10,000	-	Consistent application of BB brand values by key players in all sectors	Extent to which BB brand values are conveyed in marketing communications across all sectors	BBMCG
S/T Product Development		-	10,000	-			
TOTAL COST (per year)		52,000 - 59,000	65,000	55,000			

Assumptions

* Year 1 costs are based on the remaining 22 weeks of 2010-11. Years 2-3 reflect a full 52 week year.

** Strategy Coordinator costs are based on £250 p. day x 2 days per week x 46 weeks p.a. Ideally there would be some cost saving on these figures if the Strategy Coordinator, PR, and digital marketing services could be sourced from the same person/agency.

Notes on Action Plan

- The aim of this plan is to present a **menu of opportunities**, from which the Brecon Beacons can select activities according to priority and budget.
- Activities under each heading (*Marketing Infrastructure Development, Marketing Communications, Product Development*) are listed in **descending order of priority** – i.e. the most important at the top of each of these sections, and the least worthwhile – or least realistic (e.g. in terms of person-time or skills) - at the bottom.
- These costs are **indicative only**. They represent a reasonable estimate to do what has been identified for the Brecon Beacons. However, they will depend on tenderers' costs at the time of tender. It is quite possible that, by modifying requirements or finding cheaper service providers, these costs could be lower. Conversely, if greater levels of sophistication (e.g. website) or more extensive marketing activity (e.g. digital) is required, costs would be higher.
- **Media relations/PR - Journalists' visits:** It would be expected that Brecon Beacons' businesses would host visiting journalists either at no cost or at cost. £2,000 has been included to cover any other essential costs that might be incurred.
- **Accommodation database:** The cost of upgrading the BBT database to NTOP functionality is unknown. Nor is it clear whether this is a cost that would have to be borne by BBT, or whether Visit Wales might assist in this.
- **E-CRM:** The cost of developing a database has not been identified, as this would depend on the specification required, which would need to be advised by a database specialist once the specification was decided.
- **Niche advertising and guerrilla/opportunistic marketing:** £ 5,000 has been included as a contingency for suitably targeted ad hoc opportunities.
- **Targets** are indicative only. They will need to be agreed with the designated task "owner"/leader, after activities have been chosen from this menu and funding secured.

Appendix 1: Consultees

The following were consulted in meetings or by phone:

Name	Position	Organisation
Punch Maughan	Director	Brecon Beacons Tourism (BBT)
Elizabeth Jeffreys	Chairman	BBT
BBT Board members		BBT
Richard Tyler	Sustainable Tourism Manager	Brecon Beacons National Park Authority (BBNPA)
Jo Maurice	Communications Manager	BBNPA
Carol Williams	Tourism Growth Officer	BBNPA
Nick Stewart	Sustainable Tourism Officer (Collabor8 project)	BBNPA
Alan Bowring	Geopark Development Officer	BBNPA
Annie Lawrie	Visitor Transport Officer	BBNPA
Ruth Nicholson	Visitor Services Manager	BBNPA
Julie Lewis (also Matthew Davies)	Marketing & Information Officer	Powys County Council
Nicola Smith	Principal Tourism Officer	Monmouthshire County Council
Huw Parsons	Marketing & Tourism Manager	Carmarthenshire County Council
Sarah Owen	Marketing & Tourism Development Officer	Carmarthenshire CC
Elinos Walters	Marketing & Research Assistant	Carmarthenshire CC
Lowri Jones	Marketing & Tourism Assistant	Carmarthenshire CC
Jane Lewis		Herefordshire CC
Peter Cole	Regional Strategy Director	Capital Region Tourism
Dee Reynolds	Regional Strategy Director	Tourism Partnership Mid Wales
Gary Davies	Regional Strategy Director	South West Wales Tourism Partnership
Roger Pride	Director of marketing	Welsh Assembly Government/Visit Wales
Gill Berntsen	Head of Campaigns & Digital Marketing	Welsh Assembly Government/Visit Wales
Steve Webb	Director of Development of Strategies & Partnership	Welsh Assembly Government/Visit Wales
Jon Munro	Digital Marketing Project Leader	Welsh Assembly Government/Visit Wales
Val Hawkins	Director	Mid Wales Tourism
Lucy O'Donnell		Heads of the Valleys Regeneration Company
Denise Fletcher	Tourism Programme Manager	Western Valleys SRA
Peter Florence		Hay Festival & Brecon Jazz Festival
Ashford Price		Dan-Yr-Ogof caves
Phil Park	Property Manager Mid & SE Wales	Dinefwr Park and Castle
Geoffrey Marshall	Dean	Brecon Cathedral
Mary Lewis	General Manager	Cawdor Hotel, Llandeilo
A wide range of Brecon Beacons tourism businesses at the Tourism in Action workshop, held in Brecon on 3 rd March 2010		

Appendix 2: Documents and Information Sources

The following were consulted to provide a strategic context in preparing this strategy:

Brecon Beacons National Park Authority and National Parks Wales

- *BBNPA Destination Code of Practice*
- *BBNPA Management Plan 2010-2015 - Draft version 2 (June 2009)*
- *BBNPA Management Plan – Actions Final (Excel) - Draft version 3 (June 2009)*
- *BBNPA Sustainable Tourism Strategy*
- *BBNPA Waterfall Country Visitor Survey (2009)*
- *Breathing Spaces Workshop notes (July 2007)*
- *Branding Outcomes from BBNPA Visitors Services team branding workshop (undated)*
- *Branding Workshop notes from BBNPA Web Development Group (Aug 2006)*
- *Branding for Tourism* paper by BBNPA (undated)
- *Brecon Beacons National Park – 6 Year Summary Figures 2003-2009, STEAM (Oct 2009)*
- *Brecon Beacons National Park STEAM Report 2008, STEAM (2008)*
- *Brecon Beacons National Park STEAM Report Jan-June 2009, STEAM (2009)*
- *Developing Brecon Beacons’ Sense of Place – Angharad Wynne Marketing Communications (July 2007)*
- *Fforest Ffawr Geopark Marketing Strategy*
- *Tourism Branding Core Outcomes* paper by BBNPA (undated)
- *Sustainability Marketing Workshop – outcomes July 2007*
- *Visitrac Survey for Brecon Beacons National Park 1/10/2008-31/01/2019 (2009?) - Lynn Jones Research*
- *Visitrac Survey Response Analysis for Brecon Beacons National Park 1/10/2008-25/6/2009 - Lynn Jones Research (2009)*
- *Britain’s Breathing Spaces, National Parks Wales, Brand Design Guidelines*

Brecon Beacons Tourism and Brecon Beacons Sustainable Tourism Partnership

- *An Exploration of the Possibilities for Segmenting the Brecon Beacons’ Visitor Market – The Tourism Company (Jan 2008)*
- *BBT Business Action Plan (2009)*
- *BBT Marketing Plan (2009)*
- *BBT On-line Visitor Survey Results (2009)*
- *BBT How is Business? on-line survey (June 2010)*
- *Brecon Beacons Sustainable Tourism Partnership - Tourism Area Business Plan 2010/11-2013/14*
- *Brecon Beacons Sustainable Tourism Partnership - Tourism Area Business Plan draft 2010 & Action Plan 2010-2013*
- *Brecon Sustainable Tourism Action Plan* draft – Alison Caffyn (March 2010)
- *Business surveys in Brecon, Talgarth & Upper Swansea Valley*

Powys County Council

- *Tourism Action Plan (2009)*
- *Powys Hotels Needs Study – MPA (July 2010)*

Monmouthshire County Council

- *Marketing Statement (July 2009)*

Pembrokeshire

- *Draft Terms of Reference*, Destination Pembrokeshire

Tourism Partnership Mid Wales and Mid Wales Tourism

- *Mid Wales brand guidelines*
- *Naturally Different* – Mid Wales Tourism Strategy Review – Locum (2003)
- *Self-Catering Agencies*, Guestlink Cymru PowerPoint presentation by Val Hawkins, Mid Wales Tourism
- *Virtual Mid Wales Scoping Study* (2007)

South East Wales-Capital Region Tourism

- *Benchmarking*, South East Wales – Blue Sail (Feb 2008)
- *On-line Visitor Survey*, South East Wales (2009)
- *Regional Tourism Strategy Review presentation*, South East Wales – Blue Sail (Jan 2008)
- *Think Tank Outcomes*, South East Wales – Blue Sail (Jan 2008)
- *Tourism Action Plan*, South East Wales – Blue Sail (April 2008)
- *South East Wales Visitor Survey 2008-2009* – Lynn Jones Research (March 2010)
- *Strategic Tourism Framework*, South East Wales – Blue Sail (Feb 2008)
- *Strategic Fit Report*, South East Wales – Blue Sail (2008)

South West Wales Tourism Partnership

- *Inspirational South West Wales*
- *Open all Year* – Regional Strategy for S W Wales (2004 – 2008)

Valleys Regeneration Companies

- *The Valleys Heart and Soul of Wales*, PowerPoint presentation for Best Business Awards 2010
- *Tourism Framework for Action*, Western Valleys Strategic Regeneration Area (Feb 2010)

Visit Wales/Welsh Assembly Government

- *Achieving Our Potential – A Tourism Strategy for Wales* (2006 – 2013)
- *Bedstock in Wales*, Welsh Assembly Government Statistical Directorate (Feb 2010)
- *Destination Management & Marketing in Wales* draft final report – The Tourism Company (Sept 2008)
- *Developing a Digital Marketing Strategy* – PowerPoint presentation by Jon Munro, Visit Wales
- *Strategic Marketing Action Plan 2010 – 2013* draft version 0.2
- *Review of Cultural Tourism in Wales* for The Department for Rural Affairs and Heritage – Stevens Associates (Oct 2007)
- *Strategic Marketing Action Plan* (2007 – 2012)
- *Tourism Industry Review Report* (2008)
- *Tourism in the Brecon Beacons* – PowerPoint presentation by Richard Tyler
- *Tourism Trends in Wales* (April 2009)
- *Visit Wales Research Update* - Wales Tourism Research Partnership (Feb 2009)
- *Visit Wales Tourism Investment Strategy 2008-13* – Appendix 3, (Feb 2010)
- *Wales Brand Guidelines* (Version 1.0, 2008)
- *Wales Day Visitors Report*, Wales Visitor Survey – Beaufort Research (April – Oct 2009)
- *Wales Staying Visitors Report*, Wales Visitor Survey – Beaufort Research April (Oct 2009)
- *Wales Tourism Partnership Framework* (undated)
- *Wales Visitor Research 2009, Presentation of Key Findings (PPT)* – Beaufort Research (2009)

Visit Britain

- *Tourism Trends & Forecasts* Visit Britain (2009)
- *Visitor Survey* (2009)

Other/General

- *Attracting Tourists to Smaller Communities*, PhocusWright, <http://www.yfactor.com/Public/Default.aspx?l=939&n=Attracting+Tourists+to+Smaller+Communities>
- *Creating Responsible Tourism Destinations*, Harold Goodwin, Leeds Metropolitan University (Nov 2009)
- *Dark Skies*, Travelmole (Jan 2010)
- *Interreg 4B Collabor8* summary
- *Love Llandoverly brand guidelines*