

REPORT OF THE DIRECTOR OF COUNTRYSIDE, COMMUNITY AND VISITOR SERVICES

SUBJECT: PEMBROKESHIRE DESTINATION MANAGEMENT PLAN 2020-2025

Purpose of Report

To request that Members formally adopt the Pembrokeshire Destination Management Plan 2020 – 2025 as the key document to guide visitor services across the county.

Introduction

Destination Management is the process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

In Pembrokeshire, destination management is overseen by the Destination Pembrokeshire Partnership (DPP) which is comprised of the organisations listed below:

- Pembrokeshire County Council (PCC)
- Pembrokeshire Coast National Park Authority (PCNPA)
- Pembrokeshire Tourism (PT)
- Pembrokeshire Local Action Network for Economic Development (PLANED)

In 2019 the DPP, with direct funding from PCC and PCNPA, commissioned Blue Sail to undertake a review of the existing Destination Management Plan (DMP) and, through consultation with key stakeholders, create a refreshed and more contemporary plan for the county that supports the continued growth of the visitor economy.

As such, the revised Pembrokeshire Destination Management Plan 2020 – 2025 is a shared statement of intent to strengthen the county's approach to tourism, eliminate duplication of effort and provide best value for the resources available now and in the future.

The Plan

The Destination Management Plan (DMP) 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.

The overarching aim of the DMP is to safeguard and grow the visitor economy in order to improve the contribution it makes to the well-being of the county whilst

carefully managing the impacts that tourism growth can have on both the natural environment as well as local communities.

In formal terms the plan is 'owned' by the Pembrokeshire Destination Partnership (DPP), which is responsible for its implementation but it has something relevant to say to all those involved in the county's visitor economy either directly or indirectly.

The Pembrokeshire Destination Management Plan 2020 – 2025 aligns with the key priorities outlined in both the Well-Being Plan for Pembrokeshire as well as Visit Wales' soon to be launched National Tourism Strategy (working title: Welcome to Wales). The plan should, therefore, give confidence to external funders (private or public sector) as well as those in the county developing and marketing their businesses, services and operations.

A full copy of the DMP is attached as an appendix to this report. There are 4 key areas for action in the medium-term supported by an ongoing commitment to the destination management essentials ('the brilliant basics' as Visit Wales term it) which underpin the 'visitor offer'. In summary they are:

- Shared narrative and brand
- Events and seasonality
- Responsible and sustainable
- Wellbeing and active
- Brilliant basics

Each of the key partners is seeking to adopt the DMP formally and PCC Cabinet will consider the plan at their next meeting on the 10th February 2020.

Financial considerations

All public agencies involved in the delivery of visitor services are operating with reduced budgets (although Pembrokeshire County Council recently received a 4.9% increase in their settlement from Welsh Government for the 2020/21 financial year). It is, therefore, important that the tourism sector is well co-ordinated to maximise the use of existing public resources and to respond collectively to opportunities as they present themselves.

The Pembrokeshire Destination Management Plan 2020 – 2025 provides a means to galvanise joint activities and, through ongoing dialogue, continue to improve the co-ordination of visitor services across Pembrokeshire by strengthening the 'brilliant basics' as the foundation to grow the visitor economy year on year.

Risk considerations

It is important that PCNPA fully endorses the Pembrokeshire Destination Management Plan 2020 – 2025 as a means of demonstrating the Authority's firm commitment to joint working and the development of the local visitor economy.

Compliance

The Pembrokeshire Destination Management Plan 2020 – 2025 provides a mechanism for PCNPA to deliver the 'Prosperity' actions highlighted in the Corporate and Resources Plan 2020/21. The corporate plan highlights PCNPA's commitment to "*work with others to take a strategic and sustainable approach to the promotion and*

management of the Park and its special qualities as a tourist and recreation destination, including supporting activities that help lengthen the traditional tourist season.”

Human Rights / Equality issues

The proposal is unlikely to impact negatively on any groups with protected characteristics as defined within the Equality Act 2010.

Biodiversity Implications / Sustainability Appraisal

The Pembrokeshire Destination Management Plan 2020 – 2025 highlights the importance of the natural environment and the National Park designation as key aspects of the ‘visitor offer’. The plan emphasises ‘responsible and sustainable’ tourism as a key theme, in turn, acknowledging the need to ‘only market what we can manage successfully.’

From PCNPA’s perspective we would always like to see a greater emphasis placed on key issues highlighted in the National Park Management Plan 2020-24 such as the urgent need to respond to both climate change and biodiversity loss. However, the DMP emphasises both sustainable tourism and ‘localhood’ as key priorities for Pembrokeshire and this, in turn, should bring a greater degree of acknowledgement and protection to the special qualities of the National Park.

However, it will be important for relevant PCNPA representatives on the DPP, and other associated tourism forums, to continually challenge partners to rise to the challenges facing the National Park’s special qualities in order to avoid any potential criticism of the tourism sector simply paying ‘lip service’ to the important strategic environmental issues facing the Park as well as the wider county.

Welsh Language Standards

Historically, Pembrokeshire has experienced a unique linguistic heritage, with the north of the county, including the majority of the land area of the National Park, considered an area where Welsh has traditionally been spoken, while the southern part of the county being more anglicised with a lower proportion of Welsh speakers. However, although the number of Welsh speakers in Pembrokeshire has declined overall, the numbers of Welsh speakers in the south are increasing gradually. The development of new Welsh-medium schools in the county has the potential to consolidate and increase the number of Welsh speakers.

This will, in turn, provide opportunities to increase access to the Welsh language through the wide range of visitor services provided across the county including those managed by the Park Authority. Presenting Welsh culture, history and language and supporting environmental sustainability are seen as ‘cornerstones’ of the emerging Visit Wales strategy and continuing support for the Welsh language across the tourism sector is vital to meet customer expectations as well as demonstrating the authenticity of Pembrokeshire’s ‘warm and friendly’ welcome.

Conclusion

The Pembrokeshire Destination Management Plan 2020 – 2025 provides a clear and co-ordinated strategy to develop the visitor economy throughout Pembrokeshire. In addition, it provides an ideal mechanism for PCNPA to deliver a number of key goals

relating to the local economy as outlined in the Corporate and Resources Plan 2020/21.

By formally adopting the plan, PCNPA will be highlighting the importance of the National Park to the visitor economy and our commitment, as an Authority, to work collectively with all key partners across the tourism sector to ensure that Pembrokeshire strengthens its reputation as a beautiful, accessible, active and 'green' county, offering some of the most memorable, enduring and authentic holiday experiences in Wales

Recommendation

Members are asked to formally adopt the Pembrokeshire Destination Management Plan 2020 – 2025 as the key document to guide PCNPA's visitor related services and activities over the next five years.

(For further information, please contact the Director of Countryside, Community and Visitor Services, James Parkin)

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**PEMBROKESHIRE DESTINATION
MANAGEMENT PLAN
2020-2025**

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INTRODUCTION – THIS IS PEMBROKESHIRE

This plan sets clear priorities around which the destination and partners can unite, offers a positioning that makes the destination stand out against competition and provides a focus for activity.

Our ambition is to grow tourism for the good of Pembrokeshire.

In formal terms the Plan is ‘owned’ by the Destination Pembrokeshire Partnership, which is responsible for its implementation and monitoring, but it has something relevant to say to all those involved in the county’s visitor economy directly and indirectly.

It should give confidence to external funders (private or public sector) as well as those in the county developing and marketing their businesses, services and operations.

TARGETS

Through delivering this plan we expect...

- The value of the visitor economy in Pembrokeshire to increase by 10% in real terms over 5 years - **Growth**
- At least 25% of that value to be generated Oct-March - **Seasonality**
- 75% of tourism businesses to be actively engaged with the Pembrokeshire brand¹ - **Engagement**
- Pembrokeshire to become a Top 5 UK destination choice² - **Reputation**

THE VISION
 One Pembrokeshire
 – a place of
 landscape, culture
 and adventure

¹ As measured through ‘sign-up’ and participation in the shared narrative approach and use of on-line resources which support it
² As measured through search engine listings, sentiment analysis, awards and media accolades

By 2025....

We are truly earning our reputation as a beautiful, accessible, active and 'green' county. We offer some of the most memorable, enduring and authentic experiences in Wales. We are a place where history and myth collide with a thriving contemporary culture and arts scene. Pembrokeshire is a leader and innovator, reinforcing the Wales brand values and a 'top 5' UK destination of choice.

There is still plenty of room across our county and across the year for growth, but we are only marketing what we can manage successfully. A commitment to sustainability now comes as standard - this is a genuine differentiator for us and so we carry it through in all we do: managing our assets sensitively; supporting responsible transport and travel choices; buying food, services and supplies locally; developing our home-grown talent; celebrating local entrepreneurship, making and ideas; improving digital connectivity; providing year-round economic opportunities; involving our communities in delivery – a true 'localhood' approach.

We are now all talking about Pembrokeshire in the same consistent way, spelling out for a new generation of visitors what makes us so different as a destination for the 21st century: the special quality of the land, coast- and sea-scapes; memorable places like St David's, Strumble Head, Carn Ingli, Narberth and Tenby; the friendly people, their communities and their stories; the life-changing adventures and encounters on offer but also how it makes us and our visitors, feel – a 'sense of person' as much as a 'sense of place'.

We have learnt from the many Pembrokeshire businesses which have built successful year-round demand, by segmenting the market and their offer. Major Events and festivals are helping us mould and stretch the tourism year, build seasons of activity and attract new audiences. We have also invested to strengthen the 'indoor Pembrokeshire' offer.



Most important we are seeing 'Team Pembrokeshire' in action. Each partner, organisation and business understands its role and contribution in delivery – public and private, business and community, coast and inland, town and countryside, north and south, large and small – **we are all 'Pembrokeshire' as far as our visitors are concerned.**

ACTION PLANNING

To start delivering the Vision's themes, there are 5 key areas for action in this medium term planning period, including an ongoing commitment to the destination management essentials ('the brilliant basics' as Visit Wales term it). In summary they are:

- Shared narrative & brand
- Events & seasonality
- Responsible & Sustainable
- Wellbeing & Active
- Brilliant Basics

SETTING THE SCENE

THE BIG PICTURE - WALES

Tourism is considered a foundation sector in the Wales Economy. The Welsh Government's interest is led by the key themes of the Wales Economic Plan 'Prosperity for All' and the Welsh Government's statutory Well-being goals – not least in terms of delivering prosperity and jobs, promoting health and well-being, building cohesive communities, presenting Welsh culture, history and language and supporting environmental sustainability.

Targets set for the Wales tourism plan Partnership for Growth 2013 - 2020 (P4G) were a 10% growth in real terms of the value of staying visitors, tourism employment growth from 88,300 to 97,130 and tourism contribution to GVA from 4.4% to 4.8%.



As part of its evidence base for the new Tourism Action Plan from 2020 - 2025, Visit Wales has identified:

- Growth in overall tourism value from £4.5bn to £6.3bn (up to 2017)
- Overnight tourism on course to meet the 29% cash growth target
- 127,000 employed (in 2017) - but falling from 2015
- GVA growing faster than the overall economy average (6% in 2016) but per hour values below Wales average
- Particular challenges remaining (with resonance in Pembrokeshire) around:
 - Over- reliance on regular repeat visitors from the UK and under-performance in new and overseas markets
 - Per trip spend below UK average – with no real growth since 2012
 - Seasonality
 - Impact/ Timing of Brexit

Work is nearly complete on the new plan (working title: Welcome to Wales). The ambition is 'to grow tourism for the good of Wales'. In contrast to the pure economic targets of P4G the goals for WTW will be economic growth, environmental sustainability, social and cultural enrichment, health benefits, satisfaction of visitors and locals. The core Wales offer is defined as Outstanding Natural Landscapes, Creative Culture and Epic Adventure.



Visit Wales is encouraging the sector to combine a local-first focus in terms of 'sense of place', culture, community engagement and benefit, local supply chains, home-grown skills and businesses with a 'world' perspective in terms of breadth of vision, quality comparisons, welcome, environmental awareness.

In terms of Visit Wales own investment key priorities will be around 4 core areas of activity:

- Great Products and Places
- Quality Visitor Experiences – including the destination management 'basics'
- An innovative Cymru/ Wales Brand
- An engaged and vibrant sector

Success will be measured through 'hard' volume and value data, but also through perception and awareness analysis and contributions to well-being indicators.

Development and consolidation of the 'This is Wales/ Gwlad Gwlad' Brand will continue. The brand objectives are to:

- Elevate our status
- Surprise and inspire
- Change perceptions
- Do good things
- Be unmistakably Wales

To reinforce this brand development Visit Wales has provided focused leadership for marketing and product development in terms of themed 'Years of'..... 'Adventure', 'Legends', 'Sea', 'Discovery' with 'Outdoors' planned for 2020/2021 – all relevant to Pembrokeshire. In 2017 it launched a route-based tourism initiative (The Wales Way) – aimed particularly at overseas and first-time visitors to Wales – with one of the first routes being The Coastal Way running from St Davids to the Llyn Peninsula. In future markets will be targeted for their Value over their Volume.

Visit Wales has successfully attracted substantial ERDF funds to support 13 highly targeted Tourism Attractor Destination (TAD) projects with the potential to transform the visitor economy, 2 of which are located in Pembrokeshire – Saundersfoot Harbour (retail, heritage, maritime, events) and Llys-y-Fran (adventure activities). Any similar geographical targeting of major funding in future is likely to be based on integrated destination development, management and marketing plans supported by strong partnership working. While Visit Wales may become more interventionist in future, finance available is likely to be more 'patient' finance (low/no interest) rather than grant-based (other than for public realm improvements).



PEMBROKESHIRE

As a destination, Pembrokeshire has embraced the opportunities offered by the new brand as well as the destination partnership approach promoted by Visit Wales, with Pembrokeshire County Council (PCC), Pembrokeshire Coast National Park Authority (PCNPA), Pembrokeshire Tourism (PT) and PLANED as core partners. This plan is therefore the successor to a sequence of others taken forward by the partners over the last decade.

Over time the resources available from the Destination Pembrokeshire Partners have diminished, and this inevitably has followed through into the amount of investment available for tourism. However, all four core destination partners remain committed to the sector and wish to see it grow and flourish.

Alongside the development of this plan, a potential enabler for future growth could be the creation of a new Destination Management Organisation with support and investment from the existing partnership. This could strengthen the county's approach to tourism, eliminate duplication of effort and provide best value for the resources available now and in the future.

While enthusiasm for a Tourism Business Improvement District has receded, partners remain open to innovative funding and partnership mechanisms to support not just the marketing but also the development and management of tourism in the county.

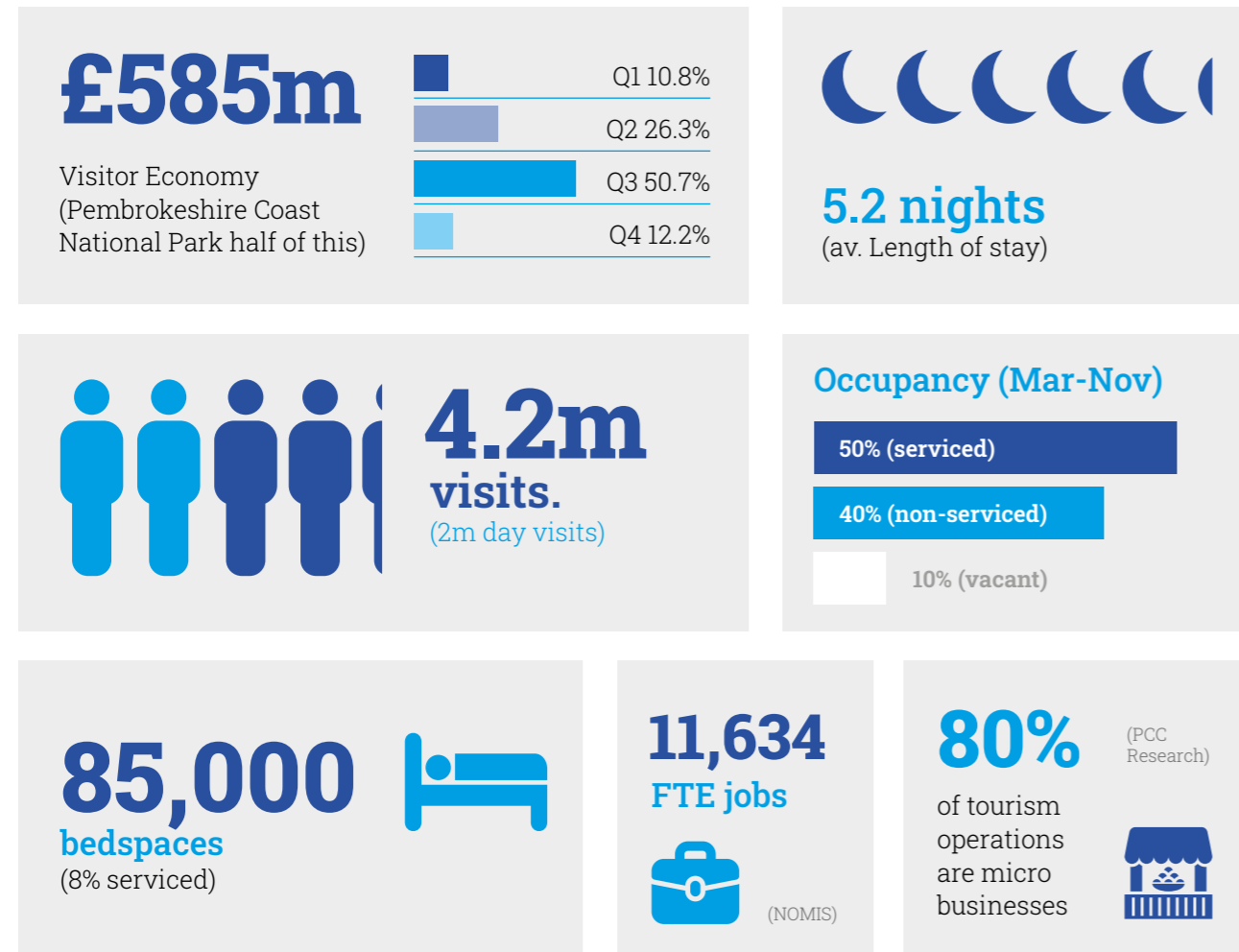
Pembrokeshire continues to generate investment in its product offer through a variety of public sources. Over the years European Funding in particular (Regional and Rural Development) has been a key source of support. It is unclear whether or how this will be replaced in future. Meanwhile the private sector continues to invest in landmark projects e.g. Seren Dome at Bluestone, Cruise facilities at Goodwick as well as match funding for the TAD projects at Llys-y-Fran and Saundersfoot Harbour.

External validation of the destination's credentials is evident in the number of Blue Flag and Green Coast Awards annually together with recent 'one-off' endorsements e.g. Castle Beach as best in UK, Narberth as Cleanest Town in UK, the National Geographic's nomination of the Coast Path as one of the best places to visit, Countryfile Holiday Destination of the Year (2018), Sunday Times Beach of the Year (Tenby 2019), Lonely Planet's 10 best travel experiences in the UK.



PEMBROKESHIRE IN NUMBERS

While economically vital for the county, the tourism economy has 'flatlined' with inflationary increases masking a gentle decline in visits over a decade or more up to 2015.



WHAT STAKEHOLDERS SAY

We held a series of 1-to-1 consultations with key tourism stakeholders across the County. You told us that natural assets and local access to them, the Pembrokeshire 'name', iconic settlements like St Davids, Tenby and Newport and friendly people were among the things Pembrokeshire does best. You have concerns though about complacency in the sector, public transport (especially rail to and buses around the county), fragmentation between organisations, seasonality, skills and 'patchy' quality.

Among competitors you see Cornwall admired for its sense of purpose, single-mindedness, unified brand, universal appeal across market and demographic segments, food culture, artistic reputation and media-friendliness. You do not envy its commercialisation, over-developed hotspots, hollowed-out communities and visitor crowds. In your view, while our back was turned Snowdonia has successfully claimed the adventure activity space in Wales.

The priority 'asks' from the plan are adopting a team approach, developing a shared Pembrokeshire narrative, being smarter about marketing especially in lengthening the season and delivering 'brilliant basics' in terms of Destination Management.

You felt that sustainability can be a powerful destination USP, major events are effective in extending the season and the wider cultural offer provides real opportunities. Cooperation in cultural projects with Ireland (e.g. Ancient Connections) highlight the opportunities for joint product development and promotion.

In a county-wide industry survey - you told us the range, amount and quality of accommodation and improving food offer are seen as significant pluses but the clear top 3 assets were landscape quality, things to see and do and the friendly welcome. Access/ Public Transport (bus and rail), range and availability of food (especially local produce) and parking (availability, charges) were seen



as the areas for improvement, along with other Destination Management 'housekeeping' issues - over-crowded hotspots, toilets, uncoordinated information provision, waste and litter management.

For many smaller accommodation businesses Scenic Explorers are more valuable as a market than Active Family Explorers. The remedies for seasonality revolve around major events, improving the range and quality of wet weather attractions including the arts and culture and smarter marketing. That means varying the headline offer to suit different market segments across the year, developing packages and being more honest about what is open (and what is not).

The most important things you want to see from the plan is more dynamic/ coordinated marketing followed by a 'responsible' tourism' approach (including an extended season).

MARKET TRENDS

Pembrokeshire needs to respond positively to powerful trends in the wider visitor economy, which include:

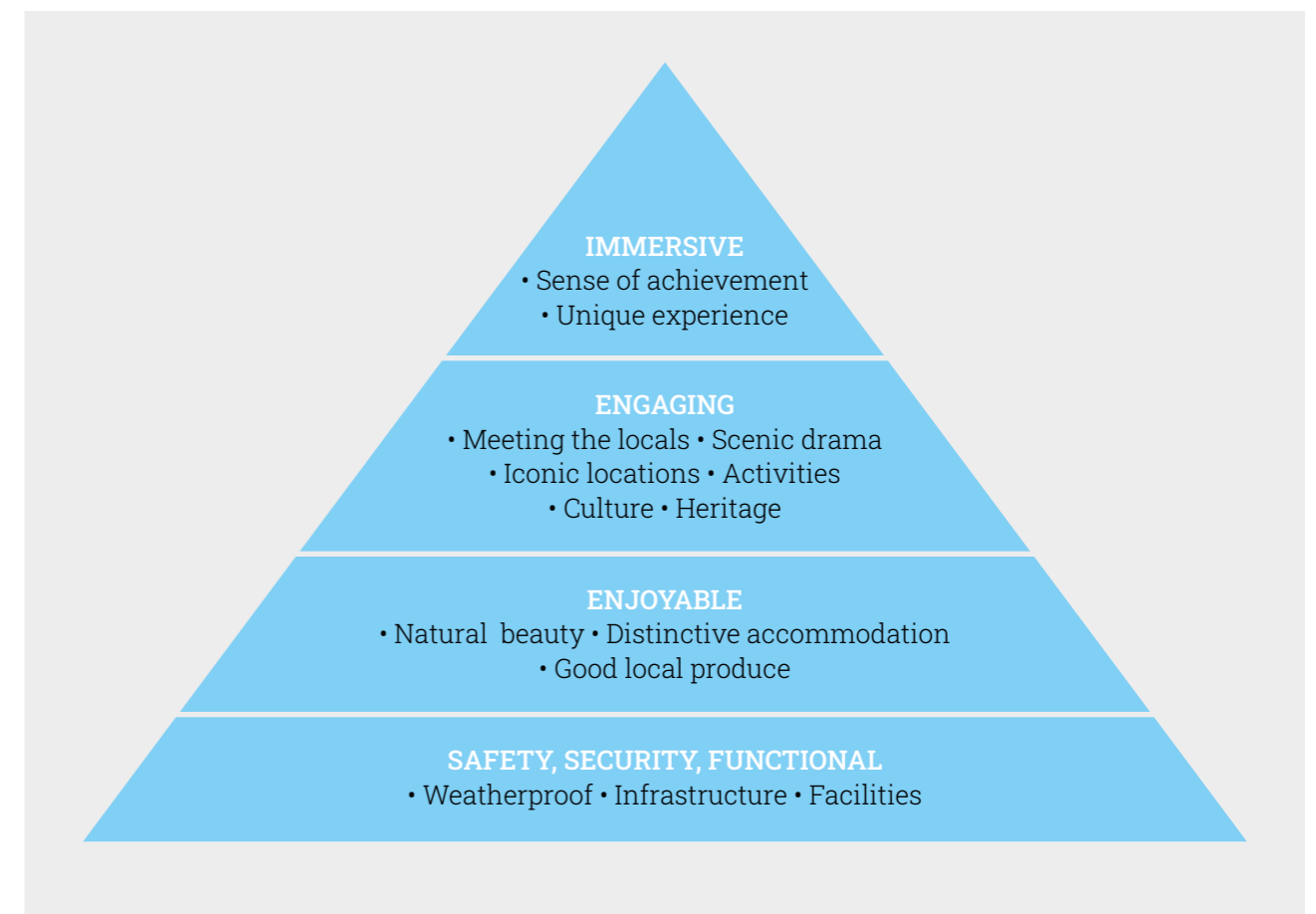
- **Authentic & the pursuit of real** – Visitors wanting to connect deeply with a place and its people. Perhaps stay with an artist, eat with locals, attend local festivals, visit studios of local artisans and custom design their visit
- **Green travel** – They are concerned by sustainable and responsible travel and how they travel to and around a destination, where the food and drink comes from and how service providers are managing scarce resources
- **Maximising behaviour** – They want to cram a lot into a short space of time, enjoying unique experiences across the day and into the evening reflecting the increase in short break taking
- **Wellness and nature** – Visitors are acutely concerned by their own wellbeing, health and fitness. They want to escape into nature and enjoy sensory experiences e.g. yoga retreats, long-distance walks, forest-bathing, wellness-focused facilities such as hot wild river baths, open air hotels, outdoor spa
- **Technology Trends** – Social media is increasingly prominent in travel marketing with the public driving content creation. Video is the new currency for storytelling and Destination Management Organisations can only control their own content or channels; not content that is user generated.



TRAVEL EXPERIENCE HIERARCHY

The best destinations are engaging and immersive. They go beyond just having some beautiful places – they have a drama and a depth of engagement and interest that is exceptional and unique.

For this plan to be market oriented the actions must help the destination think how it can deliver across every level of this hierarchy to create ‘stand-out’ experiences, motivate visits, build reputation and loyalty while ensuring the basics are delivered superbly well.



SWOT ANALYSIS

We have analysed the Pembrokeshire offer through the consultation, survey, workshop, desk research and first-hand visits. Our assessment is:

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Natural assets – beaches, countryside, wildlife Well-managed access to landscape and coast and Coastal Path National Trail a jewel in the crown Attractive 'headline' settlements: Tenby, St Davids, Narberth, Newport Range and heritage of adventure activities and events – birthplace of coasteering Range of attractions (esp. outdoor) Range of accommodation (esp. non-serviced) Strong destination 'brand' and National Park designation Friendly people/ community buy-in Big-hitters – iconic individual businesses and places Successful approach to cruise welcome Unique cultural heritage Track record for hosting major events Visitpembrokeshire.com 	<ul style="list-style-type: none"> Public transport frequency and routes Local skills recruitment and development Reliance on traditional markets/ repeat visitors Range and quality of food offer Variable quality standards (accommodation/ attractions) Fragmented marketing Stubborn seasonality 'Rainy day'/ off-season offer Connectivity, particularly rail Presentation of some towns and villages and public realm Some parochialism Packaging of experiences Fragmented parking regimes Lack of current tourism statistics
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Claim sustainability as USP – e.g. EV charging points and responsible travel options to and around the county Year(s) of Outdoors 2020/21 'The Coastal Way' anchor point Market trends: well-being, localhood, cultural immersion, learning 'Team Pembrokeshire' approach Shared brand narrative and content Events programme and calendar Closer practical cooperation with SE Ireland via ferries/ cruise New Visit Wales Tourism Action Plan plays to Pembrokeshire's strengths Latent demand for cruise sector growth More 'attractor' destination developments 	<ul style="list-style-type: none"> Competitors have successfully claimed activities space Core community services moving out of county (e.g. A+E) Over-tourism in hot-spots Over-supply of some accommodation types Uncertain funding environment for public sector and post-Brexit as well as market volatility Impact on landscape

This analysis shows that Pembrokeshire has great potential to develop its visitor economy while there are some clear challenges to overcome and which are reflected in the strategic priorities in this plan.

MARKETS FOR GROWTH

CURRENT MARKET ASSESSMENT

The current key target markets for Pembrokeshire are Active Family Explorers (Visitors with children aged 7-15 years who like beach and active holidays with sightseeing) and Scenic Explorers (45+ They want to experience the outdoors 'off the beaten track', but take in the local culture). Visit Wales is increasingly targeting markets based on Values rather than purely Volume.

In addition, Visit Wales is targeting Germany and USA:

Germany – Working empty nesters: Independent explorers, 45+, affluent, educated. **Dual income, no kids:** 30-45, well-off, want unique experiences.

USA – Mature empty nesters: Independent explorers, quite independent in their travels and looking for quality accommodation with character.



MARKETING REVIEW

We looked at a wide range of marketing outputs and different media. Our assessment of what is working well and areas for improvement is:

- Families understand the Pembrokeshire offer and are the summer season's 'bread and butter'. However, there is scope to develop the high value, middle-class family market, given the range of outdoor activities and improving accommodation/food products e.g. Bluestone, The Grove.
- Travel writers 'get' Pembrokeshire and are positive about it but Cornwall and Snowdonia have traditionally tended to be featured more frequently as destinations. Journalists are interested in the 'new': Pembrokeshire must continue its PR work to create reasons for them to write about its destination offer. Pembrokeshire must continue its PR work to create reasons for them to write about its destination offer, and the trade need to continue to innovate, to underpin this work.
- Partners are promoting a wealth of online content but it can feel overwhelming. A more editorial approach is required.
- Partner content is focused on family, beaches, outdoor activities and walks. New content is required to attract growth markets e.g. ancient sites, interesting towns, learning retreats.
- Tripadvisor reviews are extremely positive, particularly about the landscape, the coastal path and the people of Pembrokeshire.
- Images on the official Instagram channels are focused on the landscape. There is less about the people and their experiences. There's an opportunity to promote the local community and 'their' Pembrokeshire e.g. artisan food producer, park ranger.
- Pembrokeshire is making good use of the Visit Wales 'Year of' initiative.

MARKET OPPORTUNITY

A selective approach to growth will enable resources to be focused and thus maximised. Whilst the family market underpins the summer, business can be grown in the shoulder seasons by focusing on the following priority markets from UK and Ireland. They are all looking for authentic experiences and places; shun over-commercialised destinations and like to visit comparatively undiscovered places; want places where they can be themselves, which enrich and challenge them; like interaction – meeting local people and understanding the culture; gain a sense of satisfaction from planning a trip.

Pre-family Explorers (18-35 years)

Active explorers/'soft' adventure enthusiasts. Couples and groups who enjoy the outdoors, activities (hiking, mountain biking, kayaking) and sightseeing. They enjoy discovering new experiences and places to visit in the UK and try to go somewhere different every time. More likely to have taken a sightseeing, romantic break, spa, or festival holiday in the past, possibly because of a higher disposable income.

- The themes of sustainability, wellbeing and active are a good fit for this segment.
- Micro-trips hold a strong appeal, reflecting typical vlogger content.
- Real potential to develop the offer around learning/skills breaks, focused on wellness and active strand (e.g. forest bathing, paddleboarding), local artisan skills (e.g. pottery, printmaking) and creative breaks inspired by the landscape (e.g. writing the wild, photography).
- Visit Wales is looking to strengthen its emphasis on online promotion which will play well to this market.

Cultural Explorers (+45 years)

They appreciate the scenic aspect of a destination, but want to combine this with a deeper experience of the destination's cultural heritage, visiting castles, historic houses, gardens, museums, spas and interesting towns and cities. Their main holidays are sightseeing and city breaks.

And Scenic Explorers (+45 years)

They enjoy exploring a destination's beautiful scenery – mountains, coast or countryside – taking in nature, walking, plus heritage attractions and activities. They want to experience the outdoors 'off the beaten track', but take in the local culture, e.g. visit a castle with lunch in a pub along the way.

- Pembrokeshire can offer authentic experiences to these segments.
- Short breaks appeal to these markets and events can also drive bookings.
- Older visitors are a growing trend which tourism businesses can start to prepare for and welcome now e.g. accessibility.
- Cultural Explorers will respond to the expansion of the cultural heritage offer, which will enhance the year-round 'indoor' offer.
- Opportunity to package up current offer in appealing new ways, such as foodie tours, itineraries which can be added to an events-based trip.
- Potential to attract these visitors to St Davids and beyond via promotion of Coastal Way and planned artistic interventions in the city through the Ancient Connections project.
- Visit Wales is planning to enhance its promotion of out of season breaks which chimes well with these target markets, as does Visit Wales' likely focus on heritage as a specific interest.
- In addition, Visit Wales is set to target staycations more extensively and will embrace UK cities, Wales and Ireland which will benefit Pembrokeshire across all target markets, including pre-family explorers
- Two centre holidays in Pembrokeshire and Ireland present a potential growth area as the cruise market continues to develop, alongside initiatives such as Ancient Connections which link with Ireland.

STRATEGIC PRIORITIES

To address the opportunities and threats we need action in 5 priority areas including a continued commitment to Destination Management 'nuts and bolts' – what we are calling 'Brilliant Basics'.

- Shared Narrative & Brand
- Events & Seasonality
- Responsible & Sustainable
- Wellbeing & Active
- Brilliant Basics

There is a temptation to use this plan to list everything that can or will happen. And there will be other things taking place over the lifetime of this strategy that make sense. Just because they are not specifically named here doesn't mean they aren't important. But there is a need to focus on the handful of actions that will have the greatest impact on tourism to Pembrokeshire helping achieve the vision and targets.

The actions identify which of the delivery partners currently engaged in the Destination Pembrokeshire Partnership would be responsible for these actions. In many cases, these would be led by any new Destination Management Organisation, were it to be established.



SHARED NARRATIVE & BRAND

Create a shared narrative which sells Pembrokeshire's year-round offer and is communicated through marketing and PR activities.

RATIONALE

Responds to Stakeholder demand for a co-ordinated 'Team Pembrokeshire' approach which ensures consistent communication about the destination, both visually and verbally, and supports tourism businesses in

their marketing efforts. Tackles seasonality by promoting shoulder season breaks to priority growth markets. Actively involves local community in the creation of content, recognising the value of a 'localhood' approach.

TARGETS SUPPORTED

Growth

Engagement

Seasonality

Reputation

ACTION	DELIVERY (WHO)	LINK TO VISIT WALES PLAN PRIORITIES	TIMETABLE
Engage with the tourism sector and work in partnership to develop a shared narrative about Pembrokeshire, which partners and business sign up to	Destination Pembrokeshire Partners	Wales Brand Sector Engagement	Q3-Q4 2020
Create supporting materials for businesses and provide training on how to best use e.g. copy, image libraries, themed itineraries (including short breaks) and events calendar, updated destination marketing wheel	Pembrokeshire Tourism	Wales Brand Sector Engagement	Q3-Q4 2020
Deliver a coordinated destination PR and marketing plan with specific campaigns to target priority growth markets	Destination Pembrokeshire Partners	Wales Brand	Q3-Q4 2020
Adopt a more 'curated' approach to content. Rather than listing everything (e.g. all beaches) engage local business and community advocates in creating content which inspires specific markets (e.g. for pre family explorers – most instagrammable beaches, for family explorers – best beaches for active teens) and provide an online/social channel where this content can be easily accessed and shared. Offer training to provide guidance and support	Pembrokeshire Tourism, Businesses and PCC	Wales Brand Sector Engagement	Q4 2020
Continue to engage with 'Year of' and 'The Wales Way' initiatives	Destination Pembrokeshire Partners	Wales Brand	Ongoing

EVENTS & SEASONALITY

Seasonality has remained 'stubborn' so we need to generate additional demand in spring and autumn.

RATIONALE

Events have proved to be the most effective short-term catalyst for extending the season e.g. Ironman. There is scope for appropriate scale cultural events in spring e.g. St Davids Day and/or autumn across the county. Better coordination of existing events information to create 'festivals' and themed 'seasons' will add value, improve awareness,

reduce internal competition, encourage referral and build excitement. This will encourage accommodation and hospitality businesses to extend their opening. An overall events plan would help consolidate the work done and expertise on offer by event organisers and managers in the county. For the longer term this needs to be backed up by continuing investment in the 'indoor Pembrokeshire'

offer, encouraging the private and public sector to increase 'weatherproofing' of attractions and activities, but also giving new impetus to showcasing the county's unique cultural assets and offer.

TARGETS SUPPORTED

Seasonality

Growth

ACTION	DELIVERY (WHO)	LINK TO VISIT WALES PLAN PRIORITIES	TIMETABLE
Develop an Events Plan and network for the County in partnership with WG Major Events Team	PCC/Visit Wales	Products and Places Sector Engagement	2020
Group and promote existing events by theme and seasons to optimise referral, repeat visits and resources	PCC	Wales Brand Products and Places	Ongoing
Support event season information with open business listings	Pembrokeshire Tourism/ PCC/ PCNPA	Products and Places Sector Engagement	Ongoing
Develop new 'on brand' major events in spring/ autumn e.g. St Davids Day, Cnapan/ Rugby Sevens, Open Studios, revitalised Fish Week	PCC/ PCNPA	Products and Places	2021-2023
Develop and share content on 'indoor Pembrokeshire' offer for tactical campaigns	Pembrokeshire Tourism, PCC	Wales Brand	Ongoing
Major product development supporting investment in existing or new indoor/wet weather attractions with 9 months per year opening a minimum requirement (esp. those linked to the The Coastal Way)	PCC/ PCNPA/ Visit Wales/ Private Sector	Products and Places	2020-2025

RESPONSIBLE & SUSTAINABLE

From actions already taken and planned, as well as its environmental qualities, Pembrokeshire can legitimately claim 'responsible' tourism and sustainability as a USP.

RATIONALE

In addition to the great work on beach and path management, and the planned EV charging points, this positioning will need concerted activity in areas such as public transport and cycling to make them more visitor-friendly to the point

when they offer a realistic alternative. A 'Localhood' approach in terms of food and drink, community engagement and cultural provision can learn from the North Pembrokeshire Cruise Welcome initiative.

TARGETS SUPPORTED

Reputation

Engagement

ACTION	DELIVERY (WHO)	LINK TO VISIT WALES PLAN PRIORITIES	TIMETABLE
Encourage a community-based approach to the visitor economy using the North Pembrokeshire Cruise Welcome initiative as one exemplar	PLANED	Industry Engagement Quality Visitor Experiences	Ongoing
Map current public and alternative transport provision in the county against needs of the tourism sector and plan practical improvements (including walking, cycling, and e-cycling)	PCC/PCNPA	Quality Visitor Experiences	2020
Work with partners to improve the frequency, capacity and quality of sustainable services (especially rail) into the county from key markets	PCC/Transport for Wales	Quality Visitor Experiences	Ongoing
Develop the cruise market in the most sustainable way working closely with the Ports and Cruise Wales	PCC	Quality Visitor Experiences	Ongoing
Continue to incentivize use of EVs within the County through installation of charging points (public and private sites)	PCC/PCNPA	Quality Visitor Experiences	Ongoing
Incentivise and prioritise tourism products that deliver a sustainable offer	Destination Pembrokeshire Partners	Wales Brand	Ongoing
Celebrate responsible tourism excellence through annual industry awards e.g. local sourcing, community engagement, environmental impact, food + drink	Pembrokeshire Tourism	Wales Brand Sector Engagement	2021 and Ongoing

WELLBEING & ACTIVE

Re-establish Pembrokeshire as a preferred destination for activities.

RATIONALE

North Wales may have temporarily stolen the crown for Adventure Activities in Wales but Pembrokeshire's heritage in this area persists with a much stronger coastal offer than other parts of Wales, and a particular appeal for younger and family groups. Ironman has created

a reputation for endurance participation events and a healthier local lifestyle. The county is also well-placed to take advantage of market trends around cultural 'immersion', learning and wellness (of mind, body and spirit)

TARGETS SUPPORTED

Seasonality

Reputation

Growth

ACTION	DELIVERY (WHO)	LINK TO VISIT WALES PLAN PRIORITIES	TIMETABLE
Seek to extend benefits of existing Ironman and endurance brands through targeted 'familiarisation' and training breaks year round	Destination Pembrokeshire Partners	Products and Places	2020-2025
Identify and develop opportunities for off-season deeper Pembrokeshire 'learning' breaks – making, craft and arts skills, well-being techniques, adventure activities, wild-swimming, food foraging and cooking as well as spa and other well-being opportunities	PCNPA/PLANED and other organisations such as the National Trust (NT)	Products and Places	2020-2025
Support development of new events and experiences which respond to this theme and provide policy and planning support in the development and delivery of new initiatives	PCC / PCNPA	Products and Places	2020-2025

BRILLIANT BASICS

Delivering the foundations of destination stewardship – the under-pinning level of the travel experience hierarchy and the visitor welcome.

RATIONALE

These are the ‘nuts and bolts’ of destination management – the life support for front-line tourism businesses and the visitor experience. Beach management, toilets, parking, waste management, environmental maintenance, waymarking, food standards, licensing, events planning and support are ‘unsung heroes’ – often unregarded until they go wrong or go missing.

They do not on themselves drive visits but can strongly influence reputation, visitor spend and dwell-time. The burden of delivery inevitably falls largely on the public sector while resources to underwrite them continue to diminish. Wider public sector decisions including policing, health and development planning and local taxation policies also can have significant (unintended) consequences for the visitor economy.

There is a need to secure a pipeline of visitor economy skills through local animation, education and training. Equally important is agreeing and implementing a credible and consistent methodology for assessing the destination performance over time against the targets set in this plan.

TARGETS SUPPORTED

Reputation
Engagement



ACTION	DELIVERY (WHO)	LINK TO VISIT WALES PLAN PRIORITIES	TIMETABLE
Develop the agreed partnership approach for delivering core DM services more sustainably: Parking, Toilets, Beach Management, Rights of Way, Charging Points, Coastal Buses etc	PCC/PCNPA	Quality Visitor Experiences	2020-2021
Develop a parking and access plan which manages potential over-tourism ‘hotspots’ more effectively, rewards sustainable behaviour, tests feasibility of a county-wide parking pass and disperses visitors to sites with capacity	PCC/PCNPA/ NT/Other Landowners	Quality Visitor Experiences	2020-2021
Ensure a visitor economy filter is consistently applied to wider community policy discussions by statutory authorities/ Public Service Board through industry advocacy (e.g. policing, health planning, skills and training, highway repairs, transport planning including high speed rail)	PCC/PCNPA	Sector Engagement	2020-2025
Work with Welsh Government and providers to improve broadband/ mobile connectivity and speeds to support tourism providers and their visitors	PCC/Welsh Government/ Private Sector	Quality Visitor Experiences	2020-2025
Use data from public Wi-Fi/ 4G to map visitor behaviour and inform destination planning	PCC/PCNPA	Sector engagement	2021
Maintain up-to-date visitor research: e.g. volume, value, attitudes through comparative trend models (e.g. STEAM) and cooperation with Visit Wales occupancy and visitor research	PCC/PCNPA/ Visit Wales	Sector Engagement	2020-2025
Establish baseline and annual measurement against Plan targets i.e.: Growth in tourism value, industry engagement levels, destination sentiment analysis	Destination Partnership	Sector Engagement	2020-2025

DELIVERING THE PLAN

NEW WAYS OF WORKING

The Action Plan does not assume the creation of a new trade-led partnership Destination Management Organisation (DMO) (P5) to take on delivery of the brand narrative, destination marketing and product packaging but if that is what partners and business decide they want, in common with most other destinations, then any emerging DMO will take on responsibility for those tasks. In addition a new DMO could offer trade membership (linked to marketing and other benefits), services to members, intelligence, industry communications and advocacy. All 4 current lead destination partners would have a stake in any potential DMO: Pembrokeshire Tourism, Pembrokeshire County Council, Pembrokeshire Coast National Park Authority and PLANED. The main destination 'stewardship' priorities will continue to fall on the public sector. So if we think about the travel experience hierarchy (P9) the role of the private sector is stronger further up the pyramid while the public sector has an essential role supporting the foundations for a successful and well-managed tourism sector.



Depending on the exact organisational model that emerges, whether it is adopted and the level of financial support it can summon, will determine the extent to which this plan can be delivered. Many of the actions are scalable – up and down – and can be adjusted to fit the resources. But the speed and scale of impact will be affected by those resources – the more partners can be persuaded to come together and invest, the better the outcomes for everyone.

RESOURCES

A new DMO model is a pragmatic response to the current funding environment. While initial resources raised may be relatively modest, until a potential DMO has a proven track record, it would also be able to access external grant, commercial and sponsorship funds unavailable to the public sector. Visit Wales in particular maintains funds to support projects in destination plans where an active delivery partnership is in place.

The public sector will continue to invest in the destination management and stewardship functions – the brilliant basics. Their support for a potential DMO and its marketing outputs will also be but vital – often acting as a catalyst for wider business investment.

The tourism business must also step up and invest together if Pembrokeshire is to inspire a new generation of visitors. Working together to ensure that the benefits are spread widely and their combined achievements exceed what any of them are able to do on their own.