

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

# THE SOUTH EAST WALES STRATEGIC TOURISM FRAMEWORK

CAPITAL REGION TOURISM

AUGUST 2008

# CONTENTS

1. INTRODUCTION .....	3
2. THE CHANGING LANDSCAPE .....	5
3. THE VISION AND FRAMEWORK.....	14
4. FOCUSED MARKETING .....	17
5. DISTINCTIVE BRANDING .....	20
6. HIGHER QUALITY .....	25
7. EASIER ACCESS .....	29
8. BETTER SKILLS.....	32
9. STRONGER PARTNERSHIPS .....	34
10. MEASURING SUCCESS .....	36

# 1. INTRODUCTION

## THIS REPORT

This is the tourism strategy for South East Wales that covers the period from 2008 onwards. It has been prepared for Capital Region Tourism which is acting on behalf of the tourism stakeholders in the region. It contains the Strategic Framework to cover the period to 2020 and a separate three-year Action Plan.

## THE BACKGROUND

The first tourism strategy for South East Wales called “Competing with Confidence” was commissioned by the South East Wales Economic Forum in 1999 (covering the local authorities of: Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taff, Torfaen and the Vale of Glamorgan) and Wales Tourist Board (now Visit Wales).

This was part of a wider and co-ordinated approach which also covered the other three economic regions of Wales - north, mid and south west.

The strategy had a 10 year life and contained the following vision for the region:

Our strategic vision is that the region will be fully prepared, in terms of quality of its people, businesses, infrastructure and marketing to welcome the world to the Ryder Cup in 2010.

As a first step, by 2006, the region will be established as a leading short-break destination with the domestic market and with international tourists to the UK. It will be positioned as the essential gateway to Wales featuring the vibrant capital, the cultural and sporting opportunities, the heritage attractions and the activities based on the coast, mountains, valleys and vales.

At the same time the region will also be developed as a major business tourism destination, based on its facilities for conferences, meetings and incentives, coupled with the exciting leisure opportunities.

All major stakeholders were signed up to the strategy yet there was no one organisation specifically resourced, equipped or tasked to oversee its implementation. In 2001 Wales Tourist Board initiated the formation of four regional tourism partnerships (RTPs) in Wales with devolved resources and responsibilities for the marketing and development of tourism and the primary aim of taking the strategies forward.

Capital Region Tourism (CRT) is the RTP serving South East Wales with all 11 local authorities (including the Brecon Beacons National Park Authority) and a corresponding number of elected trade representatives serving on its board of management. CRT prepares and delivers an annual business plan based on the priorities identified in the strategy.

The strategy was thoroughly reviewed and revised in 2003. This endorsed the original vision and focused on a new set of market propositions and destination brands. Destination brand research was then undertaken in 2004. The current business planning process is therefore shaped by those two reports.

The RTPs were subject to a planned review during 2006/07. This review, which has now been signed off by Welsh Assembly Government (WAG), recognises the value and the extent of the partnership working currently undertaken in South East Wales to deliver tourism activity against strategic priorities, but anticipates more integration with Visit Wales' work in the future.

This is a timely moment to review the strategic framework:

- ▶ The current strategy expires in 2010
- ▶ The strategic context has changed significantly
- ▶ Sustainability is now a mainstream influence for consumers and the industry
- ▶ National tourism reviews are in-hand and need to be informed by the regions
- ▶ The competitive environment has evolved and grown

This report establishes a strategic framework until 2020. However, the pace of change is likely to continue and an interim strategic review would be desirable.

This report:

- ▶ Looks at the changing landscape
- ▶ Sets the strategic vision
- ▶ And develops a series of strategic recommendations under a number of themes

The action plan covers the first three years to 2011. This is presented in a separate document. Again, the anticipated pace of change suggests it would be unwise to plan any further ahead at this stage. The action plan should be reviewed and rolled forward each year in the light of success and experience. The action plan should provide the framework for the CRT annual business plan as well as informing the work of many tourism stakeholders across the region.

Separate reports cover the background topics of Benchmarking and Strategic Fit.

This report is the Full Version of the Strategic Framework. A Short Version has also been produced.

## 2. THE CHANGING LANDSCAPE

### INTRODUCTION

This section talks about the changing landscape, specifically:

- ▶ The previous tourism strategy
- ▶ Performance against targets
- ▶ Regional tourism profile
- ▶ Destination benchmarking
- ▶ Political, economic, sociological and technological change
- ▶ Strategic fit

### THE PREVIOUS TOURISM STRATEGY

The last strategy, published in 2003, is an important building block for the new strategic framework. Strategic planning is a continual process which needs to build on previous success and experience. Hence there are lessons to take forward.

The regional tourism strategy “Competing with Confidence” established an annual growth target of 6.5% in the value of tourism. This is a gross figure so the net target including inflation is nearer 3.5% per year. The emphasis has been placed on high yield markets with growth potential.

The strategy originally focused on urban propositions using Cardiff as the focal point, but in the light of consumer research this was expanded to include:

- ▶ Cardiff
- ▶ The Wye Valley
- ▶ The Brecon Beacons
- ▶ The Valleys of South Wales
- ▶ Glamorgan Heritage Coast

“Southern Wales” had already been introduced at this stage as a channel for overseas and travel trade activity. It was rolled out as the area designator and has since been used to draw some product themes together:

1. Business tourism
2. Luxury and activity breaks
3. Events
4. Golf
5. Culture and heritage

CRT’s mission is:

Through genuine partnership working, to lead South East Wales in fulfilling its tourism potential as both the essential gateway to Wales and a destination of world class quality in its own right, in ways which bring clear, lasting and increasing benefits to the resident communities and businesses of the region.

Subsequently, five lead roles have evolved for CRT:

- ▶ Marketing and branding
- ▶ Regional investment framework
- ▶ Building business networks
- ▶ Information sharing
- ▶ Research

In addition CRT has a crucial role delivering the regional priorities against the wider WAG spatial and thematic agenda.

### PERFORMANCE AGAINST TARGETS

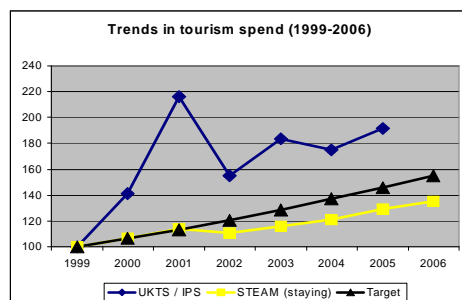
The last strategy was predicated on the assumption that the urban areas (particularly Cardiff) would attract the higher yield markets and a relatively high proportion of the region's market share. This was based on an analysis of economic impact data from STEAM and the product distribution. Yet it did not take full account of the fact that large parts are business travel and visits to friends and relatives which are difficult to influence. Discretionary tourism is more likely to be dispersed around the region.

Hence the refocus in 2004 on a series of areas and themes was a wise move.

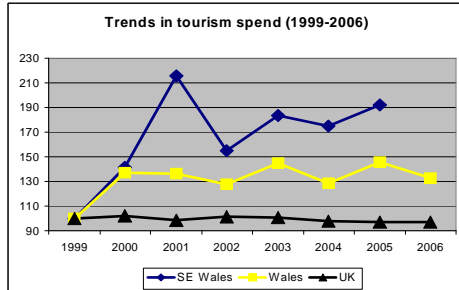
The 2003 Strategy and Action Plan identified over 40 objectives but did not highlight specific growth targets, other than the annual 6.5% growth in the value of tourism. Hence measuring performance is not straight forward and is hampered by having two means of measuring the volume of tourism - the UKTS and IPS which is a "top down" approach using national survey data, and the STEAM economic impact model which is "bottom-up" and dependent on local authorities' participation.

Trends in tourism over seven years to 2006 are shown in the following charts.

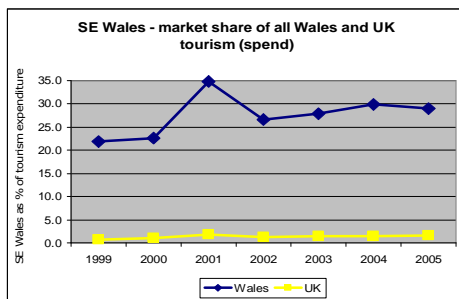
The target for regional tourism spending has been significantly exceeded according to UKTS / IPS data.



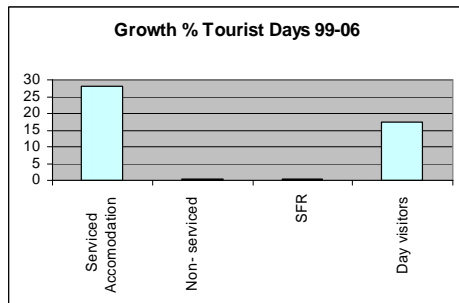
The growth in regional tourism spending (based on UKTS / IPS) has outperformed Wales as a whole and the UK.



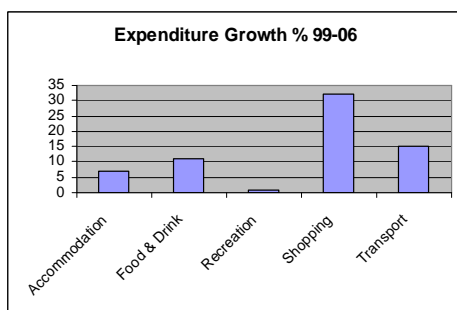
SE Wales market share of all Wales and UK tourism spend has increased.



Visitor growth has been mainly in serviced accommodation and day visitors.



Visitor expenditure growth has been seen in the retail sector.



A set of soft and hard performance measures has been agreed between CRT and the Department of Heritage within WAG. These are set out in the CRT business plan.

Trends for volume, value and employment continue to be monitored through STEAM, disaggregated UKTS / IPS values and Government employment figures. STEAM is also being used to benchmark the region against comparator regions, supported by work through the DP:UK benchmarking consortium.

## REGIONAL TOURISM PROFILE

This is a snapshot of the current regional profile (source Visit Wales 2005).

### UK Visitors

- ▶ 2.8 million trips
- ▶ 8.5 million nights
- ▶ £439 million spend - average spend per night £52
- ▶ Average length of stay is 3 nights
- ▶ 60% of nights are for holiday, 21% to visit friends and relatives, and 14% on business
- ▶ 75% of nights are spent in city / town accommodation
- ▶ 70% of trips are from England
- ▶ 75% of trips are by car
- ▶ 70% of trips are by people aged 16 to 44

### International Visitors

- ▶ 0.47 million trips
- ▶ 3.4 million nights
- ▶ £152 million spend - average spend per night £45
- ▶ Average length of stay is 7 nights
- ▶ 25% of nights are for holiday, 36% to visit friends and relatives, and 14% on business
- ▶ 20% of trips are from Ireland, 12% USA and 12% Germany
- ▶ 30% of trips are from people aged 16 to 44

### Annual Occupancy

- ▶ Hotel bedrooms 61% (Wales average 57%)
- ▶ Guest house and B&B 51% (Wales average 43%)

The South East Wales Visitor Survey undertaken in 2005 provides a further insight. This was undertaken through interviews mainly in town centres, at tourist attractions and TICs. The nature of the survey tends to pick-up the “sightseeing market” and does not necessarily cover outdoor pursuits or business trips.

The headlines are:

- ▶ 53% are on a day out from home
- ▶ 46% come from Wales with over a third from the immediate locality
- ▶ 85% have been to the area before

- ▶ Scenery, landscape and countryside are the main influences - plus shopping and the influence of friends and relatives
- ▶ 96% score the visit as excellent or good

## DESTINATION BENCHMARKING

The South East Wales region was compared to three other areas in the UK as part of the strategic review process:

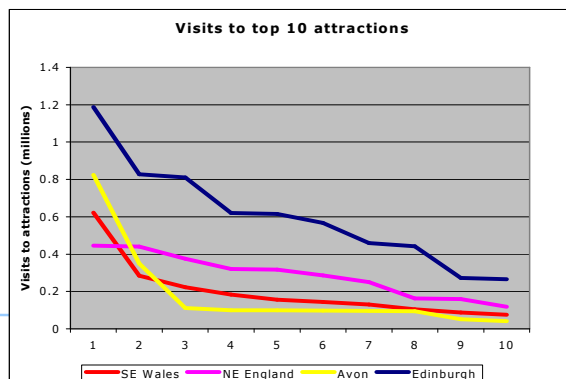
- ▶ Edinburgh and the Lothians
- ▶ Avon (Bristol and Bath)
- ▶ Newcastle and the North East of England

The benchmarking looked at a range of measures including:

- ▶ Volume and value of tourism trips
- ▶ Visits to attractions
- ▶ Accommodation stock
- ▶ Conference venues
- ▶ Guidebook coverage

The headline findings are:

- ▶ In absolute terms, the visitor economy of South East Wales is broadly on a par with Avon, but considerably smaller than NE England and Edinburgh and the Lothians
- ▶ SE Wales (along with the NE) has a higher proportion of domestic trips (86% in the case of SE Wales) than Edinburgh and Avon
- ▶ The proportion of VFR trips is higher than in the other areas (31%)
- ▶ Spend per trip and per night are relatively low in SE Wales - on a par with Avon, but around 86% of the spend in the NE and 64% of the spend in Edinburgh and the Lothians
- ▶ In relative terms (i.e. per head of population), SE Wales is generating slightly more tourism spend than the NE, but slightly less than Avon, and considerably less than Edinburgh (which is in a different league)
- ▶ SE Wales has a lack of depth of major attractions - particularly in comparison to Edinburgh - as shown below



- ▶ For SE Wales there is a lower level of absolute and relative coverage in independent travel guide books relative to the other areas, yet coverage is largely positive
- ▶ In overall terms, SE Wales is generally on a par with its comparators, albeit Edinburgh and the Lothians are in a different league in terms of scale, product supply and performance

### WHAT HAS CHANGED SINCE 2003?

This is a review of the Strategy that was prepared in 2003. Much has happened and changed in the intervening years, which means the Strategy must move on. The broader changes are expressed within the PEST analysis.

Political	Economic
<ul style="list-style-type: none"> <li>▶ Consumer concerns about security in global travel due to factors such as 9/11, the Iraq War, Middle East tensions, the tsunami, London bombings, etc</li> <li>▶ Enlargement of the EU has created new market opportunities, led to more competition for EU funds and created a mobile pool of labour in the service sector</li> <li>▶ WAG has a new agenda for strategic change based on a fairer, more prosperous, healthier and better educated country</li> <li>▶ Wales Tourist Board was integrated within the Assembly Government in April 2006 and has recently been relocated under Heritage and Culture</li> <li>▶ New Spatial Plan for Wales provides high level strategic guidance and will influence the location of public sector expenditure</li> <li>▶ New tourism strategies have an important influence on regional tourism - Achieving our Potential, Cultural Tourism Strategy for Wales, Sustainable Tourism Framework and Action Plan, Coastal Tourism Strategy for Wales, Activity Product Strategies including Golf</li> <li>▶ Changes in EU funding regimes - recently to Objective One funding and now in Convergence funding - are moving the goal-posts for tourism and infrastructure projects, and temporarily causing some uncertainty</li> </ul>	<ul style="list-style-type: none"> <li>▶ Steady economic growth in the UK over the last ten years but evident signs of an imminent slow down</li> <li>▶ Affluence is increasing with growth predicted in ABC1 groups and a decline in C2D groups in the UK</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>▶ Growth of low cost airlines is having a big impact on the outbound UK short break market going to European cities and resorts</li> <li>▶ High employment levels and tight labour markets are creating retention problems in hospitality</li> <li>▶ Big urban renewal schemes are changing the way people think about and use cities</li> <li>▶ Business trips have grown significantly over the past decade, though business tourism is a smaller proportion of the Welsh visitor economy than in the UK as a whole</li> <li>▶ Distinctiveness is disappearing - creating a backlash against clone towns and a desire for more local and authentic products and experiences</li> </ul>

Social	Technological
<ul style="list-style-type: none"> <li>▶ Population is ageing and growing - more people are 55+ and more affluent and agile than their previous generation - but influenced by pension planning and disposable income</li> <li>▶ Increasing affluence is driving up the demand for quality</li> <li>▶ More sophisticated and discerning consumers are being offered a greater choice and variety of holiday destinations</li> <li>▶ Increasing desire for more authentic holiday experiences and greater interaction with local people</li> <li>▶ Time is becoming more precious and life more stressful, placing greater expectations on the tourism sector</li> <li>▶ Time constraints coupled with a work ethic is creating growth in shorter and more frequent breaks</li> <li>▶ Fewer traditional family units and more single person households and single parents, children travelling with grandparents, civil partnerships and people visiting / living with “mates”</li> <li>▶ Growing interest in self-development, life-long learning, well-being, health awareness and exercise - which provides opportunities for countryside and activity providers</li> <li>▶ Eating out and drinking out market has grown significantly and shopping is now seen as a leisure pastime</li> <li>▶ Congestion is increasing, as is the desire to escape it</li> </ul>	<ul style="list-style-type: none"> <li>▶ The internet provides an instant route to a global market with a vast array of destinations competing for share of voice</li> <li>▶ More consumers are using the internet for holiday and travel - to plan, book and tell others about their experience</li> <li>▶ The popularity of social networking sites allows holidaymakers to share good, bad and indifferent experiences - so visitor satisfaction is essential</li> <li>▶ The integration of tourism business databases and new distribution channels create opportunities for small businesses to take products to various markets</li> <li>▶ The evolution of mobile phone technology and satellite navigation systems creates new channels to influence visitor behaviour at a destination</li> <li>▶ As the number of media messages and choices increase, people look for simple and clear information - and recommendations or must-see things</li> </ul>

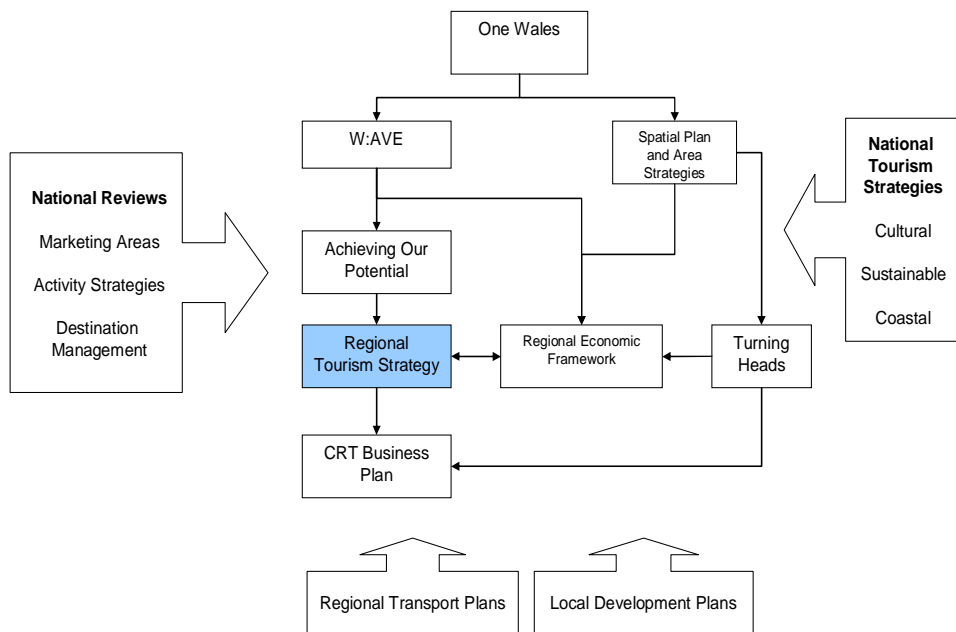
## STRATEGIC FIT

The preceding political analysis identifies a number of tourism and other strategies that will have an important influence on the new tourism strategy and bids for funding.

The details of each strategy are summarised in a separate paper.

Capital Region Tourism has helpfully identified the relationships between these strategies in the following diagram.

## New Strategic Landscape



This highlights the importance of the Regional Tourism Strategy in relation to regeneration, transport and the local development planning process. There is a need to ensure tourism issues and opportunities are embedded in the wider planning framework.

The Spatial Plan forms one of the high level strategic guidance building blocks for the Welsh Assembly Government. Specifically the Wales Spatial Plan:

- ▶ Provides a framework for collaborative action between the Welsh Assembly Government and its partners to achieve the priorities it sets out nationally and regionally
- ▶ Influences the location of expenditure by the Assembly Government and its agencies
- ▶ Influences the mix and balance of public sector delivery agencies' programmes in different areas
- ▶ Sets the context for local and community planning
- ▶ Provides the evidence base for the public, private and voluntary sectors to develop policy and action

On behalf of the region CRT has committed to developing and marketing tourism in the Heads of the Valleys - a key focus of the spatial planning process and practical response to the 'Turning Heads' strategy.

The table below prepared by CRT identifies the divergence between the Spatial Plan (which has three sub-areas and a set of key settlements) and tourism.

Wales Spatial Plan		Tourism		
Spatial Plan Sub-Area	Key Settlement	Primary Tourism Hub	Additional Key Tourism Locations	Current Tourism Destination Area
City Coast	Cardiff	Cardiff	Cardiff Bay	Cardiff
	Barry	Barry	Rural Vale	Heritage Coast
			Cardiff Airport	
	Bridgend	Porthcawl	Bridgend	Wye Valley / Vale of Usk
	Newport	Newport	Caerleon	
		Celtic Manor		
Connections Corridor	Chepstow	Chepstow	Tintern	Wye Valley / Vale of Usk
	Abergavenny	Abergavenny	Brecon Beacons	
			Monmouth	
	Caerphilly	Caerphilly	Usk	Valleys
	Blackwood		Cwmcarn	
Pontypool		Pontypool		
Heads of the Valleys Plus	Cwmbran	Cwmbran		Valleys
	Pontypridd	Pontypridd / Porth		
	Merthyr Tydfil	Merthyr Tydfil	Brecon Beacons	
	Aberdare	Aberdare	Brecon Beacons	
	Ebbw Vale	Tredegar	Ebbw Vale	
	Blaenavon	Brecon Beacons		
		Brecon Beacons		
		Bridgend Valleys		

The key settlements are internally focused and do not always necessarily correspond with tourism destinations which are market-driven. The Spatial Plan needs to recognise this in terms of service planning, land use planning, transport and access to employment. There are others issues yet to be addressed such as the connectivity to neighbouring English regions and the overall weight given to tourism in the South East compared to other regions.

To date tourism has not been represented on the regional spatial planning team. It would be helpful if CRT provided direct input on visitor economy issues on behalf of the region.

There is currently a national tourism review, commissioned by WAG, on the current Marketing Area Partnerships, Tourism Growth Areas and Destination Management. The outcomes are due in late summer 2008 and are critical for the region and future resource allocations.

Hence this regional strategy needs to:

- ▶ Be an advocacy document to inform and influence the Spatial Plan debate and national tourism review
- ▶ Be adjusted in the light of the outcomes from these two pieces of work

## 3. THE VISION AND FRAMEWORK

The original strategic vision has stood the test of time. But it was focused on the Ryder Cup in 2010 which creates a unique milestone. The underlying principles need to be adjusted to reflect a longer horizon and to set new aspirations.

### THE VISION STATEMENT

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:

- ▶ 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.

### GUIDING SUSTAINABLE PRINCIPLES

The Welsh Assembly vision for Sustainable Tourism is:

*“Wales is recognised internationally as a leading sustainable tourism destination that promotes local economic prosperity, supports community well being and engagement, enhances its natural environment and culture and delivers a high quality experience to visitors.”*

**All** tourism in South East Wales should seek to be sustainable. Hence, there are four key guiding principles behind this strategy:

**Promoting local economic prosperity**

- ▶ To maximise the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally
- ▶ To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways
- ▶ To ensure the viability and competitiveness of tourism destinations and enterprises so that they are able to continue to prosper and deliver benefits in the long term
- ▶ To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability, or in other ways

**Supporting community well being and involvement**

- ▶ To ensure that tourism maintains and strengthens the quality of life in local communities, including social and linguistic structures
- ▶ To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders
- ▶ To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services to local people

**Minimising tourism's environmental impact**

- ▶ To minimise the use of scarce and non-renewable resources in the development and operation of tourism facilities and services
- ▶ To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

**Protecting and giving value to natural heritage and culture**

- ▶ To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment
- ▶ To support the conservation of natural areas, habitats and wildlife and minimise damage to them
- ▶ To enhance and value historic heritage, authentic culture, traditions and distinctiveness of host communities

There are seven parts to the strategic recommendations for South East Wales:

- ▶ **Focused Marketing**
- ▶ **Distinctive Branding**
- ▶ **Higher Quality**
- ▶ **Easier Access**
- ▶ **Better Skills**
- ▶ **Stronger Partnerships**
- ▶ **Measuring Success**

Each part has a brief introduction, then an overview of the key issues and opportunities, followed by the recommendations. These provide the building blocks for the accompanying Action Plan.

## 4. FOCUSED MARKETING

### INTRODUCTION

The division of responsibilities in the medium term between Visit Wales and the Regional Tourism Partnerships for UK marketing will be influenced by the ongoing national review of marketing areas. The regional partners must continue to have a role in UK marketing, but the future of the current set of sub-regional guides and web sites (that collectively cover the region and consequently provide marketing collateral for Visit Wales) will be determined by the marketing area review.

Local authorities should continue to take 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. The main vehicle for this will be through information print locally distributed and local destination web sites.

It is anticipated that Visit Wales will continue to take the lead responsibility for international marketing supported by regional consortia. But the region should influence the overseas market planning work of Visit Wales to ensure that activities meet the needs of stakeholders. Specifically, Cardiff should be heavily involved as the capital city of Wales.

Regional marketing should take account of the potential return on marketing investment and should lean towards promoting strong destinations which are not constrained to local authority administrative boundaries to high yield markets. Consequently the key markets are likely to be UK short breaks, additional holidays and the meetings and conference sector.

### OVERVIEW

Visit Wales has undertaken market segmentation and identified the target market for Wales as "Independent Explorers" which is further segmented into Active Explorers, Family Explorers and Personal Explorers.

These seven million potential visitors to Wales are people who are:

- ▶ Looking for short break (1 to 3 nights) and additional holiday (up to 7 nights) destinations
- ▶ In search of new places and experiences
- ▶ Seeking quality accommodation at all levels - hotels, guest houses, farms, B&B, self catering, camping and caravanning, hostelling, etc
- ▶ Up-market and relatively affluent
- ▶ Age 30+
- ▶ Keen to avoid commercialised tourist traps
- ▶ Independent in thought and action
- ▶ Looking for places and ideas that inspire and challenge them
- ▶ Interested in outdoor activities
- ▶ Interested in understanding local culture and meeting local people
- ▶ Wanting to return home refreshed and enriched

Visit Wales identifies the best prospects as lying within the two hour drive time of Wales - the M4 corridor, Midlands, North West, Hampshire and the West Country.

Outdoor activities are a key part of the visitor offer. This creates a series of niche markets and providers - each highly specialised. The classic segmentation is by activity. South East Wales might not have the biggest or best outdoor activity offer in Wales but it does have the most accessible and the greatest choice.

The promotion and development of tourism activities that depend on the landscape - such as walking, cycling and horse-riding - helps to provide the rationale for protecting and improving the landscape quality. There are opportunities to ensure that revenue from visitors support the maintenance and restoration of the natural and built environment.

There is strong product offer in South East Wales year round. The spring, autumn and Christmas periods are key times for short breaks, additional holidays and city breaks. Shopping, food and drink, arts, cultural entertainment and theatre are on offer all year. And the great outdoors is also a draw throughout the year. The seasonal changes to the landscape offer great appeal.

However, there is current fragmentation in the regional marketing messages and a lack of a consistent look and feel in communication. It reflects the diverse nature of the region but confuses the market and inhibits building a clear identity, awareness and interest in visiting.

Specifically:

- ▶ There seems to be a traditional reliance on print and distribution, yet visitors are increasingly using the web to make holiday decisions
- ▶ The marketing of Cardiff underplays its potential as Wales' capital city
- ▶ The potential of business tourism to benefit the region is inhibited by a lack of coherence in its promotion

Currently there is no systematic segmentation to guide the marketing. This is an area which needs attention - particularly around lifestyle and values based segmentation which takes account of the motivation and behaviour of potential visitors.

## STRATEGIC FRAMEWORK RECOMMENDATIONS

### Market Planning

- ▶ Develop a regional tourism marketing plan

For leisure tourism:

- ▶ Select priority target segments using VisitWales segmentation approach
- ▶ Target the 2 to 3 hour travel time with priority for M4 corridor, Midlands, Hampshire and the West Country

- ▶ Focus regional marketing support around the strong experience propositions of the region and tailor their promotion to target segments
- ▶ Support VisitWales' international marketing with Cardiff in particular as a key destination
- ▶ Focus on seasonal campaigns rather than annual guides

For business tourism:

- ▶ Target small to medium sized meetings, conferences exhibitions and business events
- ▶ Identify market segments in the longer term for a potential conference / convention centre within the region

### **Routes to Market**

- ▶ The marketing plan should give particular attention to developing new routes to market, specifically:
  - ▶ Create first class web sites for each of the experience propositions, linked into the Visit Wales web site, all South East Wales local authority sites, and other partners sites
  - ▶ Develop digital marketing - exploit web 2.0 approaches, encourage user-generated content and peer reviews and recommendations with e-newsletters and promotions
  - ▶ Develop PR activity through press stories and press trips – focusing in particular on film and TV exposure (such as Torchwood, Dr Who and Gavin & Stacey); and the Ryder Cup

## 5. DISTINCTIVE BRANDING

### INTRODUCTION

This section covers the brand positioning of South East Wales within the overall Wales branding, and the product experiences and destinations with most potential.

### OVERVIEW

The 2003 Tourism Strategy initially identified Cardiff as the attack brand for the region. This was tested through qualitative research (by Senior King in 2004) which concluded that a brand strategy focusing solely on Cardiff neglected other destination brands which already had some recognition and appeal or had potential. The brands were therefore expanded to:

- ▶ Cardiff
- ▶ The Wye Valley
- ▶ The Brecon Beacons
- ▶ The Valleys of South Wales
- ▶ Glamorgan Heritage Coast

Senior King also proposed that the area designator (in effect the brand name) for regional campaigns should be “Southern Wales” which, although it had little awareness nor particular understanding other than the geography, sounded better than South East Wales. This is in effect what has been pursued, initially for the travel trade and more recently to consumers.

Meanwhile Visit Wales uses long established tourism marketing areas which are similar - but slightly different:

- ▶ Cardiff
- ▶ The Wye Valley and the Vale of Usk
- ▶ Mid-Wales and Brecon Beacons
- ▶ South Wales Valleys
- ▶ Glamorgan Heritage Coast

In conclusion there is a plethora of names used with, in reality, limited identity and awareness in the market place. The destinations promoted have:

- ▶ No apparent relationship between them
- ▶ No consistency of presentation
- ▶ Equal status
- ▶ Little relationship with Wales brand and branding
- ▶ Multiple themes which are being taken to market for each destination

A brand strategy framework should ideally lead with a few priority destinations, 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 and coast, easy and invigorating, with a range of protected and designated landscapes
- ▶ Attractive towns for “pottering”
- ▶ Some very high quality restaurants and gastro-pubs
- ▶ Strong - and distinctively Welsh - heritage and culture, including events

This can be summed up as 4Cs - City, Coast, Countryside and Culture.

On a practical level South East Wales also has the huge advantage of proximity to large population bases in the M4 corridor, the Midlands and the South West

By focusing on the experiences identified above and destinations with the most potential to attract visitors the whole of the region can benefit. It is a small area and inevitably visitors will move around. So, it is not necessary to promote every location and list every place in all marketing communications for them to benefit - and in fact it is generally better not to.

The destinations which are the hooks for the marketing effort are those which can best:

- ▶ Exploit existing market awareness and appeal
- ▶ Fit the growth trend for city breaks
- ▶ Fit the substantial driver for short breaks and additional holidays which offer escape / get away from it all
- ▶ Fit the growth in interest in soft activities
- ▶ Provide focus to the marketing but benefit the whole of the region

On this basis the destinations for the region which already enjoy strong recognition are:

- ▶ Cardiff - as the capital city of Wales
- ▶ The Wye Valley - for relaxation and indulgence through its beautiful scenery, towns and food
- ▶ The Brecon Beacons - with its “easy” scenery and “invigorating” activities

These are supported by

- ▶ The Welsh Valleys offering culture and heritage (but not yet a product which can easily deliver a complete visitor experience)
- ▶ The Heritage Coast (which is currently seeking to redefine the role of traditional resorts and their hinterland)

Underpinning the destinations are the constant elements of *City + Coast + Countryside + Culture*.

South East Wales is a relatively small region and all these fundamental and desirable elements are offered by (either as part of the offer, or within easy reach of) the strongest destinations.

So, these four constant elements should form the backdrop to **all** of the region's marketing communications - although it is likely that one of the four will be to the foreground compared to the others, depending on the audience and objectives of a communication.

An approach which focuses on the strong experiences which the region has to offer is also required. The strengths lie in: city breaks, countryside and scenery, beaches and cliffs, easy and accessible outdoor activities, browsing (towns, villages and food), and culture and heritage. This might be an easier task for partners to work on in the short term, bearing in mind the ongoing review of Marketing Areas across Wales.

Targeted communications that present a tailored product offer to the relevant market segment have a greater potential to generate more spending throughout the region compared to a "something for everyone" approach.

Visit Wales have made a considerable investment in researching and developing brand guidelines for the promotion of Wales. There is a clear opportunity for SE Wales to benefit from this and not reinvent it. The branding is based on the concept of Wales as a "challenger brand" - a brand which is "*powered by ideas, with the courage to break with its past, be a leader – even a bit radical – and disrupt people's perceptions*". The central concept is "*Wales = Original Thinking*" so Visit Wales marketing communications reflect this and are original and bold and challenge perceptions of Wales. The brand guidelines give a number of examples of this as well as describing the design "look and feel".

The Welsh culture and sense of place is significant. It is a priority for WAG and fits the wider strategic agenda, provides the authentic experience sought by visitors, allows a re-positioning of Cardiff and the rest of the region in a contemporary way and provides a channel for SE Wales' attractions and events to be taken to market.

This creates clear opportunities for the region to:

- ▶ Exploit the (relatively) large spend on awareness advertising made by Visit Wales
- ▶ Ensure that the core differentiation of the region's destinations - the fact they are in Wales is not confused by other area descriptors which are meaningless to consumers
- ▶ Retain personality and distinctiveness - which the guidelines are easily broad enough to allow

However the national review of the current Marketing Area Partnerships needs to be taken into account. It has potential implications:

- ▶ This might result in thematic brands that cut across regional boundaries - for instance, the development of a Welsh Coast or South Wales Coast proposition which could create a stronger brand proposition for the coastal partners
- ▶ The marketing and branding recommendations in this strategy should be used to influence the national review

- ▶ This regional strategy should be adjusted at a future point in the light of the national agreement on the future of the current Marketing Areas and their Partnerships

Within the business and conference sector, Cardiff (as the capital city) is the brand, although the product extends along the M4 corridor east to Newport and west towards Swansea. Conference organisers are most interested in cities rather than regions or rural areas. It is more effective to have one destination to sell and to use a range of venues to back up that sales proposition. The region is easily small enough to be viewed in this way and serviced by Cardiff and Bristol airports, fast train connections to London and the Midlands, and the M4.

The best way to maximise conference tourism would be a brand proposition that is Cardiff and South East Wales, delivered by a single conference bureau. There would be an opportunity to include event management and event bidding within the remit of such a bureau. However currently such a unified approach is unlikely to be acceptable, therefore in the short term greater collaboration and joint marketing between Cardiff and Newport conference bureaus should be pursued.

The South East region is the market leader region in Wales for championship golf. There is a major opportunity to continue exploiting the PR potential of the Ryder Cup. This positions the region as a quality environment and exploits the platform created by Visit Wales and their investment in golf promotion.

In conclusion, the brand recommendations need to be finalised later in 2008, so are unlikely to affect the marketing plans for the region until at least the next season.

## STRATEGIC FRAMEWORK RECOMMENDATIONS

### Brand Planning

- ▶ 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
- ▶ Focus regional marketing support around five experiences:
  1. City breaks
  2. Countryside, coast and scenery
  3. Easy and accessible outdoor activities
  4. Browsing (towns, villages and food)
  5. Culture and heritage
- ▶ Co-ordinate the five experience brands to pull the regional offer together
- ▶ Co-ordinate destination marketing based on partnerships that reflect the new brand map post 2008

**Brand Building**

- ▶ 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
- ▶ For business tourism: develop a unified regional offer led by Cardiff and Newport partners

**Brand Communication**

- ▶ 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

## 6. HIGHER QUALITY

### INTRODUCTION

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.

### OVERVIEW

The quality of the environment is one of the main motives to visit the region. The economy and the environment are directly linked through tourism. Promoting the landscape and culture in tandem with sustainable management of these resources provides the economic justification for protecting and investing in them. Yet the cumulative impact of tourism can put the environment in some localities at risk, especially from day visitor pressure. Visitors and businesses therefore need to have greater environmental awareness.

The “Independent Explorer” market segment likes to interact with the places they visit to understand the culture and meet the people. The successful promotion of local distinctiveness can add significant value to the tourism product.

The region has a number of areas with well established special designations, such as National Park and Area of Outstanding Natural Beauty. These designations are relatively well understood by visitors. Yet there have been other designations (the World Heritage Site at Blaenavon, the Heritage Coast, and the potential Valleys Regional Park) that use terms which are not so well known to the public and require additional visitor infrastructure / services and growth in awareness over time.

Trips to Wales tend to last longer than the UK average, yet the level of spend per trip is lower, suggesting a low yield, perhaps due to the VFR market. A low quality approach is still prevalent and many businesses and places are selling on price rather than quality and value.

Increasing market affluence and visitor expectations are shifting demand towards higher quality accommodation. Quality assurance is reflected in various ways - through the Visit Wales grading schemes, through independent guidebooks, through marketing consortia that major on quality and through social networking on the web. The advent of Trip Advisor, and other such web sites, allows visitors to post messages about their experiences - good, bad or indifferent.

The quality end of the market propositions is reflected in the success of the current regional promotion of Luxury and Activity breaks. Yet, there are two propositions in one here. Luxury is about time out and pampering - a market proposition in itself which does not have to be allied with activities. Several luxury hotels - often with spa and golf facilities - have become destinations in their own right.

Cardiff has seen strong growth in branded hotels yet still lacks distinctive boutique hotels. These are becoming more common in other major UK cities who are big players in the city break market - London, Edinburgh, Manchester, Brighton, etc.

The self-catering offer is very strong in places and the quality is good. There is an opportunity for further development in the northern part of the region, especially in tandem with the development of outdoor activity facilities.

There is still a significant level of relatively poor and indifferent quality accommodation. This is often not quality assured and is unable to feature in public sector funded marketing activity or TIC services. This is a problem not peculiar to Wales or the South East. Visit Britain has ambitious growth targets for participation by 2012.

WAG has had aspirations to establish a statutory registration scheme for accommodation. This would have regional implications - potentially an uptake in the scheme, and / or a quite significant reduction in the overall known bedstock. There are other accreditation schemes and those relating to green or cultural tourism help to reinforce the messages about a quality environment and quality operators within the region.

The sourcing and presentation of Welsh food and drink is not a key part of the visitor offer - yet this could enhance the cultural appeal.

Activities are a key part of the visitor offer. This is true of most of Wales, so the region needs to stand out from the crowd. This points towards gentler walking for all ages and abilities, cycling and riding (National Park and AONB designations are important), championship golf and niche water sports. There are opportunities to identify centres of excellence, especially in terms of climbing, mountain biking, walking, water sports and golf which will provide benchmarks for the rest of the regional offer.

The region has few premier league visitor attractions - only three attract more than 200,000 visits per year. Then there is a large number of small attractions - unlikely to be prime generators of visitors from the regional market segments, but still very important as "things to do and see" once people have arrived. Overall visits to attractions are fairly static yet there has been an increase in the number of attractions. In a regional context there is a case for backing winners - the major attractions and those capable of drawing more people into the region.

Events are an important component of the visitor offer. They are being developed and promoted in two different ways: by event venues who are securing big names and acts, acting commercially to fill seats; and by local authorities who tend to focus on small scale local events mainly for the benefit of their communities. Both approaches are required, but few events are conceived and promoted primarily for the benefit of tourists.

The national events strategy being prepared by WAG will have an important bearing on the regional approach to events.

There is plenty of evidence of growth in business tourism. The region has 64% of Wales's business tourism in terms of value. It tends to be focused on Cardiff

and the motorway corridor. Cardiff is a national capital and ranks 8<sup>th</sup> in terms of conference destinations in the UK. The region lacks a world-class purpose built convention centre and exhibition centre.

There has to be a close match between the promises made to visitors in the marketing and the experience delivered on the ground.

Encouraging businesses to use local goods and services reduces leakage of tourism expenditure from the local economy, reduces goods traffic on the roads and helps to ensure that visitors receive a distinctive, high quality Welsh experience.

Visit Wales has prepared a tourism investment strategy which looks at market needs, quality and product gaps. This is aligned to the Wales Spatial Plan and the emerging structural fund programme.

There is a need to support the case for projects that are truly transformational in their nature and would have a major spin-off to the region and the southern part of Wales. They stand to bring new markets to the region and will be a major stimulus to changing awareness and perceptions. At present there are several projects in the pipeline (e.g. Convention Centre in Cardiff, Exhibition Centre in Newport and Tropical Rainforest near Bridgend) - although this list will change in the light of planning and investment decisions. The provision of public transport is an important consideration.

Equally there is a need to support the case for infrastructure projects that help to support the visitor economy. The proposed Valleywood Studio Complex, the proposed new access route between the M4 and Cardiff International Airport, proposals to complete the orbital route around Cardiff and suggestions for a new M4 relief road are all complementary to tourism.

## STRATEGIC FRAMEWORK RECOMMENDATIONS

### Strategic Planning and the Environment

- ▶ Raise tourism within the profile of the South East Wales Spatial Plan and ensure the rural and coastal areas feature in a sustainable way to benefit from inward investment
- ▶ Support initiatives to protect / maintain / improve those parts of the environment at risk - natural habitats and wildlife, designated areas, beaches, footpaths and the underwater environments

### Investment and Infrastructure

- ▶ Stimulate transformational and sustainable visitor projects and major infrastructure schemes which boost the tourism sector
- ▶ Secure investment in Cardiff to ensure the city meets its image of a capital city and regional gateway

- ▶ Expand the level of inbound short break, VFR and business traffic to Cardiff International Airport by developing new air routes, supported by local infrastructure to improve access and encourage visitor dispersal
- ▶ Develop additional quality self-catering accommodation in the northern part of the region and in tandem with outdoor activity facilities

### **Visitor Experience**

- ▶ Pursue excellence within the public realm and customer service at hubs of visitor activity (such as destinations, attractions, town centres, rural hubs, waterfront areas, gateways)
- ▶ Encourage visitor dispersal from the hubs to create more regional spread
- ▶ 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
- ▶ Provide better interpretation of the landscape

### **Business Clusters**

- ▶ Promote networking, good practice and collaboration by working with local clusters of tourism businesses

### **Business Investment**

- ▶ Stimulate appropriate business investment to improve the quality and increase the capacity in line with market demand

### **Local Distinctiveness**

- ▶ Encourage partnerships between local food producers, suppliers and tourism operators
- ▶ Improve the marketing quality of locally produced goods to visitors
- ▶ Encourage local communities and businesses to present and promote local features to visitors - such as local events, arts, crafts, cuisine, customs and language

### **Events**

- ▶ Create a tier of tourist events, underpinning the cultural offer, and plugging the gap between community events and major commercial venue events

## 7. EASIER ACCESS

### INTRODUCTION

Access is a theme with many facets - online and new technology, traditional information systems, transport, travel and access for all.

### OVERVIEW

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 many of the regions in England which have invested significantly in a Destination Management System (DMS). There is no DMS for South East Wales 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. The region's businesses have been slow to adopt e-commerce.

The English experience suggests the annual costs would need to be covered by the public sector although there are revenue streams from accommodation and ticket commission. But there are state-aid issues to be addressed within the trading model. There are also income streams from web site entries and advertising - although many businesses may simply switch their holiday guide advertising spend to the web.

Mid-Wales Tourism has a DMS which currently drives the Southern Wales events database which in turn feeds the web sites for VisitBritain and other partners. But there are many web sites in the chain between the national Wales site and local community sites. These have varying styles and draw their content from separate databases and systems. This approach is inefficient. It confuses the public - who face an array of sites to navigate. And it frustrates local businesses which have to enter their same business data onto a range of separate databases and web sites.

Mid-Wales Tourism has recruited members from the region so data records and business profiles from the South East region also appear elsewhere.

The web is becoming more and more important to the public in choosing their destination, planning their break, booking and paying, getting last minute travel and event information - and telling their friends about their holiday experience.

Destinations elsewhere in the UK report falling conversions of bookings from brochures, rising web traffic and a drop in TIC bookings. These trends will continue.

Progress here will require regional leadership, significant investment and genuine local authority collaboration.

The location of TICs is largely historic and driven by the desire for most local authorities to have at least one TIC. Consequently the largest slice of many local authority tourism budgets often goes on the high cost of running a TIC.

Most trips to Wales and within Wales are made by car. Reducing car dependency is important to lower noise levels, air pollution and CO2 emissions. It would also help reduce congestion and disruption to local people. A greater proportion of tourist trips by public transport is highly desirable and continues to be a goal. Tourists can contribute to the viability of local transport services, especially in sparsely populated areas. Rising fuel prices and road tax now makes public transport more attractive - providing it meets the needs of visitors, is co-ordinated, good quality, affordable, and information is abundant, relevant and timely.

There is a comprehensive network of white-on-brown signs to tourist destinations and attractions across the region, in line with the Traffic Sign Regulations. But much of the network was done around 10 years ago. New destinations have emerged, some places have closed, some signs are missing, some are in poor condition and some localities are suffering from signage clutter as more signs are added to the network. This is an aspect that requires attention and a co-ordinated regional approach.

Visitor orientation within the Valleys is poor for first time visitors - a lot of similar valleys, running in parallel, similar in scale and feel. There are no obvious clues to the "must see" places or suggested routes around the valleys.

There are other places where orientation is very important - between Cardiff City Centre and Cardiff Bay, and between Cardiff Airport, Cardiff and the rest of the region.

Cardiff International Airport is a major tourism asset - a gateway to Wales, the region and Cardiff. There are targets to double the annual passenger number to 4.5 million people by 2015. The key growth markets will be inbound short breaks from other UK and European cities, people visiting friends and relatives who live and work in the region, plus business and conference activity. This will require incremental development of the airport terminal, road improvements to the M4 and corresponding growth in the infrastructure (hotels, etc). Success will depend on developing new inbound routes and opening up new markets - which should be part of the Cardiff and Wales international marketing strategy.

The cruise market is growing strongly and this is a major opportunity for Cardiff to act as a regional gateway. But it does pose visitor management challenges of coping with large volumes of visitors in a short period of time.

## STRATEGIC FRAMEWORK RECOMMENDATIONS

### e-Tourism

- ▶ Prepare an e-tourism strategy with a long-term investment plan to create a Destination Management System that underpins the information service activity and supports the marketing

### TICs

- ▶ Assess the implications on the future structure and roles of Tourist Information Centres in the light of the e-tourism strategy

**Transport Planning**

- ▶ Develop closer strategic relationships between the tourism sector and transport operators and planners to ensure tourism is better understood and higher on their agendas
- ▶ Encourage tourism businesses to make visitors more aware of transport options and actively promote sustainable transport options

## 8. BETTER SKILLS

### INTRODUCTION

This section covers workforce development, skills training and business support.

### OVERVIEW

The tourism sector is affected by a range of skills-related issues. In the main, they are consistent with those at a national level. There will be some regional variance but solutions often call for a national approach to be delivered at regional and local levels.

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

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

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

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.

In this digital marketing age, the uptake of ICT is essential to small businesses.

An influx of new staff from accession countries in the last year has eased the recruitment situation, although many of the people concerned expect their stays to be temporary. Whilst in many cases they have a service culture, their awareness of the local area and region is likely to be low. This is relevant to front-line staff that is likely to be asked by visitors for recommendations on where to go and what to see. And it does not necessarily add to the Welsh culture expected by visitors. The sense of place and Welsh culture depends on staff with good product awareness and knowledge.

60% of the workforce in tourism in Wales is female and many are in part-time employment. Hence, training and working arrangements need to be flexible and address child care issues.

The image of careers in the industry still needs to be improved.

Businesses need to be aware of the environmental impact of tourism. They need to minimise energy consumption and water use. Environmental accreditation schemes, achievement awards, more green networking and engagement with trade bodies are required.

## STRATEGIC FRAMEWORK RECOMMENDATIONS

### Skills Planning

- ▶ Develop closer strategic relationships between the tourism sector and the educational sector to ensure tourism is better understood and higher on their agendas

### Business Support

- ▶ 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

### Best Practice

- ▶ 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

## 9. STRONGER PARTNERSHIPS

### INTRODUCTION

Capital Region Tourism has a history of success and achievement within a relatively short period, operating with limited dedicated resources. The RTP review in 2006/07 recognised the importance of the organisation. The current Marketing Area Partnerships, the work in the Valleys and the Southern Wales Partnerships are testimony to the successful role played by Capital Region Tourism and its partners in the region.

A number of national tourism reviews are in-hand and these could have a bearing on the scale and direction of the RTPs. But in the absence of those outcomes we assume it is “business as usual” for CRT, subject to some fine tuning to support the delivery of this Strategic Framework.

### OVERVIEW

The regional tourism function should:

- ▶ Enable: Be an enabling vehicle and channel for appropriate national activity, supporting those initiatives which are being targeted at the national level
- ▶ Deliver: Be a delivery vehicle and channel for regional activity where there is a business case for intervention and where there is sufficient critical mass at the regional level
- ▶ Co-ordinate: Be a co-ordinating vehicle and channel for local initiatives which is primarily undertaken by local organisations - councils, trade associations, specific venues, etc

The ethos of CRT is to be a facilitator of partnership working, with much of the resource held by the partners. It therefore has to persuade and find consensus. In a partnership framework of this kind it can be difficult to take a strategic position that prioritises any geographic area or sector of activity or cuts across well-established local ways of operation. While there is a need to back winners, this has to be balanced with WAG policies for addressing disadvantage and deprivation.

Administrative areas mean little to visitors, so cross-boundary collaborations and offers make sense.

There are indications of less resource in the near future from WAG and Visit Wales for regional tourism partnerships, and more prescription about what they can do.

The region needs a powerful voice for tourism - especially in the public sector where tourism is low on the agenda and funding cuts to Visit Wales send out negative messages.

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.

The Strategic Framework seeks to highlight those aspects where a change of emphasis may be warranted to support the overall delivery. CRT is the organisation that must take ownership of the Framework and seek buy-in at a range of levels from partners. Therefore CRT has the key role of monitoring, evaluating and reviewing the Framework over the course of time.

## **REGIONAL LEADERSHIP**

The following aspects call for specific regional intervention:

### **National Reviews**

- ▶ Provide regional input into national tourism reviews

### **Advocacy**

- ▶ 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

### **Local Engagement**

- ▶ 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

### **Collaboration**

- ▶ Create closer collaboration between tourism and the wider regeneration agenda with CRT acting as a bridge between Communities First, Next and DE+T
- ▶ 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
- ▶ Support ongoing partnership development work with and between the Brecon Beacons and the Welsh Valleys

## 10. MEASURING SUCCESS

### IDENTIFYING SUCCESS

The Vision Statement identifies what success will look like:

- ▶ Growth in the annual volume and value of tourism to the region - and benchmarked with the other regions of Wales and a selection of UK and European regions
- ▶ More job creation (and retention)
- ▶ Higher levels of community pride
- ▶ Higher levels of visitor satisfaction

The umbrella indicators will still be the volume and value of tourism collected by the UKTS / IPS and disaggregated to South East Wales, and modelled by STEAM for local authority areas. The STEAM approach requires every local authority to sign-up to STEAM for the foreseeable future.

### TRACKING INDICATOR RECOMMENDATIONS

The original version of “Achieving our Potential” and the subsequent regional Strategy “Competing with Confidence” set a strategic growth target of 6.5% per year in terms of the value of tourism. The subsequent review of the national tourism strategy and transfer of tourism responsibility to WAG no longer ties itself to such a target. Instead it looks to a set of tracking indicators. There are likely to be softer measurements linked to heritage and culture, rather than pure economic measurements.

Monitoring and evaluation is already in place to measure the success of Achieving our Potential. It makes sense to tie the Regional Tourism Strategy to the same things to create a single set of tracking indicators and avoid 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