

REPORT OF DIRECTOR OF DELIVERY AND DISCOVERY

SUBJECT: REVIEW OF TOURISM AND DESTINATION MANAGEMENT

Purpose of Report

To provide Members with an overview of Pembrokeshire Coast National Park Authority's contribution to tourism development in Pembrokeshire.

Introduction

At the Authority's Operational Review Committee meeting in October 2014, Members requested information regarding Pembrokeshire Coast National Park Authority's present role in terms of tourism development and the current performance of the Authority's tourism related services.

This paper is designed to give a an overview of the changing context of tourism development within the region, the evolving role of *Destination Pembrokeshire* in shaping the tourism priorities in Pembrokeshire as well as providing performance data on key tourism services provided by Pembrokeshire Coast National Park Authority (PCNPA).

Background – National Context

Tourism is big business in Wales. Tourists spend around £14 million a day in Wales, amounting to around £5.1 billion a year (roughly 2.8% of all products and services purchased in Wales).¹ The strategic focus of tourism development in Wales is led by Visit Wales as part of the Department for Economy, Science and Transport (DEST) at Welsh Government. Visit Wales set the national targets for tourism in Wales as outlined in the Welsh Government's 'Partnership for Growth 2013-2020' strategy document.

The strategy asserts that the overall prospects for sustainable growth in the tourism sector remain good. However, in a crowded market place Wales must differentiate itself from other destinations. It will be important to focus on market needs and the quality of the visitor experience.

Key areas for development over the coming years include targeting key domestic and overseas markets. The Great Britain domestic market is the main market for Wales and will continue to be the focus. Marketing activity will be increased in London, South East Midlands and Yorkshire, as well as within Wales itself for the first time. Overseas, the three key markets will be Ireland, Germany and USA.

¹ The Tourism Satellite Account (TSA) for Wales 2007 – Welsh Economy Research Unit (2007): <http://wales.gov.uk/topics/tourism/development11/tsa/?lang=en>

Delivery at the Regional Level - Recent Changes

Up until October 2014, the Regional Tourism Partnership (RTP) for Pembrokeshire was the South West Wales Tourism Partnership (SWWTP). SWWTP's aim was to join all sectors of the tourism industry together at a regional level, eliminating duplication and encouraging partnership working.

SWWTP received devolved resources and responsibilities from Visit Wales for many aspects of tourism marketing and development such as skills training and industry engagement. In 2013/14 the SWWTP received just over 1/5 of the £2.5m RTP budget (£550,000) for Wales. In March 2014 the European Union gave special recognition to South West Wales Tourism Partnership for its success in developing and promoting tourism with the 'Open All Year' strategy².

However, in February 2014 the Welsh Government (WG) conducted a national consultation on the Regional Tourism Partnerships (RTP) across Wales. The consultation led to the abolishment of RTP's by WG with a new regional model for tourism development coming into place across Wales from October 2014 onwards.

The new Visit Wales regional model aims to provide:

- Direct account management of high impact sector business partners
- Stronger links between tourism businesses and Government
- Greater regional representation on the Tourism Advisory Board
- Increased accountability of local delivery
- Simplified structure for tourism in Wales



² SWWTP – 'Open All Year' Strategy 2004-2008: <http://www.swwtp.org/wp-content/uploads/2013/11/490-Open-All-Year.pdf>

A budget of £150,000 has been allocated to the South West Wales Region by Visit Wales for the period October 2014 – March 2015. The focus of the newly established Regional Tourism Engagement Fund (RTEF) is to support destination management and the delivery of destination management plans with strategic partnerships and share best practice in order to develop and improve Wales' product offer. In turn this aims to draw additional visitors and audiences for the benefit of the sector, local communities and critically, to grow the tourism economy in a sustainable way in Wales.

Local Level	Regional Level	National Level
<ul style="list-style-type: none"> • Destination Partnerships as well as tourism and economic development teams (public and private) will have a named point of contact within the Visit Wales regional engagement team. 	<ul style="list-style-type: none"> • Informal Regional Forums: support businesses or destinations in partnership working and accessing funding opportunities. • Four Regional Teams: strongly aligned to Visit Wales grading team, TISS, wider Partnerships and Marketing. (North Wales, Mid Wales, South West, South East) 	<ul style="list-style-type: none"> • Visit Wales' appointed Members of Regional Forum will represent the trades' needs and views. They will be a key member of the national Tourism Advisory Board, and will work closely with Swansea Bay City Region Board.

Swansea Bay City Region

In 2013, the Welsh Government created the Swansea Bay City Region to engage more partners in improving the regional economy. The evolving Swansea Bay City Region Board (SBCRB) is comprised of Swansea City Council, Carmarthenshire County Council, Neath Port Talbot County Borough Council and Pembrokeshire County Council as well as key representatives from the business sector.

The SBCRB published a City Region Economic Strategy³ in to identify key actions for increasing the City Region's economic performance. The strategy highlights a number of strategic priorities relating to tourism including:

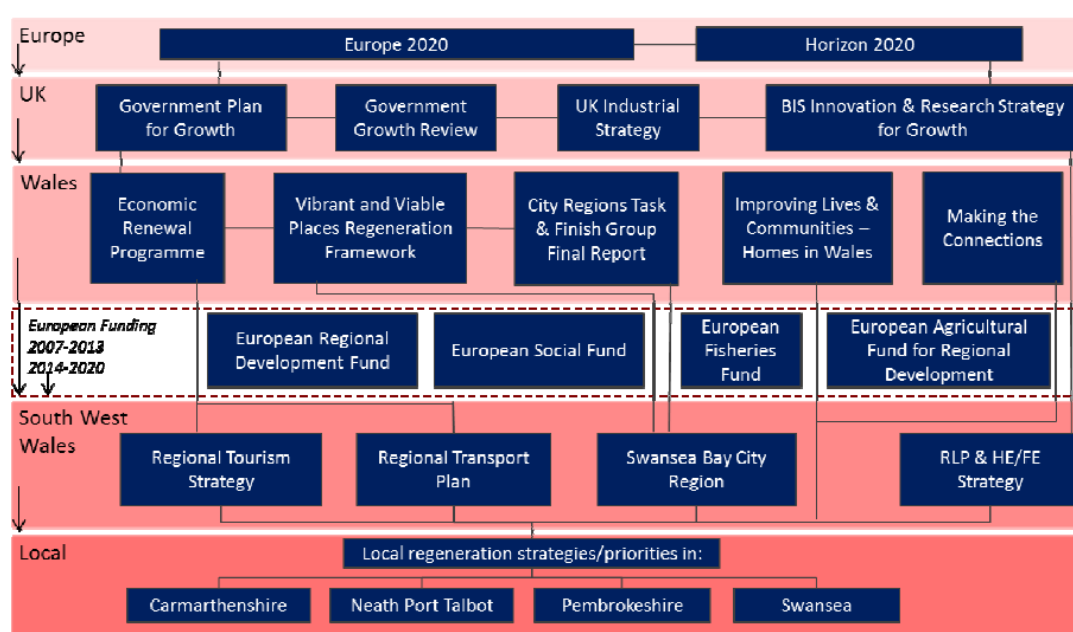
- Develop and implement a coherent framework for the engagement of visitor and investment audiences leveraging the physical, commercial and cultural assets across the City Region.
- Establishing a consistent visitor proposition combining high quality and integrated National Park, Coastal, Rural and City offers.

³ Swansea Bay City Region Regeneration Strategy (2013) - <http://www.swanseabaycityregion.com/en/what-we-do.htm?ref=submenu>

- Engaging key commercial and community stakeholders in the building and communication of a coherent City Region identity and brand to internal and external stakeholders.
- Investment in the co-ordination of spatial planning to establish a roadmap for targeted development of land, property and infrastructure.

The interrelationship between the Swansea Bay City Region and the Regional Tourism Forum will be vital to the development of a coherent tourism strategy for the region. In particular, it will be important to align key funding streams with the City Region priorities. The diagram below sets out the complexity of this task.

Overview of the policy landscape influencing Swansea Bay City Region.



Destination Pembrokeshire

Destination Pembrokeshire is the brand name of the Destination Partnership for tourism development in Pembrokeshire. The partnership consists of four core organisations, Pembrokeshire County Council (PCC), Pembrokeshire Coast National Park Authority (PCNPA), Pembrokeshire Tourism (PT) and Pembrokeshire Local Action Network for Enterprise and Development (PLANED).

The core organisations all commit resources to the partnership (particularly in terms of staff time) to help develop the tourism strategy and action plan for Pembrokeshire through close consultation with Visit Wales and wider stakeholders at a local and regional level (see Appendix 1). The partnership operates on an informal basis and is hosted by Pembrokeshire County Council who provides administrative support via the Council's Tourism Marketing and Development Manager.

Destination Pembrokeshire launched its official Destination Strategy and Action Plan in June 2013⁴ (see Appendix 6). The strategy focuses on issues that can be tackled locally. It is intended as a development guide for all Pembrokeshire based organisations, businesses and employees in tourism related roles. The Pembrokeshire Destination Plan includes five objectives with priorities for action under each one;

- Working together effectively
- Re-focusing marketing
- Creating a year round quality experience
- Developing and sustaining infrastructure environment and cultural resources
- Improving business practice, profitability and performance

Destination Pembrokeshire follows the guidance established by Visit Wales in relation to destination management. Under the evolving regional model of delivery, each destination in Wales has a Destination Partnership that acts as the main conduit between key stakeholders and Visit Wales at a local and regional level.

Locally, *Destination Pembrokeshire* has been established to:

- improve communication within the tourism industry in the County;
- better define roles and responsibilities;
- identify the most appropriate organisations to undertake certain tasks; and
- coordinate the delivery of activity that meets the priorities identified in the Pembrokeshire Destination Management Plan

It is recognised that *Destination Pembrokeshire* has made significant positive strides in terms of improving the cohesiveness of tourism delivery in Pembrokeshire, specifically in relation to communication (See Appendix 5). However, due to the changing nature of tourism delivery at a regional level (as detailed above) the role of *Destination Pembrokeshire* is evolving with a greater expectation on the partnership to deliver more directly on issues such as training, information and marketing.

The Visit Wales Tourism Insight literature highlights a range of benefits that can be delivered through effective tourism partnerships. Whilst *Destination Pembrokeshire* can already be seen as realising some of these benefits, such as:

- cohesive, shared objectives and vision, increasing the likelihood of successful delivery
- improved communication and understanding, and mutual respect between local authority and industry
- a collective "voice" for the industry, increasing power and influence

⁴ Pembrokeshire Destination Management Plan 2013-2018:
<http://business.wales.gov.uk/dmwales/sites/dmwales/files/documents/pembrokeshire-dm-plan.pdf>

Further development of partnership working can, potentially, improve the effectiveness and efficiency of tourism services in Pembrokeshire. Benefits of closer working arrangements could include:

- An integrated destination approach to tourism development
- Better funding and integration of brand development and destination marketing
- Comprehensive and consistent communication with all stakeholders and tourism businesses
- Better integration of research, statistics, market intelligence, surveys and trends
- More focused advice, training and guidance for tourism businesses
- Coordination of visitor services including tour guides and ambassadors
- Proactive development of festivals and events as a tool for attracting publicity and generating visits

These benefits could potentially be realised by evolving the existing inter-organisational partnership model into a more formalised organisational structure. As a result, PCC and PCNPA, with funding assistance from Visit Wales, have commissioned a piece of work to formally review the effectiveness of *Destination Pembrokeshire* and suggest potential future governance and financing models.

The final review report will be available in April 2015 and will be considered by the Operational Review Committee at their subsequent meeting on Wednesday 22nd April 2015.

The Importance of Tourism to Pembrokeshire

Before looking at PCNPA's operations in detail it is useful to understand the importance of tourism to the economy of Pembrokeshire and West Wales. Tourism is one of Pembrokeshire's most significant industries, worth just over £500 million to Pembrokeshire⁵, and is the largest private sector employer representing 35% of the total workforce⁶.

In a range of coastal destinations in Pembrokeshire, including key locations within the National Park, tourism plays an even greater role. For example, a report by Sheffield Hallam University⁷ undertaken in 2009 looked at employment, economic

⁵ STEAM Report, Pembrokeshire County Council, 2013:
<http://www.tourismhelp.co.uk/content.asp?id=339>

⁶ Dr. Steven Jones, Director of Development, Pembrokeshire County Council, Economy Overview and Scrutiny Committee Meeting, 16th September 2010:
<http://mgenglish.pembrokeshire.gov.uk/ieListDocuments.aspx?CIId=292andMIId=2123andVer=4>

⁷ The Seaside Tourist Industry in England and Wales – employment, economic output, location and trends, Centre for Regional Economic and Social Research (CRESR), Sheffield Hallam University, June 2010: http://www.shu.ac.uk/_assets/pdf/cresr-seaside-tourism-report.pdf

outputs and trends for seaside resorts and towns including Tenby, Saundersfoot and Fishguard⁸. The report shows that:

- Average year round employment supported by tourism in Tenby, Saundersfoot and Fishguard is 3,700 jobs
- As a percentage of all jobs, these are 53% in Tenby, 49% in Saundersfoot and 21% in Fishguard (outside NP)
- Annual output directly attributable to tourism is estimated at £33 million for Tenby, £9 million for Saundersfoot and £7 million for Fishguard

However, despite the dependency of the local economy on tourism, it is apparent that over the last 15 years visitors are undertaking less trips to the Welsh seaside, with a decline in the number of trips and nights spent by UK visitors overall on the Welsh coast. The seaside share of the UK holiday market in Wales fell from 61% in 1991 to 41% in 2006⁹.

The seaside sector has been particularly affected by the continuing rise in the number of long holidays taken abroad by UK holidaymakers. The number of long holidays taken at the Welsh seaside declined in number from over 2.7 million in 1991 to 1.76m in 2006. This decline, however, has been off-set by a growth in short breaks which rose from a low point of less than 1m in 1993 to a high of over 2.2m in 2006.

Consequently, despite the importance of tourism to the Welsh economy (which represents approximately 5.8% of GDP in Wales¹⁰) the industry remains volatile and is susceptible to considerable change through a range of factors, often beyond the control of organisations in Pembrokeshire, such as the strength of the pound, the weather, seasons or occurrences that disrupt or distract potential visitors, such as the foot and mouth outbreak, or the current economic recession.

Further facts and figures relating to tourism in Pembrokeshire can be found in Appendix 2.

The Importance of the National Park to Tourism

Pembrokeshire Coast National Park is a tourism destination of both national and international importance. It was recognised by National Geographic magazine in 2010 as the 'second best coastal destination in the world'¹¹, alongside the Tutukaka coast in New Zealand, beating other coastal destinations in the Seychelles, Bermuda and Costa Rica.

⁸ Please note that Fishguard is not wholly within the National Park boundary.

⁹ Coastal Tourism Strategy, WG, 2008:

<http://wales.gov.uk/docs/drah/publications/Tourism/090612coastaleng.pdf>

¹⁰ Wales Tourism Alliance website: <http://www.tourismalliance.org.uk/en/tourism-the-welsh-economy/>

¹¹ National Geographic Magazine - Nov/Dec 2010 issue:

<http://travel.nationalgeographic.com/travel/coastal-destinations-rated/top-rated/>

The current landscape and accessibility of the National Park owes much to the Park Authority's planning, conservation and recreation management activities over the last six decades and this was reflected in the aforementioned 'National Geographic' article which highlighted that the Pembrokeshire Coast is a *"magnificent protected coastline from both an ecological and geological perspective. Land-based and marine-based conservation tourism appeals to all ages. Current stewardship practices maintain quality and integrity."*

Similarly, the Park Authority consulted on a Draft National Park Management Plan in 2014. A significant point raised by respondents to the consultation was the importance of coastal scenery and local beaches. The consultation suggested that the coastline is potentially the most important attraction in Pembrokeshire and a key reason for the high frequency of repeat visits.

The current Management Plan for the National Park¹² draws attention to the fact that visitors are stimulated to holiday in Pembrokeshire due to the *"blend of different types of countryside, the spectacular appearance and diversity of coastal scenery, and the bonding of the landscape with angry or glittering seas. The National Park's relative freedom from noise and light pollution is considered to be a scarce and at-risk commodity in a cluttered world."*

"Visitors appreciate the small scale, the relative peacefulness and the friendliness of settlements, mentioning St. David's and Newport in particular. The variety of attractions and the range of independent outlets for local produce were welcomed. Some visitors noted that tourism and commercialisation have not managed to spoil the character and attractiveness of the National Park"

Research evidence collated by Visit Wales also suggests that the National Park plays a significant role in the 'tourism offer' in the region with 87% of visitors to South West Wales coming to the area due to its *nature attractions, beautiful scenery and unspoilt coastline*¹³.

The key challenge for PCNPA, particularly in relation to planning, is to enhance the visitor economy whilst maintaining an approach to land use planning that can help to tackle seasonality and the over-domination of the visitor economy in certain locations of the National Park¹⁴.

PCNPA Activities that support Tourism

The contribution that the Park Authority makes to tourism is a prime example of how the Authority is meeting its socio-economic duties under the Environment Act

¹² Pembrokeshire Coast National Park Management Plan 2009-2013:
<http://www.pembrokeshirecoast.org.uk/default.asp?PID=196>

¹³ Wales Visitor Survey – Unitary Authority Report (Staying Visitors) – April-October 2009, Visit Wales:
<http://wales.gov.uk/topics/tourism/research/tourisminwales/visitorsurvey09/?lang=en>

¹⁴ Pembrokeshire Coast National Park, Local Development Plan (end date 2021), PCNPA, Adopted Plan, September 2010: <http://www.pembrokeshirecoast.org.uk/default.asp?pid=178>

(1995)¹⁵. PCNPA's contribution to tourism in the area is substantial and covers a wide range of key functions including (See Appendix 3):

- **Planning** – conservation of the NP's special qualities and landscape characteristics.
- **Coast to Coast** - the design, publication and distribution of the 'Coast to Coast' visitor magazine (225,000 copies distributed every summer).
- **Policy** - tourism policy advice and guidance (through various WG related working groups).
- **Partnerships** - contributing to a range of partnerships including *Destination Pembrokeshire* led by Pembrokeshire County Council (PCC).
- **Rights of Way** - practical management and promotion of the Coast Path and public rights of way (PROW) – PCNPA manages 950km of public rights of way throughout the NP including the 186 mile Coast Path and 200 circular walks, including easy access paths.
- **Summer Events** - organising and promoting the extensive summer activities and events ('A and E') programme.
- **Beach Management** - joint management of beaches throughout the county in conjunction with PCC, Crown Estate, National Trust, etc.
- **Recreation Management** - Working with recreation providers to ensure that facilities meet demand without damaging the flora and fauna of the National Park (Outdoor Charter, Marine Code, etc).
- **Bus Travel** - Direct support for sustainable travel initiatives such as the Coastal Bus Service provided through the 'Greenways Partnership' in conjunction with PCC.
- **TIC's** - management of key TIC and visitor centre facilities (St. David's, Tenby and Newport).
- **Castles** - managing visitor attractions (Carew Castle and Castell Henllys).
- **Sponsorship** - direct involvement in a range of key events (e.g. Ironman Wales, Tour of Pembrokeshire, Really Wild Festival, etc).
- **Car Parking** - management at various sites throughout the NP.

In reality, there are very few activities provided by PCNPA that don't either directly contribute or indirectly add value to the 'tourism offer' in Pembrokeshire. However, the focus of the remainder of this report is principally in providing an overview of PCNPA's marketing & communications activities, the summer events programme, recent interpretation works and the overall performance of the Authority's visitor centres & castle sites.

Marketing & Communications

Tourism communications accounts for over one half of all Authority-related PR material generated each year, with Oriel y Parc Gallery featuring in over 50% of tourism-related press releases generated in 2013-14. Almost 450 pieces of unique

¹⁵ Environment Act 1995: <http://www.legislation.gov.uk/ukpga/1995/25/contents>

tourism-related editorial were generated by the Authority's Communications team between 2013-14.

60th Anniversary Retro Poster Campaign

The success of the Authority's retro poster campaign, created to celebrate the Park's 60th anniversary in 2012, has been recognised through the many awards it has received, including:

- Three UK Marketing Design Awards
- A Canmol Wales Award
- Finalist in the CIM Marketing Excellence Awards

As well as promoting the National Park to residents and visitors outside of Pembrokeshire, the campaign has also made a significant contribution to increasing visitor numbers to the county and marketing the area on a national scale. As a result of the impact and success of the 2012 campaign, the Authority secured an additional £30k Welsh Government funding to re-run the retro poster campaign in 2014 as a key driver in boosting the Welsh tourism industry.

Evaluation of the campaign shows that it was highly visible, motivating, and has also generated significant demand for associated merchandise, with exceptional sales figures recorded to date.

The full 2012 campaign evaluation highlights include:

- Website traffic increased by 75% during the promotional period
- QR Code drove a 348% increase of site access via mobile/tablet devices (20,000 visits)
- Facebook & Twitter community increased by 100%
- PR Coverage including the Western Mail; all six Pembrokeshire newspapers; BBC Wales Today; and lifestyle magazines Coast, Britain, and the front cover image (and editorial) for the August 2013 edition of Welsh Coastal Life
- Increased levels of visitors to the National Park by 25% (against same time in 2011)
- Merchandise sales currently over 80% of original campaign costs

Coast to Coast

The Authority's free - and market leading - visitor newspaper, plays a pivotal role in supporting the National Park Authority's tourism work, as well as promoting appreciation and enjoyment of the National Park. It is also one of the few activities of Authority work that generates an income for the organisation. Nearly a quarter of a million (225,000) copies are distributed annually throughout the Pembrokeshire area, being read by over one million people each year. The newspaper was also named as the Best External Publication at the 2014 CIPR Pride Cymru Awards.

Evaluation of the 2013 edition generated outstanding results, including:

- An independent survey of users and advertisers highlighted an incredible 99% satisfaction rate.

- 76% of local residents are aware of the publication, with over 65% of these using it regularly to access and enjoy the National Park.
- 89% repeat advertising; £120k income generation with a net profit of £33k.
- Website traffic increased by 50% during the publication's distribution period.
- Over 6,000 people downloaded the 2013 Coast to Coast app, with 50% of downloads being made by people in England, the United States, France, Germany and Holland.
- Engagement with the online page-turner version of Coast to Coast increased by 25% (against the same duration in 2012).

PCNPA Visitor Centres & Castle Sites

The Park Authority operates five centres across the Park at St Davids, Newport, Castell Henllys, Carew and Tenby. In Jan-Dec 2014 the Authority's centres welcomed over 270,000 visitors as follows:

PCNPA Centre	2013	2014
Oriel y Parc (St Davids)	144,966	147,291
Newport	28,713	33,830
Castell Henllys	19,918	20,327
Carew	30,075	36,831
Tenby	34,842	34,031
Total	258,514	272,310

Each of the centres provide a range of services including:

		St Davids	Newport	Castell Henllys	Carew	Tenby
a	Networked TIC	✓	✓			
b	National Park interpretation/activities/events	✓	✓	✓	✓	✓
c	Cultural / historic attraction (wet weather)	✓		✓	✓	
d	Community focus for locals, meetings etc.	✓	✓	✓	✓	✓
e	Satellite working arrangements for staff	✓	✓	✓		✓
f	Base for our SI, Health and Well Being work	✓		✓	✓	

From the tourism perspective the focus is on delivering the following services.

Networked TIC's

St Davids and Newport provide a bed booking service as part of the Tourist Information Network Group (TING) arrangement (successor to the former Visit Wales TIC Network). With increasing use of internet Trip Advisor etc. this is a declining service. (The reduction in income received from the service is a good indicator of this decline).

	Amount	
Year	St Davids	Newport
2010	£3,557	£810
2011	£3,300	£564
2012	£2,607	£281
2013	£2,553	£198
2014	£1,707	£123

Interpretation

Each of the centres provides interpretation allowing visitors to better understand and appreciate the special qualities of the National Park. In Newport and Tenby the relatively modest displays offer interpretation focusing on their local area. In addition to this general interpretation St Davids focuses on art and Castell Henllys and Carew on history. The experience and knowledge of staff at each centre to explain and enthuse about the Park in ways which are tailored to each individual visitor is where we add most value, it is the most important of our services and the one most appreciated by visitors.

Cultural & Historic Attractions

Oriel y Parc in St Davids provides a world class gallery space to display ever changing exhibitions of the treasures from the National Collections and beyond in collaboration with the National Museum Wales / Amgueddfa Cymru. The emphasis is on “inspiration” with emotional as well as intellectual approaches to the understanding and enjoyment of the Parks’ landscapes.

At Carew and Castell Henllys the interpretation of the Medieval period and Iron Age respectively provide the obvious focus. Both have been the subject of major capital investment in recent years with resurfaced car park, new visitor centre and upgraded Lesser Hall at Carew and an upgraded visitor centre (with café and improved retail offer) and new interpretation package (including a dedicated “app” with augmented reality) at Castell Henllys. There are planned phased programmes of works for the continued development of both centres which will be rolled out as and when funding permits. The three centres are key “non-beach day” attractions and increasingly important components in Pembrokeshire’s tourism offer.

With such a wide variety of sites and such a range of services, the site managers have developed a common language (the four Cs) against which to deliver and develop our work:

- **Communities** – we are moving away from a “product” based focus to greater market orientation (i.e. a more tailored understanding of visitor needs) and serving those customers where we can add most value.
- **Coordination** – joint marketing and ticketing are obvious examples internally but we also work closely with external partners (e.g. Amgueddfa Cymru at St Davids and Cadw at Carew and Castell Henllys).
- **Congruence** – underlying everything we do is the aim to communicate *park principles* and *purposes* (e.g. at Carew and Castell Henllys the emphasis is not only learning about Medieval life and the Iron Age but also what we can

learn from these historic periods i.e. their relevance to current issues facing the Park and the planet).

- **Commercial** – a cost reduction strategy over recent years has delivered substantial savings and we are now aiming to complement this by generating increased income (especially through secondary spend on retailing and catering).

Future Strategy

Public Sector funding seems set to decline in both the short and medium terms but it is difficult to see how the Park Authority's centres can absorb further cuts without a fundamental change to the services provided. In the long-term it may, therefore, be considered appropriate to retain the quality of service in fewer centres rather than continuing to provide a diminishing service across the five sites.

In applying this approach, a number of factors need to be considered (including visitor numbers, costs, geographic spread and provision of alternatives). In particular, the Park Authority is keen to work more closely with the trade to help equip local businesses with the necessary information and skills to act as tourism ambassadors for Pembrokeshire and the National Park.

It is proposed that the above issues relating to the Authority's visitor centres and attractions are explored in more detail at a future Operational Review Committee meeting during 2015.

Discovery Team

The Discovery Team aims to help people discover the National Park landscapes and provide wider benefits in terms of health, wellbeing, skills development, employability and wider learning.

Traditionally the service focused predominantly on visitors but in recent years this focus has expanded to tailor specifically for key target audiences, especially people most in need of help in accessing the Park and where we can add most value including:

- Primary, Secondary and Tertiary learners – through our education programme
- Black and Minority Ethnic (BME) audiences – through the Mosaic Cymru programme
- Those with health problems – through the Walkability Project
- Those with social barriers to access - through the Your Park Project
Developing employability skills and new opportunities for volunteering – through the Skills in Action Traineeship Project and co-ordination of Pembrokeshire Coast National Park Authority's volunteering work.

In addition the Discovery Service continues to develop and coordinate a very full programme of activities and events for visitors during the summer months. A major part of this is the published Activities & Events (A&E) Programme which appears in Coast to Coast each year (running from mid to late March until the end of October each year). In 2014, the Discovery Service delivered 123 events attracting 3,020 attendees.

The programme is delivered through the Discovery and Area Ranger teams with the support of others across the Park Authority. Volunteers also make a significant contribution to this programme both leading and back marking walking activities. The programme is delivered with a range of partners and in 2014 this included the following organisations and groups:

- Cadw at St. David's Bishop's Palace
- Trinity House
- Field Studies Council (FSC) at Orielton
- FSC at Dale
- National Trust at Colby Woodland Gardens
- Little Haven Community Group
- MOD
- PCC

A wide range of activity is included in the programme with the aim of attracting a variety of audiences from families through to individuals/couples wishing to explore the National Park. Within the programme staff focus on where they can add most value to the experience of both visitors and local people. For example, the Authority no longer runs the Annual Coast Path Walk as participants were able to undertake the walks independently or book with one of a number of private sector operators offering similar services. Instead the Authority has focussed on shorter, more accessible routes and experiences for those less likely to venture into the National Park independently.

In 2014 42% of those attending our activities and events were local to Pembrokeshire, a further 10% visited from elsewhere in Wales with the remainder from other parts of the UK and/or overseas. The table below provides a comparison of our performance in delivering the A&E programme between 2011 and 2014:

	2011	2012	2013	2014
Number of events	94	92	102	123
Number of Events Cancelled	11	12	8	8
Total Attendance	2134	1716	1981	3021
Average attendance per event	22	19	21	26

In addition to the published programme of activities and event there are walks, talks and tailored events throughout the years which attract a range of audiences both local and visitors. This includes a PCNPA presence at a number of partnership events including (for example) Pembrokeshire Fish Week and the County Show and specific events such as Pembrokeshire Archaeology Day.

The Discovery team have been able to develop specific initiatives which support tourism. For example we were able to support Bluestone Resort through the *Park Wise* initiative, training their staff to have a better understanding of the National Park's landscapes, purposes and principles to help inform their visitors.

All of the above work is complemented by the Authority's interpretation work (leaflets, panels, activity packs etc.) which is also increasingly focussed on supporting the work at our Centres (Appendix 4).

Conclusion

Pembrokeshire Coast National Park Authority (PCNPA) continues to play an important role in terms of tourism development in the county. The estimated economic value of tourism in the National Park is £261m¹⁶ and the Authority's work with the *Destination Pembrokeshire* tourism partnership helps to ensure that PCNPA adds maximum value to the tourism offer in Pembrokeshire by liaising closely with key partner organisations and stakeholders.

The challenge facing the Authority in the years ahead is to determine how we continue to maximise our contribution to tourism development in the county when the Authority's funding and resources are reducing year on year. The need for PCNPA to clearly define our priority services in relation to tourism will be informed by the pending joint scrutiny exercise being undertaken by the three Park Authorities to examine economic development in National Parks across Wales. Similarly, the review of the *Destination Pembrokeshire* tourism partnership will help shape the Authority's commitment to tourism development in Pembrokeshire.

The challenge for the Operational Review Committee throughout 2015 and beyond is to ensure that the Authority develops a clear rationale for scrutinising the Authority's work in relation to tourism development and, through future NPA meetings, both prioritise and rationalise PCNPA's tourism related work to ensure that the Authority continues to meet its objective of demonstrating "*a positive impact on the local economy and the well-being of residents and visitors to the National Park*"¹⁷.

Recommendation: Members are requested to RECEIVE and COMMENT on the Report.

(For further information, please contact PCNPA Director of Delivery and Discovery)

Author: James Parkin – Director of Delivery and Discovery
Consultees: Tegryn Jones – Chief Executive / National Park Officer
Phil Roach – Head of Discovery
Hannah Buck – Health and Tourism Policy Officer
Marie Edwards – PR and Communications Manager
Graham Peake – Discovery Team Leader
Alan Hare – Business and Performance Manager

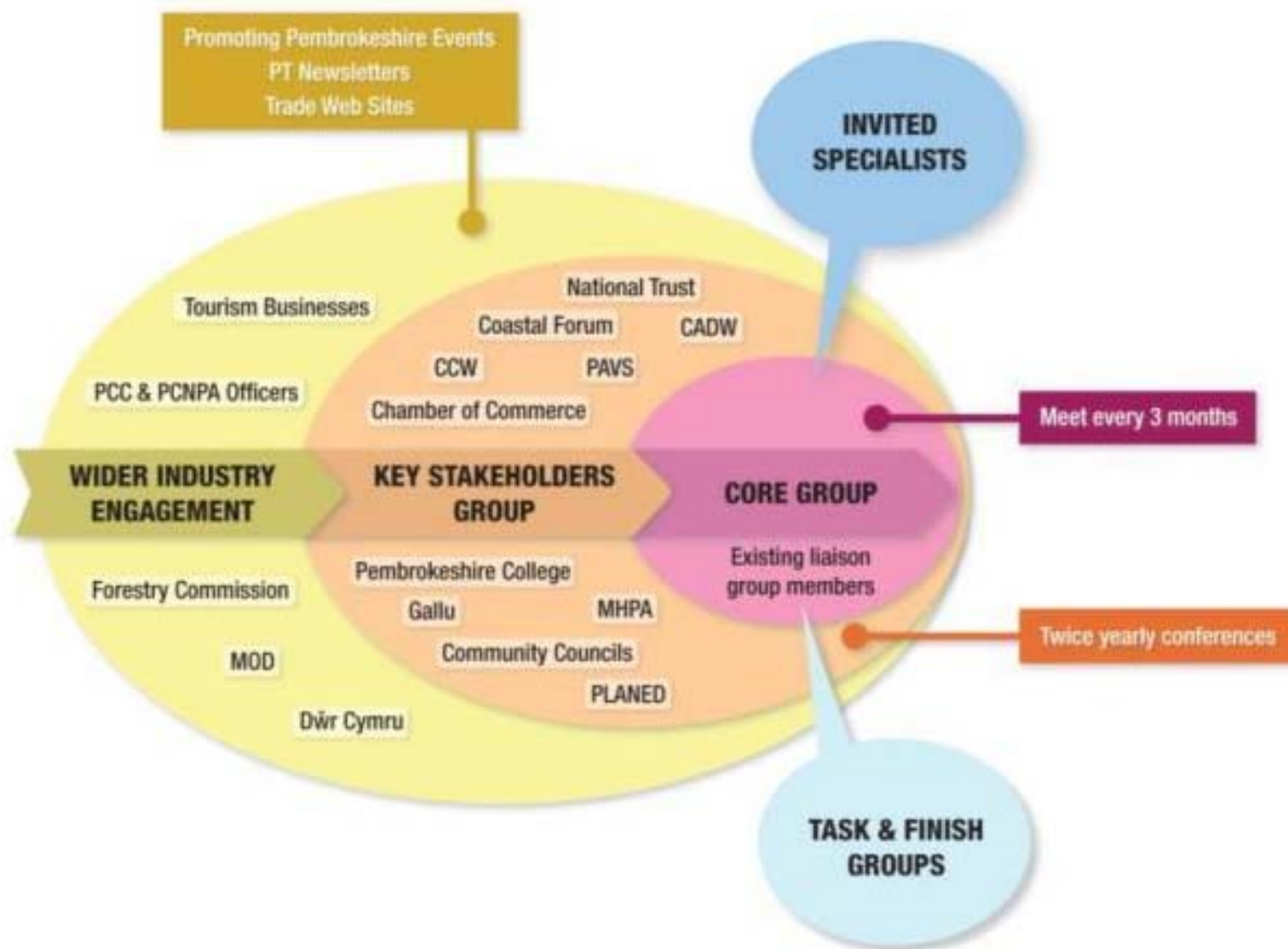
Appendices

- Appendix 1 – Destination Pembrokeshire Engagement Model
- Appendix 2 – Pembrokeshire Tourism Statistics
- Appendix 3 – Overview of PCNPA's tourism services
- Appendix 4 – PCNPA Interpretation work 2013-14
- Appendix 5 – Overview of Destination Pembrokeshire marketing
- Appendix 6 – Destination Pembrokeshire Plan

¹⁶ PCNPA STEAM Report (2012)

¹⁷ PCNPA Improvement Plan (Draft) 2015-16

Appendix 1 – Destination Pembrokeshire – Stakeholder Engagement Model (2012)



Appendix 2

Part A - STEAM Data for PCC and PCNPA (respective areas) for 2012

2012

Analysis by Sector of Expenditure			
(£'s millions)	Pembrokeshire	PCNP	PCNP %
Accommodation	87.55	50.36	58%
Food & Drink	99.89	47.85	48%
Recreation	34.38	16.44	48%
Shopping	54.50	25.79	47%
Transport	42.40	20.32	48%
Total Direct Revenue	318.72	160.77	50%
Indirect Expenditure	133.07	67.84	51%
VAT	63.74	32.15	50%
TOTAL	515.54	260.76	51%

Revenue by Category of Visitor			
(£'s millions)	Pembrokeshire	PCNP	PCNP %
Serviced Accommodation	67.10	37.24	56%
Non-Serviced Accommodation	379.93	192.59	51%
SFR	15.88	2.94	19%
Day Visitors	52.62	27.99	53%
TOTAL	515.54	260.76	51%

Tourist Days			
(Thousands)	Pembrokeshire	PCNP	PCNP %
Serviced Accommodation	788.9	397.4	50%
Non-Serviced Accommodation	10,591.3	5,076.8	48%
SFR	450.1	83.3	19%
Day Visitors	1,811.3	963.5	53%
TOTAL	13,641.6	6,521.0	48%

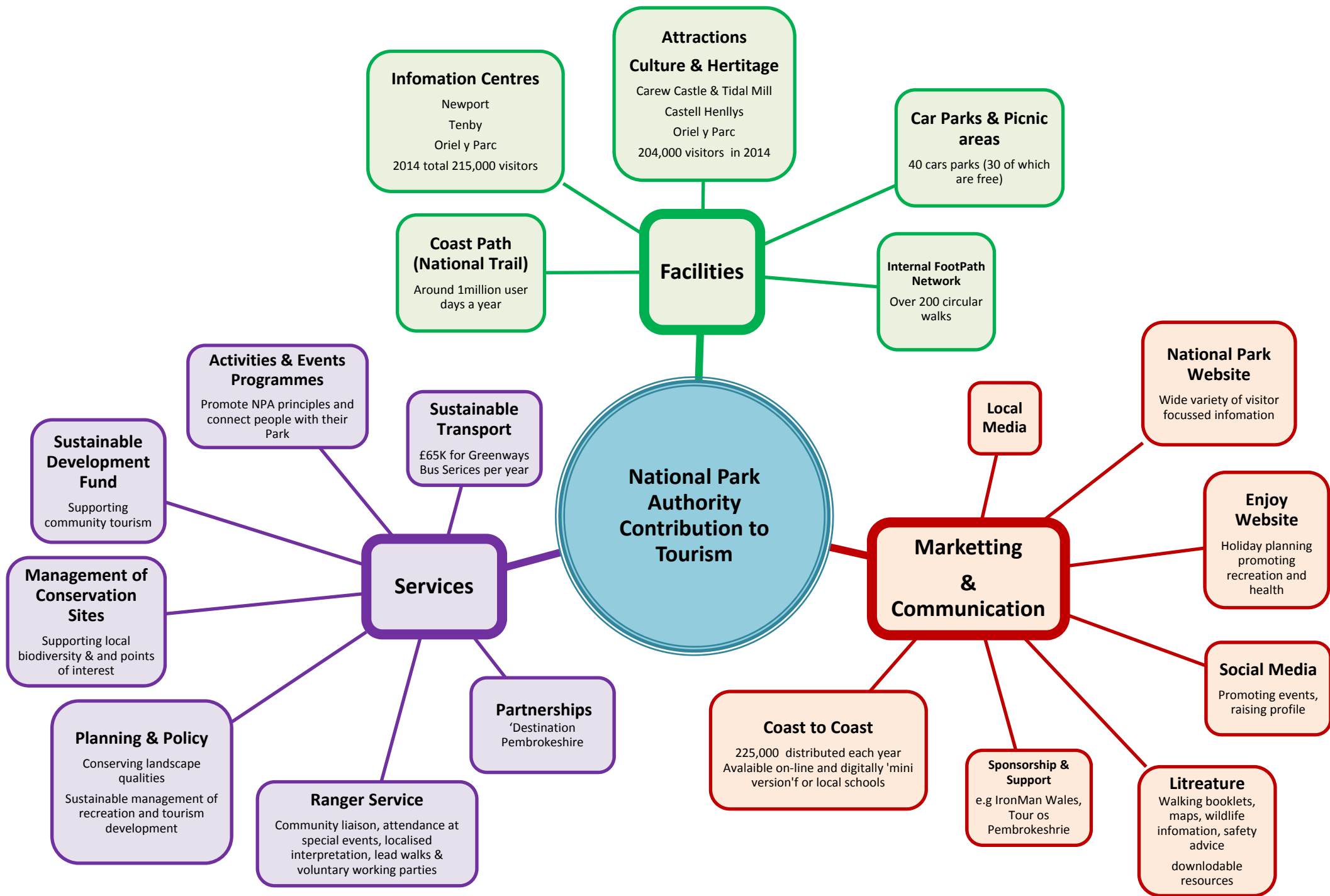
Tourist Numbers			
(Thousands)	Pembrokeshire	PCNP	PCNP %
Serviced Accommodation	387.1	195.7	51%
Non-Serviced Accommodation	1,580.5	759.9	48%
SFR	189.0	35.0	19%
Day Visitors	1,811.3	963.5	53%
TOTAL	3,968.1	1,954.1	49%

Sectors in which Employment is supported			PCNP
(FTE's)	Pembrokeshire	PCNP	%
Direct Employment			
Accommodation	5,799	3,419	59%
Food & Drink	2,055	984	48%
Recreation	858	410	48%
Shopping	1,022	484	47%
Transport	390	187	48%
Total Direct Employment	10,123	5,484	54%
Indirect Employment	1,768	902	51%
TOTAL	11,892	6,386	54%

Part B - STEAM Data PCNPA and PCC comparison 2012

STEAM measures tourism at the local level from the supply side. This has the benefit of immediacy and relative inexpensiveness. Traditional measurement of tourism activity is from the demand side, but, surveying visitors is both time-consuming and costly. This is further complicated when economic impact assessment is made, which requires surveys of businesses and the consumption patterns of local people.

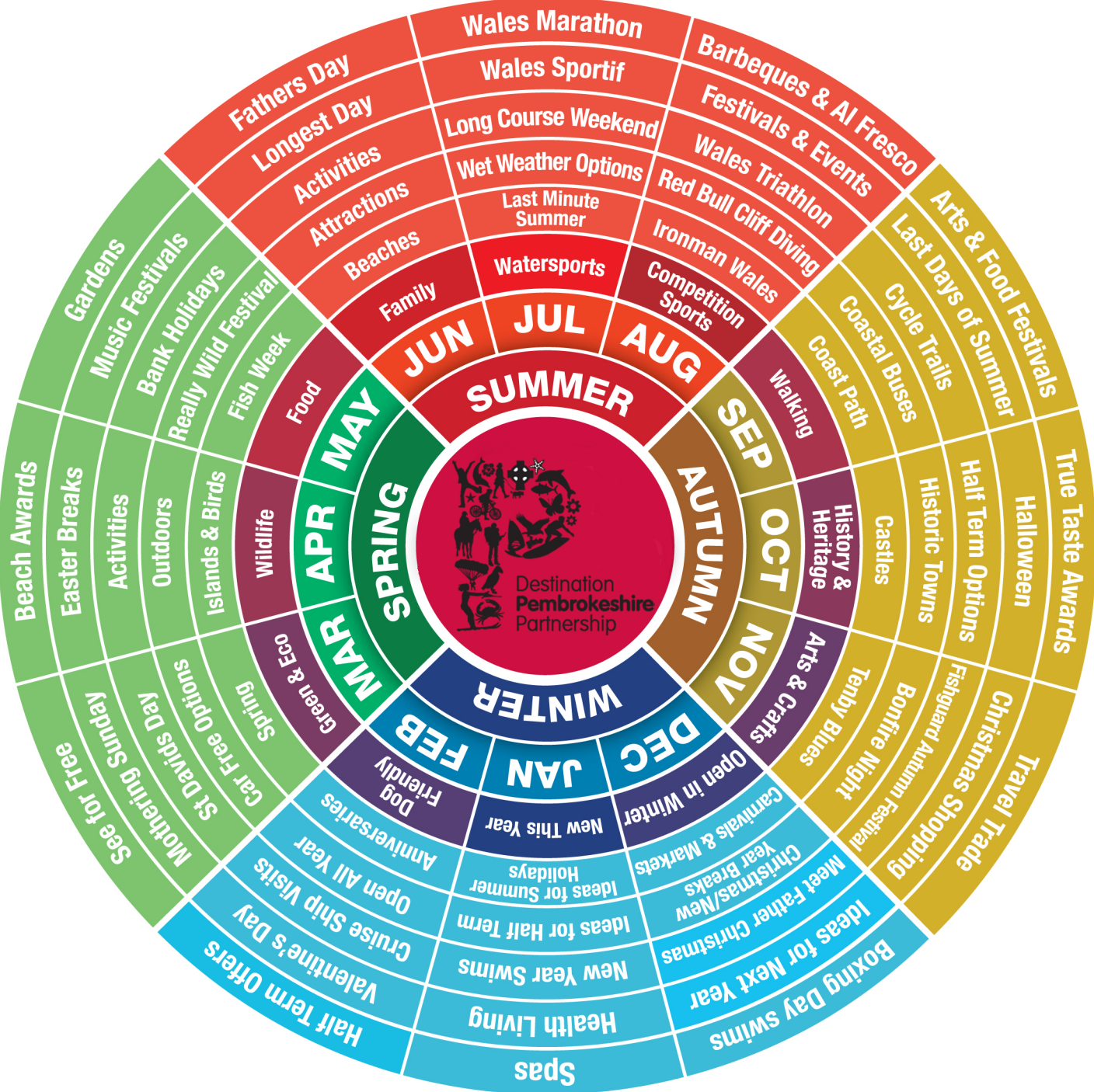
STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends. The confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs and plus or minus 5% in respect of trend.



Appendix 4

Discovery Team Interpretation work 2013-14

Interpretation activity	Status
PCNPA Easter Trail 2014	COMPLETE
Carew Castle – re-opening temporary interp. panels plus posters	COMPLETE
OyP –Photo Presentation	COMPLETE
OyP Interpretation Panels	COMPLETE
OyP Interpretation of future National Gallery exhibitions in 2013	COMPLETE
Solva Interpretation Panel	COMPLETE
Ocean Lab (Sea Trust)	COMPLETE
Strumble Head Lighthouse	COMPLETE
Bluestone Interpretation panel	COMPLETE
Wildlife Information Leaflets	COMPLETE
Wildlife Information Leaflets (inc reprint)	COMPLETE
Film (OyP)	COMPLETE
St. David's Airfield panels	COMPLETE
Tenby – Communities in Bloom	COMPLETE
Manorbier Dovecot	COMPLETE
Replacement panel at Broad Haven	COMPLETE
Replacement of St.Govans and Stackrock interpretation panels	COMPLETE
OyP Green Bags	COMPLETE
Penally Firing range – panel	COMPLETE
Insert for Saundersfoot Trail leaflet	COMPLETE
PCNPA mobile unit - refresh	ONGOING
Origins CH Interpretation work	ONGOING
Porthgain Community Interpretation Project	ONGOING
Review Interpretation Plan	ONGOING
Mobile Beach Unit (PCC) Liaison	ONGOING
Wildlife Information Leaflets (new leaflet 'wild coast')	ONGOING
Trefin Mill panel	
OyP Interpretation of future National Gallery exhibitions in 2015	ONGOING
Nevern Castle	ONGOING
Lawrenny Panel - replacement	
Heritage Orchards project	ONGOING
Carew Mill and Castle Trail leaflet	ONGOING




Do you want to know more?

This document gives a very brief description of the agreed priorities. For a more detailed explanation you can obtain a copy of the full Destination Management Plan from: www.tourismhelp.co.uk (listed under Tourism Strategies)

If you would like a copy to be e-mailed to you or to be added to the Destination Pembrokeshire Partnership mailing list, contact tourism@pembrokeshire.gov.uk

PEMBROKESHIRE DESTINATION MANAGEMENT PLAN 2013-2018





“This isn’t just a list of the aspirations of public sector organisations, it should be relevant to everyone working in or associated with the tourism industry in Pembrokeshire.”

Andrew Evans,
British Hospitality
Association
Chairman,
Welsh Committee
and owner of the
St Brides Hotel,
Saundersfoot.



Why do we need a plan?

Pembrokeshire is the most popular coastal holiday destination in Wales, with some of the best preserved coastline in Britain.

We regularly win awards and accolades for the quality of the beaches, landscapes, local products and tourism facilities. In 2010, for example, a panel of 340 National Geographic experts rated Pembrokeshire as the second best coastline in the world, quoting “the magnificent protected coastline from both ecological and geological perspectives” as the reason why.

They also applauded a very mature and established tourism industry that has preserved, rather than eroded, the qualities that make Pembrokeshire so unique.

Pembrokeshire also appeals to a wide range

of visitors from couples and families in every income bracket to groups and individuals participating in activities and sporting events. The variety and choice of things to do and the range of niche markets are so numerous it’s difficult to list them all.

Despite our obvious appeal as a visitor destination, the future of tourism is by no means secure. There are significant challenges to overcome for Pembrokeshire to retain or grow tourism revenue.

There are issues that significantly impact on visitor patterns such as the weather, the price of fuel or the state of the economy that can’t be changed locally but there are issues that can be tackled locally. This plan will concentrate on these.

What is the Destination Pembrokeshire Partnership?

This plan is intended as a development guide for all Pembrokeshire based organisations, businesses and employees in tourism related roles. There are, however, a smaller number of organisations that will probably play a more significant role in making sure this strategy is delivered:

The **Destination Pembrokeshire Partnership** has been established to deliver this plan. The Core Group of the partnership membership is drawn from the key organisations listed below but has no staff or budget of its own. The partnership has been established to better define roles and responsibilities, identify the most appropriate organisations to undertake certain tasks and to coordinate the delivery of activity that meets the priorities identified in this strategy. Action against the strategy will need to be funded and resourced from within these organisations and through available external sources.

Pembrokeshire Tourism has grown to become the largest and most proactive tourist association in Wales with over 500 members in all sectors including retail, accommodation, attractions and catering. They have a key role in keeping businesses informed, helping them to develop their potential and representing their interests.

Pembrokeshire County Council has a Visitor Services team who provide the Tourist Information service and the Tourism Marketing & Development team, which has the key role of persuading visitors to take their holidays in Pembrokeshire and making sure we remain the most popular coastal destination in Wales. The Council also provides a range of other services that impact on tourism, such as Food Development Support, Coastal Bus Services, Beach Management, Car Parks, Food Safety and Highways.

The **Pembrokeshire Coast National Park Authority** is our chief environmental guardian. It is the unspoiled coastline that makes Pembrokeshire so special and what attracts so many of our visitors. The National Park run two Tourist Information Centres and a visitor centre as well as operating three visitor attractions: Carew Castle, Castell Henllys and Oriel Y Parc. They also manage perhaps our most important visitor asset, the Pembrokeshire Coast Path.

PLANED whose expertise is closely linked with Community Tourism and developing European Union and grant funded initiatives.

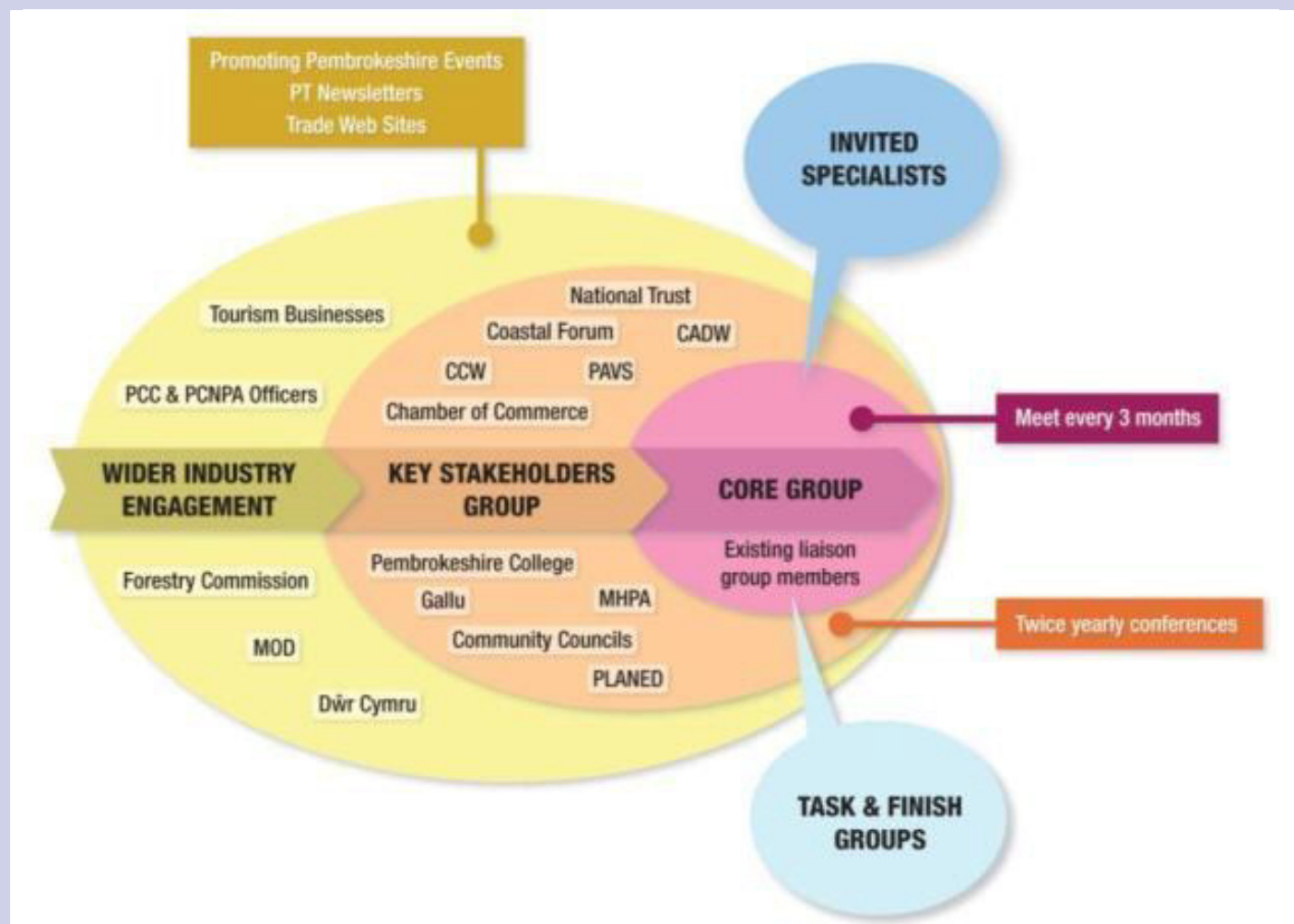
Visit Wales, the tourism department of the Welsh Government, has a key role to play. The work that the **South West Wales Tourism Partnership** undertakes is the principal mechanism for integrating this at a local level. Linking local action with what happens in the region and throughout Wales is critical, not just with the Visit Wales tourism team but with other Welsh Government teams.

Many other organisations also have a big part to play. Their dedication and hard work in many different areas of tourism will be essential in making this plan work. They include **Gallu**, the **National Trust**, **The Pembrokeshire Coastal Forum**, **Pembrokeshire College**, **The Wildlife Trust of South & West Wales**, chambers of trade and town and community councils.

It is also important to recognise the work of the many interest groups

whose members invest a lot of their own time for the common good including **Coast Care** groups, **Sea Trust**, **Surfers Against Sewage**, **Sustrans** and numerous **historical societies** to name just a few.





What do we need to change?



‘development guide for all Pembrokeshire based organisations, businesses and employees in tourism related roles’



Some sectors in the tourism industry are experiencing reduced profit margins, particularly in the current economic climate but reduced investment in facilities and staff will undermine our ability to offer the quality our visitors now demand, leading to a further decline in profitability. We need to reverse this and become more profitable.

Competition from other parts of the UK, Europe and the world is increasing especially from modern resort hotels offering all-inclusive holidays.

We have traditionally attracted very loyal older visitors who come back year after year, but this is changing too. Greater wealth and a

more adventurous attitude have encouraged older people to explore more. An example of this is cruise ship operators who even provide pick-ups from their customer's front door.

Trends and tastes change very quickly. We need to change what we offer to match these modern tastes. A significant proportion of the UK population do not know about Pembrokeshire or have an unfavourable idea of what is on offer.

We need to better exploit digital opportunities to improve efficiency, communication and promotion. Developing high speed connections and building digital understanding will be required to achieve this.



People. Nothing will change without hard work, drive and enthusiasm. Investing in workforce development to build skills and confidence is needed in order to run successful businesses and to provide the level of service visitors expect.

Product improvements are needed to keep pace with visitors' expectations. New products are also needed to attract new markets. Visitor expectations are constantly growing and we need to provide products and services that meet those expectations.

Promoting Pembrokeshire as a visitor destination will always be a priority. How can we come up with a common approach that will attract more visitors, especially at times when we have capacity?

Year Round trading would solve many of the profitability, investment and employment issues but increasing the number of visitors in Spring and Autumn is a more realistic goal.

Partnership working is the best way the tourism industry can make a collective difference. Public and private sector organisations, tourism businesses and voluntary groups need to work better together

Protecting the environment is critical. If the environment is damaged, one of the principal reasons for visiting Pembrokeshire is damaged as well.

Additionality v Displacement. Activity to develop tourism should seek to create new business rather than displace it from existing enterprises.

Local residents' needs are as important as visitors. They use many of the same facilities such as restaurants, attractions and entertainment. Local residents are year-round consumers, who support tourism related businesses throughout the year.

Preventing leakage. Ensuring greater use of local products and local labour rather than buying it in from outside is important in order to maximise the proportion of visitor spending we retain.

Small and Micro businesses are the norm in Pembrokeshire. Services need to be tailored to meet the needs of this type of business.

Sustainability. Making it easier for visitors to make more environmentally friendly holiday choices. Making 'green' holidays an easy option.



Working together effectively

The model for the Destination Pembrokeshire Partnership has been welcomed by many working in tourism. A key priority for the strategy is to strengthen and build on it. The flow of knowledge through the partnership is an important part of this.

- Strengthen the core group to increase collaborative working and reduce duplication
- Establish a 'stakeholder' group of organisations involved in tourism, business and the community who have an interest in tourism but it's not their prime function
- Continue to develop communication links with and between tourism businesses to enable them to contribute and thrive
- Continue to develop the monitoring of visitor satisfaction, enterprise performance and tourism impact

- Undertaking surveys, consumer research, collecting marketing intelligence and feeding this through to tourism businesses to help guide development.

Re-focusing marketing

Marketing activity should play to the key strengths of Pembrokeshire and focus on generating more year round, higher value business, subject to the availability of product at the right quality.

- Develop a joined-up approach to marketing to the primary holiday markets and niche market segments
- Develop a strong image of Pembrokeshire that appeals to key market segments who don't currently visit
- Continue to develop key niche markets. They are people visiting for a specific reason rather than taking a 'holiday'.
- Better promotions targeting local residents as they are year-round customers.

- Maintain overseas marketing with regional and national partners
- Refocus marketing activity to better exploit digital marketing opportunities as digital is instant, worldwide, cost effective and it's what our visitors are increasingly wanting.

Creating a year round high quality experience

Improving the quality of experience is crucial in getting visitors to return. Central to this is the availability of high quality tourism enterprises and facilities open all year.

- Improve welcome and information delivery. Good, accurate information on what to see and do, is central to visitors enjoyment.
- Improve the availability of good quality serviced accommodation. The limited availability of top quality serviced accommodation is a weakness for Pembrokeshire in contrast to some other competitor areas.
- Support the continual improvement and upgrading of self-catering accommodation
- Support the continual improvement and upgrading of camping and caravanning accommodation
- Strengthen the year-round appeal and accessibility of places to visit. Priority should be given to strengthening the profile and appeal of existing attractions.



- Encourage the development of better facilities for people with disabilities
- Encourage high quality food tourism offer, available all year as provision is sometimes better in competitor destinations.
- Seek to become a market leader in high quality land and water based activity holidays
- Seek to exploit new and emerging markets as they develop such as Cruise Ships.
- Develop and support a sustainable events programme
- Develop integrated promotional activity and product development to increase the number of visits outside the peak summer months

Developing and sustaining infrastructure, environment and cultural resources

Pembrokeshire's outstanding natural environment is its main strength as a tourist destination. This calls for great care and creativity in the way these precious resources are managed and made accessible to visitors. At the same time, there is a need to ensure that Pembrokeshire's visitor infrastructure is of the



highest quality, which will benefit local residents as well as visitors.

- Encourage sound environmental management at all levels. Growing numbers of visitors are also seeking eco-friendly destinations
- Work with local groups to improve their communities. This can benefit residents as well as visitors.
- Develop local distinctiveness. The visitor experience is as much about experiencing local life and character as it is about the product itself.
- Support sustainable land management and traditional activities through tourism
- Improve and promote countryside access. Good access to the coast and countryside is an essential part of any visit to Pembrokeshire especially the Coast Path, which is extremely important in attracting visitors.
- Develop a more coordinated approach to managing facilities and services used by visitors
- Improve the quality and appearance of the built environment

Pembrokeshire County Council and The Pembrokeshire Coast National Park Authority provide a wide range of services that impact directly and indirectly on visitors. A whole authority approach to tourism in both will be beneficial.

- Improve the provision and promotion of public transport options to encourage visitors to use of public transport while they here.
- Improve communication links including road and rail networks and better broadband, WiFi, mobile and 3G coverage.

Improving business practice, profitability and performance

The quality of the experience visitors' encounter is significantly affected by the people they encounter in tourism businesses. Developing good customer handling skills and positive attitudes to customers can improve both the visitor experience and profitability. Likewise, investing time and effort into developing better business skills such as marketing and business planning will improve profitability and capacity for developing high quality, year-round business. Tackling seasonality will raise profitability and the quality and attractiveness of tourism jobs available.

- Improve management and business skills as this is stopping some tourism enterprises from fulfilling their potential.
- Improve the appeal of jobs in tourism in order to provide better pay and prospects for those working in tourism and improve business performance
- Improve the co-ordination of provision and signposting of training and business support services