

# Pembrokeshire Destination Management Plan

2012 - 2017



## Contents

1. Introduction	Page 2
2. What needs to change?	Page 5
3. Factors to be considered	Page 6
4. Priorities for action	Page 8
5. Objective 1: Working together effectively	Page 8
6. Objective 2: Re-focusing marketing	Page 10
7. Objective 3: Creating a year round quality experience	Page 14
8. Objective 4: Developing and sustaining infrastructure, environment and cultural resources	Page 20

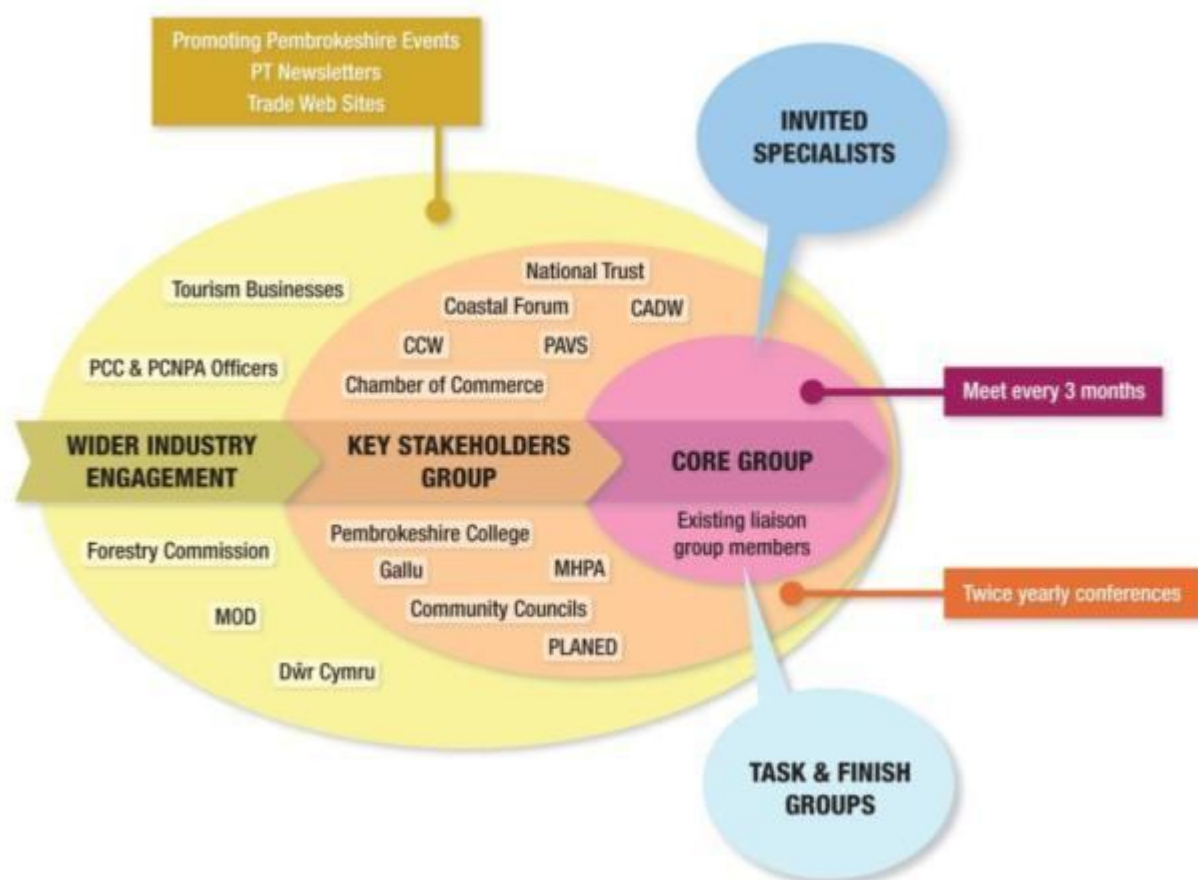
# 1. Introduction

- 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 **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.



## 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. Developing 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 stand out from other destinations?

- 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 **Develop the role of the stakeholders group to fully engage with the partnership**

The stakeholders group comprises of organisations representing various 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, 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 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 to be developed that can generate a modern and vibrant image of Pembrokeshire;
- Coordinated PR activity that supports the branding.

#### **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.

Examples of how this can be achieved:

- Facilitate the creation of groups of businesses with an interest in working together to tackle specific markets;
- Investigate options for creating a sustainable structure for consortia groups that doesn't place too much burden on individual members.

#### **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 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.

The Tourist Information Centre (TIC) Network is well placed to develop this market as they have a year-round service in 8 local communities all around Pembrokeshire.

Examples of how this can be achieved:

- Rebrand TICs as 'Information Centres' in local promotions but retain the 'Tourist Information' brand for promotions aimed at visitors;
- Investigate the provision of new services that can draw in local residents and encourage them to become regular customers;
- Organise free-entry winter promotions in partnership with attractions to encourage visits to TICs and increase repeat visits to attractions;
- Provide a 'Collect from your nearest Information Centre' service.

#### **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:

- 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;
- Undertake 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;
- Agree who does what and better integrate activity such as web sites and apps;

- Identify projects suitable for Visit Wales digital tourism project funding;
- Develop more applications suitable for mobile devices;
- Expand the [www.facebook.com/visitpembrokeshire](http://www.facebook.com/visitpembrokeshire) presence to establish it as an effective promotional tool;
- Convert [www.visitpembrokeshire.com](http://www.visitpembrokeshire.com) to an open platform format so that it can feed content to web sites such as [www.visitwales.co.uk](http://www.visitwales.co.uk);
- Support initiatives such as [www.sharewales.com](http://www.sharewales.com) in order to develop better integrated and digitally sophisticated tourism businesses.

### 4.3 Objective 3: Creating a year round 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 where it is needed**

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.

This is a time of change in the field of tourist information with the rapid development of mobile technology and digital information systems. Tourist Information Centres should continue to play a major role at key locations where personal contact is so important, but there may be a need for developing new services which exploit digital technology, for expanding their role away from a counter service and for providing services for local residents.

Examples of how this can be achieved:

- Provide more information that can be accessed via smart phones and i-phones;
- Provide a TIC service via social media such as the Visit Pembrokeshire facebook page;
- Provision of free WiFi access in TICs;
- Develop QR code interpretation apps 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:

- Giving a high priority to accommodation development and upgrading in the allocation (and possible ring-fencing) of public funds;
- Encourage good quality schemes for total renovation, building conversion, extension and new build, where appropriate;
- Providing support only to those prospective owners/operators who can demonstrate their ability to achieve quality standards in both product delivery, training and customer care;
- Promoting participation in grading schemes;
- Only promoting graded accommodation;
- Using the inspection process to identify properties where limited action/ investment can lead to higher grading; and
- 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;
- Give consideration for the provision of basic overnight facilities for camper vans, possibly in car parks;
- Investigating the provision of camping facilities at locations where frequent wild camping is creating a nuisance;
- Encourage the provision of low impact facilities such as safari tents, yurts, camping pods and tree houses;
- Encourage landscaping, screening 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 attractions**

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.



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 TIC's 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 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 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.

#### **4.3.7 Seek to become a market leader in high quality land and water based activity holidays**

Activity holidays provide a special opportunity for Pembrokeshire, 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.

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 membership of the Outdoor Charter Group and Marine Code Group to all operators;
- Set up a group to implement the National Park Recreation Plan;
- Promote environmental management and accreditation to all activity operators;
- Disseminate examples of good practice.

#### **4.3.8 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.

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:

- Work with the Cruise Wales Group and the Celtic Wave project 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.

#### **4.3.9 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;
- 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, heritage and culture;
- Encourage 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.

#### **4.3.10 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:

- Focusing action around major off-season events, which would be used as the main draw;
- Working with a network of attractions and retail outlets that had agreed a programme of extended opening; and
- Promoting packages linking the event, accommodation, activities and the attractions;
- Develop social networking activity to promote visitor opportunities outside 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:

- Prevention of intrusive tourism development, through careful application of planning and development control policies;
- Careful visitor management in the most popular locations;
- Greater awareness of the damage large numbers of visitors can have 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 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:

- 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:

- 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 the visitor 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. Increasingly, a primary 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 CROW Act;
- 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, 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 run Tourist Information Centres;
- Better communication with the stakeholders group;
- Set up a forum for the Agriculture sector.



#### **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:

- Comprehensive village and townscape improvements;
- Paying special attention to the appearance and sense of welcome at gateway points to towns and villages; landscaping the main entry routes;
- Improving the appearance of car parks, toilets and pedestrian routes to the local centres;
- Reinforcing gateways with good signposting, thereby encouraging people to stop;
- 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;
- Encouraging regular management and maintenance of public areas;
- Improve the exterior appearance of tourism businesses via enhanced quality grading schemes.

#### **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;
- 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.

#### 4.4.9 Improve communication links

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.

Likewise, poor digital communication networks including Broadband, WiFi, mobile and 3G coverage are creating a disadvantage for businesses and a disincentive to visit.

Local solutions to improve communication should be supported. However, most of the required improvements need to be undertaken by organisations not based in Pembrokeshire.

Examples of how this can be achieved:

- Lobby for improvements to trunk roads west of St Clears;
- Encourage communities and clusters of businesses to bid for Digital Tourism grant money for setting up local communication solutions;
- Install free WiFi access points into Tourist Information Centres;
- Put pressure on mobile networks to improve their coverage;
- Work with the Wales Government Broadband Support Scheme team to improve broadband speed.

#### 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 do a lot to help profitability and the quality and attractiveness of tourism jobs available.

#### **4.5.1 Raise awareness of 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;
- Continue to develop better communication with local businesses and between them and support service providers;
- 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 enhance curriculum development to meet local needs and employer requirements;
- Work with the Welsh Food & Drink Skills Project to address their recommendations.

#### **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 increase the pool of local people keen and able to take jobs in tourism.

Examples of how this can be achieved:

- Improving pay, prospects and conditions, which is primarily reliant on business performance;
- Taking a broader and more flexible approach to sources of local labour, including older people and inactive workers;
- Addressing practical barriers such as transport to work;
- Addressing the continuing poor image of working in tourism or the service industry, through P.R. and work with school and college careers services;
- Develop a customer service skills module for the Welsh Baccalaureate.

#### **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 of training and business support and signposting towards it**

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 Pembrokeshire Business Hub 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, particularly to new businesses such as environmental health and food development.