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VISITORS PLACES DESTINATIONS

THE SOUTH EAST WALES STRATEGIC TOURISM FRAMEWORK

STRATEGIC FIT REPORT
FOR CAPITAL REGION TOURISM

AUGUST 2008

STRATEGIC TOURISM CONTEXT

ONE WALES - A PROGRESSIVE AGENDA FOR THE GOVERNMENT OF WALES

One Wales is the agreement document between Labour and Plaid Cymru which delivers a progressive programme for government over this Assembly term. It states that tourism should be developed across Wales on a regional basis in order to make the most of local resources and assets. The key tourism aims are to:

- ▶ Make strategic investments in facilities and employee skills
- ▶ Support the tourism industry as the market moves increasingly towards shorter and activity-based breaks

SPATIAL PLAN

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

ACHIEVING OUR POTENTIAL – A TOURISM STRATEGY FOR WALES (2006 - 2013)

The mid term review of Achieving our Potential, the national tourism strategy for Wales has set five strategic challenges for developing tourism in Wales. These are:

Distinctive branding – The visibility and competitive appeal of Wales as a holiday destination must continue to increase, representing the quality of the Wales tourism product. A strong brand identity must be reinforced at all levels of the industry to enable Wales to increase its market share of international and UK visitors.

Higher quality – Wales will be a high quality destination that offers a distinctive experience throughout the year. There will be a close match between the promise made to visitors and the experience delivered. Businesses will provide quality products and the changing needs / expectations of visitors will be exceeded. Product investment and innovative ways of working will enable the industry to capture growth markets.

Easier access – Wales' tourism products will be easily accessible to the key markets via online visibility and other more traditional channels. The information provided to potential visitors will be of high quality, reflecting the brand positioning of Wales. A quality tourism experience will be accessible to all.

Better skills – The tourism industry will offer year round employment with good career prospects and equal opportunities for training and development.

Stronger partnerships – Tourism in Wales will be competitive, sustainable and based on a distinctive Welsh offer. Intervention from the public sector will be targeted as operators or products that meet the needs of the future growth markets. All tourism stakeholders will work together to ensure appropriate coordinated action at national, regional and local level.

STRATEGIC MARKETING ACTION PLAN

The Strategic Marketing Action Plan is a new roadmap for growing Welsh tourism over the next 5 years (2007 – 2012). The headline objective of the plan is to grow the value of tourism in Wales by increasing visitor spend by 6% by 2012.

The plan notes: "While recent years have seen considerable improvement in accommodation standards and restaurant quality, with some outstanding examples, standards are not consistent throughout Wales. In order to compete effectively to attract more visitors, there needs to be an increase in the number of good quality establishments throughout Wales. Success over the next five years will depend on continuing to modernise the image and reality of Wales, by encouraging the industry to keep pace with service quality demands and create innovative new products."

Visit Wales aspiration is to be seen as the 'New Zealand of Europe'.

- ▶ A natural, friendly destination that appeals to travellers with an "independent explorer" mindset, whether they are motivated by adrenalin activities, an interest in our culture or the desire to "chill out" in a relaxing atmosphere with contemporary facilities and enviable service standards
- ▶ Being respected for our clear-sighted, focussed, consistent and effective approach to marketing Wales, as well as for our engaging, stimulating marketing campaigns
- ▶ Exuding the ambition and self-belief necessary to move mountains

- ▶ Punching above our weight to overcome the constraints we face as a small country, in the way that New Zealand has used brand clarity and focussed marketing to overcome its remoteness
- ▶ Becoming the European leader in environmentally responsible tourism, recognised worldwide - we want people who come to Wales to “tread more lightly” than anywhere else in Europe, in terms of their impact on the environment

The markets are:

- ▶ Short breaks - Attracting independent explorers who expect higher quality accommodation and food standards when they travel
- ▶ Adventure activities - They offer both growth potential and an opportunity to extend the season throughout the country

Primary - Activity Holidays - Adventure, Walking, Golf (Ryder Cup)

Secondary - Riding, Cycling, Fishing, Gardens

- ▶ Meetings, Incentives and Conferences – They offer the opportunity to attract high spending visitors, mostly outside the main season
- ▶ Events - Large-scale events not only attract business during the event itself, but they also reach a wider audience and can contribute to the long-term image of Wales, not just for tourism, but as a destination for business, inward investment, education and sport
- ▶ Encourage the development of more green products

CULTURAL TOURISM STRATEGY FOR WALES

Cultural distinctiveness is critical for destination standout in the marketplace and the principal means of differentiating a destination. The Cultural Tourism Strategy 2000 has been the main vehicle used to influence and shape how Wales should respond to the fast-growing demand for cultural tourism. Since its introduction there have been some positive improvements with new products, initiatives and promotions.

However, in comparison with international competitors the cultural tourism experience in Wales is relatively weak. There is much to be done if Wales is to capitalise on its cultural assets.

Since the commissioning of the review in spring 2007 a new heritage portfolio has been created within the Welsh Assembly Government. The Minister with this portfolio is now responsible for heritage, tourism, arts and sport. This move offers a fresh opportunity for an integrated approach and partnership working amongst the relevant public sector organizations. This, in turn, should provide clear direction and focus for public sector investment in support of cultural

tourism, thus creating an environment to encourage private sector initiatives and involvement.

International best practice highlights the importance for tourism of sustained investment in the cultural assets of a country often linked to a bold innovative approach to both strategy and implementation. A prime example of this confident aspirational type of strategy is found in many of Wales' direct competitor destinations, notably Spain, Italy, Austria, Slovenia, Finland, Denmark and Switzerland, as well as Ireland, Scotland and Northern Ireland.

Wales has relatively few cultural icons, making it even more important to maximise the impact of those icons that do exist and harnessing the collective power of the multiplicity of other tangible and intangible aspects of the cultural heritage of Wales.

Over the past five years there has been considerable investment in the cultural infrastructure in Wales. Funding has come from the Millennium Commission, the National Lottery and from the Welsh Assembly Government, as well as European Development Funds. Over the next ten years the availability of funding from these traditional sources to support cultural tourism initiatives is likely to decline due to the impact of the Olympics and changes in European Funding structures. Consequently the further development of the cultural tourism product will depend upon securing funding from other sources and greater collaboration between the sectors.

Resources should be found to support marketing within Visit Wales. In order to identify and promote the existing cultural tourism product and to encourage the development and enhancement of other products:

Training is needed to bring the culture and tourism sectors in Wales together. The lack of understanding and appreciation of each other's needs and challenges is currently contributing towards an underachievement

Promotion is also confused. The lack of cohesive marketing means that visitors are bombarded with a plethora of information leaflets and information which dilutes the impact and undermines Wales' attractiveness as a cultural destination.

The web environment is similarly complicated with much duplication of information across web sites or glaring gaps in details. Many of the images and the positioning of Wales focus on the landscape and outdoor activities.

There is still a great deal of work to be done in developing the product to make it more marketable for the tourist and local visitor. It is important that this work is undertaken within the cultural sector and in partnership with others; improving the product by better interpretation; providing cultural activities which will appeal to the tourist; recognising the importance of the tourism market to provide income and support for the cultural product.

Currently the development and marketing of the cultural tourism product is undertaken almost exclusively by Visit Wales. It is essential that this work is also

embraced and supported by the cultural sector which needs to be encouraged and supported to be more commercial and competitive when appropriate.

There is a lack of clarity in the roles and responsibilities of the different organisations involved in cultural tourism. There is a need for better partnership working at all levels in Wales.

COASTAL TOURISM STRATEGY FOR WALES

The preparation of a Coastal Tourism Strategy was identified as one of the key national outputs within the Wales Spatial Plan. The 'Coastal Tourism Strategy for Wales' identifies the need and opportunities for coastal management, coastal towns and resorts. The strategy will provide spatial guidance for the future allocation of funds to support coastal tourism in the regions of Wales through the Spatial Plan. It aims to create a coherent network of routes, destinations and facilities.

The priorities include:

- ▶ Establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- ▶ Consider the potential for developing nature tourism both on land and at sea within strict environmental and protection criteria
- ▶ Consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- ▶ Consider new or expanded regeneration programmes for 'tourist' towns in order to diversify and strengthen local economies
- ▶ Consider how gaps in the accommodation stock (e.g. quality camp sites) can be addressed
- ▶ Consider innovative public transport schemes that will reduce the pressure in particularly sensitive areas or congested areas by providing an alternative to the private car
- ▶ Consider opportunities for exploiting the potential of food, heritage and culture

Linked to the strategy is the Wales coastal access improvement programme aiming to increase access to the coast of Wales. The national programme will be strategically directed by the Countryside Council for Wales.

SUSTAINABLE TOURISM ACTION PLAN

The plan identifies key opportunities for Visit Wales to develop and market Wales as a "Sustainable Destination2.

Economic impact and quality of tourism in Wales

- ▶ Development / investment - ensure that future investment schemes adopt truly sustainable principals and criteria for investment that maximise sustainable outcomes

To protect and enhance the built and natural environment

- ▶ Environmental management of tourism - explore opportunities for developing projects to support the expansion and take up of renewable energy in the tourism sector
- ▶ Environmental enhancement -encourage the development and promotion of eco-tourism
- ▶ Biodiversity - develop and encourage projects which improve / promote biodiversity in Wales

To support local communities and culture

- ▶ Encouraging community involvement in tourism - explore opportunities for developing and promoting programmes at a more local level that involve high levels of community participation and respect the local distinctiveness of the area

GOLF DEVELOPMENT IN WALES

The “Golf Tourism in Wales” strategy 2002 highlights the lack of world class golf facilities in Wales when benchmarked against the best in England, Scotland and Ireland. The major product deficiency in Wales today is the lack of on-site accommodation, with only 6 courses on the ‘Wales Best’ list having on-site accommodation, and only three resort venues have accommodation of sufficient scale to host more than small number of tourists. In addition there is a need to improve clubhouse appointment, particularly changing rooms.

To implement the strategy a public sector budgetary requirement of £60-70 million is required.

The strategy was devised to drive up numbers of visits from its current 30,000 to 100,000 per year. Taking a 15% annual growth this would deliver 105,000 annual visits by 2011 and payback of the public investment in 5 years. Furthermore, 100,000 golf visits producing economic benefits of £300 per visit would generate value of £30 million per year.

ACTIVITY PRODUCT STRATEGIES

Outdoor activities are one of the key drivers of tourism in Wales and have a major role to play in improving health and fitness. Natural facilities in Wales have provided an excellent competitive advantage for activity tourism. However,

considerable investment is required to ensure that the supporting infrastructure such as suitable accommodation, access to the countryside and changing facilities / toilets are of a satisfactory quality to meet and exceed visitor expectations.

In some instances specific infrastructure, such as walking, cycling and equestrian trails, climbing and rope-work attractions, slipways and moorings for water-sports are also required to remain competitive internationally.

The following table indicates the hierarchy of activity sectors.

	Value in 2004 (£ million)	Potential Value in 2010 (£ million)	Annual Growth
Walking Tourism	550	700	3.5%
Watersports Tourism	160	220	4.0%
Adventure Tourism	133	220	7.4%
Cycling Tourism	103	172	7.6%
Fishing Tourism	76	115	6.0%
Horse-riding Tourism	18	27	6.0%
TOTAL	955	1,358	5.1%

SUB - REGIONAL TOURISM STRATEGIES

The Spatial Plan divides Wales into six areas with specific strategies and actions for each area. The headline objectives for South East Wales are outlined below.

The Spatial Plan divides the South East into three corridors. Steps need to be taken to more closely align the SE Plan with the SE regional tourism strategy where the current priorities are identified as:

Heads of the Valleys

Key Market Propositions

- ▶ Activity Breaks
- ▶ Culture and Heritage
- ▶ Events

Key Development Priorities

- ▶ Increase stock of and upgrade accommodation
- ▶ Attractions
- ▶ Activities
- ▶ Amenities
- ▶ Evening offer

Connections Corridor

Key Market Propositions

- ▶ Business Tourism
- ▶ Events
- ▶ Culture and Heritage
- ▶ Activity Breaks
- ▶ Golf

Key Development Priorities

- ▶ Upgrade accommodation
- ▶ Attractions
- ▶ Activities
- ▶ Amenities
- ▶ Evening offer based on key settlements

City Coast

Key Market Propositions

- ▶ Business Tourism
- ▶ Luxury Breaks
- ▶ Events
- ▶ Golf
- ▶ Culture and Heritage
- ▶ Water sports - particularly relevant to Bridgend CBC and identified as a priority within the Swansea Bay plan

Key Development Priorities

- ▶ Convention Centre and exhibition space
- ▶ Transport infrastructure
- ▶ Airport route development

HEADS OF THE VALLEYS

“Turning Heads ... Strategy for the Heads of the Valleys 2020” has been compiled to guide the strategic planning of the tourism strand of the Heads of the Valleys Programme - a regeneration initiative for the Heads of the Valleys area. The overall strategy is strengthened by the wider Valleys Regional Park concept.

A number of key areas have been identified which will act as a focus for investment in the first three years of the programme. These are:

- ▶ 2006 / 07: Major environment (landscape-scale) projects
- ▶ 2007 / 08: Renewal of Town Centres
- ▶ 2008 / 09: Development of the tourism and leisure offer

Specifically the tourism investment will be as follows:

Year 1 and 2

- ▶ Capacity building through Tourism Associations, co-ordinating signage, web presence and marketing
- ▶ Work with Herian developing people's history – tapping into Heritage of the Valleys

Year 3

In the "Tourism Year" £5m has been allocated in conjunction with the HOV tourism group and matches with a possible further £5m convergence funding - focusing on the following 5 individual projects:

- ▶ Bedwellty House and Park - full restoration and development of listed building as a visitor centre - £1m budget
- ▶ Dare Valley Country Park - £1m budget
- ▶ Cyfarthfa Castle & Gardens - £1m budget
- ▶ Blaenavon Railway - extension of existing line -£1m budget
- ▶ Markham Colliery – Country Park development - £1m budget

HERIAN

HERIAN in Action is a unique partnership with a mission to bring alive the amazing story of the world's first industrial nation. To achieve this, Herian is working with partners to redevelop and improve heritage interpretation and accessibility throughout South Wales. Herian has implemented a number of projects in year 1 of the HoV project. Further development of a number of key strands by engaging with communities is planned to be taken forward into years 2 and 3.

VALLEYS REGIONAL PARK

Valleys Regional Park is a project that seeks to designate the geographical area known as the South Wales Coalfield as a Regional Park.

It is intended to create an overlay for the individual local authorities within the proposed VRP to:

- ▶ Standardise the quality of the existing recreational product
- ▶ Link the existing recreational product
- ▶ Identify gaps in the existing recreational product
- ▶ Market a cohesive recreational product
- ▶ Provide a framework for cross valley projects and activities

The tourism related primary aims of the Park are to:

- ▶ Stimulate collaborative working between authorities and partners within an agreed framework

- ▶ Co-ordinate the prioritised development and improvement of key countryside recreation sites, links and visitor facilities across the Park
- ▶ Develop opportunities, encourage and support the role of local enterprise to contribute to the delivery of countryside recreational services
- ▶ Develop a Valley-wide approach to the problems of antisocial behaviour in the countryside including off-road motorcycling, fly-tipping, vandalism and abusive behaviour
- ▶ Work with Local Service Boards and Community Strategies to provide the mechanism whereby local communities can influence the recreation and open space facilities on their doorstep
- ▶ Implement and enforce a sustainable design code and management principles to reflect and deliver the national sustainable development agenda
- ▶ To work collaboratively with HERIAN to ensure that the outstanding natural and built heritage of the South Wales Valleys are developed and managed sustainably for economic and social benefit