

REPORT OF THE DIRECTOR OF DELIVERY & DISCOVERY

SUBJECT: PEMBROKESHIRE DESTINATION MANAGEMENT PLAN 2013-2018

Purpose of Report

To request that Members formally adopt the '2013 – 2018 Pembrokeshire Destination Management Plan' as the key document to guide service delivery in relation to tourism in the county.

Introduction/Background

In 2009 the Wales Audit Office (WAO) undertook a review of the 'Pembrokeshire Tourism Strategy 2006-2012', produced by Pembrokeshire County Council (PCC), recommending that the strategy be updated to encompass tourism activity and services across the whole county and not just the services delivered by PCC.

Similarly, in 2009 Visit Wales, the tourism service of Welsh Government, undertook a review of destination management and marketing arrangements in Wales. Their report titled 'Developing the Visitor Economy: A Charter for Wales', included a number of recommendations for local authorities to:

- Support a local partnership approach and implementation of agreed elements of a Destination Management Plan (DMP)
- Lead on the production of strategic development plans at the Tourism Area level

As a result, in 2011 PCC formed a new county-wide steering group entitled the 'Destination Pembrokeshire Partnership (DPP)' to help prepare a new Destination Management Plan for the county and to ultimately steer the development of tourism related activities and marketing across the county.

As a result the DPP, which is comprised of the organisations listed below, has worked to produce the attached strategy which Members are asked to formally adopt. The main organisations involved in the production of the strategy include:

- Pembrokeshire County Council (PCC)
- Pembrokeshire Coast National Park Authority (PCNPA)
- Pembrokeshire Tourism (PT)
- South West Wales Tourism Partnership (SWWTP)

As the plan embraces a wide variety of services across PCNPA, adopting a 'whole authority' approach to tourism, as part of a broader 'county-wide' approach, is important to the long-term success of the visitor economy. The document has undergone formal consultation, led by PCC, with 37 separate organisations ranging from Chambers of Commerce to the Pembrokeshire Coastal Forum (PCF) and the

tourism sector responding. The consultation responses were very positive and helped “fine tune” the published plan (attached).

Destination Management

The aim of the Destination Management Plan is to safeguard and grow the visitor economy in order to improve the contribution it makes to the economic well-being of the county. A copy of the draft Plan is attached as an Appendix. There are 5 strategic objectives:

- Working together more effectively
- Promoting Pembrokeshire as a visitor destination
- Product development
- Infrastructure and the environment
- Skills and business development

The Destination Plan seeks to map out partners’ aspirations in order that complementary action plans are developed by the main public agencies involved in tourism development, in turn, guiding the work of stakeholder organisations and individual tourism businesses.

Each of the key partners will be seeking to adopt the plan formally and PCC adopted the plan at a Cabinet meeting held on the 7th January 2013.

As tourism has now been added to the priority sectors identified by the Welsh Government, the plan will assist the partnership in bidding for external resources as it provides a robust evidence base to support funding applications.

Financial considerations

All public agencies involved in the delivery of tourism services are operating with reduced budgets. In addition, tourism spend in general has dropped markedly in the last few yearsⁱ placing enormous pressure on a range of local businesses. As a result, the tourism economy in Pembrokeshire remains somewhat ‘fragile’.

It is, therefore, important that the tourism sector is well co-ordinated to maximise the use of existing resources and to respond collectively to opportunities as they present themselves in order to remain competitive during a difficult economic period.

The ‘2013 – 2018 Pembrokeshire Destination Management Plan’ provides a means to galvanise joint activities and, through ongoing dialogue, continue to improve the co-ordination of services, including those provided by PCNPA, and ultimately improve the ‘visitor offer’ year on year.

Risk considerations

It is important that PCNPA fully endorses the ‘2013 – 2018 Pembrokeshire Destination Management Plan’ as a means of demonstrating our firm commitment to joint working and the development of the local tourism economy.

Compliance

The ‘2013 – 2018 Pembrokeshire Destination Management Plan’ provides a mechanism for PCNPA to deliver ‘Improvement Outcome 3’ of the ‘2013-14 Corporate Plan’ which highlights the Authority’s continuing commitment to ensure

that our work has “a positive, sustainable, impact on the local economy and well-being of Pembrokeshire”.

Human Rights/Equality issues

Not considered to impinge on any of the rights or freedoms contained in Human Rights Act 1998 or relevant equalities legislation.

Biodiversity implications/Sustainability appraisal

The ‘2013 – 2018 Pembrokeshire Destination Management Plan’ highlights the importance of the natural environment and the National Park designation as key aspects of the ‘visitor offer’. This, in turn, should bring a greater degree of acknowledgement and protection to the special qualities of the National Park.

Welsh Language statement

A Welsh language version of the document will shortly be available from Pembrokeshire County Council.

Conclusion

The ‘2013 – 2018 Pembrokeshire Destination Management Plan’ provides a co-ordinated strategy to develop the visitor economy throughout Pembrokeshire. In addition, it provides a clear mechanism for PCNPA to deliver a number of key goals relating to the local economy as outlined in the ‘2013 -14 Corporate Plan’. By formally adopting the plan, PCNPA will be highlighting the importance of the National Park to the visitor economy as well as the contribution it makes to the economic well-being of the county.

Recommendation

Members are asked to formally adopt the ‘2013 – 2018 Pembrokeshire Destination Management Plan’ as the key document to guide PCNPA’s tourism related services and activities over the next 5 years.

Background Documents

Anything published previously in relation to this report (e.g. previous reports to Authority/Committee, consultation reports, etc.)

(For further information, please contact the Director of Delivery and Discovery, James Parkin)

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ⁱ Pembrokeshire Visitor Survey 2011-12

Pembrokeshire Destination Management Plan

2013 - 2018



DESTINATION
PEMBROKESHIRE
PARTNERSHIP

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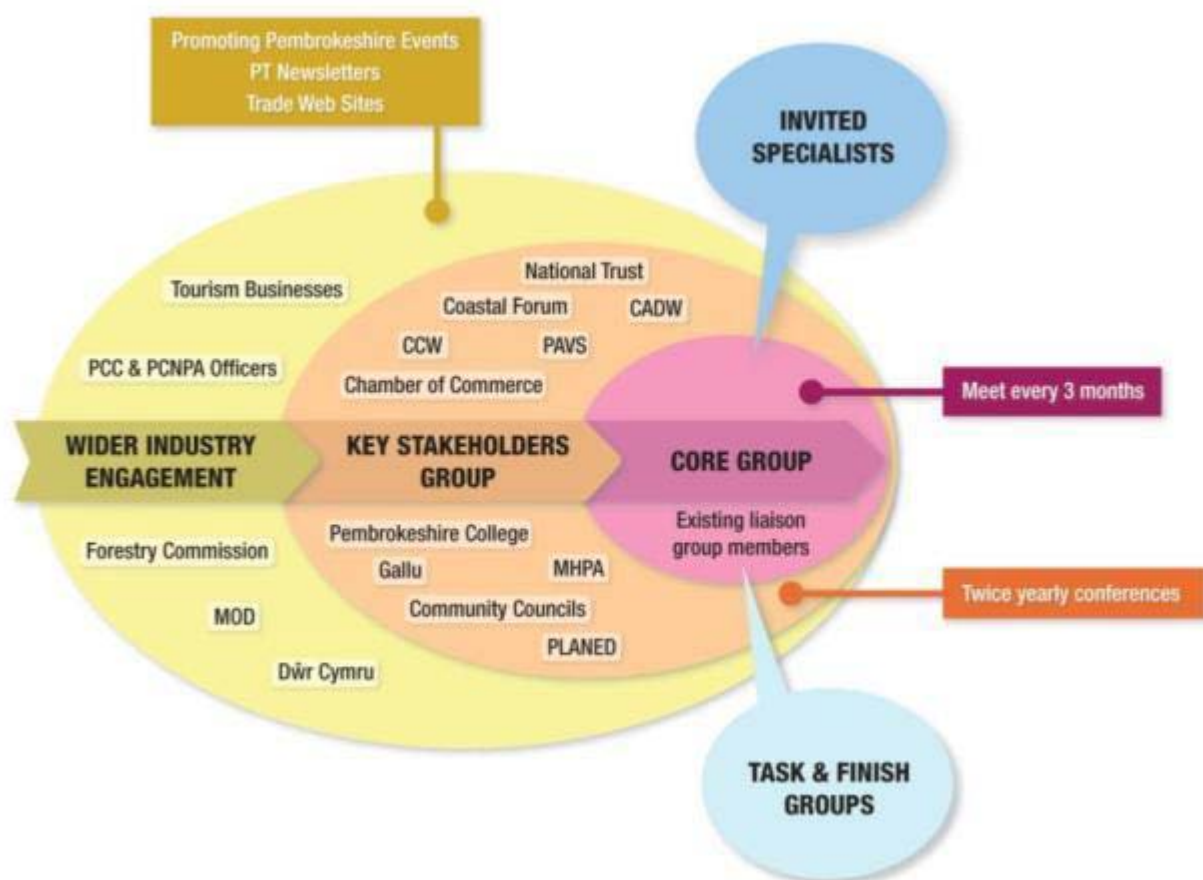
1. Introduction

- 1.1 Pembrokeshire is the most popular coastal holiday destination in Wales, with some of the best preserved coastline in Britain. Only one county in south west England has more blue flag beaches. Pembrokeshire regularly wins awards and accolades for the quality of the beaches, landscapes, local products and tourism facilities. In 2010, 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.
- 1.2 Pembrokeshire 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.
- 1.3 Despite the obvious appeal of Pembrokeshire, however, 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. There are issues that can be tackled locally. This strategy will concentrate on these issues.
- 1.4 This strategy 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 play a more significant role in making sure this strategy is delivered.
- 1.5 **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, catering and businesses that provide services to the tourism sector. They have a key role in keeping businesses informed, helping them to develop their potential and representing their interests.
- 1.6 **Pembrokeshire County Council** has two dedicated tourism teams: the Visitor Services team who run seven Tourist Information Centres 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 the Fish Week Festival, Food Development Support, Coastal Bus Services, Business Support, Beach Management, Car Parks, Food Safety and Highways. Coordinating these to make sure visitors' needs are met is a key role.

- 1.7 **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 provide a number of direct tourism services including running 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.
- 1.8 **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 in The Department for Education and Skills and The Directorate for Business, Enterprise, Technology and Science, and with CADW and the Food, Fisheries and Market Development Division in particular.
- 1.9 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 strategy work. They include **PLANED, 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.**
- 1.10 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.
- 1.11 The **Destination Pembrokeshire Partnership** has been established to deliver this strategy and to improve communication within the tourism industry. The Core Group of the partnership membership is drawn from the key organisations listed above 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.



2. What do we need to change?

- 2.1 Some sectors in the tourism industry are experiencing reduced profit margins, particularly in the current economic climate. They struggle to invest sufficiently in their facilities and maintain year-round employment. Unless facilities are improved, visitors will choose to go elsewhere where the facilities are better, leading to a further decline in profitability. Reversing this decline will help provide good quality full time and year round employment.
- 2.2 Competition from other parts of the UK, Europe and the world is increasing. The facilities available at modern resort hotels abroad has taken away many of our traditional family visitors, especially outside the main summer holidays.
- 2.3 Pembrokeshire has 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 customers front door.

- 2.4 Trends and tastes change very quickly. What Pembrokeshire offers in terms of activities, accommodation, restaurants and the image of Pembrokeshire needs to change to match these modern tastes. A significant proportion of the UK population do not know about Pembrokeshire or have an outdated impression of what is on offer.
- 2.5 Pembrokeshire needs 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.

3. Factors to be considered

- 3.1 **People.** Without hard work, drive and enthusiasm, change will not happen. Investing in workforce development to build skills and confidence is needed to run successful businesses and to provide the level of customer service visitors expect. Working in tourism can be very rewarding but it is often viewed as a poor career choice. The level of expertise needed, however, is extremely wide ranging from kitchen skills to interior design; from customer services to marketing; from information technology to book keeping. A consistent, comprehensive and business driven approach to training and skills development is needed.
- 3.2 **Product** improvements are needed to keep pace with visitors' expectations. It is essential if we want visitors to make repeat visits. New products are needed to attract new markets. This includes the style and presentation of what businesses are offering, how well maintained towns, villages and beaches are and how good the food offer is. Visitor expectations are constantly growing and we need to provide products and services that meet those expectations. Businesses should be upgrading regularly and improving their facilities in order to improve profitability. There is a danger that competitor destinations provide a better level of facilities, and visitors go to them instead.
- 3.3 **Promoting** Pembrokeshire as a visitor destination will always be a priority but visitors come to Pembrokeshire from across the UK and Europe for a wide variety of reasons, which makes targeted marketing a significant challenge. How can we come up with a common approach that will attract

more visitors, especially at times when we have capacity? We need to increase visitor numbers and spend but not at the expense of what makes Pembrokeshire special. How can we make Pembrokeshire become a more sustainable destination and stand out from others?

- 3.4 **Year Round** trading would solve many of the profitability, investment and employment issues but most destination are trying to achieve the same thing. Increasing the number of visitors in Spring and Autumn is a more realistic objective.
- 3.5 **Partnership** working is the best way the dispersed and diverse tourism industry can make a collective difference. Public and private sector organisations, tourism businesses and voluntary groups need to work better together to get more value out of their combined efforts. Partnership also applies to organisations who might rely on grant funding or to communities and individual businesses. Marketing consortia are a good example of sharing the cost and the work, but also sharing the benefits.
- 3.6 **Protecting the environment** is critical. Visitors need to make more sustainable holiday choices, reflecting the precious nature of the natural environment and its importance as part of the overall holiday experience. If the environment is damaged, one of the principal reasons for visiting Pembrokeshire is damaged as well.
- 3.7 **Additionality v Displacement.** Activity to develop tourism should seek to create new business rather than displace it from existing enterprises in Pembrokeshire.
- 3.8 **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.
- 3.9 **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 retained visitor spending within Pembrokeshire.
- 3.10 **Small and Micro businesses** are the norm in Pembrokeshire. Services need to be tailored to meet the needs of this type of business.

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

4. Priorities for action

The following priorities for action are identified under each of the five objectives.

4.1 Objective 1: Working together effectively

The model for the Destination Pembrokeshire Partnership has been welcomed by all those 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.

4.1.1 **Strengthen the core group to increase collaborative working and reduce duplication**

The four core group members should become recognised as the main vehicles for engaging private sector enterprises in developing a skilled workforce, enhancing the quality of the product, improved tourism marketing both on line and off line and engagement with destination management activities.

Examples of how this can be achieved:

- Each organisation needs to adopt this strategy and agree to continue to work together to achieve common goals.

4.1.2 **Establish the stakeholders group to develop and engage with the partnership**

The stakeholders group comprises of organisations representing different tourism, business and community groups. Tourism will be a big part of their activities but not necessarily their most important function. Improving communication with this group is essential if strategic priorities are to be adopted and actioned by the wider tourism community.

Examples of how this can be achieved:

- Organise annual tourism conferences to highlight developments in tourism to set standards of delivery for the county and encourage greater participation in the destination partnership;

- Establish an effective communication network for sharing information with stakeholder organisations and the businesses or individuals they represent;
- Use this strategy to focus attention on the more important issues for Pembrokeshire

4.1.3 Continue to develop communication links with and between tourism businesses to enable them to contribute and thrive

A coordinated approach to communicating with businesses providing goods and services to visitors is important if greater participation is to be achieved. Improving business to business communication will help contribute to this.

Pembrokeshire Tourism will have the principal responsibility for communication with tourism businesses with the support of Pembrokeshire County Council and The Pembrokeshire Coast National Park Authority, thereby reducing duplication and generating added value to their membership.

Examples of how this can be achieved:

- Engage with tourism businesses with a view to drawing them into the tourism community and to become active members of Pembrokeshire Tourism;
- Organise regular events for tourism businesses to highlight destination issues and build knowledge and understanding;
- Coordinate contact information particularly on new business start-ups.

4.1.4 Continue to develop the monitoring of visitor satisfaction, enterprise performance and tourism impact

Obtaining systematic feedback from visitors and enterprises is an essential component of improving the quality of facilities and services and informing destination management planning.

Existing trade surveys, consumer research and the gathering of tourism intelligence needs to continue and to be further refined to provide the right information to properly support tourism related decision making processes.

Results of satisfaction surveys and intelligence on consumer preferences and trends needs to continue to be communicated to tourism businesses to help guide their own development.

Examples of how this can be achieved:

- Conduct in-depth visitor surveys every 4 or 5 years to measure how Pembrokeshire is perceived by visitors and to identify strengths and weaknesses;
- Investigate a mechanism for ongoing collection of visitor feedback;
- Analyse consumer feedback to develop strategic actions that address weaknesses;
- Encourage tourism businesses, festivals and events to conduct their own customer surveys to improve their products and services.

4.2 Objective 2: Re-focusing marketing

Marketing activity should play to the key strengths of the region and focus on the strategic approach of generating more year round, higher value business, subject to the availability of product at the right quality. The strategy should set the framework for marketing at different levels, avoiding overlap and encouraging mutual reinforcement.

4.2.1 **Develop a coordinated approach to marketing to the primary holiday markets and niche market segments**

A marketing framework should be prepared which addresses the main U.K. target markets.

The main focus of marketing should rest with Pembrokeshire County Council, the Pembrokeshire Coast National Park Authority and Pembrokeshire Tourism working together but should also acknowledge the combined impact of tourism businesses' own marketing activity.

Examples of how this can be achieved:

- Agree respective roles and responsibilities;
- Prepare a joint marketing opportunities document detailing the target markets and distribution patterns of each promotional vehicle.

4.2.2 **Develop a strong image of Pembrokeshire that appeals to key market segments who don't currently visit**

A strong common image or 'Brand' for Pembrokeshire is needed to strengthen or correct potential visitor's perceptions of what the county offers as a place to visit. The brand isn't a logo or a strap

line but a collection of the characteristics and values that significantly differentiate us from other destinations.

To be successful, the 'brand' needs to be consistently used by everyone from the big organisations to individual businesses.

Examples of how this can be achieved:

- Undertaking a comprehensive branding exercise would be good but the necessary funding isn't likely to be available. Practical and cost-effective ideas need be developed that can generate a modern and vibrant image of Pembrokeshire;
- Coordinated PR activity that supports the branding.
- Capitalise on publicity opportunities of national interest such as major sporting events and film locations.
- Work with the Wales Film Commission to stimulate more interest in film locations

4.2.3 Continue to develop consortia marketing activity in order to attract key niche markets

Pembrokeshire currently attracts a lot of visitors who are coming for a specific reason rather than taking a 'holiday'. These niche markets are very lucrative and relatively easy to target but there are a lot of them, they each need a different and much more focused approach. The best approach for businesses operating in these niche markets is to combine forces as consortia or cluster marketing groups.

A number of groups already exist. They should be encouraged and supported in order for them to thrive and provide marketing opportunities for their members:

- The Conference Pembrokeshire Group
- The Cruise Pembrokeshire/Cruise Wales Group
- The Pembrokeshire Farm Holidays Group
- The Marine Code & Outdoor Charter Groups
- The Pembrokeshire Tourist Guides Association

Opportunities exist for developing new niche marketing groups in areas such as group travel, festivals & events, attractions, outdoor activity markets, eco-tourism and accessible holidays.

4.2.4 Better promotions targeting local residents

Facilities provided for visitors play a big role in the well being of local residents. Without the financial support provided by visitors, many local amenities would not be viable. This is especially the case with entertainment venues, events, community halls/facilities and village pubs & shops. Local residents can also make an important contribution to tourism businesses, particularly when visitor numbers are low. Local residents should be encouraged to make full use of these facilities, which might require the development of services specifically tailored for a local market. Their contribution could enable greater year round opening and employment.

Partners provide a year round information service in a couple of key locations to inform local residents as well as visitors with regard to places to visit activities and events.

Examples of how this can be achieved:

- Introduce an events ticketing system which will enable customers to purchase tickets for local events and attractions in a number of locations in Pembrokeshire, or over the telephone, negating the need to travel to the venue prior to visiting.

4.2.5 Maintain overseas marketing with regional and national partners

Overseas marketing will continue to be led at a national level, with the South West Wales Tourism Partnership co-ordinating input from local authorities and the trade in the form of multi-lingual promotional activity.

As the awareness of individual counties in overseas markets is limited, the only viable option is to promote a larger region and work with Visit Wales, Visit Britain or a respected third party like Google. Overseas markets are also quite limited and cover a vast geographic area, making marketing reach negligible. The exception is Ireland, which has some potential for a Pembrokeshire approach.

- Examples of how this can be achieved:
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- Undertake marketing activity in Ireland with local, regional and ferry company partners;

- Capitalise on major events such as Ironman Wales to raise Pembrokeshire's profile at home and abroad;
- Consider regional promotions with respected third party organisations such as Tripadvisor and Google.

4.2.6 Refocus marketing activity to better exploit digital marketing opportunities

There are compelling reasons why everyone should focus more time and effort into doing more of their marketing digitally. It's instant, worldwide and cost effective. It's what our visitors are increasingly wanting. On the other hand, it's very time consuming and developing the expertise and an approach that works is very frustrating as it changes so quickly.

Traditional brochure based campaigns have worked very well in the past and demand for printed publicity for researching holidays and for helping decide what to do once in Pembrokeshire is still very strong. There will continue to be a need for printed brochures and leaflets but they are expensive to produce and distribute. A gradual transition to digital marketing, however, is the only realistic solution for improving the image of Pembrokeshire.

An integrated and coordinated approach to digital marketing needs to be included in the marketing framework.

A vital part of developing our digital capability will be in developing the necessary skills. This will be covered later in the action plan.

Examples of how this can be achieved:

- Develop a digital marketing strategy that identifies the most effective ways of reaching potential visitors;
- Identify projects suitable for Visit Wales digital tourism project funding;
- Develop more applications suitable for mobile devices;
- Expand the www.facebook.com/visitpembrokeshire presence to establish it as an effective promotional tool;
- Convert www.visitpembrokeshire.com to an open platform format so that it can feed content to web sites such as www.visitwales.co.uk;
- Support initiatives such as www.sharewales.com in order to develop better integrated and digitally sophisticated tourism businesses.

4.3 Objective 3: 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.

4.3.1 **Improve welcome and information delivery**

A warm welcome and good, accurate information on what to do, is central to visitors enjoyment. The strategy should concentrate on ensuring that the right level of information is delivered when and where people need it, particularly through the use of mobile technology and digital information systems.

Information on Pembrokeshire will continue to be provided in locations where personal contact is important, but there may be a need for developing new services which exploit digital technology.

Examples of how this can be achieved

- Provide an information service via social media such as the Visit Pembrokeshire facebook page;
- Provide more information that can be accessed via smart phones and i-phones;
- Provision of free WiFi access in TICs;
- Develop digital interpretation facilities to allow visitors to better understand Pembrokeshire's landscape, history and culture.

4.3.2 **Improve the availability of good quality serviced accommodation**

The lack of quality serviced accommodation, particularly at the higher end, is a major weakness for Pembrokeshire, placing it in stark contrast to competitor areas such as Cornwall, the Cotswolds and Cumbria. This is a major challenge in the light of the strategy to grow more, high quality, out of season business.

Action is needed to:

- Establish more high quality accommodation, including good 3* and 4* establishments and smaller boutique hotels;
- Improve the overall quality of serviced accommodation stock.

This can be assisted through:

- Prioritising high quality serviced accommodation in the allocation of grant funding;
- Encourage good quality design in renovation, building conversion, extension and new build, where appropriate;
- Promoting participation in grading schemes;
- Promoting graded accommodation;
- Encouraging greater participation by serviced accommodation in occupancy surveys, feedback processes and benchmarking as identified in 4.1.4 above.

4.3.3 Support the continual improvement and upgrading of self-catering accommodation

Although priority needs to be given to serviced accommodation, there is also a need to see further improvement in self-catering accommodation, particularly aimed at securing year round use.

Restrictions, imposed through the planning process, on the use of self-catering accommodation at certain times of the year should be avoided, unless there are over-riding local constraints.

Examples of how this can be achieved:

- Encourage self catering property owners to apply for a change in holiday accommodation planning restrictions from a fixed closure period to a more flexible arrangement that allows Christmas and New Year bookings.

4.3.4 Support the continual improvement and upgrading of camping and caravanning accommodation

Holiday parks will continue to play an important role in Pembrokeshire's tourism offer and special attention should be paid to their quality and landscaping. Existing visitors to such sites and the potential new markets now demand a superior quality of environment. Good quality self-catering villages and complexes may also have a role in extending the season, provided they are well located and integrated with the local community.

Examples of how this can be achieved:

- Increasing capacity for visiting touring caravans rather than pitches occupied throughout the summer;
- Investigating the provision of camping facilities at locations where frequent wild camping is creating a nuisance;
- Consider the provision of low impact facilities such as safari tents, yurts, camping pods and tree houses;
- Encourage landscaping, screening, matt paint finishes and reductions in the density of static caravan sites to reduce their visual impact;
- Encourage the provision of all-weather facilities for families.

4.3.5 Strengthen the year-round appeal and accessibility of places to visit

Rather than the development of more, small attractions which will be competing with each other for a finite market, priority should be given to strengthening the profile and appeal of existing attractions and, especially, encouraging longer out-of-season opening and the provision of better all- weather facilities.

Examples of how this can be achieved:

- Supporting requests for financial assistance for the improvement of existing attractions, which may also be linked to extended, out-of-season opening;
- Supporting attractions who wish to extend their opening through marketing activity;
- Continue to work with tourism businesses to improve their knowledge of the availability of year-round facilities;
- Undertake promotions in appropriate locations targeting local residents to encourage greater use of facilities outside summer months.

Pembrokeshire has few attractions of sufficient profile which generate business in their own right from outside the region. There is an awareness of the fragile market for new major attractions but should the opportunity arise to establish a unique, high quality icon attraction this should be encouraged, subject to careful assessment of its long-term viability. Particular encouragement should be given to the development of iconic architecture, art and sculpture that can raise the profile of an area year-round but require little operational costs.

4.3.6 Encourage the development of better facilities for people with disabilities

There are over 10 million disabled people in Britain, half of whom are over the state retirement age. Of these, about 750,000 need to use wheelchairs. By 2033, almost a quarter of the UK population will be aged 65 and over and many of them will have either a disability or limited mobility. While holidays amongst these groups are much less frequent, there are significant challenges and opportunities for attracting more disabled visitors.

Examples of how this can be achieved:

- Raise awareness of the needs of the disabled market to the tourism industry, where a combination of simple adjustments to facilities, together with the provision of good customer service, can make a real difference to the experience of the disabled visitor;
- Encourage greater investment in disabled facilities and infrastructure;
- Work with Visit Wales to extend the reach of the existing National Accessible Scheme;
- Seek to 'mainstream' accessibility so that it is not seen as an 'add-on' but that the provision of information, services and facilities for the disabled visitor (and not solely wheelchair users) is an integral part of good business practice;

4.3.7 Encourage high quality food tourism offer, available all year

We have a growing reputation for high quality food and drink products and a growing number of farm shops and direct sale outlets. This momentum needs to be maintained. The use of local food in catering establishments is a strength but is not being fully utilised in their promotional material.

The quality and diversity of the food offer from the producer to the customer, however, is better provided in some competitor destinations. Private sector investment in staff, facilities, quality and extended opening will be essential if the higher value, off-season markets are to be attracted. Increased low season trade would improve consistency in quality and service.

Examples of how this can be achieved:

- Promote farmers markets, food festivals and events as a part of the food offer;
- Encourage more applications for awards such as the responsible fishing awards;

- Capitalise on award winners such as True Taste winners to attract high spending visitors and highlight best practice;
- Encourage applications for Farm Assured, Protected Designation of Origin and Protected Geographical Indication status for locally distinctive food and drink products.
- Continue to provide assistance on the use of local produce and how to develop attractive menu's highlighting local products.
- Expand the Ffres food initiative to help local food producers and hospitality businesses communicate with each other and to develop skills and knowledge.

4.3.8 Seek to become a market leader in high quality land and water based activity holidays

Pembrokeshire provides a stunning location for activity holidays, including marine based tourism for which it has a comparative advantage e.g. wind surfing, surfing, sailing, kayaking, diving etc. Such activities are now indulged in all year. The region should aim to become a market leader in accessible, accredited and environmentally friendly activity holidays.

Land based activities including cycling, walking and horse-riding are also important. The role of the Pembrokeshire Coastal Path/Wales Coast Path is of particular importance and should not be underestimated. Walking is by far the most popular activity undertaken by visitors but is difficult to sell as a separate activity package.

Care needs to be taken in promoting the right product at the right time, when the infrastructure and management can cope. Some activities, in some locations e.g. jet skiing, do not meet with environmental goals and so it will be important to be selective in terms of which activities are given priority.

Examples of how this can be achieved:

- Promote the Outdoor Charter Group and Marine Code Group as the recognised representative organisation for all activity and boat trip operators;
- Disseminate examples of good practice and environmental management via these groups;
- Set up a group to implement the National Park Recreation Plan;

4.3.9 Seek to exploit new and emerging markets as they develop

Tourism is a fast evolving industry driven by the ongoing creation of new products and changes in consumer holiday taking preferences. Some of these changes will be beneficial to Pembrokeshire and will need to be identified and exploited. These markets do, however, take a long time to develop and a great deal of investment.

For example, a coordinated approach to attracting more cruise ships and developing better berthing facilities has the potential to make a considerable contribution to Pembrokeshire and especially to the communities of Pembroke Dock, Milford Haven and Fishguard.

Examples of how this can be achieved:

- Identify where development opportunities could exist;
- Work with the Cruise Wales Group to attract more cruise ships;
- Enhance the services and facilities provided for cruise ship passengers and crew to maximise the economic impact for Pembrokeshire communities.

4.3.10 Develop and support a sustainable events programme

Events can play an important role in stimulating year round tourism provided they are of significant size, format and stature to encourage additional staying visitors. Research for the Fish Week Festival, for example, indicates that the 37% of non-local participants came partly or specifically for the event. Smaller events can also add value to local experiences but there may be scope for some rationalisation and more joint co-operation.

Participation events have a significant role to play where the participants and their supporters are visitors to Pembrokeshire. Key amongst these events is Ironman Wales, which will be held every year until at least 2016. Many other participation events also take place with relatively few spectators but large numbers of visiting entrants.

Examples of how this can be achieved:

- Investigate the possibility of creating a Pembrokeshire Arts & Events Officer post;
- Coordinating and promoting programmes of events in Pembrokeshire;
- Develop a comprehensive events listing system in partnership with all the entertainment venue's;

- Establish an Events Safety Advisory Group;
- Supporting applications for major events funding for strategically important events held in Pembrokeshire;
- Focussing on events relevant to local product strengths e.g. food, environment, outdoor activities, heritage and culture;
- Identify a point of contact for event organisers to consult local authorities and conservation organisations to identify the best location and dates;
- Develop Pembrokeshire as a destination for high-end sports events;
- Expand the support and coordination of events role provided by PLANED;

4.3.11 Develop integrated promotional activity and product development to increase the number of visits outside the peak summer months

A particular step to address the main strategic priority to extend the season could be taken through concerted, coordinated action in one or more identified locations at predetermined weeks of the year. This could be treated as a pilot scheme to be replicated elsewhere.

Examples of how this can be achieved:

- Encourage the development of packages linking the event, accommodation, activities and the attractions;
- Develop social networking activity to promote visitor opportunities outside summer months;
- Encourage the development of events and festivals that attract visitors outside peak summer months;

4.4 Objective 4: Developing and sustaining infrastructure, environment and cultural resources

Pembrokeshire's outstanding natural environment, coupled with strong elements of cultural and historic heritage, 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. Many initiatives in this area will benefit local residents as well as visitors.

4.4.1 Encourage sound environmental management at all levels

All stakeholders in tourism should be committed to the sustainable development of the industry whilst respecting our natural assets. Pembrokeshire is well placed to earn a reputation for environmental stewardship enhanced by its role as a National Park. This is an important element in the Pembrokeshire 'brand'.

Concern for the environment is important in its own right as well as being critical for the future wellbeing of tourism in Pembrokeshire. A large proportion of visitors, especially amongst more affluent markets, are looking for destinations with well maintained, attractive surroundings, including clean beaches and well kept public spaces. Smaller but growing numbers are seeking destinations and enterprises which can demonstrate concern for issues such as energy saving, carbon reduction and traffic management initiatives such as the coastal bus services, which run on recycled vegetable oil.

Action to maintain and improve the environmental quality of destinations includes:

- Support the work of the Sustainable Tourism Education Program via their Green Communities Program;
- Prevention of intrusive tourism development, through careful application of planning and development control policies;
- Careful visitor management in the most popular locations;
- Support for Keep Wales Tidy initiatives including Tidy Towns, Coastal Awards and Beach Cleaning events.
- Reduce the impact of large numbers of visitors on sensitive locations (natural sites, certain villages etc,) in terms of numbers of visitors and traffic that can be accommodated throughout the year and at any one time; and
- Extending the number of beaches that comply with Wales and European environmental standards.

Tourism enterprises should be encouraged to pursue sound environmental practice, through:

- Increased training in environmental management;
- Encouraging greater participation in environmental certification schemes;

- Fostering greater awareness of local environmental issues and support for conservation amongst their visitors as exemplified by the relationship between the Bluestone/Bourne Leisure group and National Park rangers.

Examples of how this can be achieved:

- Seek to consolidate the numerous environmental certification schemes in order to reduce consumer confusion;
- Establish Pembrokeshire as a leading destination for environmental understanding.

4.4.2 Work with local groups to improve their communities

Pembrokeshire would benefit from more vibrant local destinations able to offer visitors a complete quality experience in terms of welcome, environment, heritage appeal, attractions, interpretation, events, accommodation, catering, catering and infrastructure such as car-parking, signing and information. This can benefit residents as well as visitors.

Local schemes, involving tourism enterprises, public authorities and local community groups working together should be encouraged, building on, for example, the work of the Saundersfoot Bay Development Trust and other community-based initiatives.

Examples of how this can be achieved:

- Proactive work with geographic clusters of tourism businesses to enhance their knowledge of, and support for, facilities in their locality;
- Develop a more proactive Information Centre service to improve communication with the communities they are located in.

4.4.3 Develop local distinctiveness

There are various ways in which more can be made of the unique qualities of Pembrokeshire, thereby stimulating and adding to visitor interest and at the same time helping to sustain the local economy and local traditions and benefit local communities.

Relevant action includes:

- Encourage town council's and chambers of trade to develop complimentary brands and programs;
- Reflecting the local vernacular in the design of new tourism facilities;
- Encouraging local people to train and enter the industry;
- Grow the local food and drink supply chain and networks, developing more linkages between producers and tourism enterprises;
- Promote the use of local produce to facilitate the development of Pembrokeshire as a quality food destination;
- Continuing to develop the Arts and Crafts network;
- Encouraging more interpretation of local themes and cultural heritage through attractions, events, arts venues etc;
- Recognise the role of the Welsh language in enhancing the visitor experience.

Those who inter-face with visitors have an important role to play in communicating this local distinctiveness with knowledge of local features, history and culture. The visitor experience is as much about experiencing local life and character as it is about the product itself.

4.4.4 Support sustainable land management and traditional activities through tourism

This is a time of considerable change in the rural economy with the whole structure of support for agriculture under review. This has particular significance for a predominantly rural region such as Pembrokeshire. A potential role for land managers will be as custodians of the landscape, as a major tourism and recreation resource.

The tourism strategy should support land managers in this role, as the local industry in turn depends upon it. Tourism enterprises which are integrated with, and support, sustainable land management activities should be encouraged. This includes support for good quality farm-based tourism enterprises.

Continuing to support the local food and drink initiatives is critical to the interaction between farming and tourism.

Examples of how this can be achieved:

- Encourage farm diversification to provide facilities for visitors;

- Continue to work with the Food, Fisheries and Market Development Unit at Wales Government to diversify, add value and exploit marketing opportunities for local products.

4.4.5 Improve and promote countryside access where appropriate

Good access to the coast and countryside is an essential part of any visit to Pembrokeshire. The importance of well maintained and promoted access in generating business for rural communities has been widely demonstrated and The Pembrokeshire Coast Path National Trail is one of our key selling points and extremely important in attracting visitors.

The opening of the Wales Coast Path provides both an opportunity and a threat. There is a great deal of confidence that the appeal of the Pembrokeshire section of the Wales Coast Path will be strong compared to other sections but the availability of new areas to explore might persuade some visitors to go elsewhere.

Examples of how this can be achieved:

- Implement the Rights of Way improvement plan to ensure priority is driven by need/demand;
- Capitalising on the 'open countryside' opportunities offered by the countryside rights of way Act;
- Improve signage to facilities of interest to visitors;
- Developing and promoting off road multi user trails such as The Dramway and The Pembrokeshire Trail;
- Continuing to improve access to The Pembrokeshire Coast Path by replacing stiles etc;
- Improve access to rivers for amenity and recreational activities, while respecting the needs of the sensitive environments through which they pass;
- Develop and promote circular walks on well maintained footpaths to encourage a reduction in the use of cars;
- Continue to develop the Greenways partnership to encourage sustainable access to the countryside;
- Support, develop and promote the Coastal Bus Services as the best way to access the coast;
- Continue to create better disabled access to the countryside and coast.

4.4.6 Develop a more coordinated approach to managing facilities and services used by visitors

In addition to the businesses providing goods and services to visitors, there are a lot of other facilities that visitors come into contact with, which have a big impact on their experiences. Beaches are a prime example of this. A number of different agencies and organisations will play a part in keeping our beaches in good order including Dwr Cymru, The County Council, The National Park Authority, the RNLI, Keep Wales Tidy and the numerous Coast Care groups around the county.

Pembrokeshire County Council provides a lot of services that impact on tourism from ensuring hygienic food preparation to maintaining footpaths and highways. The Pembrokeshire Coast National Park Authority, likewise, provide a wide range of services that impact directly and indirectly on visitors. Maintaining a good level of service is going to be a challenge as budgets are cut during the life of this strategy.

A whole authority approach to tourism within both organisations is advocated as the best way to safeguard the services that are most important.

Examples of how this can be achieved:

- Enhanced collaborative working arrangements between Pembrokeshire County Council and Pembrokeshire Coast National Park Authority run Tourist Information Centres;
- Better communication with the stakeholders group (see page 5);
- Set up a forum for the Agriculture sector to compliment the work of the Pembrokeshire Sustainable Agriculture Network;
- Continue to develop effective beach management structures in order to improve facilities, services and the quality beach awards. An effective Beach Management Liaison Group is key to this;

4.4.7 Improve the quality and appearance of the built environment

As with many other parts of Wales, the quality of the built environment is often poor in comparison with the wider countryside.

Examples of how this can be achieved:

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- Improving the signposting and appearance of gateway points to towns and villages to enhance the appearance and sense of welcome in order to encourage people to stop.
- Improving the appearance of car parks, toilets and pedestrian routes to the local centres;
- Attract external funding to enhance town centres e.g. through a commercial property grant scheme or town enhancement schemes;
- Focusing environmental improvements on the 'tourism envelope' of any visitor destination i.e. that area within which the visitor is likely to spend time and money;
- Encouraging new, high quality design in buildings;
- Encourage the improvement in the exterior appearance of tourism businesses;

4.4.8 Improve the provision and promotion of public transport options

Public transport services to and within Pembrokeshire are relatively weak, and the proportion of visitors coming without a car is very low. This is unlikely to change in the foreseeable future. While efforts need be made to ensure that public transport options into Pembrokeshire are improved, the main focus of this strategy will be to encourage visitors to make better use of public transport while they are on holiday.

Examples of how this can be achieved:

- The South West Wales Integrated Transport Partnership (SWWITCH) and the South West Wales Community Rail Partnership can help to promote and lobby for improved public transport to and within the county and enable public transport interchange enhancements;
- Building on the introduction of additional train services to Fishguard;
- Encourage the improvement of station facilities;
- Continue to develop the Greenways Partnership to encourage access to the countryside through walking, cycling, bus and train travel;
- Use developing trade engagement mechanisms to identify gaps in services and encourage greater use of local transport;
- Encourage accommodation businesses, attractions, festivals and events to highlight public transport options in their marketing.
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- 4.4.9 Improve communication links
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- Pembrokeshire's relative isolation and distance from visitor markets is a significant limiting factor, especially for encouraging short breaks outside peak summer months. Improved road and rail networks linking other destinations, especially those in south west England, will have a displacement effect on visits to Pembrokeshire.
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- Likewise, poor digital communication networks including Broadband, WiFi, mobile and 3G coverage are creating a disadvantage for businesses and a disincentive to visit.
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- Local solutions to improve communication should be supported. However, most of the required improvements need to be undertaken by organisations not based in Pembrokeshire.
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Examples of how this can be achieved:

- Press for improvements to trunk roads west of St Clears;
- Install free WiFi access points into Tourist Information Centres and other P.C.C. facilities;
- Put pressure on mobile networks to improve their coverage;
- Work with the Wales Government Broadband Support Scheme team to improve broadband speed.
- Use local projects that enable local communications networks to develop such as Connecting Communities

4.5 Objective 5: 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.

4.5.1 **Tackle business skills shortages**

Limited management and business skills is stopping some small tourism enterprises from fulfilling their potential. Sometimes the business owners and managers are not aware of the gaps in their own knowledge or their staff and how this is compromising their business. The suppliers of support

services and training, likewise, do not fully appreciate what training is required or how to deliver it in a format that will encourage small businesses to participate.

The Gallu initiative was established in South West Wales in order to address this. Talking with tourism businesses about their training needs and helping them to identify skills gaps, has enabled appropriate formal and informal training to be developed and delivered but participation levels could be further increased.

The Welsh Food & Drink Skills Project have undertaken extensive research into future skills requirements. Their recommendations include raising awareness and understanding of skills, improving the appeal of careers in the food and drink industry, better links between trainers and the industry and develop better understanding of non-accredited training.

Examples of how this can be achieved:

- Undertake more research into business needs and share this knowledge;
- Continue to develop better communication with local businesses and between them and support service providers;
- Encourage the development of a more coordinated approach between organisations providing training;
- Look to develop a national tourism and hospitality academy in partnership with Pembrokeshire College and key tourism businesses;
- Continue to develop a skills plan, which will both develop and enhance skills in the tourism industry and those who serve the tourism industry;
- Work with further/higher education establishments to target and enhance curriculum development to meet local needs and employer requirements;
- Work with the Welsh Food & Drink Skills Project to address their recommendations.
- Support development of the Tenby Hotel School

4.5.2 Improve the appeal of jobs in local tourism

- Working in tourism can be very rewarding but a significant number of jobs are seasonal and work patterns can be unsociable. This results in many businesses not being able to recruit locally and having to use overseas staff instead. This has serious disadvantages in a region such as Pembrokeshire where local distinctiveness is an integral part of the appeal. The objective should be to improve business performance in order to improve pay, prospects and conditions for those employed in tourism thereby increasing the pool of local people keen and able to take jobs in tourism.

Examples of how this can be achieved:

- Taking a broader and more flexible approach to sources of local labour, including older people, inactive workers and those on supported programs;
- Addressing the continuing poor image of working in tourism or the service industry, through work with school and college careers services;
- Develop customer service skills module as part of broader qualifications.

4.5.3 Provide training that is more structured to enterprise and employee needs and circumstances

Take up of training opportunities has improved but there is scope for greater take up through:

- Further tailoring of the type, duration and location of training on offer to more closely meet the specific needs of small tourism enterprises, such as flexible short courses (including distance learning) and on-site training;
- Expanding creative schemes that bring business people together to discuss common interests, problems and solutions, as well as promoting awareness of the local destination.

Gallu and Pembrokeshire Tourism with the support of Pembrokeshire County Council tourism, food and business support teams, play the principal role in developing a more 'bottom-up' approach to identifying need both within the tourism sector and ancillary services such as retailing.

Examples of how this can be achieved:

- Support the Welsh Food & Drink Skills Project with their work to promote the food and drink sector as an attractive career option.

4.5.4 Improve the co-ordination of provision and signposting of training and business support

A number of local organisations offer training and business support services. Problems are more to do with overlap, awareness and co-ordination than with the extent of provision.

A 'One Stop Shop' has been established under the Welsh Government regional centre services to provide a free, comprehensive, signposting service showing businesses and advisers the whole

range of support available including grants, training, advice etc. They are also in a position to identify gaps in support.

Pembrokeshire Tourism should continue to be active in directing their members to available services, and liaising with higher/further education providers on funding opportunities available to tourism businesses

Examples of how this can be achieved:

- Provide advice on local sourcing of food, drink and other products;
- Produce and distribute a 'Who's Who in Food' information sheet to complement the 'Who's Who in Tourism' sheets;
- Better coordinate the cross promotion of complementary services, such as environmental health, licensing, highways, building control, planning and food development, particularly to new businesses;
- Support the development of a 'one-stop-shop' approach for business support;