

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

# THE SOUTH EAST WALES STRATEGIC TOURISM FRAMEWORK

SUMMARY

CAPITAL REGION TOURISM

AUGUST 2008

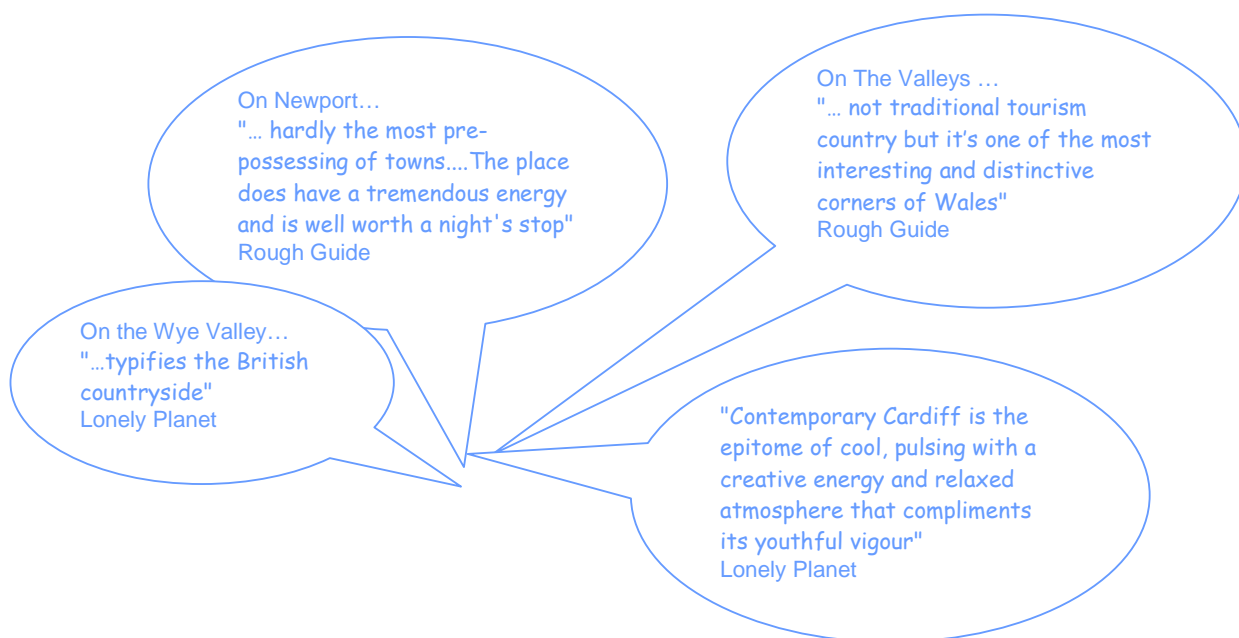


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This is a summary of the South East Wales Tourism Strategy. It gives a short and snappy overview of the direction we are recommending.

If you need more detail then have a look at the Full Version of the Strategy and the Action Plan which provides a full list of the actions with how and when they will be implemented.



# 1 INTRODUCTION

This is the tourism strategy for South East Wales which will guide the work of partners in Capital Region until 2013 and beyond.

The vision we are pursuing is

*South East Wales is the lively city region, the nation's capital region for tourism and the gateway to Wales. It will compete with the best in the UK and Europe to win a growing share of the UK short breaks, overseas, events, meetings and conference markets.*

*It will build upon and promote its special strengths:*

- ▶ *Our sense of place, our culture, our people, our heritage and our traditions*
- ▶ *The special places - Cardiff - one of Europe's great capital cities, the Brecon Beacons and the Wye Valley, the Welsh Valleys and the Coast*
- ▶ *The great choice of outdoor activities that are easy to get to and not too extreme*
- ▶ *The success of the Ryder Cup*
- ▶ *The capacity and appealing location for events, meetings and conferences*

*The offer will be strongly branded, with clear links to the Welsh identity that is authentic and contemporary. Perceptions of the region as a desirable destination with an excellent mix of leisure, sport and shopping will continue to rise.*

*The region will strive for quality that delights visitors, through ready access to information, booking and transport, and by delivering outstanding service and hospitality at all times.*

*The prizes will be:*

- ▶ *More visitors with higher spending patterns*
- ▶ *More and better jobs within the Welsh economy*
- ▶ *Greater pride within the Welsh communities*
- ▶ *More appreciation of Welsh culture, heritage and environment*

*Key players in all sectors will remain committed to genuine partnership and will work together to secure and co-ordinate the resources and skills to achieve this vision and sustainable success for the industry.*

There are four key guiding sustainable principles for this strategy:

- ▶ Promoting local economic prosperity
- ▶ Supporting community well being and involvement
- ▶ Minimising tourism's environmental impact
- ▶ Protecting and giving value to natural heritage and culture

## 2 CONTEXT

In the decade since the first tourism strategy was produced the region has seen major changes supported by publicly funded investment in infrastructure and marketing. And the decade has also seen radical changes in the political environment, approach towards sustainability and visitor behaviour and expectations.

The region has done well to exceed its 6.5% growth rate target as measured by national statistics but the landscape is changing.

### LOOKING OUTSIDE

Here are a few of the most important drivers:

Political	Economic
<ul style="list-style-type: none"> <li>▶ Wales Tourist Board integrated into WAG within the Heritage and Culture Department</li> <li>▶ New Spatial Plan and Tourism Strategy for Wales (as well as many other strategies)</li> <li>▶ EU funding changes</li> <li>▶ EU enlargement expanding the labour market.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Economic growth and affluence for a decade but now a slow down</li> <li>▶ Consumers are becoming much more ethically aware</li> <li>▶ Climate change - aspirations to reduce carbon footprints and local impacts of changing weather patterns - drought, risk of flooding, etc</li> <li>▶ Expansion of low cost airlines</li> <li>▶ Big urban renewal schemes changing the way people think about and use cities</li> </ul>
Social	Technological
<ul style="list-style-type: none"> <li>▶ Ageing but affluent and agile population</li> <li>▶ Increasing desire for more authentic holiday experiences and greater interaction with local people</li> <li>▶ Time constraints placing greater expectations on the tourism sector</li> <li>▶ Growing interest in self-development, indulgence and reward</li> </ul>	<ul style="list-style-type: none"> <li>▶ The internet has changed everything – for marketers and consumers</li> </ul>

## LOOKING INSIDE

Here is a snapshot of the market to South East Wales<sup>1</sup>:

UK Market	International market
<ul style="list-style-type: none"> <li>▶ 2.8 M trips</li> <li>▶ 8.5 M nights</li> <li>▶ £439 M spend</li> <li>▶ Average length of stay is 3 nights</li> <li>▶ 60% of nights are for holiday, 21% to visit friends and relatives, and 14% on business</li> <li>▶ 70% of trips are from England</li> <li>▶ 75% of trips are by car</li> <li>▶ 70% of trips are by people aged 16 to 44</li> </ul>	<ul style="list-style-type: none"> <li>▶ 0.47 million trips</li> <li>▶ 3.4 million nights</li> <li>▶ £152 million spend</li> <li>▶ Average length of stay is 7 nights</li> <li>▶ 25% of nights are for holiday, 36% to visit friends and relatives, and 14% on business</li> <li>▶ 20% of trips are from Ireland, 12% USA and 12% Germany</li> <li>▶ 30% of trips are from people aged 16 to 44</li> </ul>

Occupancy	Visitor Survey
<ul style="list-style-type: none"> <li>▶ Hotel bedrooms 61% (Wales average 57%)</li> <li>▶ Guest house and B&amp;B 51% (Wales average 43%)</li> </ul>	<ul style="list-style-type: none"> <li>▶ 53% are on a day out from home</li> <li>▶ 46% come from Wales with over a third from the immediate locality</li> <li>▶ 85% have been to the area before</li> <li>▶ Scenery, landscape and countryside are the motivators - then shopping and friends and relatives</li> <li>▶ 96% score the visit as excellent or good</li> </ul>

## STRATEGIES

Many strategies have influenced our strategy – in particular the Spatial Plan and Achieving our Potential, the Wales Tourism Strategy. The Spatial Plan identifies three sub-areas (City Coast, Connections Corridor and Heads of the Valley). These do not always necessarily correspond with tourism destinations which are market-driven. But one that will have a major impact is the national review, commissioned by Welsh Assembly Government (WAG), on the Marketing Area Partnerships, Tourism Growth Areas and Destination Management. The outcomes are due in late summer 2008 and will be critical for the region and future funding. This regional strategy needs to inform and influence the national review where possible.

<sup>1</sup> Source VisitWales 2005 and 2005 Visitor Survey.

### 3 FOCUSED MARKETING

The priority for regional marketing should be on supporting the promotion of the five leisure experiences within the UK market and a unified approach to discretionary business tourism.

Local authorities have the lead role in local marketing to local residents, their friends and relatives and day visitors - and tourists who are already staying in and around the region. Visit Wales will lead international marketing supported by regional consortia and Cardiff in particular.

Moving forward there is a need to get rid of the current fragmentation in how the region is taken to market regional marketing messages and a lack of a consistent look and feel in communication. There is also a need to move much more into digital marketing.

#### RECOMMENDATIONS

Market Planning: Develop a Regional Marketing Plan	
<p><b>Leisure</b></p> <ul style="list-style-type: none"> <li>▶ Select priority target segments using VisitWales segmentation approach</li> <li>▶ Target the 2 to 3 hour travel time with priority for M4 corridor, Midlands, Hampshire and the West Country</li> <li>▶ Focus regional marketing support around the strong experience propositions of the region and tailor their promotion to target segments</li> <li>▶ Support VisitWales' international marketing with Cardiff in particular as a key destination</li> <li>▶ Focus on seasonal campaigns rather than annual guides</li> </ul>	<p><b>Business</b></p> <ul style="list-style-type: none"> <li>▶ Target small to medium sized meetings, conferences exhibitions and business events</li> <li>▶ Identify market segments in the longer term for a potential conference / convention centre within the region</li> </ul>
Routes to Market	
<ul style="list-style-type: none"> <li>▶ Create first class web sites for each of the experience propositions, linked to all partner sites</li> <li>▶ Develop digital marketing - exploit web 2.0 approaches, encourage user-generated content and peer reviews and recommendations with e-newsletters and promotions</li> </ul>	<ul style="list-style-type: none"> <li>▶ Develop PR activity through press stories and press trips – focusing in particular on film and TV (such as Torchwood, Dr Who and Gavin &amp; Stacey); and the Ryder Cup</li> </ul>

## 4 DISTINCTIVE BRANDING

The brand strategy framework should ideally lead with a few priority destinations, under-pinned by the constant elements of *City + Coast + Country*, and enhanced with themes and experiences, using clear and consistent messages, and wrapped in the national branding.

The elements of the visitor experience where South East Wales is particularly strong are:

- ▶ A capital city in Cardiff
- ▶ Beautiful and appealing countryside
- ▶ Easy activities in that appealing countryside
- ▶ Attractive towns for ‘pottering’
- ▶ Some very high quality restaurants and gastro-pubs
- ▶ Strong – and distinctively Welsh – heritage and culture, including events
- ▶ A good business tourism offer

We propose this is what the region should focus on.

### RECOMMENDATIONS

Brand Planning	
<ul style="list-style-type: none"> <li>▶ Adopt a branding strategy that uses the Wales brand guidelines to give a consistent tone of voice and distinctive personality in the promotion of product experiences and destinations - and promote these as in “Wales” rather than Southern or South East Wales</li> </ul>	<ul style="list-style-type: none"> <li>▶ Focus regional marketing support around five experiences:                             <ol style="list-style-type: none"> <li>1. City breaks</li> <li>2. Countryside and scenery</li> <li>3. Easy and accessible outdoor activities</li> <li>4. Browsing (towns, villages and food)</li> <li>5. Culture and heritage</li> </ol> </li> <li>▶ Co-ordinate the five experience brands to pull the regional offer together</li> </ul>
Brand Building	Brand Communication
<ul style="list-style-type: none"> <li>▶ For leisure tourism: build the destination brands through closer marketing relationships with other regions of Wales based around the Brecon Beacons and the coastal offer, and with English partners for the Wye Valley</li> <li>▶ For business tourism: develop a unified regional offer led by Cardiff and Newport partners</li> </ul>	<ul style="list-style-type: none"> <li>▶ Develop a ‘brand manual’ for the region, taking the Wales branding approach and applying it to the South East Wales propositions, to provide the visualisation and stakeholders guidance on how to use the branding appropriately and consistently</li> </ul>

## 5 HIGHER QUALITY

The need for higher quality applies across the region and it relates to the overall visitor experience and satisfaction levels. It does not mean five-star. It means regularly exceeding visitor expectations across the experience.

Our findings show

- ▶ Quality of the environment is one of the main motives to visit the region
- ▶ Accommodation is too often of poor quality and lacks the distinctiveness and quality sought by today's market
- ▶ The sourcing and presentation of quality Welsh food and drink is not a key part of the visitor offer yet could enhance distinctiveness and cultural appeal.
- ▶ The region has few premier league visitor attractions and there is a case for focusing resources on these as key attractors of visits
- ▶ Few events are conceived and promoted for visitors
- ▶ There is a need to support the case for projects that are truly sustainable and transformational e.g. Convention Centre in Cardiff, Exhibition Centre in Newport and Tropical Rainforest near Bridgend

### RECOMMENDATIONS

Strategic Planning	Visitor Experience
<ul style="list-style-type: none"> <li>▶ Raise tourism's profile in the South East Wales Spatial Plan and ensure the rural and coastal areas are well placed to benefit from inward investment</li> <li>▶ Support initiatives to protect / maintain / improve those parts of the environment at risk - natural habitats and wildlife, designated areas, beaches, footpaths and underwater environments</li> </ul>	<ul style="list-style-type: none"> <li>▶ Focus excellent public realm and customer service at visitor hubs (attractions, town centres, rural hubs, waterfront areas, gateways)</li> <li>▶ Encourage visitor dispersal from the hubs</li> <li>▶ Improve the level of visitor awareness and quality of the visitor experience in newly designated and emerging destinations such as Blaenavon World Heritage Site, Valleys Regional Park and the Heritage Coast</li> </ul>
Investment and Infrastructure	Local Distinctiveness
<ul style="list-style-type: none"> <li>▶ Stimulate transformational and sustainable visitor projects and major infrastructure schemes which boost the tourism</li> <li>▶ Secure investment in Cardiff to ensure the city meets its image of a capital city and regional gateway</li> <li>▶ Develop new air routes to Cardiff International Airport</li> <li>▶ Develop additional quality self-catering accommodation in the northern part of the region and in tandem with outdoor activity facilities</li> </ul>	<ul style="list-style-type: none"> <li>▶ Encourage partnerships between local food producers, suppliers and tourism operators</li> <li>▶ Improve the marketing quality of locally produced goods to visitors</li> <li>▶ Encourage local communities and businesses to present and promote local features to visitors - such as local events, arts, crafts, cuisine, customs and language</li> </ul>

Events	Business Clusters & Investment
<ul style="list-style-type: none"><li>▶ Create a tier of tourist events, underpinning the cultural offer, and plugging the gap between community events and major commercial venue events</li></ul>	<ul style="list-style-type: none"><li>▶ Promote networking, good practice and collaboration by working with local clusters of tourism businesses</li><li>▶ Stimulate business investment to improve quality and increase capacity in line with market demand</li></ul>

## 6 EASIER ACCESS

Access has many facets - online and new technology, traditional information systems, transport, travel and access for all.

The region's visibility online is fragmented and there is a focus on print rather than on other routes to market. South East Wales is significantly lagging behind other areas of the UK which have invested in Destination Management Systems. South East Wales has none and this is holding back a raft of potential opportunities linked to business databases, customer databases, web content management, business-to-business communication and customer relationship activities.

Progress here, and on the implications for TICs will require regional leadership, significant investment and genuine local authority collaboration.

Visitor orientation, signage, transport and road links are vital for a successful visitor economy and yet are the responsibility of others. Reducing car dependency continues to be a goal.

### RECOMMENDATIONS

E-Tourism	Transport Planning
<ul style="list-style-type: none"> <li>▶ Produce an e-tourism strategy with an investment plan to create a Destination Management System that underpins the information service and supports the marketing</li> <li>▶ Assess the implications of e-tourism for the future structure and roles of Tourist Information Centres</li> </ul>	<ul style="list-style-type: none"> <li>▶ Develop closer strategic relationships between the tourism sector and transport operators and planners to ensure tourism is better understood and higher on their agendas</li> <li>▶ Encourage tourism businesses to make visitors more aware of transport options and actively promote sustainable transport options</li> </ul>

## 7 BETTER SKILLS

Investment in tourism product and promotion must go hand in hand with investment in better skills, to create that virtuous circle of a prospering industry able to offer higher levels of pay and career prospects.

Four issues have been defined by People 1<sup>st</sup> (the sector skills body) for Wales as a whole:

- ▶ Retention
- ▶ Management and leadership skills
- ▶ Customer service
- ▶ Craft skills (especially chefs)

All of these apply in South East Wales and require both local and national action.

Businesses need to continually improve and develop their products to meet the evolving tastes and needs of visitors. Small enterprises require business support and access to finance to overcome skills gaps and improve staff recruitment and retention.

### RECOMMENDATIONS

Skills Planning	Business Support
<ul style="list-style-type: none"> <li>▶ Develop closer strategic relationships between the tourism sector and the educational sector to ensure the needs of tourism is better understood and higher on the agenda</li> </ul>	<ul style="list-style-type: none"> <li>▶ Develop a new regional SPICE programme to cover on the ground operational support and training, start-up measures, access to finance, business support websites and toolkits on business management, ICT, environmental impacts and operations</li> <li>▶ Introduce an annual Regional Tourism Award Scheme to showcase best practice in sustainability and boost the overall profile and awareness of tourism to decision makers and local communities</li> </ul>

## 8 STRONGER PARTNERSHIPS

Capital Region Tourism has a history of success and achievement within a short timescale and operating with limited resources.

Capital Region Tourism’s role is to:

- ▶ Enable and support those initiatives which are being implemented at the national level
- ▶ Deliver activity where there is a business case for intervention and where there is sufficient critical mass at the regional level
- ▶ Co-ordinate local initiatives which is primarily undertaken by local organisations - councils, trade associations, specific venues, etc

Closer partnerships are required between tourism and regeneration, tourism and transport, and tourism and education to stimulate some of the recommendations elsewhere in this strategy.

It is uniquely placed to take ownership of this strategy and seek buy-in from partners, persuading and finding consensus within the region and across boundaries. And speaking out on tourism on behalf of the region.

### REGIONAL LEADERSHIP

Advocacy	Local Engagement
<ul style="list-style-type: none"> <li>▶ Provide the powerful voice for tourism in, and for, the region ensuring local authorities at high and political levels are engaged with tourism and strategic priorities are shared and understood</li> <li>▶ Provide regional input into national tourism reviews</li> </ul>	<ul style="list-style-type: none"> <li>▶ Encourage local authorities to focus on things they uniquely can do - place-shaping and the public realm, support for culture and heritage, proper visitor management with provision for access and amenities, local information and TICs, and their planning framework to encourage investment in the visitor economy</li> </ul>
Collaboration	
<ul style="list-style-type: none"> <li>▶ Closer collaboration between tourism and the wider regeneration agenda with CRT acting as a bridge between Communities First, Next and DE+T</li> <li>▶ Create the climate for more collaboration across external boundaries with South West Wales, Mid-Wales, Herefordshire and the Forest of Dean where it strengthens the visitor offer</li> <li>▶ Support ongoing partnership development work with and between the Brecon Beacons and the Welsh Valleys</li> </ul>	

## 9 MEASURING SUCCESS

The vision identifies success as

- ▶ Growth in the annual volume and value of tourism to the region
- ▶ More job created and maintained
- ▶ Greater community pride
- ▶ Greater visitor satisfaction

Monitoring and evaluation is already in place for Achieving our Potential, the Wales Tourism Strategy. It makes sense to tie this Strategy to the same things creating a single set of tracking indicators and avoiding duplication.

- ▶ Perceptions of South East Wales as a destination in advertising tracking exercises
- ▶ Number of responses to campaigns, cost per response, additional spend generated and return on investment
- ▶ Total number of businesses being marketed via regional web sites
- ▶ Value of business tourism as a percentage of total tourism spend
- ▶ Average quality assurance grading scores
- ▶ Percentage of trips and spend occurring in the shoulder months
- ▶ Number of Green Dragon accredited businesses
- ▶ Number of registered accommodation properties in the context of a potential statutory registration scheme
- ▶ Number of visits to specific regional web sites
- ▶ Percentage of total visits that are booked through the regional DMS
- ▶ Number of overseas visitors flying direct to Cardiff Airport

