



# **Staying in Wales Limited**

Response to:

## **Welsh Coastal Tourism Strategy Final Draft Strategy Document; January 2007**

2<sup>nd</sup> April 2007

## **Background to Staying in Wales Limited**

Staying in Wales Limited was established in 2003 in the wake of the foot and mouth epidemic to sustain the work and good practice of the Taste of Wales–Blas ar Gymru initiative, discontinued by the Welsh Development Agency Food Directorate.

Much of the good practice and investment has been in the adaptation of information communication technologies (ICTs) to deliver information to visitors on points of interest in Wales using geographic information (GI). This was recommended in 1996 in the original blueprint for a Wales destination marketing system.

Developments have been maintained throughout in collaboration with Visit Wales, the Welsh Food Directorate, Countryside Council for Wales, North Wales Tourism, Mid Wales Tourism, Welsh Rarebits, Wales Great Little Places, Youth Hostels Association, Welcome Host, Cadw, the National Trust in Wales, National Museums & Galleries of Wales, RSPB Cymru and Sustainable Transport for Tourism Wales (STTW). A number of beta projects involving GI-embedded ICTs are under development as part of this collaboration.

The company now has over 35,000 geocoded, Wales tourism-related records on its database that are current. These include accredited Visit Wales accommodation providers, visitor attractions, restaurants, events, placenames and railway stations.

Staying in Wales seeks to complement the work of Visit Wales within DEIN, the Food Division within DEPC and the Countryside Council for Wales in developing the visitor economy in Wales and substantially increasing its contribution to 'Wales Plc'.

## **Consultation Questions and Responses**

### **Chapter 2 – Analysis**

#### **Q1. Do you agree with the analysis of the tourism market?**

Yes, save that the growth in single-parent and nuclear families should be identified under the demographic and socio-economic change headings.

#### **Q2. Have all the factors influencing future changes in visitor activity been identified, and which do you consider to be the most important?**

No. Forestry and woodlands have not been identified under this main heading as presenting opportunities for the development of sustainable tourism. Forests have a unique ability to absorb the tourism product.

#### **Q3. Have all the key challenges been identified, if not what additional challenges are there which we need to address?**

The development of forestry- and woodland-related coastal tourism presents a special challenge in that Forestry Commission Cymru does not appear to have been fully engaged in the consultation process up until now. Yet over 11m visits are made to Welsh woodlands each year and although many of these visits are domestic-market based for recreation and leisure purposes it indicates the potential for attracting greater numbers of tourism visitors (see also Q14).

Also, in the Wales Action Plan for the Countryside Experience, Forestry Commission Cymru was not only engaged in the consultation process but also had actions allotted to it under the 'Meeting Visitors Needs' theme. These concerned improving the rights of way networks and extending access to the countryside through consistent and accurate information provision. Many forest and woodlands are on or near the coasts of Wales and are rural by definition.

Furthermore, an informative seminar entitled 'Woodland for People' took place in October 2006 chaired by Jim Embrey from what was then the Wales Tourist Board.

**Q4. Do you agree that the challenge in respect of access to the coast is to develop innovative forms of public transport to move people around local 'hot spots', to link sites and walking routes?**

Yes but note needs to be taken of the response of the Sustainable Transport for Tourism Wales (STTW) forum to the Wales Transport Strategy consultation. It brings out the need for a rather more focused approach to the visitor market as distinct from the domestic market if positive results are to be achieved in the implementation process.

**Q5. Have the challenges of climate change and coastal erosion been fully identified?**

Yes, save that the term 'visitor economy' used in this section needs to be properly defined.

Coined by Staying in Wales in 2005, the term was introduced as an attempt to differentiate the narrowly defined tourism industry from the broader economy and the impact visitors have through post-visit in addition to during-visit expenditure on Wales' goods and services.

It would be a mistake to use this term simply to replace the term 'tourism industry', which forms only part of the overall visitor economy.

### **Chapter 3 – Developing the Strategy**

**Q6. Do you agree with the vision statement for the strategy? – ‘ An integrated year round coastal tourism industry, based on an outstanding natural environment and a quality tourism product that meets and exceeds visitor expectations, whilst bringing economic, social and environmental benefits to coastal communities’**

Yes, providing woodlands are recognised in the final strategy as forming an important part of the natural environment.

**Q7. Do you agree with the strategic aims and outcomes for the strategy as set out on page 16?**

Yes, save that ‘Increasing numbers of tourism visitors be attracted to coastal woodlands and woodland walks’ should be included as an outcome under the aim to achieve an integrated approach to the development of coastal tourism.

### **Chapter 4 – The Strategy**

**Q8. Have we got the right themes for the strategy?**

*Coastal Towns and Resorts*

**Q9. Do you agree with the analysis of issues under ‘Coastal Towns and Resorts’ theme for cities and towns on the coast, coastal resorts, environmental quality, beaches and seaside, accommodation, visitor attractions, retail and catering, and visitor access?**

Yes, save that under 4.1.4 the unique attraction of beaches should be noted as an opportunity to develop innovative forms of cluster marketing with beaches as the central focus.

This requires full information on beaches to be made more accessible to potential visitors together with the full range of products and services – accommodation, visitor attractions, retail and catering and visitor access – in the surrounding area. This can be facilitated through integrated, GI-embedded internet applications.

See also Q18 and Q19.

**Q10. Are the recommendations on page 24 for the ‘Coastal Town and Resorts’ appropriate and realistic to address the challenges identified, or do you consider there should be additional recommended actions?**

Yes, save that there ought to be a recommendation on improving access by visitors to information on all the elements that make up the experience:

- That innovative ways be explored of providing better access to information by visitors on all elements of the visit experience.

### *Rural Coast*

#### **Q11. Do you agree with the analysis of the issues for the 'Rural Coast' theme on page 25 or are there additional issues which need addressing?**

Yes, save that an overt reference to woodlands could be included in the 4.2 introductory paragraph and, under 4.2.6 Access, there should be a reference to access to information by visitors on the innovative public transport services mentioned.

The Sustainable Transport for Tourism Wales (STTW) draft strategy at <http://sttw.wales.info> identified that many opportunities are lost by not providing information early enough (i.e. pre-visit) for visitors to include these in their holiday planning.

#### **Q12. Do you agree with the recommendations for the 'Rural Coast' theme on page 28?**

Yes, save that 'more effectively' be inserted into the fourth bullet point to read:

- That innovative public transport initiatives should be promoted more effectively and developed to provide opportunities for visitors to visit the coast without using their cars.

#### **Q13. Is the current voluntary approach to managing conflicts between users adequate to meet the challenges posed?**

Yes but this is also a case of educating users by presenting information in innovative new ways. An example of this can be seen at <http://countryside.wales.info/Countryside.asp> Search engine marketing can then be used effectively to target specific user groups.

### *Coastal Activities*

#### **Q14. What more can be done to realise the economic potential of the 'all Wales Coastal Footpath' (page 29)?**

Whilst 74% of visitors participate in walking while on holiday, walking is not an economic proposition in itself whilst spending by walkers is. This requires better and

more innovative ways of communicating other opportunities to visitors using the 1,000kms of coastal footpaths mentioned in the draft strategy. This can be achieved using geographic information to create virtual corridors of potential economic activity within easy walking range to and from footpaths.

Whilst the National Trust, Countryside Council for Wales, Farming Unions, the Ramblers Association and RSPB Cymru are mentioned in the draft strategy, Forestry Commission Cymru appears once again to have been overlooked (see also Q2).

**Q15. Do you agree that nature tourism provides excellent opportunities for further development along the Welsh coastline?**

Yes but the point made under Q4 also applies, save that one might talk in terms of virtual clusters round a given point or within given areas (National Nature Reserves for example), rather than virtual corridors along a given route.

**Q16. What more can we do to develop coastal land based activities in a sustainable manner?**

It might prove constructive to consider afresh the Natural Facilities Database compiled and geocoded by the Countryside Council for Wales and the Sports Council in the mid 1990's. It contains 2,545 records giving information on the following:

**Land based**

Rock climbing  
Snow and Ice climbing  
Hill walking  
Pony trekking  
Caving  
Orienteering  
Cross country racing  
Fell running  
Cycle paths  
Mountain biking  
Motor cycling  
Rallying  
Land yachting  
Clay target shooting  
Rambling, long distance, regional paths  
Golf

**Water Based**

Game angling  
Coarse angling

Shore angling  
Sea angling  
Sailing  
Board sailing  
Canoeing  
Rowing  
Water-skiing  
Sub aqua  
Surfing  
Hovering  
Sea bathing  
Surf life saving  
Jet skiing

**Air Dependant**

Hang gliding  
Gliding  
Paragliding  
Parachuting  
Microlite flying  
Ballooning

A new recommendation might be:

- that a geocoded database of all coastal and coastal hinterland activities be produced and maintained.

See also Q34.

**Q17. Do you agree with the list of opportunities for the development of water sports on page 33?**

Yes, subject to new opportunities presented under Q16.

**Q18. Are the suggested assessment criteria for considering the location of new marina development adequate, if not what additional criteria would you propose?**

An additional criterion under the heading 'Economic and Business' might be to:

- Should identify innovative means of communicating information to coastal visitors on opportunities available in rural hinterlands.

As with beaches (see Q9), this would make harbours and marinas the central focus of a full range of products and services clustered around them where multiplier expenditure can occur.

**Q19. Should we be seeking to attract more cruise ships to Welsh ports having regard to the market potential and the cost of infrastructure provision?**

Yes, provided there are opportunities for passengers to explore the rural hinterland and information on this is conveyed in time for plan onshore trips. Once again, as with beaches (see Q9), and harbours and marinas (see Q19), ports should in this instance become the central focus of a full range of products and services clustered around them.

**Q20. Do you agree with the recommendations for developing coastal activities on page 39?**

Yes, subject to the observations made under Q16, Q17 and Q19. It could prove constructive to expand the fifth bullet point to read:

- That a new and innovative marketing campaign is developed to promote Wales as a destination for nature related tourism activities, using geographic information to pinpoint all opportunities available to visitors and potential visitors.

Or alternatively insert:

- That GI-embedded applications are used to create virtual tourism clusters and corridors combined with positive search engine marketing to communicate all opportunities to visitors and potential visitors.

On this theme, a further bullet point might be added reading:

- That the role of hospitality providers as during-visit information providers to their guests considered in the light of common technology and internet access.

### *Coastal Culture*

#### **Q21. Do you consider that a national Seafood Festival would encourage the development of more seafood specialist restaurants and help raise standards?**

Yes. This needs though to be considered in light of the Food Tourism Action Plan currently out for consultation to avoid disjointed development.

#### **Q22. Would a Festival of the Coast as an umbrella for a coordinated programme of coastal events provide added value and how could this be funded?**

Yes but this would work better as an element of a new Festival of the Countryside campaign informed by the experiences of the organisation of that name in trying to transfer an otherwise successful (though now dated conventional marketing campaign) onto the internet.

The result can be viewed at <http://www.foc.org.uk> where little provision was made for maintaining the site in the long term and how it was to be funded. Lessons are clearly there to be learnt.

Regarding funding, the main beneficiaries of campaigns such as these should be tourism SMEs and micro businesses, otherwise in terms of economic regeneration there would be little point in mounting them.

It follows then that the businesses themselves should become main stakeholders and principle funders with their investment matched by stakeholders whose aims and objectives are more strategic for the country.

One has to be careful though that these campaigns do not compete with successful promotional activity already undertaken and funded by commercial businesses, otherwise they might lead to displacement and duplication. Better to collaborate than compete and to widen the distribution network.

#### **Q23. How can we best develop the tourism potential of our coastal heritage?**

By integrating them more fully with 'mainstream' tourism in terms of planning and promotion.

Events have properly been identified as a means by which this can be achieved. Not only can they provide interesting contact opportunities between residents and visitors as stated in the draft strategy but they can also help develop relationships between local suppliers and visitors, creating a potential year-round export market for products and services from Wales.

Yet owing to their time-of-essence nature, events have always been challenging to use as a promotional tool but success in this area has now been achieved through the application of EU

Objective 1 funding to develop up-to-date methods of information collection from events organisers.

As a result, a common accessible database, networked between developers, has been operating since 2004 with event Webster using the data to target visitors in association with nearby accommodation, visitor attractions and restaurants etc.

For good practice examples see:

<http://walescalendar.com>

[http://www.stayinginwales.com/New\\_events.asp](http://www.stayinginwales.com/New_events.asp)

<http://www.stayinginwales.com/events.asp>

<http://www.nwt.co.uk/events.php>

<http://www.visitmidwales.co.uk/thedms.asp?dms=12&groupid=1>

It would be far more sensible and cost-efficient to develop sites such as these and to create additional categories and classifications than to start from scratch.

The Welsh Assembly Government's Events, Sponsorship and Business Tourism Unit within Visit Wales, headed up by Pat Crimp, is likely to be aware of these developments. An excellent 'Festival and Events Toolkit' published by the Wales Tourist Board in 2004 (see <http://www.timelineforevents.co.uk/fulldocs/english.pdf>) identifies on page 6 the need for events organisers to 'Get Date into Events Lists' as well as 'Develop Marketing Plan' and 'Develop PR/Marketing Plan'.

This is crucial for events to attract wider audiences, visitors to Wales in particular who are far less aware of what's on in Wales than residents who are well informed by local and national Wales' newspapers and listings. Only 1% of visitors find out about things to do in Wales through local newspapers, according to WTB and this is likely now to be the case for internet listings that are there to serve local people in the first instance.

Yet still too few local events organisers recognise or see the need for this and ignore, or are largely unaware of, the benefits of having their events listed in websites that make it their business to target visitors. Nor do they take account of the need to publish their event dates a lot earlier than usual to reach this valuable, free-spending market in time for holiday planning.

Those that do are often hampered by the time they have to wait for confirmation of grant funding for their event from government sources. As this additional funding often underpins marketing and promotional budgets, this results in the unintentional yet somewhat perverse position of getting too late to market.

Food festivals supported by what used to be the Welsh Food Directorate are affected in this way owing annual budget allocations and decisions not being made on which festivals to support until April of the year in question. Meanwhile, they have been identified in the developing Food Tourism Action Plan as events that can help encourage additional year-round spend by visitors to Wales.

Planned and promoted well, events can become a main driver of cultural tourism, acting as a catalyst for marketing all other associated products and services to visitors.

**Q24. Do you agree with the recommendations for coastal culture set out on page 45?**

Subject to the observations made above under Q23 regarding food and events, yes, and it might prove beneficial to add further recommendations concerning these. For example:

- That the development and promotion of coastal food festivals and events is informed by the Food Tourism Action Plan for Wales.
- That due regard is taken of existing provision for the collection, networking and distribution of events information funded by previous EU structural funding programmes and that these initiatives should be built on.

The third existing bullet point might then be reworded to recognise the fact that much of this work has already been done:

- That links already made between local tourism interests, Cadw and other relevant heritage organisations should be strengthened to promote, interpret and protect coastal heritage.

**Q25. What more can be done to minimise the potential damaging impact of tourism development on the linguistic balance within Welsh speaking communities on the coast?**

Make greater use of the language in online publications targeting visitors in order to put the language in view as early as possible in the holiday/short break decision-making process (see <http://countryside.wales.info/#6> for example).

At the same time provide simple online guides to the definition and descriptive quality of Welsh placenames and other words in a coastal context together with a pronunciation guide (see <http://countryside.wales.info/Gymraeg.asp> for example).

Make greater use of the internet for running competitions involving the Welsh language. For example, wordsearch competitions that also provide the definition, the English translation and Welsh pronunciation of words used in the competition. This was carried out successfully in printed media during the 1990s and there is no reason why this shouldn't be even more successful on the internet. This will at the same time provide a database of respondents who may wish to learn more.

A further general bullet point to this effect could be added to the recommendations cover in Q24, which might read:

- Make greater use of the Welsh language in online publications and competitions targeting visitors to Wales to help familiarise them with the existence and use of the language.

**Q26. How important is it to have a range of standards to guarantee quality and does Integrated Quality Management provide an appropriate tool in ensuring an integrated approach to coastal destination management?**

It is important but it should not be overprescriptive. Many small communities will have their own, often-innovative ideas on how they should develop their own brand of tourism with IQM tools providing a guide.

**Q27. Do you agree with the list of needs for training and skill development on page 47?**

Yes. The seventh bullet point should recognise that developments happen so swiftly in new media that yesterday's training course may not be so relevant today and the majority of tourism businesses have yet to catch up with yesterday's. Simple online tutorials such as those provided by Opportunity Wales and Wales.info should be made more widely available to tourism businesses (see [http://www.wales.info/internet\\_marketing.asp](http://www.wales.info/internet_marketing.asp) and [http://www.wales.info/website\\_planning.asp](http://www.wales.info/website_planning.asp) for example).

**Q28. Are the proposed recommendations on page 50 the right ones to achieve an improvement in coastal management from a tourism perspective?**

Yes, they are comprehensive providing the incentives are stated in terms of the commercial benefits that will accrue rather than in terms of if you don't do this you can't do that.

**Chapter 5 – Delivering the Strategy**

**Q29. Should the area spatial plan groups have a key role in assisting with the development and implementation of the strategy?**

Yes. These in themselves are broad geographic areas that lend themselves well to cluster marketing.

**Q30. Do you agree with the priorities identified for your spatial plan area, are there any additional ones you would suggest?**

Yes but on reflection an addition to the national actions for each of the designated areas in the Spatial Plan itself might have concerned the development by the Welsh Assembly Government's of the E-Wales strategy (see also item 5.7 in the draft Welsh Coastal Tourism Strategy).

**Q31. Should there be a national coordinating group to oversee the strategy implementation, and are there any omissions from the suggested organisations represented on it?**

Yes, there should be a national coordinating group. The omissions from the suggested organisations represented on it include Cadw, Forestry Commission Cymru, North Wales Tourism,

Mid Wales Tourism, and Staying in Wales, the latter three having deployed EU structural funding collectively in the development of effective new media marketing solutions.

**Q32. Are the current partnership and coordination arrangements adequate to meet the challenges?**

No, not yet at least. Individual tourism and related SMEs and micro businesses need better representation if the final strategy is to be implemented successfully at community level.

**Q33. Do you agree with the suggestion that EIN regional offices convene working groups to coordinate delivery of the final strategy at the spatial plan level?**

Yes.

**Q34. Are there any additional actions you would suggest for inclusion within the action plan, which could help deliver the recommendations?**

Yes. Actions in association with the suggestions made under various questions above:

*Coastal Towns and Resorts (Q10)*

- that innovative ways be explored of providing better access to information by visitors on all elements of the visit experience.

**Action:** work with existing services and pilot projects tackling this.

**Lead Partner:** Visit Wales

**Other Partners:** Staying in Wales

**Timescale:** Ongoing

*Rural Coast (Q12)*

- that innovative public transport initiatives should be promoted more effectively and developed to provide opportunities for visitors to visit the coast without using their cars.

**Action:** take forward recommendations made in the Sustainable Transport for Tourism Wales draft strategy at <http://sttw.wales.info>

**Lead Partner:** CCW

**Other Partners:** Visit Wales; Sustainable Transport for Tourism Wales; Private Sector.

**Timescale:** 2007–2010

*Coastal Activities (Q16/Q18/Q20)*

- that a geocoded database of all coastal and coastal hinterland activities be produced and maintained.

**Action:** Update, add to and maintain the Natural Facilities Database for Wales.

**Lead Partner:** CCW

**Other Partners:** Sports Council for Wales; Visit Wales; Staying in Wales; Private Sector

**Timescale:** Ongoing

- that innovative means should be identified of communicating information to coastal visitors on opportunities available in rural hinterlands.

**Action:** work with existing services and projects capable of facilitating this.

**Lead Partner:** Visit Wales

**Other Partners:** CCW; Staying in Wales; Sustainable Transport for Tourism Wales; Private Sector.

**Timescale:** Ongoing

- that a new and innovative marketing campaign is developed to promote Wales as a destination for nature related tourism activities, using geographic information to pinpoint all opportunities available to visitors and potential visitors.

**Action:** work with existing services and projects capable of assisting in this development.

**Lead Partner:** Visit Wales

**Other Partners:** CCW; Staying in Wales; Sustainable Transport for Tourism Wales; Private Sector.

**Timescale:** 2007–2010

- alternative wording: that GI-embedded applications are used to create virtual tourism clusters and corridors combined with positive search engine marketing to communicate all opportunities to visitors and potential visitors.

**Action:** work with organisations that have already made rapid advances in this field.

**Lead Partner:** Visit Wales

**Other Partners:** CCW; Staying in Wales; Sustainable Transport for Tourism Wales; Private Sector.

**Timescale:** 2007–2010

- that the role of hospitality providers as information providers to their guests during visit be considered in the light of common technology and internet access.

**Action:** work with existing services and projects engaged in this area.

**Lead Partner:** Staying in Wales

**Other Partners:** Visit Wales; Private Sector.

**Timescale:** Ongoing

### *Coastal Culture (Q24/Q25)*

- that the development and promotion of coastal food festivals and events is informed by the Food Tourism Action Plan for Wales.

**Action:** contribute to the Food Tourism Action Plan consultation.

**Lead Partner:** Visit Wales

**Other Partners:** WAG Food Division; Designate; Staying in Wales; Private Sector.

**Timescale:** 2007–2008

- that due regard is taken of existing provision for the collection, networking and distribution of events information and initiatives supported by previous EU structural funding programmes.

**Action:** work with existing providers in this field and build on developments to date.

**Lead Partner:** Tourism Wales/Staying in Wales

**Other Partners:** Visit Wales; WAG Food Division; Cadw; National Trust (NT); National Museums & Galleries of Wales (NMGW); National Library of Wales; Cymal; RSPB; Private Sector.

**Timescale:** Ongoing

- rewording suggestion: that links already made between local tourism interests, Cadw and other relevant heritage organisations should be strengthened to promote, interpret and protect coastal heritage.

**Action:** (see above)

**Lead Partner:** (see above)

**Other Partners:** (see above)

**Timescale:** (see above)

- that greater use be made of the Welsh language in online publications and competitions targeting visitors to Wales to help familiarise them with the existence and use of the language.

**Action:** build on existing provision in this field.

**Lead Partner:** Visit Wales

**Other Partners:** Staying in Wales–Aros yng Nghymru; Welsh Language Board; Private Sector.

**Timescale:** Ongoing

### **Q35. Have we identified the right outcomes and the appropriate indicators to measure them?**

Yes, save that the ultimate aim of the strategy and its implementation is to increase sustainable economic activity and produce hard economic outcomes for Wales. At present the monitoring indices that address this are as follows:

- (1) The volume of UK staying visitors at the seaside – Source: UKTS
- (2) The value and volume of nature and culture related holidays/activities – Source: UKTS
- (3) The value and volume of participation watersports of coastal visitors – Source: UKTS

Yet there is no singular index that measure the overall effect of these increases in value and volume on the bottom line of 'Wales Plc'. Perhaps this may not be possible but given that the largest expenditure by staying visitors is on overnight accommodation (2005: £564m), an index measuring occupation rates of accommodation businesses in coastal and coastal hinterland area might prove useful.

Given then that the second highest expenditure by staying visitors is on food and drink (2005: £335m), part of the Food Tourism Action Plan for Wales might include outcomes relating to food festival visits, and expenditure on Welsh food and drink (1) at destination and (2) post visit with appropriate monitoring indices.

Satellite accounting might assist in this process but new opportunities also exist for running sample visitor exit polls on the Internet.

## **Contact Details**

Aros yng Nghymru

### **Staying in Wales Limited**

Unit 4, Parc Busnes Penamser, Porthmadog LL49 9GB, Wales UK

**Tel:** 01766 543011

**Email:** [info@stayinginwales.com](mailto:info@stayinginwales.com)

**Web:** [www.stayinginwales.com](http://www.stayinginwales.com)

**Contact:** Terry Jackson

**Mobile:** 07770 574130

**Email:** [terry@stayinginwales.com](mailto:terry@stayinginwales.com)



Aros yng Nghymru

**Staying in Wales Limited**

Uned 4, Parc Business Penamser, Porthmadog LL49 9GB

*Cofrestrwyd yng Nghymru a Lloegr Rhif 4969289*