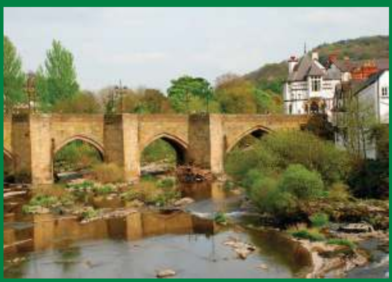
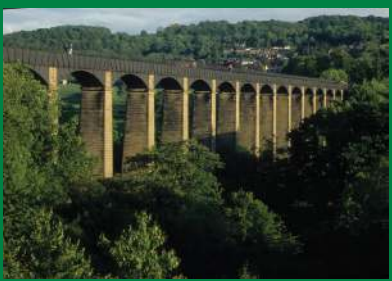
TOURISM STRATEGY NORTH WALES

2010-2015





FOREWORD

Tourism is vitally important to the North Wales economy. It brings in £1.8bn of income to the region each year, supports over 37,000 jobs and provides the lifeblood for many small businesses. I believe it can make an even greater contribution in future and is a sustainable sector which, properly managed, will continue to thrive for generations to come.

This is too important to be left to chance. If it is to achieve its full potential, then all involved in tourism need to agree where it is heading and work to a common agenda. That is the purpose of this document - to highlight the importance of tourism, set out a vision for its future, and identify the strategic priorities and action needed to take us there.

The existing strategy for Tourism '*Planning Tomorrow's Tourism Today'* was produced in 2003 and has served us well. Much of the analysis set out in it is still relevant and many of its provisions and recommendations have been adopted and implemented. Nevertheless, it is now time to review this in the light of changing circumstances, new opportunities, the current economic climate and the progress that has been made to date.

The strategy has been commissioned by Tourism Partnership North Wales (TPNW) but overseen by a steering group with representation from all sectors of tourism. It has been subject to extensive consultation with six county-wide meetings and two regional workshops attended by a wide range of tourism interests. This has been supplemented by further meetings with groups and key individuals. All in all, nearly 200 individuals have been involved in the above process and I would like to thank them for giving their time and expertise.

North Wales has a huge amount to offer visitors, but also some work to do if it is to realise its potential. This strategy provides a blueprint for the next five years and I look forward to seeing it come to reality.

Alun Ffred Jones AM
Minister for Heritage

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CYNGOR Sir y Fflint
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Denbighshire COUNTY COUNCIL

PARC CENEDLAETHOL ERYRI
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THE TOURISM COMPANY

SUMMARY: TOURISM STRATEGY NORTH WALES 2010-2015

Tourism is vitally important to the North Wales economy and we believe it can play an even more significant part in future. This strategy sets out how we can achieve its potential and is a blueprint to guide action over the next five years.

The importance of tourism and the visitor economy

Tourism generates £1.8bn for the North Wales economy each year, supports an estimated 37,500 jobs and is a lifeline for numerous small businesses. There is potential for further growth. Like an export industry tourism brings money into the region from outside and North Wales would be poorer without this.

North Wales accounts for a third of Wales' tourism, attracting 8m staying visitors and an estimated 17m day trips in 2007. The majority of the visitors are from the UK and holiday tourism predominates. Tourism is not evenly distributed across the region, the North West (Anglesey, Conwy, Gwynedd) accounts for 75% of staying visits and 60% of day visits, with the balance of 25% of staying visits and 40% of day visits in the North East (Denbighshire, Flintshire, Wrexham).

It is quite seasonal with 70% of trips taking place in the summer 6 months. Volumes have remained broadly static in the region over the past decade with a slight drop in real spending although this is not dissimilar from the picture across the UK as a whole. People who do visit are loyal and show high levels of satisfaction.

North Wales has wonderful natural assets in its countryside, mountains and coast; a variety of landscapes contained in a small area; a distinctive heritage and culture; a good range of attractions; unrivalled scope for activities; an improving product; a large population on its doorstep; and an experienced tourism industry.

Compared to similar places, North Wales performs well in terms of its climate, catchment population, accessibility and strength of its core offer. In the light of this, we believe it could and should be achieving more.

Challenges for the future

North Wales is heavily dependent on the domestic holiday market which is highly seasonal. Tourism is static and has shown some decline in value. The quality of the product and visitor experience is still patchy and it has proved difficult to attract new private investment. Some areas are jaded and look more to the past than to the future of tourism. There is also evidence to suggest that awareness and appeal of the region is slipping and that we are failing to attract new visitors and new markets.

We also need to address external factors which will impact on our tourism potential including:

- The current economic crisis. This may work in favour of domestic tourism but will have adverse impacts on private sector investment and public sector spending.
- Increasing competition from other destinations both at home and abroad offering a more appealing experience.
- Changing tastes and market demand. If we don't provide the products and experiences people want then tourism will decline.
- The impact of new technology affecting how people plan and organise their leisure time.
- Climate change and the need to embrace sustainability. Increasing real transport costs and growing awareness of the impact of travel on climate change might encourage people to stay closer to home.

Our vision for tourism in North Wales

One of the top 5 UK tourism destinations, internationally known for its natural beauty, dramatic scenery, heritage and distinctive culture. A place you can boast about visiting, easy to get to but rewardingly different. A centre of excellence for adventure sports and the market leader for activity tourism of all sorts. Plenty going on at all times of the year, whatever the weather, with a lively, living culture and thriving arts scene. A place that is often talked about and features in the media for the quality of its food, hospitality and interesting places to stay. A region that is proud of its heritage and culture, cares for its natural assets and welcomes visitors.

A strategy for the future and an Action Plan

We believe North Wales has a positive future in tourism. There is scope to strengthen and expand tourism and the contribution it makes to regional prosperity.

The future lies in capitalising on what makes this area special and stand out from the ordinary – its spectacular natural beauty, the diversity of its landscapes, its distinctive heritage and culture. This is a special place with strong and enduring appeal which should take its rightful place in the top 5 UK destinations - a place which people aspire to visit and isn't seen as second best.

The challenge is twofold - providing a tourism infrastructure and product which matches up to the quality and appeal of the region's natural assets and making our potential audience more aware of the special qualities of North Wales and what it has to offer.

We have produced an Action Plan for the next three years, setting out what we propose to do and outlining responsibilities for taking the strategy forward. TPNW will be responsible for leading on some actions, encouraging other stakeholders to play their part and for monitoring and reviewing progress.

1. Projecting our distinctive strengths

We need to put North Wales firmly back on the visitor map and re-establish it as a Top 5 destination in the UK. We need to put out more compelling and inspiring messages, be less passive in our marketing and more co-ordinated. We need to create a splash and get the region talked about in a more positive way.

- **Market driven.** We will focus marketing activity on the primary markets of UK family holidays, short breaks and activities and also target a series of secondary and niche markets which have potential for growth or where we have strengths. Market needs will determine product development and investment priorities.

- **Stronger impact**. We will project a more coherent message, focus on higher profile projects to create more awareness, and review the marketing mix to rationalise marketing activity placing more emphasis on PR, and web-based marketing activity.

- **Inspiring information.** We will review the TIC network to maintain coverage in key areas, monitor the signage system, ensure there is an effective local information distribution system in place within the region, encourage experimentation with digital media and equip front-line staff to act as information ambassadors.

2. Investing in product excellence

We must stimulate development and investment in the core product to meet the needs of a changing marketplace, exceed our customers' expectations and rival the best elsewhere. Our core product needs to enhance and complement the region's key strengths and be tuned to the needs of the target markets.

- **Quality accommodation.** We will continue to improve the quality of existing accommodation to meet market needs. We will encourage selective new developments to exploit new areas of demand and act as a stimulus to improvement.

- **Diverse attractions**. We will encourage investment and improvement in existing visitor attractions and increase their visibility and exposure to visitors. Additional attractions will not be encouraged unless they satisfy clear criteria.

- **Excellent activities**. We will strengthen and develop centres of excellence, improve the activity infrastructure and fill gaps in the network of routes, support the activity sector to generate more business, and make it easier for holidaymakers to access activities on a casual basis.

3. Providing an outstanding experience

We need to deliver a total quality experience from arrival to departure, making it a delight to spend time in North Wales. Positive first impressions, easy to move around and get the most from the visit, a warm welcome and good service everywhere you go, distinctive and well cared for places to visit.

- **Well-managed places.** We will adopt an integrated approach to destination management, identify tourism hubs which will receive priority treatment and actively experiment with new ways of delivering tourism services and management at the local level.

- **Enriching experiences.** We will develop a richer local experience through making more of events and festivals, exposing visitors to arts and culture, food and shopping and Welsh heritage and culture. The mix of opportunities will vary from place to place.

- **Efficient transport**. We will press for key infrastructure improvements, make transport operators more aware of visitors needs, make more of the heritage and scenic rail network to link attractions, and promote alternatives to the car.

- **Skilled people.** We will review establishing a regional co-ordinator for skills, promote a learning culture across the tourism industry, influence training providers and improve the image of tourism as a job and career.

4. Working together in partnership

Improving working relationships and organisation to harness the energies of the public, private and not for profit sectors, encouraging a climate of co-operation and mutual support, moving tourism up the agenda, seeking more efficient and transparent ways of working and becoming more evidence driven.

- **Effective organisation**. We will agree and more clearly delineate roles and responsibilities for tourism in the region to eliminate overlap and make more efficient use of resources.

- **Better recognition** for tourism. We will communicate the importance of tourism to decision makers more effectively to change attitudes, ensure tourism interests are represented, and build a reputation as a responsible industry and a good neighbour.

- **Sound evidence**. We will undertake research and data collection, fill gaps in knowledge and disseminate and share information to improve decision making and effectiveness.

CONTENTS

1. TOURISM IN NORTH WALES

We begin by reviewing tourism in North Wales, summarising current trends and how it performs compared to other places. This is based on an analysis of existing research, published material and feedback from our consultations[1].

1.1 The scope of the strategy

Our definition of tourism embraces the whole visitor economy - the network of places, people and businesses that service the needs of people visiting North Wales for business and pleasure, from the UK and abroad, on day trips, holidays and social visits.

The strategy covers the whole of North Wales, defined as the 6 counties of Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd and Wrexham. This is slightly wider than the area covered by TPNW as it includes Meirionnydd.

It is a strategy for the region as a whole, rather than a detailed delivery plan for each county, with a focus on issues of strategic importance. Nevertheless, we recognise that the region is not homogeneous and in Section 8 of the report we highlight differences in emphasis between the North West and North East sub-regions.

1.2 Why tourism is important

Tourism is vitally important to North Wales and has ramifications which extend far beyond the economic. It can be a powerful tool and stimulus for regeneration and in some places it can help underpin the social and environmental fabric of places. Tourism is worth supporting because it:

Attracts additional income. Tourism is unlike other service industries in that it operates like an export industry, bringing in money from outside the region which flows into local businesses and households. Many service industries merely recycle money within the economy.

Generates jobs and supports businesses. It is estimated[2] that visitors inject some £1.8bn of additional spending into the North Wales visitor economy. This spending spreads throughout the economy and generates an estimated 37,500 jobs equivalent. Tourism is estimated[3] to account for 7.5% of GVA and 8.7% of employment in North Wales. It is a lifeline to many small businesses which could not survive on the spending power of the local population alone. The Foot and Mouth outbreak of 2001 illustrated how closely tourism is woven into the economic life of rural areas.

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[1] A more detailed review of the state of tourism in North Wales, prepared as part of this process is available on the TPNW website.
[2] North Wales STEAM Initiative. 2007 figures.

[3] Estimates derived from Tourism satellite accounts. VW.

Diversifies the economy, a sustainable sector. Developing tourism does not preclude attracting other economic activity but it adds another string to the bow. Other industries may come and go but tourism is driven by the natural resources of the region and the skills of its people and is sustainable in the long term.

Makes the region a better place. Visitor spending can help support a wider range of social and cultural amenities from pubs to post offices, and buses to bistros. It promotes a positive image of the region and celebrates what's best about it which boosts local pride and helps attract inward investment. It can be a powerful tool for regeneration and actively supports the conservation of our natural, built and cultural heritage. The strategy supports measures which benefit both visitors and the local population.

We recognise that tourism can also bring problems in its wake which is in nobody's long term interest let alone that of the tourism industry. The thrust of this strategy therefore is about creating a responsible and sustainable tourism sector which is here to stay and will benefit North Wales for the foreseeable future.

1.3 Our visitors

Visitor profile

North Wales is an important tourism region. It accounts for 1% of the UK population but attracts 3% of domestic tourism nights. The region accounts for around a third of tourism in Wales, attracting a greater share of tourism than any other region in Wales. In 2007, the region attracted an estimated[4] 8m staying visitors, spending some 35m nights. Day visits, estimated at 17m, add to this total.

UK residents account for 90% of staying visitors, with the vast majority emanating from England. Key characteristics are shown in the table below. Overseas visitors show a slightly different pattern and spend more, stay longer and are less likely to be on holiday. About half come from Ireland, France, Germany and the Netherlands and a further quarter from North America and Australia.

Table 1.1 Staying visitors profile (UK)

- Holiday tourism predominates (82%). Business tourism and VFR are relatively small.
- Half of all holidays are short breaks (1-3 nights) and only 8% were for more than a week. Most are additional holidays as opposed to main holidays.
- There are high levels of repeat business (82%).
- Most arrive by car (82%).
- Tourism is strongly seasonal with 69% of trips occurring in the summer 6

[4] North Wales STEAM Initiative

- months.
- Average length of stay is 3.9 nights. Average spend per trip is £161.
- Half of all trips (46%) and a higher proportion of nights are spent in some form of self-catering accommodation. A quarter are spent in the homes of friends and relatives.
- Over half (56%) are from the ABC1 social classes.
- The majority (88%) come from England, primarily from the North West and West Midlands. Only 9% are Welsh.

Source: UK Tourism Survey, North Wales Visitor Survey 2004.

Key market segments in order of size are: UK adult breaks (45%), family holidays (20%), activity-led holidays (15%), visits to friend and relatives (10%), overseas visitors (10%), and business tourism (5%).

Tourism is not evenly distributed across the region and the nature of tourism also varies reflecting the nature of the product and accessibility. The North West sub-region accounts for around three quarters of the region's staying tourism and 60% of day visits.

Table 1.2 Distribution of tourism

County	% Staying Visits	% Nights	% Spend	% Day Visits
Anglesey	7.7	7.6	7.7	3.0
Conwy	28.7	23.9	25.9	32.9
Gwynedd	38.1	44.1	43.8	23.6
North West Total	**74.5**	**75.6**	**77.4**	**59.5**
Denbighshire	11.8	11.9	11.4	21.9
Flintshire	9.5	9.5	8.0	11.9
Wrexham	4.3	2.7	3.2	7.0
North East Total	**25.6**	**24.1**	**22.6**	**40.8**

Source: North Wales STEAM Initiative 2007

Tourism Trends

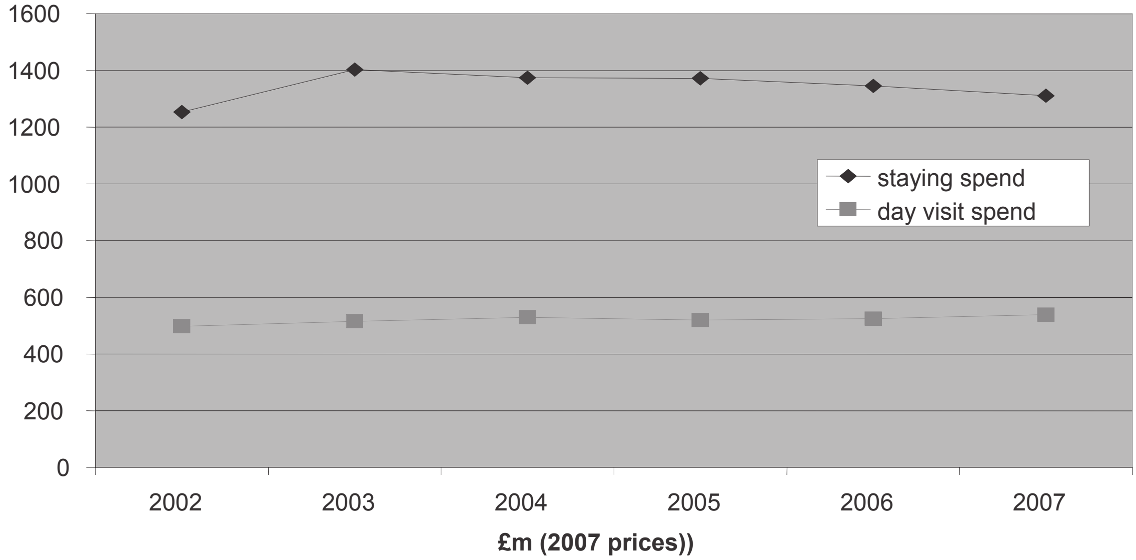
The evidence suggests that tourism has been broadly static in North Wales over the current decade.

The national tourism surveys[5] point to a slight drop in domestic tourism in North Wales since the beginning of the decade whilst overseas tourism appears to have fallen after 2000 but has since recovered to its former level. In fact the region has pretty much reflected the trend across the whole of Wales in this period and its market share of Wales' tourism has remained the same.

[5] International Passenger Survey, UK Tourism Survey

The North Wales STEAM model provides a more detailed picture of year on year trends in the region. This confirms the above picture and suggests that tourism volumes have remained static but visitor spending has fallen in real terms largely due to a reduction in length of stay[6].

Table 1.3 Visitor Spend North Wales



What do visitors think?

Key findings, drawing on various research reports suggest that:

- Wales (and indeed most of the UK) is now largely seen as a place for short breaks and additional holidays by the British.
- The level of knowledge of Wales and what it has to offer is quite poor and overseas markets have even less knowledge as have younger consumers.
- On the positive side Wales is seen as picturesque and unspoilt but people also have concerns about the weather, quality of facilities and how much there is to do there. The language and culture tends to divide people with some seeing it as a positive and others seeing it as off-putting and excluding.

Satisfaction levels amongst those that do visit Wales, however, are reasonably high which suggests North Wales is doing something right. Visitor surveys show that most aspects of the visit are rated as 'good' or above and none score below average. Scores have remained fairly consistent over the three years of the survey. Wales is rated most highly by people living in the UK, by older independents, empty nesters and families, and by people staying

[6] Note that the STEAM data is not directly comparable with statistics obtained from the national surveys IPS and UKTS.

in self-catering accommodation. Young independents and overseas visitors score it less highly.

Table 1.4 Satisfaction scores

	Wales	North Wales
Accommodation	4.0	na
Transport	3.8	na
Visitor attractions	4.1	na
Eating out	3.9	4.0
Friendliness of people	4.3	4.4
Safety/security by day	4.2	4.4
Safety/security by night	4.1	4.3
Feeling of welcome	4.2	4.3
Cleanliness in streets	4.0	4.2
Cleanliness of beaches	4.1	4.1
Cleanliness of toilets	3.6	3.6
Availability of tourist information	4.0	4.0
Standard of signposting	3.9	4.0

Source: Wales Visitor Survey 2006
Scores: 5= excellent, 1= very poor.

1.4 The tourism offer

North Wales covers an area of 2380 sq miles with a resident population of 670k and is about the size of a large English county such as Devon or Norfolk. It is predominantly rural in character, the largest urban areas being Wrexham town (63k), Abergele/Rhyl/Prestatyn (64k) and Llandudno/Colwyn Bay (45k).

Communications are good. The region is relatively well served by road and rail links comparing favourably with other rural destinations in the UK. It also has a major port of entry at Holyhead, a new Anglesey Airport and reasonable links to major regional airports at Liverpool and Manchester (the east of the region is particularly well served in this respect). It can draw on a large local catchment population with 16m living within a 2 hour drive of the eastern border.

Visitor attractions

The quality of the natural environment is the key to the region’s enduring tourist appeal. Almost half the area, 44%, consists of Snowdonia National Park and Areas of Outstanding Natural Beauty (AONB), it has a great variety of unspoilt landscape, some of the most rugged mountain scenery outside Scotland and some 370 miles of coastline with beautiful, clean beaches.

The built environment of the towns and villages of the region is generally less of a draw although the castles and fortified towns of Caernarfon, Harlech, Conwy and Beaumaris are designated as one of the 28 World Heritage Sites (WHS) in the UK.

The tourism offer varies across the region:

The North West is dominated by the mountains and dramatic scenery of Snowdonia. Anglesey and the Llŷn peninsula to the west are more remote and offer some more gentle scenery as does the eastern part of Conwy. It has an extensive coastline with some beautiful beaches particularly on the Llŷn, Anglesey and Cambrian coast. The area is predominantly rural with small towns and villages, some of which have considerable character but many require investment if they are to increase their visitor appeal. Llandudno is a thriving resort and conference town with a distinctive and well–preserved Victorian character.

The North East is a more mixed area, quite urbanised to the north and east with close links to Chester but with wilder more rugged countryside to the south and west. Key elements of visitor interest comprise the Dee Valley and Llangollen, gateway to Snowdonia; the Ceiriog Valley; the Dee estuary a RAMSAR site; the Clwydian Range AONB; the Pontcysyllte Aqueduct and Canal WHS; the traditional coastal resorts of Rhyl and Prestatyn and the small market towns of Ruthin, Denbigh and Mold. Wrexham is a busy town and regional shopping and entertainment centre. The whole area is highly accessible to major centres of population in the North West.

There are 166 formal visitor attractions in North Wales of which half are VAQAS[7] approved and attract in the region of 10m visits a year. North Wales contains a third of Wales' attractions[8] and a higher proportion of the larger ones, although none attracted more than 250k visits. Attendance is highly seasonal with 80% of visits taking place in the summer 6 months. Overall, visitor numbers have remained more or less static in recent years, although some have increased attendance.

There is a strong representation in museums, heritage properties and gardens/country parks (including several National Trust properties). Industrial heritage is also quite prominent and there are 11 heritage railway attractions in the region accounting for c500k visits.

The region has some major arts facilities, some of more than just regional significance. Arts facilities of tourism interest include the Ruthin Craft Centre, Venue Cymru, Oriel Mostyn, Galeri Caernarfon, Oriel Plas Glyn y Weddw, Clwyd Theatr Cymru and the Royal International Pavilion at Llangollen, home to the International Musical Eisteddfod.

Areas where the region has particular strengths or a unique selling point in terms of appeal are:

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[7] VAQAS Visitor Attractions Quality Assurance Scheme
[8] Visits to Attractions 2007. VW

- The **quality of the landscape**, with its mix of mountains, hills and moorland, beaches and coastline. North Wales contains some of the finest and most dramatic scenery in the UK, much of it relatively uncrowded and all contained within a small geographic area.

- The **castles and fortified towns**. The region has the biggest concentration of medieval castles in the UK and some of the best preserved. The fortified towns of North Wales are designated as a World Heritage Site. Pre-historic and Iron Age Forts (eg Dinas Bran) are also well represented.

- **Industrial heritage** is not unique to North Wales but the area has impressive features particularly related to slate working (Llechwedd, National Slate Museum), the extractive industries and the infrastructure that supported it. There are also impressive engineering structures from the Menai Straits Bridge to the WHS Pontcysyllte Aqueduct and Canal.

- The concentration of **heritage and scenic railways** (narrow gauge, tramways and preserved lines) are a charismatic attraction in their own right and link up other attractions. This is a unique cluster of railway attractions with a strong and enduring appeal across all visitor segments. The extension of the Rheilffordd Eryri adds considerably to the possibilities for linked journeys as do the scenic Cambrian and Conwy Valley lines.

- **Outdoor activities**, ranging from gentle countryside pursuits, golf and fishing to extreme adventure sports have a long association with the region. Almost every conceivable activity is on offer and the region is home to national centres of excellence for mountaineering (Plas y Brenin), sailing and watersports (Plas Menai), whitewater rafting and canoeing (Canolfan Tryweryn) and mountain biking (Coed y Brenin).

- **Welsh language and culture**. Parts of the region are strongholds of the Welsh language and there are significant sites, monuments and associations of importance for Welsh culture (eg Nant Gwrtheyrn).

- **Food and drink**. This is not an immediate association with North Wales but in fact the region has strong representation in the Good Food Guide (26 entries cf Devon 25, Cumbria 23, Cheshire 7) and a good network of local food producers and products and local festivals and events that could be capitalised upon. This is an area that has shown some improvement in recent years.

The accommodation stock

Table 1.5 shows the distribution of bedstock in the region. This highlights the relative importance of the caravan and holiday park sector although it is not as dominant as the table suggests as it achieves relatively low occupancies outside the main season.

Table 1.5 Accommodation Stock – Bedspaces

	Serviced	%	S/Catering	%	Camp/ Caravan	%	Total
Anglesey	2237	7	6645	37	28720	19	37602
Conwy	12642	42	2240	12	54593	36	69475
Gwynedd	8817	29	6549	36	19868	13	35234
North West total	**23696**	**78**	**15434**	**85**	**103181**	**68**	**142311**
Denbighshire	3245	11	2114	12	24241	16	29600
Flintshire	1778	6	118	1	21571	14	23467
Wrexham	1488	5	510	3	2272	2	4270
North East total	**6511**	**22**	**2742**	**16**	**48084**	**32**	**57337**
TOTAL	30207	100	18176	100	151265	100	199648

Source: TPNW, local authorities 2007-8 *

Serviced accommodation is dominated by small independent hotels, guesthouses and B&Bs. The average size is less than 20 bedspaces with the larger hotels being concentrated in Llandudno and in the North East. There are relatively few branded hotels and national chains in the area with the exception of the budget chains which have appeared in the past twenty years. Demand is quite seasonal with a summer peak. Average room occupancies for hotels are quite low (59%) although on a par with the Wales average and higher graded and larger hotels do better. Average occupancies for the guesthouse and B&B sector are lower (46% and 34%). Serviced occupancies have shown a modest increase over the past 5 years.

Self-catering accommodation is a mixture of second homes and small complexes, many let through agencies. Comparison with other areas suggests that parts of the area may be underprovided with high quality self-catering accommodation. Again, the demand is quite seasonal. Average occupancy is 61% (90%+ in July/August) and higher than the Wales average.

Caravans and camp sites are largely independently owned although some of the bigger holiday companies such as Bourne Park Resorts (Haven) are represented. There is a strong element of second home ownership on many sites. Static caravan parks achieve occupancies of 59% across the summer season, rising to 80% in August. There has been an increase in average occupancy in recent years.

There are no reliable statistics to make a comparison over time as to changes in supply. Overall, it seems likely there has been a net loss of accommodation capacity but a gradual improvement in standards over the past decade. Feedback suggests there has been:

- A contraction in traditional small hotels, guesthouses and B&Bs.

- Limited new hotel development, primarily the budget chains (Porthmadog, Caernarfon, Holyhead, Rhuddlan) but a handful of 4 star business hotels (The Quay, Deganwy; Ramada Plaza, Wrexham).
- Significant upgrading and improvement of existing serviced accommodation including some new small boutique hotels.

- Investment and upgrading to caravan parks, particularly in terms of site facilities.

Looking at the incidence of graded properties it appears that North Wales has a lower proportion of 4/5 star properties in the serviced and self-catering sectors than Wales as a whole.

1.5 Comparing North Wales to other places

To give a measure of how North Wales stacks up against the competition we have compared[9] North Wales to four other destinations – South West Wales, Cumbria and the Lake District, Cornwall and Finistere in western Brittany. These areas are similar in size and nature of appeal and are generally considered to be successful destinations.

Our conclusions can be summarised as follows:

North Wales stands up relatively well compared to the benchmark destinations. On paper the region is well placed to compete:

- It gets less rainfall than the other destinations, and has an average amount of sunshine and average summer temperatures.

- It has a larger catchment population on its doorstep. Road and rail access is comparable to the other areas.

- The tourism offer is strong and more varied than in the other areas offering mountain scenery and coast with some unique features and icons and a higher incidence of designated landscapes, world heritage sites and Blue Flag beaches.

- It has more visitor attractions and a greater number of larger attractions. It can hold its own in terms of quality restaurants.

- The area has good and positive coverage and exposure in guidebooks and on the web and compares favourably with the other areas.

- Business tourism is marginally better provided for than in the benchmark areas.

In terms of the volume of tourism North Wales generally outperforms South West Wales but attracts lower levels of tourist activity than Cornwall, Cumbria

[9] A detailed Benchmarking report is available on the TPNW website.

and Finistere. There is a tendency for visits to be shorter and for spend per head to be lower although it is stronger on day visits. In other respects tourism profile appears to be very similar.

The serviced accommodation stock is of similar size to the other areas but North Wales appears to have a smaller stock of self-catering accommodation and a much larger stock of caravan holiday parks and camp sites.

Given the positive results above it is perhaps surprising that North Wales doesn't perform better than it does. It suggests that perhaps the totality of the experience on the ground is less positive than it might be or that perceptions of North Wales lag behind the reality. We believe that North Wales has lost ground over the years and now lacks the aspirational appeal of Cornwall, Cumbria and Brittany.

1.6 The organisation of tourism in North Wales

Many organisations have an interest in the future of tourism in the region. Those with a main responsibility include:

- **Visit Wales**, now part of the Welsh Assembly, and responsible for marketing Wales as a whole, providing expertise and market intelligence and being the voice for tourism in Government.

- **Tourism Partnership North Wales**, funded through VW, has a strategic role in co-ordinating activity on tourism across the region and is involved in identifying investment priorities and pan-regional marketing activity. It works closely with the trade and public sector partners.

- **Local authorities** are all active in tourism, provide essential facilities and infrastructure including TICs, and undertake destination marketing activity in association with TPNW and VW working through the five tourism Marketing Areas[10]. Snowdonia National Park Authority also plays a significant role in providing facilities for visitors.

- **Tourism enterprises** market their own facilities and contribute to joint activity through tourist associations and participating in marketing area and TPNW campaigns. North Wales Tourism is an independent trade body providing marketing and other services on behalf of its members.

The above division of responsibilities has evolved over time and may need to change in future to deliver the strategy. VW is currently reviewing arrangements for destination management and marketing in Wales at the sub national level and this may have ramifications.

[10] Marketing areas are Isle of Anglesey, Snowdonia Mountains and Coast, Llandudno and Colwyn Bay, Rhyl and Prestatyn, North Wales Borderlands.

Key issues and concerns thrown up by our consultations are:

- Resource constraints in the light of the current economic climate make it difficult to sustain public sector spending on tourism at current levels.

- A reduced budget and influence for Visit Wales will put Wales at a disadvantage.

- Confusion and a lack of clarity about tourism roles and responsibilities within the region and a feeling that resources could be used more effectively.

- A concern that tourism doesn't have the profile it deserves amongst decision-makers, politicians and the local population.

- Not enough emphasis placed on destination management and a concern that declining resources may reduce the quality of the visitor experience in North Wales.

2. CHALLENGES FOR THE FUTURE

The future shape of tourism in North Wales and the consequent room for manoeuvre will be determined by a range of factors not all under our control. In this section we look at what is happening in the outside world and also review the strategic context within which tourism has to fit.

2.1 External factors

A weakening economy and recession

After a long period of economic growth, the UK and other major world economies are facing one of the harshest recession periods on record and considerable uncertainly. This began in 2007 with increases in oil prices, followed by the collapse of the US sub-prime mortgage sector leading to a crisis in the international banking sector and a significant fall in the value of Sterling. At best this is forecast to lead to negative economic growth across developed economies lasting until 2010.

As a result, the vast majority of the population will have less disposable income resulting in a fall in consumer spending with potentially extremely negative effects on the tourism industry. The World Tourism Organisation (UNWTO) has recently reduced its growth estimates for international tourism to between 0 and 2% in 2009.[11]

It is not yet clear how this will impact on tourism in North Wales. A weak pound and economic uncertainty may encourage more UK residents to holiday at home and make Britain more attractive to overseas visitors. There are some signs that flows abroad are diminishing. On the other hand it may mean that the domestic market cuts back on secondary holidays and short breaks to safeguard the main overseas holiday. Nevertheless, this clearly represents an opportunity for the domestic tourism sector.

The current economic crisis will almost certainly mean that it will become harder to attract private sector investment to peripheral areas than before and public sector spending will almost certainly come under pressure as the government seeks to reduce public debt. This is bad news for North Wales.

A changing population

The UK population is more or less stable in terms of numbers (0.7% annual growth in 2006-2016[12]) but in common with most of western Europe it is ageing. Over the next ten years most age groups will show a modest increase, apart from children aged 0-14, which could hit the family market. The big change in this period and beyond will be a 20% increase in the over 65 age group. Traditionally this group has been more likely to take holidays

[11] A recent study from Deloitte commissioned by VB has made some economic forecasts for tourism using an economic model. This suggests a decline in real spending in the short term but growth in the longer term.
[12] Population projection by Government Actuary / Office of National Statistics. 2006 based projection.

and breaks at home and has been important for North Wales, but patterns are changing and an age group that has grown up with holidays abroad is reluctant to kick the habit.

Other changes we can expect to see will be:

- A more ethnically diverse population.

- More single person households, fewer traditional family households.

- More of the population will be classified as ABC1 but increasing unemployment and reduced disposable income may constrain holiday choice for some.

- Better educated and more mobile households.

- The probability that many people will have to work longer to fund their retirement.

Changing lifestyles

Attitudes towards holiday taking and use of leisure time have changed considerably over recent years as consumers have become more sophisticated and experienced. Changes noted by commentators such as the Moffat Centre, Henley Centre and others include:

- A shift towards consumers who are ‘cash rich, time poor’ – leading to shorter more intensive holidays and added value.

- The search for authenticity and distinctiveness as everywhere begins to look the same. This has driven people further and further afield.

- The search for well-being and escape from a world where people are full-on, all the time. The spiritual quality of an experience is becoming more important.

- A fragmented market where people increasingly seek tailor-made experiences to satisfy their own particular needs and predilections – the ‘me’ generation.

- Discerning, sophisticated and ‘streetwise’ consumers who are widely travelled, know what they want, pride themselves in getting value and are IT fluent.

- Increasing importance of brands, customer reassurance and third party recommendation in an era of seemingly limitless choice, fuelled by the internet.

Irrespective of the recession we believe these trends will still continue to influence travel decisions, although there will be more emphasis on value for money.

Climate change in a turbulent world

The environment is now firmly on the political agenda and there is an increasing focus on climate change throughout government and business communities. Amongst consumers this is also reflected in a growing trend towards 'ethical living' and concepts such as 'slow tourism'. The ramifications of this on tourism are likely to be:

- Increasing real transport costs and growing awareness of the impact of travel on climate change might encourage people to stay closer to home.

- Sustainable transport options to and from destinations will become more important, which will mean a stronger role for public transport.

- There is a growing interest in green and ethical choices which is beginning to have an impact amongst a section of consumers. People want to feel good about their choices.

- It is possible that governments will enforce economic measures to mitigate climate change which will result in increased costs for businesses.

- The global impact of climate change could result in political unrest and environmental disasters which may deter people from travelling.

- North Wales may see a warmer climate as a result of climate change, although more unpredictable weather is the likely scenario. Flooding has been identified as a serious threat to coastal and inland areas in North Wales.

Technological advancements

Technology continues to move on apace and the internet has had an enormous impact on tourism. It is now the preferred route for booking and information for many people and has led to shorter booking times and a desire for tailor-made experiences. New ways of accessing and sharing information through social networking sites such as Facebook are by-passing traditional routes and information can now be accessed more readily on the move via mobile phones and 'sat nav'. Meanwhile the internet has made it easier for even the smallest enterprise to reach distant and niche markets but as a result the marketplace is increasingly crowded. It becomes more difficult to make yourself heard.

Increasing competition from destinations

Low cost airlines, the growth of the internet and a period of prosperity have meant that over the past decade the world has become more accessible to a larger number of people. The choice of places and experiences is becoming ever greater, both at home and abroad, and these are eating into traditional markets and setting new benchmarks. In this environment, simply keeping position and retaining market share becomes a challenge let alone breaking into new markets and developing new business.

Implications for the future

In the short term there is a real opportunity for North Wales to capitalise on the current economic situation and a renewed interest on the part of the domestic market in holidaying at home. The market is more receptive to this message than for many years. It means providing value for money and ensuring that the experience of visiting the region is a positive one.

In the longer term, the message is that success will lie in:

- Understanding the market and changing consumer requirements, not selling to yesterday's consumer.
- Raising sights and looking outside the area to match and exceed what the competition is offering.
- Continuously investing in and upgrading the product and infrastructure.
- Not taking for granted that consumers know what North Wales has to offer.
- Providing reasons to visit and triggers.
- Exploiting new media and making it easy to access information, and arrange last minute, flexible packages tailored to the individual.
- Offering a range of quality experiences to delight, excite and enthuse.
- Creating places that are distinctive, authentic, and enriching places to visit.
- Being seen to embrace issues about climate change and sustainability.

2.2 The strategic context

Tourism has to take account of what is happening in related areas. Some key themes which run through other policy documents and strategies are highlighted below:

Giving preference to value over volume. The respective Wales Spatial Plan (WSP) Area Statements and other documents suggest that what is needed in the area is sustainable, year–round, high quality tourism with an emphasis on attracting higher value segments.

Providing more consistent quality. This is about the Integrated Quality Management of destinations and raising the lower levels of facility standards to a more consistent quality, one of the 5 central challenges of Achieving our Potential.

Placing sustainability at the core. Sustainability is referred to in almost all policy documents and is a driver of the WSP. It means getting a balance between economic, social and cultural objectives, as set out in the WAG Sustainable Tourism Framework.

Making the most of the natural environment. This comes through particularly strongly in the WSP Area Statements, which see this as a driver for tourism and also tourism as a force for deriving economic benefit from this key strength of all three WSP Areas.

Securing effective private sector engagement. Partnership is a key policy theme (in Achieving Our Potential and elsewhere). A particular challenge is seen as getting the structures right for maximising private sector engagement.

Reflecting the Wales brand. A clear requirement of Achieving Our Potential is reinforcing the Wales brand at all levels. The implication is that North Wales and its constituent parts should not compete with the Wales brand but seek to gain from it as well as support it.

Developing more activity tourism. All relevant policy documents, from One Wales downwards, point to a continuing emphasis on activities as a particular opportunity for Wales – relating to the health agenda as well as providing an economic opportunity through tourism.

Making more of marine tourism and coastal activities. In recent years this has emerged as an important theme in Wales, particularly articulated through the Coastal Tourism Strategy which has fed into the WSP. This Strategy spells out opportunities including berths in harbours, marina development, cruise tourism and nature-based tourism.

Pursuing cultural themes. The Review of Cultural Tourism (Visit Wales) calls for a much more aggressive promotion of culture as a component of tourism, and sees this as a missed opportunity for Wales. This is not just about Welsh culture *per se,* which is part of it, but also about all aspects of heritage, arts and living culture and relates to promotion of local distinctiveness.

Maximising opportunities from events. Events are seen as a particularly important aspect of cultural tourism but also feature more widely in policies. They provide an opportunity to spread tourism in space and time. This includes winning more events for Wales as well as encouraging home grown sustainable events, however proliferation, duplication and displacement must be avoided.

Pursuing regeneration. This is quite a general theme found in a number of policy documents. It relates to both rural and urban areas. Particular attention is paid to resort regeneration in the Coastal Tourism Strategy, which sees tourism as just being one part of a multi-sector approach to development.

Considering the implications of climate change. This is increasingly seen as a strategic issue, providing possible but largely unknown opportunities but also threats in terms of flooding and exacerbated coastal erosion. Climate change is seen as a key driver of aspects of environmental/sustainability policy, for example with respect to transport.

Addressing labour and skills shortages and providing quality jobs. Inter-related HR issues are important in the WSP and other policy documents. Requirements such as career promotion, skills needs assessment and training relevant to the needs of the sector, continue to be mentioned.

Strengthening access. A key challenge in Achieving Our Potential but also features in most other policy documents. It mainly relates to physical access – continuing to improve transport links, but with an eye also to sustainability (public transport, cycling and walking links). The theme is also a broader one – covering improved access through information, ICT, bookings etc.

Developing clusters/ hubs. Some policy documents point to the identification of focal points for development and the benefits of enterprise clusters. This can be seen in the WSP in relation to strategic hubs and key settlements. It is also an approach advocated in relation to tourism – this was picked up particularly by the Inland Tourism study for Central Wales (see below).

2.3 Making the most of funding

Wales is fortunate, compared to much of England, in that the tourism sector still has access to sources of public sector and EU funding. This is even more important in the current economic climate and provides a real opportunity to stimulate investment in the product and infrastructure and test new approaches. The strategy has an important role to play in providing a context for funding applications and identifying priorities.

Key opportunities include:

- A range of relevant programmes under different WAG Departments (including VW) which touch on tourism.

- Strategic Regeneration Areas designated in Môn a Menai, North Wales Coastal (Colwyn Bay, Rhyl, Prestatyn).

- The Single Investment Fund, able to provide financial support for businesses of all sizes and linked to business support services.

- Various EU funding programmes including Convergence Programme,[13] Competitiveness Fund, Interreg and the Rural Development Plan Programme.

[13] Not available in Flintshire and Wrexham.

3. THE STRATEGY FOR TOURISM

In the light of the preceding analysis this section sets out a vision and general direction for tourism over the next five years. This is supported by the feedback received from the consultation process.

3.1 What we want to achieve

Tourism is not just an end in itself. Our overall aim is to:

Develop a successful and sustainable tourism industry in North Wales which generates wealth for the region, draws on and sustains its special environment and culture, contributes to quality of life and brings enjoyment to visitors.

This means:

- Raising awareness of the importance of tourism to the region.
- Creating and supporting worthwhile jobs and business opportunities.
- Benefiting the wider economy of North Wales through strengthening the image of the region and linkages with other sectors of the economy.
- Drawing on and helping to sustain North Wales' special natural assets and culture.
- Contributing to the vitality of the region and quality of life for people living and working in the area, and engendering local pride.
- Providing an exceptional experience for all visitors which reflects well on North Wales and promotes return visits.

Above all we want to establish a thriving, innovative and profitable tourism sector which will continue to deliver these benefits for generations to come.

3.2 Where are we now

Tourism is important in North Wales. There is a long history of welcoming visitors to this area, it supports 37,500 jobs and accounts for a third of Wales' tourism. Other industries may come and go but tourism, properly managed, can survive and flourish into the future. It is a sector with scope for growth.

North Wales has some significant strengths. It has wonderful natural assets in its countryside, mountains and coast and relationship between them, a distinctive heritage and culture, a good range of attractions, unrivalled scope for activities and an improving product, a large population on its doorstep, and a significant tourism sector. Those who do visit are loyal and show high levels of satisfaction.

However, there are also some weaknesses and areas of concern. The region is heavily dependent on the domestic holiday market which is highly seasonal. Tourism is static and has shown some decline in value, the quality of the product and visitor experience is still patchy, it is difficult to attract new investment and the evidence suggests that the region is punching below its weight and failing to attract new visitors.

Strengths • Good accessibility and a strong population catchment (16m) to the east • Snowdonia as a major recognised icon • Strong natural assets of beaches/coast, countryside and mountains • Variety of interest across the region • Good range of man-made visitor attractions • Some themes and assets which are unique or very strong – castles, narrow gauge railways, industrial heritage… • A leading destination for activity and adventure sector with centres of excellence • Llandudno, an attractive premier resort • Improving quality of food and retail offer • Investment in quality accommodation • Visitors that do come show high levels of satisfaction • Value for money • Ongoing support from local authorities
Weaknesses • Vulnerability due to overdependence on one market and the caravan sector? • Weak or poor image in the marketplace despite attractions on offer? • Difficulties of attracting private sector investment. Lack of new hotels and aspirational products • Planning constraints hinder development • Seasonality hinders investment in product and service quality and makes for less attractive jobs • Feeling that this is yesterday's product, certain lack of vitality and ambience? • Quality and appeal of towns and villages is mixed and in some areas poor • Poor or weak image apart from Snowdonia and outdated resorts • Concerns about weather, quality of facilities, language, friendliness of welcome from non visitors • Still some ambivalence about tourism locally and whether this is a worthwhile sector

If tourism is to continue to flourish and deliver for the region then these weaknesses will need to be addressed. We will also need to take account of other external factors which will affect the potential for tourism. Key challenges include:

- The current economic crisis. This may work in favour of domestic tourism but will have adverse impacts on private sector investment and public sector spending.
- Increasing competition from other destinations both at home and abroad offering a more appealing experience.
- Adapting to changing tastes and market demand. If we don't provide the products and experiences people want then tourism will decline.
- The impact of new technology affecting how people plan and organise their leisure time.
- Facing up to climate change and becoming more sustainable.

3.3 Our vision for the future

We believe North Wales has a positive future in tourism. There is scope to strengthen and expand tourism and the contribution it makes to regional prosperity.

The future lies in capitalising on what makes this area special and stand out from the ordinary – its spectacular natural beauty, the diversity of its landscapes, its distinctive heritage and culture. This is a special place with strong and enduring appeal which should take its rightful place in the top 5 UK destinations - a place which people aspire to visit and isn't seen as second best.

The challenge is twofold - providing a tourism infrastructure and product which matches up to the quality and appeal of the region's natural assets and making people more aware of the special qualities of North Wales and what it has to offer.

Whilst the current economic situation poses a threat to tourism it also provides a real window of opportunity to re-establish North Wales as one of the UK's premier and most desirable destinations.

Our vision for tourism in North Wales

One of the top 5 UK tourism destinations, internationally known for its natural beauty, dramatic scenery, heritage and distinctive culture. A place you can boast about visiting, easy to get to but rewardingly different. A centre of excellence for adventure sports and the market leader for activity tourism of all sorts. Plenty going on at all times of the year, whatever the weather, with a lively, living culture and thriving arts scene. A place that is often talked about and features in the media for the quality of its food, hospitality and interesting places to stay. A region that is proud of its heritage and culture, cares for its natural assets and welcomes visitors.

Realising this vision will deliver:

- Growth in volume, value and local benefit
- More first time visitors to refresh the market
- A broader market base to counter cyclical variations
- Increased visitor satisfaction
- An extended season
- Better jobs and more retained value
- Higher status and acceptance of tourism locally

3.4 Strategic objectives

Achieving the aims and vision will require a significant and concerted effort from all those involved in the region's tourism sector. To focus this action we have identified 4 strategic objectives which are essential pre-requisites for achieving our goals. The actions required under each of these are set out in detail in the next chapters.

The strategic objectives are as follows.

1. Projecting our distinctive strengths
2. Investing in product excellence
3. Providing an outstanding experience
4. Working together in partnership

1. Projecting our distinctive strengths

We need to put North Wales firmly back on the visitor map and re-establish it as a Top 5 destination in the UK. We need to put out more compelling and inspiring messages, be less passive in our marketing and more co-ordinated. We need to create a splash and get the region talked about in a more positive way.

Key priorities are becoming more **market driven**, creating a **stronger impact** and providing **inspiring information**.

2. Investing in product excellence

We must stimulate development and investment in the core product to meet the needs of a changing marketplace, exceed our customers' expectations and rival the best elsewhere. Our core product needs to enhance and complement the region's key strengths and be tuned to the needs of the target markets.

Key priorities are providing **quality accommodation**, **diverse attractions** and **excellent activities**.

3. Providing an outstanding experience

We need to deliver a total quality experience from arrival to departure, making it a delight to spend time in North Wales. Positive first impressions, easy to move around and get the most from the visit, a warm welcome and good service everywhere you go, beautiful and cared-for places, plenty to explore and a sense of being somewhere different.

Key priorities are creating **well-managed places**, **enriching experiences**, **efficient transport** and **skilled people**.

4. Working together in partnership

Improving working relationships and organisation to harness the energies of the public, private and not for profit sectors, encouraging a climate of co-operation and mutual support, moving tourism up the agenda, seeking more efficient and transparent ways of working and becoming more evidence driven.

Key priorities are getting **better recognition** for tourism, establishing **effective organisation** and relying on **sound evidence**.

3.5 Core principles

Core principles which run through all the strategic objectives and have shaped our recommendations are set out below.

Sustainability: This is a theme which runs through all the strategies in the region and is strongly supported by the Welsh Assembly. It means ensuring that tourism generates local economic benefit and is viable, is responsive to local communities and their concerns, sustains rather than degrades the environment and provides a good experience for the visitor. A key element of sustainability is trying to get more local value and benefit from tourism. Slow Tourism initiatives should be pursued with the Rural Development Plan partners.

Quality: All the evidence suggests that improving quality at all stages of the visitor journey is the key to success in tourism. Quality of service and welcome is as important as physical facilities in this respect. This is not the same as luxury, it is as relevant and important in a youth hostel as a 5 star hotel. The aim is to do what you do well and provide value for money. Key to improving quality is understanding and responding to what customers want.

Distinctiveness: A strong motivation for tourism is the search for somewhere different. This is increasingly hard to find in a world of global brands and creeping homogenisation. North Wales already has quite a strong sense of place and distinctiveness and it is important that this is reflected and enhanced in future development and the way in which the region is presented. Used in the right way this is a powerful asset.

Innovation: Resources are under pressure and it is a difficult economic climate. If we are to effect change we need to be bolder and braver in reviewing how we do things, deciding on priorities and looking for new approaches. We need to do more with less through a clearer definition of roles and pooling of resources.

The following sections explore what the four strategic objectives involve in more detail and highlight priorities for action.

4. PROJECTING OUR DISTINCTIVE STRENGTHS

We need to put North Wales firmly back on the visitor map and re-establish it as a Top 5 destination in the UK. We need to put out more compelling and inspiring messages, be less passive in our marketing and more co-ordinated. We need to create a splash and get the region talked about in a more positive way.

Key priorities, discussed in more detail below, are:

- Being **market driven**
- Creating a **stronger impact**
- Providing **inspiring information**.

4.1 Market driven

Aim

Focus efforts on those market segments which are the best fit for North Wales, offer potential for growth or enable us to satisfy wider objectives. Ensure product development and investment is geared to meeting the needs of these target markets.

The potential

We want to retain existing core markets but also move to a situation where we attract some higher value segments, have a more diversified tourism base and a more even demand throughout the year. Changing the market mix is not something that can happen overnight. Markets which offer the best future potential for the region as a whole are highlighted below. Individual businesses and areas within North Wales destinations may well have different priorities.

VW has identified 'independent explorers' within 2 hours drive as the key growth market for Wales. These are further subdivided into active, family and personal explorers. Research shows that these people account for a high proportion of Wales' visitors, are most susceptible to the Visit Wales message and exhibit the highest levels of satisfaction. Independent explorers are looking for quality accommodation, are in search of new experiences, are more up-market and independent in mind and action. We think this makes sense but at the same time we must not neglect our traditional holiday market where the region has an enduring appeal.

Priorities for action

►Re-establish North Wales as a Top 5 destination in the UK, putting out more compelling and inspiring messages.

►Primary market segments for North Wales, which are relevant across the region will continue to be UK family holidays, UK short breaks and activity holidays. These are relevant to most parts of the whole region although there may be a different emphasis and balance in different places. We must ensure the product meets their expectations.

Primary Market Segments	Requirements
UK family holidays: Value for money, fun-orientated holidays with younger kids, often involving larger family groups. Main and additional holidays concentrated in summer and school holidays. Not glamorous but a core market for the region. Although this market has been static in recent years the current economic climate provides an opportunity. North Wales is ideally suited to grow this market if it can refresh its appeal and overcome complacency. Nostalgia can be a powerful motivation.	Beaches, good value s/c accommodation, plenty to do, activities involving the family, wet weather proof, good value places to eat. Security, familiarity, and ease of access are important considerations.
Short breaks Often older couples or empty nesters, on holidays and breaks of less than a week (weekends and midweek), usually involving general interest sightseeing, cultural tourism, soft activities and exploring a wide area. Most prevalent in the shoulder periods and help extend the season. Typically independent explorers, and higher spending per night than families.	Range/choice of quality accommodation from boutique hotels to s/c cottages, good places to eat, shops, cultural activities, places to visit, things to do off-season, something different, special or distinctive, events, ease of travelling around.
Activity and special interest holidays Holidays and short breaks where an activity or interest provides the dominant, but not necessarily the only reason for the visit. Ranges from extreme sports to more gentle pursuits and not necessarily an overlap between activity enthusiasts. DIY sector is bigger than organised groups. Wide age range of participants and all social classes with long seasonal spread depending on activity. Mix of activities varies across the region - NW more rugged, NE more gentle pursuits but all areas have something to offer. Potential to grow this area, and use activities to grow general leisure trips.	Good facilities, range of different activities, aimed at different levels of experience. Range of accommodation needed but good food and quality facilities expected. Safety assurance. Includes canal holidays in NE where WHS designation offers scope for growth.

►**Secondary market segments** for North Wales are business tourism, overseas tourism, visiting friends and relatives and day visitors. These tend to be smaller in volume, are less universally applicable but are key to achieving wider objectives such as extending the season, and increasing spend.

Secondary market segments	Requirements
Business tourism Not a big sector for NW but important because it is high spending, counter cyclical and supports hotel development. Some impact right across the region but most significant in Llandudno, a major conference centre, and in NE where business tourism is an important element.	Range of hotel accommodation from budgets to 5 star. Meeting rooms, broadband access, business centres, early breakfasts. Conference centres and facilities in a variety of venues.
Overseas tourism Modest impact in region but higher spending and less seasonal. However difficult and expensive to reach. Best done by working with and through VW and other partners, such as carriers. Not a priority. Irish market worth exploring further. A sub-market is the large numbers of overseas residents who have moved from Wales or can trace Welsh Ancestry. Encouraging people to return to their roots has been successfully tried elsewhere. Perhaps most effectively pursued at a VW level.	More likely to use serviced accommodation. Ease of access and movement.
Visiting friends and relatives Relatively small due to low population but VFR trips can act as a stimulus for visits to attractions etc. Primarily a role for local authorities in keeping local residents informed. All year round market.	Interesting places to visit. Shops, pubs and good food.
Day visitors Huge market for North Wales, especially in the North East and very important for visitor attractions.	Beaches and coast, accessible countryside, visitor attractions of all sorts, easy access by car and train.

►**Niche segments** are of more limited interest but provide some opportunities in some places. They include the Welsh speaking market and cruise tourism.

Niche segments	Requirements
Cruise market Niche market but of some interest to Anglesey. Can offer some benefit to hinterland via excursions. Important niche market with positive economic impacts for Anglesey and North West Wales. Benefits for destinations, attractions and activities within a 2-3 hour drive of Holyhead. Capitalise on the	Facilities to berth with easy shore access. Places to visit that accept groups within 2-3 hours drive.

growth in British Isle cruise iteneraries, and the growth in the demand of cruise products.	
Welsh market Small market and relatively untapped at present. Welsh know as little of their country as the English. Scope for encouraging more Welsh to holiday at home and to tap into growing interest in Welsh history, culture and language.	Same as for UK holiday and break takers. Welsh Language, arts, heritage and culture.
Canal holidays Important niche market for NE Wales with growth potential in context of WHS nomination.	

4.2 Stronger impact

Aim

Generate a greater awareness of North Wales and its destinations in the marketplace as a place worth visiting. Getting messages across to consumers in a more cost effective way.

The potential

North Wales has strong natural assets, some distinctive selling points and lots to see and do in a small area. It compares favourably with other premier UK destinations. However, it is a mature destination and over the years its public profile and image has slipped. There is a danger that this will slip further as marketing and advertising budgets come under pressure.

We must make more effort to raise the profile of North Wales in the target markets if we are to maintain and grow tourism in future. This means capitalising on and supporting the campaigns mounted by Visit Wales to raise awareness of Wales as a whole. It means seeking to undertake more joint activity on a pan-regional basis to actively stimulate interest in the region - at present too much of marketing activity is passive. It means working smarter to create a bigger impact with the limited resources at our disposal.

Priorities for action

►**Projecting a coherent message.** We are not recommending that North Wales is necessarily marketed as a single entity but there is merit in linking the promotion of individual destinations into a wider whole. We will make more impact if we are all singing from the same hymn sheet. All marketing materials aimed at stimulating interest in North Wales should reflect the brand guidelines issued by VW and TPNW ie Human, Real, Magical, Dramatic and should embody messages to reflect the North Wales market positioning ie The Great Outdoors.

Key messages are:

- Ease of access to and within the region.
- The range of things to do and see whatever the weather.
- The best place for activities and activities for everyone.
- Familiar but interestingly different. A distinctive place – defined by dramatic landscape, heritage and culture.
- Modern comforts but value for money.
- A warm welcome.
- Icons and hooks – Snowdonia, Chester, World Heritage Sites etc.

Marketing areas should be less boundary conscious, cross-sell each other and make it clear they are part of a wider area of North Wales which extends the offer. Tourism enterprises should project what there is to see and do in the wider area.

►**Promoting stars and increasing visibility.** We need to make people sit up and take more notice of North Wales through putting more weight behind big, interesting and eye-catching initiatives which have the potential to generate a positive image and awareness of the wider region. The Giants North Wales promotion is an example of this. Areas to pursue:

- Developing and promoting the centres of excellence, particularly for outdoor activities.
- Make more of the unique features such as castles and narrow gauge, heritage and scenic railways which nowhere else has in such profusion.
- Publicising award winning hotels and restaurants, local food and local talent.
- Making capital from the Pontcysyllte Aqueduct and Canal Corridor WHS designation.
- Exploring the potential of the Gwynt y Môr development as an iconic landmark and signpost to the future.
- Working with a handful of events or festivals to create some nationally recognised attractions.
- Exploring the potential for creating a new iconic/eye-catching attraction.
- Utilising gateway/boundary markers to highlight and differentiate the region.

►**More effective communication.** We need to review the current marketing mix to make better use of existing resources and reflect changes in how consumers are accessing information. We need to avoid fragmentation of effort with small scale initiatives which achieve very little impact. We must:

- Place more emphasis on PR activity and generating third party recommendation which is by far the most powerful way to reach consumers given the lack of marketing budget. Consideration should be given to creating a much stronger and better resourced regional PR function.

- Get to grips with a digital age. There is a lot of uncertainty about how to exploit this but also an opportunity to reach new markets, cost effectively. VW and TPNW have an important role to play here in promoting good practice, current content, and encouraging adoption and experimentation.
- Rationalise print. The demand for print is unlikely to disappear and will continue to remain important for local information distribution but it will become less important for main destination guides. There is scope for further rationalisation with more enquiries being channelled to websites. Resource constraints will drive this.
- Establish a single web portal for North Wales which is capable of exciting interest in the region but then directs people off to other locations. The multiplicity of North Wales sites is confusing.
- Undertake more active promotion to drive people to websites. Websites are essentially passive tools and good at information delivery but are useless unless someone looks at them.
- Undertake fewer but better resourced marketing campaigns and at a level which realises economies of scale. There are too many small promotional initiatives at present. Further rationalisation of marketing areas would help.

4.3 Inspiring information

Aim

Become more effective at getting information into the hands of visitors to make them aware of the huge range of things to do and see in the region and delivering a memorable experience.

The potential

This is primarily about servicing visitors within the region. Whilst some arrive with prior knowledge and a list of things to do more will plan their activities during their stay. Decisions are often weather dependent and last minute. Good visitor information makes people aware of the full range of things on offer, provides exposure for lesser known places and helps people choose and locate where to go. It is vital to driving business to many tourism enterprises.

Information can be delivered in lots of different ways through different channels - what works best will vary according to the type of visitor and the situation. We need to ensure that we are making the most cost effective use of these to communicate with visitors across the region.

Priorities for action

►**TICs.** There are 22 of these at present, largely operated and funded by local authorities, and there are increasing pressures to rationalise this network. We must ensure we maintain a core network. Priority must be given to maintaining full service TICs in key tourism hubs and points of interest where there are high tourist flows and which offer the best opportunity to contact and influence visitors. It is better to maintain a quality service in these rather than spread resources too thinly. At secondary locations where a TIC presence is considered desirable, consideration should be given to:

- The use of seasonal facilities.

- A partnership with a visitor attraction, pub or shop to provide information services (eg Wrexham).

- Better use of railway and bus stations for information delivery.

- A static information display, or electronic kiosk.

►**Signage**. The W/B signposting system is largely prescribed by national regulations. The main need is to monitor the application of this to resolve inconsistencies and ensure that the needs of the industry are being met. There is also a need to ensure that key destinations and tourism hubs have an effective system of orientation and way marking in place with maps, information panels and pedestrian signposts.

►**Information distribution.** We must ensure that there is an effective distribution mechanism in place to disseminate material both within and beyond the region. Hotels, attractions and other enterprises should be encouraged and supported to act as information points, especially for their immediate locality**.**

►**Digital media.** This is rapidly developing and largely unexplored territory. Enterprises and destinations should be encouraged to explore the possibilities and experiment. TPNW can play an important role in raising awareness, disseminating good practice and stimulating adoption, in particular developing rich content.

►**People to people**. The aim is to make everyone an ambassador for North Wales. More can be done to equip and motivate frontline workers to take on this role and engage with other groups in the retail and transport sector. This is about fostering customer care skills, local pride and local knowledge and moving away from an insular approach. This will include promotion of Croeso Cynnes Cymreig.

5. INVESTING IN PRODUCT EXCELLENCE

We must stimulate development and investment in the core product to meet the needs of a changing marketplace, exceed our customers' expectations and rival the best elsewhere. Our core product needs to enhance and complement the region's key strengths and be tuned to the needs of the target markets.

Key priorities, discussed in more detail below, are:

- Providing **quality accommodation**
- Offering **diverse attractions**
- Ensuring **excellent activities**

5.1 Quality accommodation

Aim

Ensure there is a sufficient supply and range of quality accommodation to meet changing markets needs, accommodate growth and support a thriving tourism economy.

The potential

We must ensure there is a sufficient supply of quality accommodation to maintain current tourism levels and allow for growth. It is not enough just to retain the status quo as there is a need to facilitate change to allow new products to surface (eg budget hotels) in response to changing market demand. We also need to offer a range of accommodation to attract a market mix from bunk barns to boutique hotels. Self-catering and caravans are more important for family holidays, hotels and B&B for short breaks and business tourism.

The trend over many decades has been for improving quality and flexibility, reflecting growing affluence and rising living standards. This doesn't necessarily mean luxury but does mean providing a quality experience at all levels. Despite the current economic crisis this is a trend that is likely to continue although for the next couple of years value for money will become the most important consideration. Attracting inward investment has always been difficult in the region and will be more so in the immediate future.

Accommodation is almost entirely provided by private sector and in this region is dominated by large numbers of small independent businesses, each making their own decision. The main scope for influence will be through the planning system and via business support and grant schemes.

Priorities for action

►**Improving standards and quality**. There is a continuing need to invest in quality right across the board just to stand still and there is evidence to suggest that North Wales is lagging behind other places. This is not just about physical development but also about the overall ambience and quality of service. This means:

- Increasing participation in the national quality assurance scheme. There is evidence that participation in the process can help raise standards.
- Encouraging adoption of sustainable practices and participation via accreditation schemes such as the Green Dragon awards, Green Tourism Business Scheme and David Bellamy Awards.
- Encouraging enterprises to apply for awards and join recognised quality consortia such as Welsh Rarebits as a way of raising their profile.
- Looking favourably on projects which will improve the landscaping and environmental quality of caravan and holiday parks.
- Refreshing outdated décor and interiors to reflect modern tastes and design.
- Improving and adding facilities to attract specific markets eg broadband and meeting rooms, children's centres, spas, drying rooms and luggage transfer.
- Encouraging new entrants and fresh blood through publicising investment opportunities, brokerage schemes, mentoring and business support.
- Highlighting good practice, disseminating information and celebrating success.

►**Attracting new development .** This will be harder in the current climate but selected new development is necessary to revitalise the product, exploit new trends and challenge and invigorate existing enterprises. This won't happen unless we are alive to the potential and create opportunities. This will require more development supportive policies within Local Development Plans, as without increase in accommodation capacity to replace dated accommodation additional income will not be easily generated. Areas of development potential include:

- One or more branded 4 star hotels associated with golf or driven by business demand.
- Some additional purpose-built budget hotels. A sector which is still expanding with potential for inclusion in mixed-use schemes.
- Smaller independent boutique offers and restaurants with rooms, with a strong food and design offer. This is a robust business model with significant potential in North Wales.
- Limited expansion of holiday parks where it results in upgrading, improved landscaping and facilities.
- Additional quality self-catering cottages from conversion of farm buildings and redundant hotels and encouragement of letting of second homes. The latter would increase the economic impact of second homes.
- A major new self-catering holiday village with leisure facilities.

5.2 Diverse attractions

Aim

Encourage a range of good quality attractions which reinforce the region's appeal, add interest and provide value for money.

The potential

Visitor attractions are an important element in the overall experience. They provide added interest and entertainment, help to extend the stay and are a vital resource in inclement weather. Some are capable of generating visits in their own right and help form regional identity - narrow gauge railways, the slate attractions and castles for example. Most are smaller and await to be discovered on arrival but nonetheless make an important contribution to overall enjoyment. Small is not worse; sometimes it is the lower key, and unexpected attraction which really strikes a chord and makes an impact.

The region has a good spread of attractions, although there are no real blockbusters with a national profile such as the Eden Project or Alton Towers. The main priority is to maintain and refresh the appeal of the existing attractions and increase their visibility, rather than create more. Visitor numbers overall are broadly static although some attractions report increasing attendance.

Priorities for action

►**Improving the visitor experience.** There is a need to continue to invest in visitor attractions to maintain quality and interest. This is about embracing all aspects of the visit such as signage, interpretation, catering and toilets etc. We want to see:

- More attractions participating in the VAQAS scheme which provides an objective health check.
- Mystery shopper exercises to check quality.
- Investment in new features and elements which generate publicity and return visits.
- Visitor surveys to gain feedback and dissemination of market intelligence.
- Participation in the Croeso Cynnes Cymreig scheme.
- The use of joint ticketing, passport schemes and vouchers as perceived value for money will be increasingly important over the next few years.

- The sharing of experience and learning from other places through networking and visits.

- Take-up of the CADW led Convergence bid to improve presentation on heritage sites.

- Support for grant applications where they result in significant improvements to the visitor experience.

►**Increasing visibility.** We need to work harder to publicise what already exists as few people plan their activities before they arrive. This is primarily the responsibility of the attractions themselves. Print distribution and word of mouth is likely to continue to be the most cost effective route to publicise attractions. This means:

- Encouraging attractions to join marketing consortia and local tourist associations and adopting the findings of the Attractions Consortia Study to improve their effectiveness.

- Continuing to provide exposure through the Attractions North Wales website.

- Using accommodation operators and other attractions as information outlets and encouraging more cross-selling. Financial incentives may be appropriate in some instances.

- Making more use of themes and themed routes to provide exposure for smaller attractions or link clusters of attractions.

- Experimenting with digital marketing to appeal to particular audiences.

- Celebrating winners and innovators to raise profile.

►**The scope for something new**. Whilst it is not a priority to develop a major new attraction in the region it would be foolish to reject the possibility out of hand. There is a need to respond to major economic changes to the west arising from structural changes in energy and materials production. Some established attractions will inevitably run their course and allowance needs to be made for new ideas to refresh the offer. New attractions should satisfy the following criteria:

- Large enough in scale and impact to generate visitors in their own right rather than simply displacing existing visitors.

- Capable of attracting at least 100k visits with potential to reach 150k in the longer term.

- Attractions which draw on natural assets and heritage of the region and which can provide a strong Welsh branding presence.

- Wet weather attractions.

- Attractions with a strong sustainability component tapping into energy and climate change issues.

5.3 Excellent activities

Aim

Make North Wales the leading area for outdoor activity tourism in the UK, appealing to all levels of participant.

The potential

Activity tourism is a major strength for North Wales, it capitalises on the natural environment and cultural heritage of the region and draws on local expertise. Activities can range from extreme sports to more gentle pursuits and are relevant right across the region.

Activities can be a driver of visits in their own right appealing to niche markets but also add to the general holiday experience and help to extend the season being less weather dependent. They have a good fit with the rural economy. There is generally considered to be potential for growth in this market although there is significant competition and many destinations are pursuing this area. The challenge for the next five years is to consolidate and build on the existing infrastructure that has been put in place for activities, project activities as a key theme for the region and strengthen the links between the activity sector and the tourism industry. Introducing legislation to open up access to inland water access would be a significant step to developing the full potential of the region's rivers and lakes.

Priorities for action

►**Investing in centres of excellence.** The region is already home to national centres for mountaineering, mountain biking, watersports and white water canoeing/rafting. Establishing recognised centres of excellence makes sense from a tourism standpoint because they will generate their own specialist market for competition and tuition but also generate publicity, awareness and reputation which will enhance the region's visibility as an outdoor centre. There is scope to further develop clusters of activity and providers through the Convergence Programme. Areas of development potential include:

- The further development and enhancement of the outdoor sector in Snowdonia.

- Infrastructure at Pwllheli to establish it as a major sailing centre.

- Mountain biking development around Llanrwst, Blaenau Ffestiniog and Llandegla.

►**Improving infrastructure.** North Wales has seen some significant investment in activity infrastructure in recent years. The need now is to concentrate on filling gaps and bringing facilities up to scratch to enable the full potential of this investment to be realised. The Convergence Programme provides an opportunity to pursue this. Examples include:

- The missing links in the coastal path.

- Cycle routes.

- Low level footpath around the base of Snowdon.

- Yacht berths and facilities along the coast.

- Accommodation related to activity centres and golf courses.

- Supporting facilities - slipways, shelters, parking and toilets etc which make it easier for people to undertake activities.

- Developing facilities and infrastructure to maximise the potential of the Pontcysyllte Aqueduct and Canal Corridor.

Develop the connectivity of walking, cycling and other recreational activities between national and sub regional routes, such as the Dee Valley Way and the North Berwyn Way and continuing northwards to link with the Hiraethog Way and Purposeful Routes in Upper Conwy Valley.

►**Supporting the activity sector.** This is a fragmented sector which does not necessarily share a community of interest or indeed see itself as in tourism. Many are small, independent providers and lifestyle businesses with limited resources. We need to work with the activity sector to raise its profile, generate more business and strengthen its links to tourism. This will involve:

- Developing the Outdoor Strategic Partnership to bring the various interests together.

- Promoting training and generic skills development for customer care and marketing.

- Providing advice on improving sustainability.

- Encouraging local links with tourist associations and accommodation providers.

- Research and market intelligence to improve the targeting of key groups (eg team building, schools).

- Stimulating local interest and engagement with the activity sector as a career choice and business opportunity and also as part of the healthy living agenda.

►**Facilitating casual access.** Most activity holidays are self-organised and the market for casual participation is much bigger than the market for activity holidays where the activity is the main purpose. We need to make it easier to participate in activities whilst on holiday without prior organisation. This means:

- Continuing with the i-try scheme to introduce people to activities.

- Using TICs as a booking / information hub for local activities.

- Equipping accommodation providers with the necessary information about local activity opportunities.

- Ensuring there are activity opportunities for all levels and abilities including those with mental or physical disabilities.

6. PROVIDING AN OUTSTANDING EXPERIENCE

We need to deliver a total quality experience from arrival to departure, making it a delight to spend time in North Wales. Positive first impressions, easy to move around and get the most from the visit, a warm welcome and good service everywhere you go, beautiful and cared for places, plenty to explore and a sense of being somewhere different.

Key priorities, discussed in more detail below, are:

- Creating **well-managed places**
- Providing **enriching experiences**
- Offering **efficient transport**
- Ensuring **skilled people**

6.1 Well-managed places

Aim

Creating distinctive places, destinations and environments which are a joy to visit and spend time in.

The potential

The region has some beautiful countryside and beaches but the environment in towns and villages, with some notable exceptions, is less good. However, even the most attractive places can be let down by traffic, poor signage, litter, dirty toilets, and lack of basic care and attention. The look and feel of places is important, underpins visitor satisfaction and forms the image people take away with them. First impressions count! This is partly about physical upkeep but also about intangible things such as character, atmosphere and welcome.

There is a need to significantly raise the quality of many places in North Wales where visitors congregate. The recipe will be different in an AONB to a busy seaside resort but the same principles apply of adopting a more integrated approach. Although we are primarily concerned here with visitors it is almost always the case that improving a place for visitors improves it for local people as well. The aim should be to realise this synergy.

This task largely falls to local authorities and other public agencies. Their continuing involvement and leadership is fundamental to tourism success and this should be given a higher priority than tourism marketing.

Priorities for action

►**Adopting destination management.** This is key to improving the visitor appeal of places. It involves taking an integrated approach to managing places and embodies the principles of Integrated Quality Management (IQM) which many places in the region have been trying to apply over the past few years.

It can be applied at different levels and in different types of place. At a county level it might mean taking a broad overview, a compact historic town like Conwy would merit a more detailed and specific plan whilst a busy beach might require a lighter touch. The concept of the visitor journey can be a useful way to look at this. Areas to consider include:

- Access arrangements by car and public transport
- Signage and orientation
- Planning policies and environmental sensitivity
- Customer care, welcome and safety
- Information provision
- Cleaning, maintenance and look and feel of place
- Design, public realm, public art, animation
- Toilets and seating
- Distinctiveness and sense of arrival and place

The right body to lead or initiate this work will be the local authority as it is the delivery body for many services. However, to be effective it is crucial to engage with other stakeholders such as local businesses and the local community. Some of the most successful initiatives have been led by local interest groups where people feel a strong sense of ownership.

►**Defining tourism hubs.** Given limited resources it makes sense to focus on those places where you can have most impact or where there are pressing problems to address. Local authorities should define tourism hubs which will predominantly be urban/rural settlements but will also include some rural hotspots. They are places where significant numbers of visitors will stay in or visit in search of experiences, services, information or activities and which are capable of providing a distinctive, quality experience. These places will have a disproportionate impact on satisfaction, are key to generating economic benefit, and provide a chance to influence behaviour. Getting the experience right in these places is a priority and they should be given some priority in funding terms.

Local authorities are best placed to define these places. In some cases they will be synonymous with the key settlements identified in the Wales Spatial Plan. We would envisage c20 such places. An initial list is given below which will need to be refined in the light of local discussion. Selection criteria should include:

- Volume of visitors
- Range of services
- Potential to act as a focus and dispersal point and influence behaviour

Fig 6.1 Potential Tourism Hubs

North West		**North East**
Amlwch Moelfre	Harlech	Llangollen
Bangor	Holyhead	Pontcysyllte Aqueduct and Canal Corridor
Barmouth	Llanberis	Wrexham
Bala	Llandudno	Mold
Beaumaris	Llanfairpwll	Rhyl/Prestatyn
Betws y Coed	Llŷn	Ruthin
Blaenau Ffestiniog Trawsfynydd	Porthmadog	Talacre
Caernarfon	Rhosneigr	
Conwy	Snowdon	
Dolgellau		

Developing and connecting the landscapes of the Isle of Anglesey, Llŷn Penisula, and Clwydian Range Areas of Outstanding Natural Beauty as sustainable tourism destinations based on outdoor recreation and appreciation of the area’s natural and cultural heritage. Raise awareness of the AONB’s and all that they have to offer to visitors.

Reinvest in the Country Parks in North Wales to make them fit for purpose in the 21st Century, and re-enforce the natural beauty of North Wales’s specially protected landscapes. A key aspect would be to increase the footfall of visitors to the Country Parks whilst maintaining the important biodiversity of them. They include Holyhead Breakwater Country Park, Parc Padarn, Great Orme.

►**Innovation in delivery.** In the current economic climate local authorities will be under increasing pressure to reduce service levels and facility provision. Whilst this should be resisted there is a need to look for new and more innovative ways to involve and empower local communities and businesses in providing services. This can work best in small communities where there is a strong sense of ownership and private sector engagement. There is a need to explore new ways of managing places involving things such as visitor payback, volunteer schemes, community toilets etc. Pilot schemes have an important role to play here.

6.2 Enriching experiences

Aim

Create a memorable, rich and diverse experience, bustling with vitality and life.

The potential

This embraces a host of things which individually may be small but together add life, colour and excitement to a visit and help make for a distinctive and memorable experience. These can include local events, festivals, music, good food, galleries, quirky shops and Welsh language and culture. It is about adding depth and richness to the visit.

These things are quite hard to influence and control. Much of it is small scale and driven by the local community or energetic individuals rather than tourism and it is that local / bottom-up connection that gives them authenticity and appeal. Tourism and the local tourism industry, however, can provide an additional audience, offer support and create exposure. The aim is to try and create the conditions for these activities to flourish. Small grants through local initiatives and the Rural Development Plan can make a significant contribution to encouraging and facilitating this sort of activity.

Priorities for action

►**Events and festivals**: There are a number of local festivals and events spread across the region which visitors can enjoy ranging from the Anglesey Food Festival to racing at Bangor-on-Dee Races. These often depend for their execution on local commitment and enthusiasm and it is important not to erode this although the local tourism industry can often play a useful role through help in kind, sponsorship and publicity. There is potential for:

- Using these events and festivals as hooks for wider PR coverage.
- Expanding them into week-long events.
- Co-ordinating or shifting timing to avoid clashes.
- Exploring whether a few of these are capable of growing into major events with a higher profile.

►**Arts and culture.** This overlaps with events and festivals. There is a wide range of arts facilities and programming across the region - music, crafts, drama, dance which many visitors would enjoy. Some of these (Ruthin Craft Centre, Bodelwyddan) are of national significance, others are more modest – a Welsh choir practice, for example. The main priority is to publicise these to visitors (where appropriate) and make it easier for visitors to purchase tickets or to attend. There needs to be better communication and understanding between local tourism departments, tourist associations and the arts sector. There is a wealth of potential waiting to be tapped.

►**Food and shopping.** Eating and shopping are major components of tourism and account for a significant share of visitor spend. There is a huge and growing interest in food and North Wales has a lot to offer and should make more of this, and a location to promote all that is best in food product could be explored. Local produce and distinctive food, interesting places to eat should feature heavily in promotion and provides a good hook for publicity. Award schemes, eating out guides and special promotions can help to raise the profile amongst visitors who can provide a useful additional source of business to local enterprises.

Specialist and unusual shops and markets are a big draw for visitors but with some notable exceptions (Ruthin, Betws y Coed) this is not a strength for North Wales. This is a difficult area to influence. The priority should be to:

- Publicise what is available through guides or the internet.

- Identify areas where this can be nurtured and work with planning authorities and local landlords/ landowners to encourage this. Victoria Dock is a good example of a new area of visitor interest being created.

- Use empty shops to display information and act as temporary galleries and exhibition spaces. These can drag an area down and add to the air of neglect.

►**Welsh culture, heritage and language.** This is a great asset and really does make Wales a different place from England, although it can easily be off-putting and excluding for non Welsh speakers. We should aim to exude pride and confidence not defensiveness. We should invest in strengthening the cultural offer. We should aim to:

- Welcome non Welsh speakers and provide accessible information. They will have different needs from Welsh speakers.

- Distinguish important Welsh sites with some form of logo. This may need to be a Wales-wide initiative.

- Link Welsh cultural sites into a network to provide more exposure. Many sites are quite small.

- Target Welsh speakers elsewhere in Wales to encourage them to visit North Wales.

- Build on the giants North Wales heritage and culture theme.

6.3 Efficient transport

Aim

Make it easier for visitors to get to North Wales and to move easily around the region during their stay and reduce dependence on the car.

The potential

The majority of visitors to North Wales arrive by car and this is likely to continue in the near future. In the longer term, congestion and increasing petrol costs could have a significant impact on tourism flows and travel patterns. In the next few years the priority is to ensure that visitors can reach the region easily and to encourage more use of public transport whilst people are here. It is worth noting that transport issues score least well in visitor research.

North Wales is relatively well served by transport infrastructure. The main priority is to maintain or improve levels of service and make public transport more visitor-friendly and accessible. (A WAG group has been established to look into this.) Visitors on holiday have more time than local people and travel can be an enjoyable experience in its own right, rather than a means to an end. In some areas more attention needs to be given to the management of coaches and coach parking.

Priorities for action

►**Pressing for infrastructure improvements.** Decisions on transport infrastructure and service levels are clearly driven by wider considerations than just tourism. The task for the tourism sector is to ensure that the agencies involved recognise the implications for the visitor economy and the tourism case is put across. In some areas tourism provides untapped opportunities for the transport sector and a potential source of added income. Areas for action include:

- Establishing a regular dialogue with highway authorities and transport operators to highlight issues of concern.
- Providing guidance to transport operators about visitor needs and requirements grounded in research.
- Improving rail services into the region on the Holyhead and Wrexham routes.
- Developing berthing facilities for cruise ships at Holyhead.
- Increasing the range of flights to Anglesey Airport.
- Better coverage of car hire facilities with access to public transport.

►**Linking routes and attractions** can be a powerful tool for generating leisure traffic and for delivering visitors to smaller attractions and places of interest and spreading economic benefit. The region is exceptionally well placed to do this with its dense network of railway lines whilst signed, scenic leisure drives provide similar opportunities. This requires an integrated approach from transport operators and attractions supported by print, signage and publicity.

►**Promoting alternatives to the car.** Whilst it is difficult to prise people from their cars we should do more to highlight the options which are often difficult for the visitor to appreciate. Sometimes this can add a positive dimension to the holiday experience. Areas to pursue:

- Better marketing of the extensive rail network and its links. Not enough is made of this huge asset of heritage lines and community railways. Bus routes (eg Snowdon Sherpa) also need to be part of the equation.

- Making ticketing easier with through tickets, multi-use tickets and sensible pricing structures.

- Better presented information geared to visitors with easy to understand maps, routes and itineraries. Better information is needed at stations.

- More information on circular walks, safe cycle routes and bike hire.

- Completion of coastal path and missing links in long distance cycle routes.

- Improving the quality of taxi services.

- Promote Sustainable Transport and Tourism Action Plan and Slow Tourism.

6.4 Skilled people

Aim

Develop profitable businesses run by enterprising managers with a skilled and motivated workforce.

The potential

Skills and professionalism are critical to creating profitable businesses and satisfied customers. Excellent facilities in a beautiful setting will be wasted if the quality of welcome and service is poor. Raising standards of professionalism is a challenge for the tourism sector which is dominated by small businesses, with limited resources and where entry costs are relatively low. Seasonality and the use of casual staff adds to the difficulty as does the image of the industry as a poor employer.

The tourism sector has traditionally had problems with recruitment and retention of staff although this has been eased to an extent with the influx of workers from Eastern Europe. This flow is now likely to dwindle or reverse although the current economic situation may make it easier to recruit local people. However, the industry has to do more than just make do if it is to raise its game. The key to this is instilling a culture in tourism enterprises which recognises the importance of people in delivering a quality experience.

The area of training and business support is complex and confusing to outsiders with many different agencies and organisations involved – Welsh Assembly Governement (WAG) - Department for Children, Education, Lifelong Learning and Skills (DCELLS), Tourism Training for Wales (TTfW), sector skills councils, FE colleges, Careers Wales and Job Centres to name but a few. We need to find ways of adding value to this system rather than further complication.

Priorities for action

►**Review of regional skills.** Co-ordinate the People Development Forum as a sounding board on visitor economy labour supply, skills development issues and training take-up. The Forum would be responsible for pursuing the initiatives set out below.

►**Promoting a learning culture.** Getting the message across to the tourism industry that training and professional development is good business sense. Activities should include:

- Signposting what is on offer in terms of training and business support.
- Providing advice.
- Disseminating good practice and publicising success stories.
- Identifying and understanding local and specific needs.
- Encouraging the adoption of Warm Welsh Welcome.
- Organising courses where there are gaps.

►**Influencing providers.** Ensuring that training providers, business support agencies and colleges understand and respond to the particular needs of the tourism sector in this region, acting as a voice and go between for the industry. This will complement the work already being done by training providers and help provide a more local dimension to their work.

►**Improving the image of tourism as an employer.** Working with other bodies such as People 1st and Careers Wales to get over the message that the tourism sector can provide rewarding and worthwhile jobs. Again this is about adding value and a local dimension to the work of other agencies to increase impact. Work in Gwynedd to encourage school leavers to join the outdoor sector is a good example.

7. WORKING TOGETHER IN PARTNERSHIP

Improving working relationships and organisation to harness the energies of the public, private and not for profit sectors, encouraging a climate of co-operation and mutual support, moving tourism up the agenda, seeking more efficient and transparent ways of working and becoming more evidence driven.

The key priorities, discussed in more detail below, are:

- Establishing **effective organisation**
- Getting **better recognition** for the industry
- Acting on **sound evidence**

7.1 Effective organisation

Aim

Establish a clearer division and understanding of tourism roles and responsibilities and a more efficient use of resources.

The potential

To make a significant impact we need to harness the energies of all involved in the tourism sector and pull in the same broad direction. This is even more important in a period where there will be increasing pressure on resources. Feedback suggests that there is still scope for improving working relationships between public and private sectors and there needs to be a clearer understanding of roles and responsibilities for tourism. We need to ensure that duplication is minimised and that we are doing things at the right level.

At the time of writing VW, in association with other stakeholders, is reviewing future arrangements for destination management and marketing at the sub-national level. The outcomes of this may well have some implications for the region and the following priorities may need to be adjusted in the light of this. We set out some general principles below.

Priorities for action

►**Visit Wales** has a critical role to play in raising awareness of Wales in the marketplaces, undertaking research, providing leadership and championing tourism within the Welsh Assembly. VW also supports regional activity via TPNW. It is in everyone's interests in the region to secure an active, vigorous and well-resourced VW and to support its activities.

►**TPNW.** Whatever the outcome of the VW destination management and marketing review there will be a continuing need for regional co-ordination, leadership and expertise. We see the TPNW role as primarily facilitating, working with and through other parties.

- Engaging with other regional agencies and speaking for tourism.
- Acting as a two way channel between VB/WAG and local interests.
- Co-ordinating agreed cross-boundary and region-wide marketing campaigns in conjunction with other partners.
- Promoting training and skills.
- Providing a source of expertise, market intelligence and support to stakeholders.
- Co-ordinating research.
- Implementing the regional strategy.

The continuing existence of North Wales Tourism (NWT) operating alongside TPNW still causes confusion within the region. This is counter-productive. TPNW and NWT should explore how the two organisations can be brought more closely together and possibly integrated.

►**Local authorities.** Local authorities play a key role in destination marketing via the five marketing area partnerships and in destination management. Resource constraints may make if harder to sustain the current arrangements. It is vital that local authorities continue to support tourism as an important sustainable economic activity.

- They should consider working together or combining resources for tourism if this results in a more efficient approach ie identifying the lead authority for different functions and sectors. There are past examples of this. Different authorities can take the lead on different initiatives and niche campaigns.
- Destination management is a key role and needs to be enhanced and undertaken more systematically drawing on the principles of IQM. Enhancing quality and creating sustainable tourism destinations is critical for future success.
- Destination marketing should be carried out at the level at which this makes most sense but needs to be co-ordinated with destination management. There is a case for exploring amalgamation of some of the existing marketing areas.
- Formal Area Partnerships should be formed involving the tourism trade to steer and inform activity on marketing and management.
- Local authorities should sign up to and adopt the regional tourism strategy.

►**Tourism trade.** We want to encourage more participation and a greater sense of ownership by the tourism trade in the management and marketing of the region and its destinations. We want to see:

- More involvement by tourism enterprises in their local community, in local development agencies, tourist associations and regeneration initiatives. Active involvement at the local level in the region has energised the situation and got things moving.

- Local authority or marketing area-wide tourist associations established to provide private sector input into the Area Partnerships described above. Anglesey provides a good model for this and it has worked well in other places.
- Support for some paid staff to service these organisations and help them communicate with their members more effectively.
- Better communication with the tourism trade as a whole across the region.

7.2 Better recognition

Aim

Make key decision-makers and local residents more aware of the importance of tourism and its contribution to the quality of life in North Wales.

The potential

Tourism is in competition with many other activities for resources and unless its importance is recognised it will not get the priority it deserves. We need to try harder in the tourism sector to get this message across and also to put our own house in order if we are to win support and influence. This is not a quick fix and it will take a sustained effort over a period of time to change perceptions. We need to build on and learn from the good work that is already being done in parts of the region and elsewhere.

Priorities for action

►**Getting the message across.** We need to make a more concerted and convincing case about the positive impact of tourism and do this in a more systematic and consistent way if we are to achieve any impact. The tourism trade has to take some responsibility for this. This means:

- Producing information materials including print, briefing notes, DVDs to support presentations.
- Generating positive and concerted PR activity aimed at the local media, celebrating success stories.
- Using Tourism Week and local open days to open up the industry to local people.
- Providing facts and figures to back up assertions.
- Encouraging industry engagement and contact with schools and work placements capitalising on the new Welsh Baccalaureate.
- Encouraging tourist associations to champion tourism in their local communities.
- Not seeking to defend the indefensible.

►**Making the tourism case.** In addition to informing people about the general benefits of tourism there will be occasions when the industry wants to make a case against damaging legislation or regulations. This might be national legislation, local planning policies, licensing regulations or transport issues. The tourism industry needs to find better ways to articulate and co-ordinate its case.

►**Building a responsible reputation.** The tourism industry has sometimes been its own worst enemy. It must work to develop a more positive reputation as a sector which is recognised as an exemplar in terms of its social and environmental practices. This means:

- Encouraging and adopting more sustainable practices and signing up to schemes such as the Green Dragon and Green Tourism Business scheme.
- Supporting community initiatives and addressing community concerns.
- Becoming a good employer, fostering training and career development.
- Using local products, supporting local services and employing local people where possible.

7.3 Sound evidence

Aim

Understand what is happening to tourism in the region and base decisions about tourism investment and marketing on sound evidence.

The potential

Understanding market needs, monitoring tourism performance and trends, and measuring the impact of our activities is essential if we are to be masters of our own destiny and use resources effectively. North Wales has a relatively good record in this respect, and is quite well covered in terms of hard information, although information quickly becomes out of date and overtaken by events.

The priority is to maintain this coverage, improve dissemination of intelligence to those who can use it, and fill some gaps. Collecting information and undertaking primary research is expensive and needs strong justification in the current climate. We need to make more of information already in the tourism domain, beware of duplication and look for partners to share costs.

Priorities for action

►**Maintaining coverage.** It is important to continue with the current programme of data collection and analysis which takes place on an annual or regular basis. These include:

- STEAM (LAs)
- Occupancy surveys (VW, LAs)
- Visits to attractions (VW, LAs)
- Accommodation stock surveys (LAs)
- Measuring the effectiveness/ rate of return of marketing initiatives

►**Filling gaps**. There are areas where we would benefit from additional information. This may involve finding other partners willing to share costs or lead on the research, for example:

- Undertaking a visitor survey. A new survey is planned for 2009 in association with VW.

- Monitoring and recording changes in the accommodation stock. Some local authorities are doing this but it would benefit from a more systematic approach.

- Qualitative research amongst different market segments and potential audiences for North Wales to explore perceptions, test names/messages, understand market drivers and address product deficiencies.

- A regular 'how's business' survey to monitor business confidence and performance across the region. This might be achieved through enhancing the VW survey.

►**Information sharing and co-ordination**. There is a wealth of valuable, free information locked up in people's heads, cupboards and computers which never sees the light of day. We need to develop better ways of pooling, disseminating and interpreting information on a regional basis. TPNW should lead this process. Areas to explore include:

- Encouraging more sharing of information between the various parties.

- Establishing a research register to signpost what is available and where.

- Translating headline results from national and regional surveys into a form which is of use and interest to tourism enterprises.

- Experimenting with ways to communicate useful information via newsletters, seminars or website.

- Establishing a research group to plan and co-ordinate research in North Wales.

- Developing closer links with the academic institutions in the region and research resources.

8. PRIORITIES FOR NORTH WEST AND NORTH EAST WALES

In this section we look at the implications of the strategy for the western and eastern parts of the region. Whilst there are differences between these areas there are also similarities and many of the strategy's recommendations are equally applicable to both areas.

8.1 North West Wales

This area comprises the three local authorities of Anglesey, Gwynedd (including Meirionnydd) and Conwy and covers the marketing areas of Isle of Anglesey, Snowdonia, Mountains and Coast, and Llandudno/Colwyn Bay. It accounts for over two thirds of the region's land area but under half its population.

The North West is dominated by the mountains and dramatic scenery of Snowdonia. Anglesey and the Llŷn peninsula to the west are more remote and offer some more gentle scenery as does the eastern part of Conwy. It has an extensive coastline with some beautiful beaches particularly on the Llŷn, Anglesey and Cambrian coast. The area is predominantly rural with small towns and villages, some of which have considerable character but many require investment if they are to increase their visitor appeal. Llandudno is a thriving resort and conference town with a distinctive and well–preserved Victorian character.

Table 8.1 Distribution of tourism

County	% Staying Visits	% Nights	% Spend	% Day Visits
Anglesey	7.7	7.6	7.7	3.0
Conwy	28.7	23.9	25.9	32.9
Gwynedd	38.1	44.1	43.8	23.6
North West total	74.5	75.6	77.4	59.5
North Wales	100	100	100	100

Source: North Wales STEAM Initiative 2007

Table 8.2 Accommodation Stock – Bedspaces

	Serviced	%	S/Catering	%	Camp/ Caravan	%	Total
Anglesey	2237	7	6645	37	28720	19	37602
Conwy	12642	42	2240	12	54593	36	69475
Gwynedd	8817	29	6549	36	19868	13	35234
North West total	23696	78	15434	85	103181	68	142311
North Wales	30207	100	18176	100	151265	100	199648

Source: TPNW, local authorities 2007-8 *

Priorities for this area are grouped under the four strategy themes and key actions are summarised in the three year action plan which follows.

1. Projecting our distinctive strengths

Priorities and actions

- The main market potential lies with family holidays, activity-related tourism and short breaks. This has potential to be the UK's leading destination for outdoor activities and has enormous strengths for family holidays. Short breaks also have potential. Other market segments of importance in this area are conferences/meetings drawing on Venue Cymru in Llandudno, cruise ships in Holyhead and the Welsh market, drawing on its strong cultural heritage.

- Key messages to project are the ease of access, especially in the A55 corridor, the combination of coast and rugged scenery, the range of things to do, exhilarating outdoor activities for all levels. These need to be co-ordinated across the region through adoption of common brand guidelines.

- Make more of eye-catching elements and connections such as Snowdonia, centres of excellence for activities, WHS castles and walled towns, Isle of Anglesey, narrow gauge trains/network, slate/industrial heritage. The extension of the Welsh Highland Railway provides a good opportunity.

- Strengthen the presentation of coherent sub-areas as destinations in their own right eg Llŷn, Anglesey, Llandudno, Conwy Valley, Hiraethog/Denbigh Moors.

- Review current marketing mix/activities in line with overall strategy recommendations and in the light of available resources. Pare down activities which have limited impact and reduce print. Support VW and region-wide campaigns aimed at generating awareness and new business.

- Explore the potential for merging some of the three marketing areas to realise economies of scale and increase reach.

- Undertake a review of TIC coverage across the area to ensure that a strategic network is being maintained. Experiment with other forms of information delivery to complement this through other outlets eg shops, visitor attractions, mobile TICs, and use of kiosks (eg touch screens in Conwy). Encourage experimentation with digital media to provide information to people on site and on the move.

- Ensure that attractions and features of interest are adequately signed with white/brown signs and ensure consistency of application across the region.

- Promote initiatives to train and skill frontline staff and communities to improve the welcome and provide visitor information.

2. Investing in product excellence

Priorities and actions

- Encourage and support the improvement and upgrading of all types of accommodation and attractions through promotion of the quality assurance schemes, business support and mentoring, recognition of good practice and financial assistance.

- Review the concentration of caravan parks on the Conwy and Cambrian coast to explore ways in which the environment and appeal of these sites can be improved. Influence current planning policies in the light of this.

- Identify sites and seek to attract some additional branded 3-4 star, full service hotels. Preferred locations are Llandudno/ Llandudno Junction and Bangor. Potential also exists for new or extended hotels in association with spa/golf provision. Explore the potential for creating a new high quality self-catering / holiday village development adjoining the national park.

- Use leisure drives, themed routes and clusters to raise the profile of smaller attractions and add critical mass. The heritage and narrow gauge railway lines offer a major opportunity. Work with CADW to increase visitor appeal of castles and other heritage sites. Pursue projects such as cultural gateway centre in Caernarfon, Parc Padam in Snowdonia, Copper Kingdom in Anglesey.

- Activity development in this area should focus on watersports, outdoor pursuits and adventure activities, although golf, walking, cycling and fishing also have potential. Key projects include a sailing academy at Pwllheli, development and promotion of key outdoor sectors in Gwynedd, mountain biking in Llanrwst and Blaenau Ffestiniog, Llyn Brenig visitor facilities.

- Fill missing links in the footpath, cycleway and bridleway network, looking at both longer distance routes and encouraging the development of short circular routes connecting into villages and clusters of attractions.

- Implementation of the coastal action plan projects in Anglesey, Gwynedd and Conwy to improve access and management.

- Support the activity sector and providers in getting the product to market and increasing access by casual visitors. Continue to support Snowdonia Active and evolve the I-try scheme. Implement the findings of the Outdoor Strategic Partnership study.

3. Providing an outstanding experience

Priorities and actions

- Local authorities to draw up destination management plans for their areas or sub-areas to provide an integrated framework for managing tourism and the general environment in these places and prioritising investment.

- Identify and designate tourism hubs where there are particular problems or concentrations of activity and focus attention on these. Initial candidates will include Holyhead, Bangor, Caernarfon, Porthmadog, Conwy, Harlech, Dolgellau, Barmouth, Bala, Betws y Coed, Blaenau Ffestiniog, Trawsfynydd, Llanberis and Llŷn.

- Address the problems of Colwyn Bay and the associated coast and explore how it can be re-positioned in tourism terms and benefit from investment in the North Wales Coast SRA.

- Experiment with innovative approaches to delivering services and managing environmental quality in key locations which involve the tourism industry and local communities. Projects include Gwynedd coastal package and nature conservation and visitor infrastructure provision on Conwy and Gwynedd coast.

- Support and encourage locally generated activity which adds to visitor interest and vitality. This includes festivals, arts events, heritage interpretation, local food, and activities which enhance sense of place and distinctiveness. Projects include Churches trail in rural Conwy, Mona Antiqua project on Anglesey to link sites of cultural and natural heritage.

- Lobby for improvements to transport infrastructure which will make life easier for visitors. These include the improvement to services on the Holyhead, Conwy Valley and Cambrian Coast Line and the rebuilding of the 40p bridge.

- Encouraging greater use of public transport by visitors. The dense railway network in the area has huge potential. This means taking visitors' needs into account, making it easy to use and making visitors aware of the options available and seeking better integration of public transport. We also need to encourage greater use of walking and cycling. Taxis and car hire are an important link in public transport provision and need to be factored into the equation.

- Develop multi-use berth for cruise liners in Holyhead.

- Encourage further development of air passenger services at Anglesey Airport.

- Promote and support initiatives which raise professionalism, skills and efficiency in the tourism sector and increase local employment prospects.

4. Working together in partnership

Priorities and actions

- Continue to support and work with VW and TPNW to maximise benefits and economies of scale.

- Local authorities to maintain their support for the marketing and management of tourism in their areas.

- Continue working together through the Marketing Area Partnerships and explore whether these arrangements might be developed and extended in the light of the emerging VW proposals for destination management and marketing.

- Support the existing county-wide tourist associations in Anglesey and extend the model to Gwynedd and Conwy. Establish a more formal relationship between the tourist associations and marketing areas/ local authorities to plan and prioritise tourism.

- Encourage a better dialogue between the industry, public and decision-makers to raise the awareness of the significance of tourism. Use presentations, fact sheets, open weeks etc to get this message across. Support tourism industry involvement in community initiatives.

- Continue to support STEAM and other research initiatives in order to have a closer understanding of what is happening to tourism in the area. Monitor the effectiveness of marketing activity. Share and learn from market intelligence and work with partners to establish regional research priorities.

8.2 North East Wales

This area comprises the three local authorities of Denbighshire, Flintshire and Wrexham and covers the marketing areas of North Wales Borderlands and Rhyl/Prestatyn. It accounts for less than a third of the region's land area but over half its population.

The North East is a more mixed area, quite urbanised to the north and east with close links to Chester but with wilder more rugged countryside to the south and west. Key elements of visitor interest comprise the Dee Valley and Llangollen, gateway to Snowdonia; the Ceiriog Valley; the Dee estuary and RAMSAR site; the Clwydian Range AONB; the Pontcysyllte Aqueduct and Canal WHS; the traditional coastal resorts of Rhyl and Prestatyn and the small market towns of Ruthin, Denbigh and Mold. Wrexham is a busy town and regional shopping and entertainment centre. The whole area is highly accessible to major centres of population in the North West.

Table 8.3 Distribution of tourism

County	% Staying Visits	% Nights	% Spend	% Day Visits
Denbighshire	11.8	11.9	11.4	21.9
Flintshire	9.5	9.5	8.0	11.9
Wrexham	4.3	2.7	3.2	7.0
North East total	25.6	24.1	22.6	40.8
North Wales	100	100	100	100

Source: North Wales STEAM Initiative 2007

Table 8.4 Accommodation Stock – Bedspaces

	Serviced	%	S/Catering	%	Camp/ Caravan	%	Total
Denbighshire	3245	11	2114	12	24241	16	29600
Flintshire	1778	6	118	1	21571	14	23467
Wrexham	1488	5	510	3	2272	2	4270
North East total	6511	22	2742	16	48084	32	57337
North Wales	30207	100	18176	100	151265	100	199648

Source: TPNW, local authorities 2007-8 *

Priorities for this area are grouped under the four strategy themes and key actions are summarised in the three year action plan which follows.

1. Projecting our distinctive strengths

Priorities and actions:

- The main market potential lies with short breaks, family holidays and activity-related tourism. Short breaks have most potential but there is scope for family holidays on the coast and activity holidays in most areas. Other market segments of importance in this area are business tourism drawing on the strong economic base and proximity to Chester, and day visitors capitalising on accessibility.

- Key messages to project are the proximity/accessibility of Chester and Snowdonia, the range of things to do, easy/gentle activities, attractive and varied countryside, rich heritage, ease of access. These need to be co-ordinated across the region through brand guidelines.

- Making more of eye catching elements and connections such as the International Eisteddfod, Pontcysyllte Aqueduct and Canal Corridor. These should not necessarily be constrained by area boundaries. Explore visitor potential of Gwynt y Môr development. Strengthen the presentation of coherent sub-areas as destinations in their own right eg Clwydian range, Ceiriog Valley, Dee Valley.

- Explore idea of establishing distinctive boundary markers on A5, A483, A55 and Holyhead railway line.

- Review current marketing mix/activities in line with overall strategy recommendations and in the light of available resources. Pare down activities which have limited impact. Support VW and region-wide campaigns aimed at generating awareness and new business.

- Consider merging Rhyl/Prestatyn and North Wales Borderlands marketing areas to make better use of resources. Re-visit the use of the North Wales Borderlands name.

- Undertake a review of TIC coverage across the area to ensure that a strategic network is being maintained. Experiment with other forms of information delivery to complement this using other outlets eg shops, visitor attractions and use of kiosks, mobile TICs etc through shops, visitor attractions etc (eg Wrexham). Encourage experimentation with digital media to provide information to people on site and on the move.

- Ensure that attractions and features of interest are adequately signed with white/brown signs and ensure consistency of application across the region.

- Promote initiatives to train and skill frontline staff and communities to improve the welcome and provide visitor information.

2. Investing in product excellence

Priorities and actions:

- Continuing to encourage and support the improvement and upgrading of all types of accommodation and attractions through promotion of the quality assurance schemes, business support and mentoring, recognition of good practice and financial assistance.

- Review the concentration of caravan parks from Talacre along the coast to Rhyl and beyond and explore ways in which the environment and appeal of the sites can be improved. Influence current planning policies accordingly.

- Identify sites and seek to attract 1 or 2 additional branded full service 3-4 star hotels. Potential locations are the A55 corridor and in Wrexham/Deeside. Explore the potential for creating a new high quality self-catering / holiday village development.

- Use leisure drives, themed routes and clusters to raise the profile of smaller attractions and add critical mass (eg the Open Churches Network Discovery Trail).

- Make the most of the WHS designation of the Pontcysyllte Aqueduct and Canal Corridor. Support CADW's initiatives to increase visitor appeal of castles and other heritage sites.

- Explore the potential of the Royal International Pavilion at Llangollen to develop as a centre of all year round activity.

- Activity development in this area should generally be focused on gentler and more inclusive activities including golf, walking, cycling, fishing although the Upper Dee offers interesting potential for canoeing. Areas of unrealised development potential include nature conservation in the Dee Estuary and the Ceiriog Valley.

- Fill missing links in the footpath, cycleway and bridleway network, looking at both longer distance routes (Dee Estuary, River Dee, West Denbighshire) and encouraging the development of short circular routes connecting into villages and clusters of attractions.

- Investment in supporting facilities for watersports along the coast in line with coastal strategy and including the development of marina/yachting facilities at Foryd harbour.

- Support the activity sector and providers in getting the product to market and increasing access by casual visitors.

3. Providing an outstanding experience

Priorities and actions:

- Denbighshire, Wrexham and Flintshire should draw up destination management plans for their areas or parts of their area to provide an overview and integrated approach to managing tourism and the general environment in these places. This should prioritise investment.

- Identify and designate tourism hubs where there are particular problems or concentrations of activity and focus attention on these. These are likely to include places such as Ruthin, Llangollen, Wrexham, Mold, Rhyl, Prestatyn,Talacre, Pontcysyllte Aqueduct and Canal Corridor.

- Address the problems of Rhyl and explore how it can be re-positioned in tourism terms and benefit from investment in the North Wales Coast SRA.

- Experiment with innovative approaches to delivering services and managing environmental quality in key locations which involve the tourism industry and local communities.

- Support and encourage locally generated activity which adds to visitor interest and vitality. This includes festivals, arts events, heritage interpretation, local food, and activities which enhance sense of place and distinctiveness.

- Lobby for improvements to transport infrastructure which will make life easier for visitors. These include the improvement of the A458, improvements to railway services on the Wrexham and Holyhead lines.

- Encourage greater use of public transport by visitors. This means taking visitors' needs into account, making it easy to use and making visitors aware of the options available and seeking better integration of public transport. We also need to encourage greater use of walking and cycling. Taxis and car hire are an important link in public transport provision and need to be factored into the equation.

- Promote and support initiatives which raise professionalism, skills and efficiency In the tourism sector.

4. Working together in partnership

Priorities and actions:

- Continue to support and work with VW and TPNW to maximise benefits and economies of scale. Support the integration of TPNW and NWT.

- Local authorities to maintain their support for the marketing and management of tourism in their areas.

- Continue working together through the North Wales Borderlands Partnership and explore whether these arrangements might be developed and extended in the light of the emerging VW proposals for destination management and marketing.

- Support the existing county-wide tourist associations in Wrexham and Flintshire. Establish a similar umbrella group in Denbighshire. Consider establishing a more formal relationship between the North Wales Borderlands and the tourist associations to plan and prioritise tourism.

- Encourage a better dialogue between the industry, public and decision-makers to raise the awareness of the significance of tourism. Use presentations, fact sheets, open weeks etc to get this message across. Support tourism industry involvement in community initiatives.

- Continue to support STEAM and other research initiatives in order to have a closer understanding of what is happening to tourism in the area. Monitor the effectiveness of marketing activity. Share and learn from market intelligence and work with partners to establish regional research priorities.