

Tourism Matters: An Election Brief

by The Wales Tourism Alliance



www.wta.org.uk



Wales Tourism Alliance
Cyngrair Twristiaeth Cymru

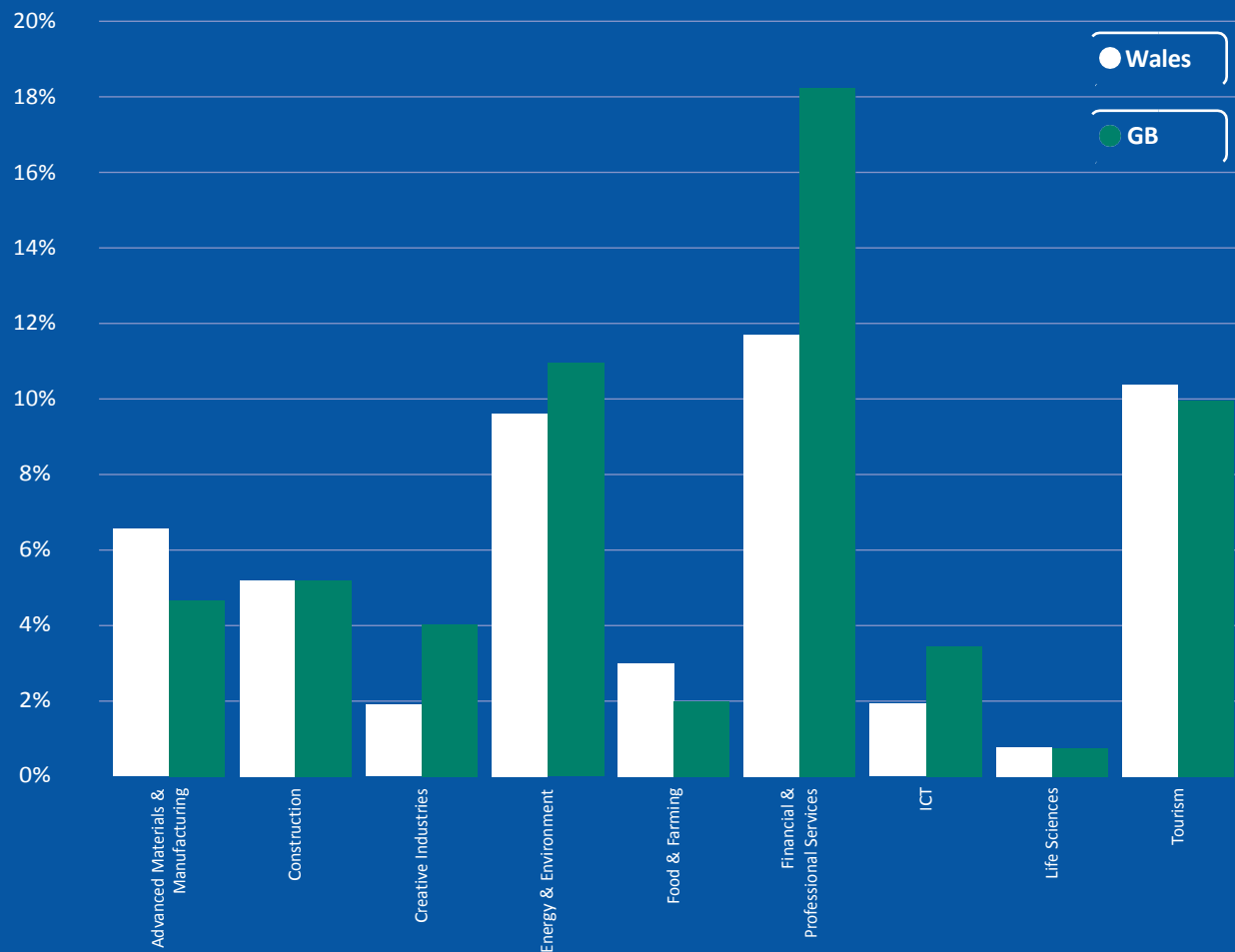
Chairman's Forward

The Wales Tourism Alliance is the representative body of all sectors of the Tourism Industry in Wales. As Chair of the Alliance, I commend to you this briefing which advocates the policies which the next Welsh Government should follow to further develop the contribution the Industry makes to the well being of Wales. The Alliance looks forward to working with the incoming Government to realise the potential of the Industry

With indirect impact on Food and Farming, Transportation, Energy and Environment, Professional Services, Construction, Manufacturing and Retail it is possible Tourism and the wider visitor economy will have the greatest impact on the next government's ability to deliver jobs and growth.

Adrian Barsby

Chairman



Source: Business Register Employment Survey (BRES), ONS



Briefing for Political Parties and National Assembly Member Candidates in the National Assembly of Wales Election May 2016

Tourism Matters

- One in every seven jobs in Wales is in tourism or dependent on it. In some areas tourism is the mainstay of the economy.
- There are 18,000 businesses in the industry spread throughout Wales, mostly small and medium size, family run.
- We host 10 million overnight stays and 89 million day visitors. 80% of earnings are from the UK market, mostly traditional family holidays.
- Welsh Government support through Visit Wales is vital if the industry is to realise its growth potential as is its responsibility to maintain a business friendly climate.
- Productive working relations with the Westminster Government are important, if we are to realise the growth potential of the industry particularly in overseas markets.
- Apart from its contribution to jobs and earnings, tourism helps define us as a nation and to preserve our distinctiveness.
- Working in partnership with Government, the industry can make an even greater contribution to the wellbeing of Wales.

1.1 The Wales Tourism Alliance (WTA) was formed when the National Assembly for Wales was established and the responsibility for tourism was devolved. The WTA has evolved over the years and is now widely recognised as the voice of the industry in Wales. It covers all sectors of the industry including representative organisations of serviced accommodation, self catering, holiday parks, touring caravan and camping, visitor attractions, activity holidays, small businesses, tourist associations, regionally based tourism companies and professional tourist guides.

1.2 Our role is to inform, to contribute to the debate and to forward the views of the tourism community to the Welsh Government and to Westminster in respect of matters relevant to the industry which are not devolved. We do this in a variety of ways including liaising with local authorities, which play an important role in the industry, and with our counterpart organisations in the other countries of the UK and through meetings with Assembly Members and Members of Parliament.

1.3 The purpose of this brief is:

- To highlight the importance of the tourism industry to Wales and the challenges and opportunities it faces
- To suggest the policies the incoming Welsh Government might espouse to meet these challenges and realise the opportunities
- To stress the role of Assembly Members in holding the Welsh Government to account for its role in helping to ensure the future of the tourism industry.

The Importance of the Tourism Industry to Wales

- 2.1 The Office of National Statistic (ONS) reported that for the first time, since the GB Tourism Survey began in 2006, that Wales has topped over 10 million overnight stays per annum in 2014, with the number of actual bed nights reaching over 34 million. On top of this there were 89 million day visits.
- 2.2 The Gross Value Added annually is estimated to be £3.1bn billion per annum and the total contribution, including impacts through the supply chain, capital investment and government expenditure, is in the region of £6.9bn billion or 13.9% of the total economy. This exceeds the contribution to the economy in England (8.5%) and in Scotland (10.5%) and demonstrates how reliant we are in Wales on this important industry.
- 2.3 The industry employs in the region of 117,400 jobs and a further 88,600 indirectly. The overall figure in the region of 206,000 is almost 15% of the total employment in Wales (ONS, 2014). This compares with 10% of the jobs in Scotland engaged in tourism and just under 5% in England.
- 2.4 Even though the tourism industry has been at the forefront of the UK's economic recovery, demonstrating consistent growth faster than almost all other industries, significant opportunities for further growth remain. Quite apart from its economic contribution, the industry through the visitor base it generates helps maintain a higher level of facilities than would otherwise be the case to the benefit of the local population. Tourism also enhances our identity as a Nation and helps maintain its cultural and built heritage by attracting visitors to its cultural facilities and events.

The Characteristics of the Industry

- 3.1 The industry is important throughout Wales but for some communities it is the mainstay of the economy and for others the industry is of recent development. The contribution it makes to our rural communities cannot be underestimated through self-employment, flexible working; and encouraging young people to stay and contribute to the reinforcement of local identity and culture.
- 3.2 It is multi-faceted including day and staying visitors, accommodation providers in hotels, b&bs, farmhouses, holiday parks, camping and self catering, tourist attractions, activity holidays, and cultural and sporting events and business tourism.
- 3.3 It has been a stable and resilient industry and, with the exception of a small amount of funding to support some new developments, not requiring subsidies for individual businesses. Its 18,000 businesses are mostly small and medium size family run, but with some larger national and international companies represented in city centre hotels and holiday parks. The National Museum of Wales, the National Trust and Cadw are also big players through their various branches and properties.
- 3.4 The holiday market predominates driven by the high regard of visitors for our land and seascapes; 25% is National Park or Area of Outstanding Natural Beauty.
- 3.5 City based tourism is growing in importance with business visitors, sporting and other events driving the growth. Cardiff alone employs 17,200. While the infrastructure facilities to support large visitor events have improved, there is still a need for improvements to infrastructure to support festivals and events throughout Wales, including better rail service provision and connectivity with local bus services.
- 3.6 Over 40% of holiday bed nights and 70% of bed spaces are in caravan and camping parks. Together with the self catering sector, this volume is important of itself and because it supports the whole of our tourism economy.

- 3.7 Of the £3.1 billion contribution to GDP, 80% is from spending by visitors from the United Kingdom and 20% from overseas. The average spend per overseas staying visitor is circa £680 compared with £280 from the UK staying visitor.
- 3.8 Visitor Satisfaction Surveys continue to record high levels of visitor satisfaction and confidence in the Wales product, testimony to the continually improving skill base and professionalism of the industry.

The Challenges facing the Government and the Industry

- 4.1 In its Tourism Strategy – Partnership for Growth - for the industry the present Welsh Government has set out its vision to grow tourism earnings in Wales by 10% or more by 2020. The industry recognises the challenge this represents.
- 4.2 Within that framework new businesses will be seeking to establish themselves and existing businesses to increase their profits. However they will be trading in an economic climate determined by UK national and international factors to which they will have to respond and which the Welsh Government will have to acknowledge in its policy development for the industry is often outside of their control. The force and impact of the Welsh Government's representations to the Westminster Government on relevant but non-devolved matters can be of huge material significance.
- 4.3 The challenge for the Welsh Government will be to develop its understanding of the industry as a whole and its various sectors so that it can make the right policy calls which will enable the achievement of the development plan targets.

The Opportunities

- 5.1 With the correct policy calls the tourism industry can make an even greater contribution to Welsh life than it does at present. As a service sector industry, tourism by definition tends to be labour intensive with accompanying constraints in many cases on the ability to automate. Its dispersal means it can offer employment opportunities across Wales with a wide variety of skilled and vocational jobs on offer. The preponderance of family run small and medium size enterprises gives the industry a structural base conducive to growth provided a climate of confidence can be established and its costs of operation, including wages, accommodated. The prize will be the growth of indigenous businesses throughout Wales contributing to greater community stability.
- 5.2 The existing large national and international hotel chains and holiday park companies and other large tourism businesses which may be attracted to Wales can offer both career employment opportunities and a range of vocationally skilled jobs. What is important for them is that Wales has a business friendly climate and the right legislative environment that supports and nurtures new businesses.
- 5.3 The opportunity created by the expansion of the tourism industry will bring greater prosperity across Wales. It will also provide more support for our historic heritage and natural environment through additional visitor spend at tourist attractions and towards the development of our cultural life.
- 5.4 Finally the development of the tourism industry will be an opportunity to raise the world profile of Wales enhancing its status as a nation on the global stage

An Agenda for the Welsh Government

- 6.1 Resource Visit Wales to support the industry.** Visit Wales is a vital support for the industry and should be adequately staffed and resourced to carry out its role. Its place in the Welsh Government administration should be kept under review to ensure it can carry out its role effectively and any proposed changes discussed with the industry. It should be recognised that tourism marketing is a specialism which needs to be reflected both in the appointment and career development of staff and in the decision making process on the timing and nature of marketing campaigns.
- 6.2 Carry out a Review in partnership with the industry of the present Welsh Government's Tourism Strategy-A Partnership for Growth.** It would be timely for the incoming Government to review the strategy.
- 6.3 Develop a better understanding of the industry.** A correct understanding of the needs of the industry is a pre-requisite of correct policy making. The incoming Government should in consultation with the WTA review the current arrangements for taking the views of the industry to ensure they are fit for purpose and that there are no unforeseen consequences that may occur as a result of the implementation of the next legislative programme.
- 6.4 Support the future of the industry by establishing productive working relations with the Westminster Government.** Decisions taken by the Westminster Government affect the tourism industry in Wales and good working relations need to be established with relevant Westminster Ministers and Departments. Members of Parliament from Welsh constituencies ought to be enlisted in support of policies which will benefit the industry. The WTA has established strong cross party and all party groups both in Westminster and Cardiff. The Government should support the campaign to reduce VAT on tourism accommodation and visitor attractions.
- 6.5 Create a business friendly climate.** Avoid the temptation to legislate for everything which often leads to a burden of regulation on the industry; some sectors have expressed concern that this is likely lead to a fall in new entrants being prepared to come into the industry. Appreciate in this context that the industry in Wales is competing with the industry elsewhere in the UK and in other countries and can easily be put at a competitive disadvantage and that new businesses can be deterred from setting up. Be prepared to be innovative in support of businesses using the tools available to the Welsh Government e.g. Business rates 'holidays' for a limited period could help the industry through periods of rising cost pressures.
- 6.6 Develop a greater appreciation within the Welsh Government administration of the impact on tourism of decisions in other policy areas.** There are still too many examples of 'silo' working within the administration. An example is the proposal to remove planning powers from National Park Authorities notwithstanding their acknowledged record in helping to preserve the superb landscape of 20% of Wales, which is the capital on which much of the tourism industry in Wales has traded over the years. Another is the failure to recognise the symbiotic relationship of tourism and agriculture, in the make- up of the proposed Partnership Council for the latter industry.
- 6.7 Investment in the development of the industry.** Where commercial sources of funding are not available the Government should continue to be prepared to support investment in the development of new, market-driven tourism products.
- 6.8 The Government in consultation with Whitehall Departments should continue to seek improvement in the provision and quality of tourism statistics.** Not only is this necessary to measure the real performance of the industry over a given period, but more needs to be done to develop a market research and forecasting capability which the industry can reliably use. Individual tourism businesses must also be prepared to play their part in the required improvement of statistical information with greater emphasis on the use of electronic media to provide live and real time updates. Consideration should also be given to qualitative research by case studies to gauge the impact on individual businesses of particular factors e.g. the impact of particular training programmes on profitability.
- 6.9 Investment in tourism infrastructure.** The Government should itself and by encouragement of local authorities be prepared to finance infrastructure investment which supports the tourism industry and benefits the home population.
- 6.10 A new programme of community led initiatives should be undertaken in the life of the next Assembly.** The tourism potential of electrification of the Paddington- Swansea line and of the Valleys network and the possibility of improvements to services in North Wales consequential to the development of HS2 should be considered, as should other rail service improvements with tourism potential.
- 6.11 Give urgent attention to the improvement of broadband connectivity a high priority.** Lack of broadband connectivity in some areas is holding back the industry in its marketing; moreover visitors expect such provision and where it does not exist a very poor impression of the country is created.
- 6.12 It is important give assurance to visitors of the quality of tourism standards in Wales.** Recognising the increasing significance of Online reviews, Visit Wales, in consultation with the industry, should continue to keep under review quality grading schemes.
- 6.13 Investment in people.** The Government should promote the industry as providing opportunities of skilled jobs and long term careers and also of the possibility of establishing successful tourism businesses. The Government and training providers should meet the associated demands for suitable training provision that can be recognised and understood by the industry, reducing and focusing the myriad of HE and FE courses and qualifications currently available. There are indications that Wales is falling behind other countries in the UK in training provision. One key area we feel is in danger of neglect is the provision of 'bite sized' training for owner managers outside the provision of formal education or training courses. Another, in common with industry generally, is the lack of engineering and technical expertise available. For its part the industry must commit to ensure continuing professional development of staff and the maintenance and improvement of standards of service at all levels.
- 6.14 Investment in marketing.** Working in consultation with the industry in a meaningful partnership, the Government must commit sufficient funds to market Wales effectively as a visitor destination. Given its fragmented nature the industry is not in a position to undertake this role. As a guide, the resources devoted to tourism marketing ought to reflect the scale of the contribution of the industry to the economy as a whole. The marketing campaigns need a better balance, recognising that the core markets, from which repeat visits need to be encouraged, are families and empty nesters. This is not to deny the need to develop product areas as well. Provision should also be made for a tactical marketing budget; it is the only way we can compete alongside the new big players on the block such as Trip Advisor and other OTAs with multinational sized budgets and global reach.
- 6.15 Working with Visit Britain and the GREAT campaign to develop promising overseas markets.** Visit Wales should continue to work with Visit Britain to develop key overseas markets and undertake direct marketing initiatives in these where they are cost effective, in the Partnership for Growth in strategic markets in Europe and North America. The appeal of Wales as a culturally distinctive destination needs more emphasis.
- 6.16 The development of gateway airports.** The efforts to develop inward routes into Cardiff Wales airport should continue, but a third Heathrow runway could also be very beneficial as could trying to develop inward bound visitors to Wales via Birmingham, Manchester and Liverpool airports which have well established and extensive inbound services. The proposed development of an additional runway at Manchester and the associated communication improvements envisaged could in the long term be particularly important for tourism in North Wales. Connectivity with these gateways is paramount.
- 6.17 Develop further the market from cruise ships.** Passenger landings from cruise ships calling at Welsh ports has increased and has further potential to enhance the earnings of surrounding tourism businesses. The proximity of the ports of Liverpool and of Bristol to North East and South East Wales in this context should not be ignored.

Commitment of the WTA

- 7.1** The WTA would be happy to discuss the above Agenda with political parties and will seek discussions with the incoming Government. It will seek to be a constructive partner with the Government over the time of the next National Assembly in the development of the industry in Wales.
- 7.2** Equally the WTA will seek to meet with Assembly candidates and undertakes to continue to brief Assembly Members in the lifetime of the next National Assembly, through the Tourism Cross Party Group of AMs to assist them in holding the Government to account for the future of the tourism industry in fulfilment of their role as assembly Members.
- 7.3** Whilst we understand that we may not always see eye to eye with the Welsh Government or indeed the Minister's Tourism Advisory Board we seek a constructive relationship for the future.

November 2015

Pwysigrwydd Twristiaeth: Cyfarwyriad Etholiad

gan Cynghrair Twristiaeth Cymru



www.wta.org.uk



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Cynghrair Twristiaeth Cymru

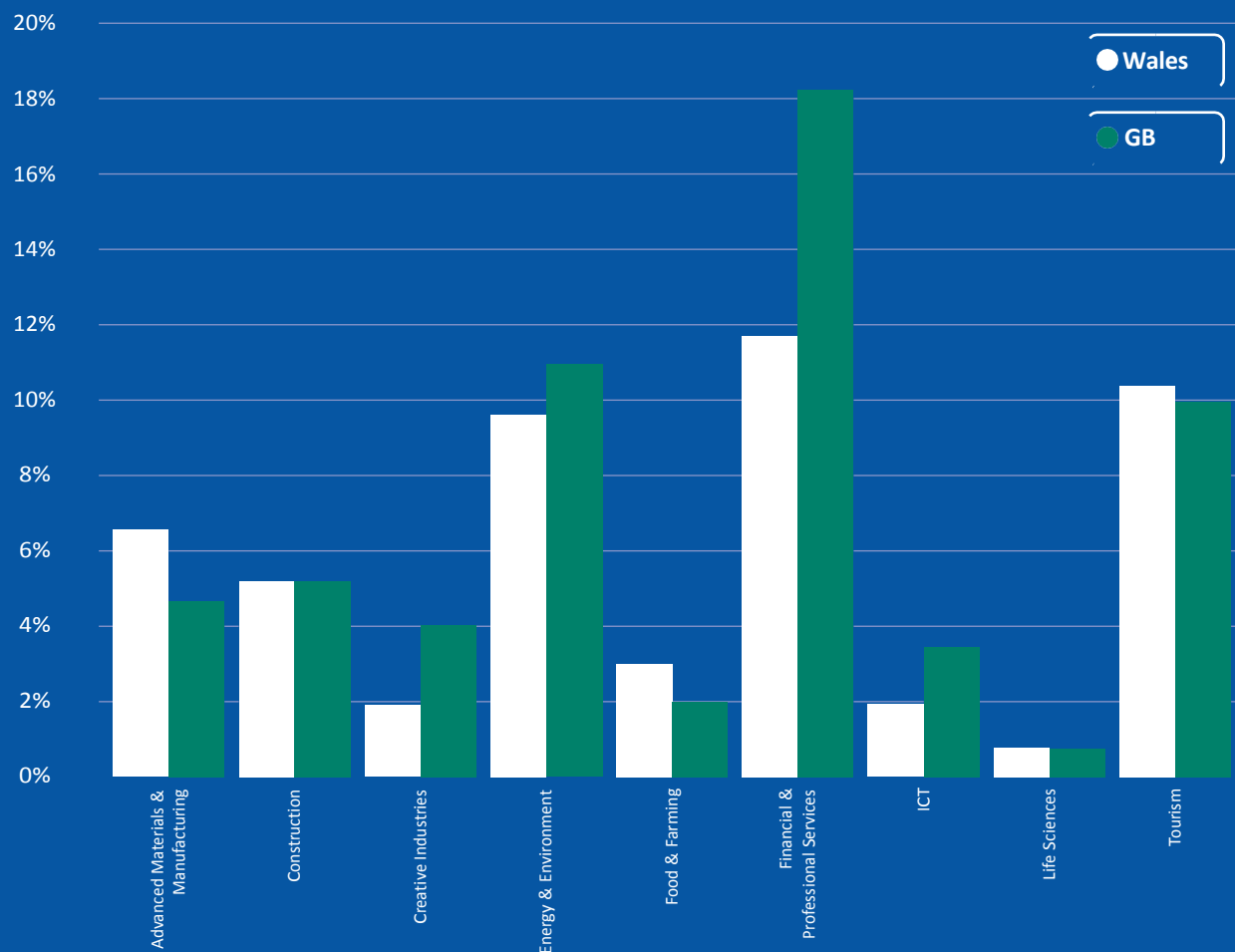
Cyflwyniad y Cadeirydd

Cynghrair Twristiaeth Cymru yw'r corff sy'n cynrychioli pob un o sectorau'r Diwydiant Twristiaeth yng Nghymru. Fel Cadeirydd y Gynghrair rwy'n cymeradwyo i chi'r briff hwn sydd yn dadlau o blaid y polisiau y dylai Llywodraeth nesaf Cymru eu dilyn er mwyn datblygu eto fyth y cyfraniad y mae'r Diwydiant yn ei wneud tuag at les Cymru. Mae'r Gynghrair yn edrych ymlaen at weithio gyda'r Llywodraeth nesaf i wireddu potensial y diwydiant.

Gydag effeithiau anuniongyrchol ar Fwyd a Ffermio, Cludiant, Ynni a'r Amgylchedd, Gwasanaethau Proffesiynol, Adeiladu, Cynhyrchu ac Adwerthu, mae'n bosibl mai Twristiaeth a'r economi ymwelwyr ehangach fydd yn cael yr effaith fwyaf ar allu'r llywodraeth nesaf i sicrhau swyddi a thwf.

Adrian Barsby

Cadeirydd



Source: Business Register Employment Survey (BRES), ONS



Cyfarwyddo Pleidiau Gwleidyddol ac Aelodau Ymgeisiol y Cynulliad Cenedlaethol yn Etholiad Cynulliad Cenedlaethol Cymru Mai 2016

Materion Twristiaeth

- Mae un o bob saith swydd yng Nghymru ym myd twristiaeth neu'n dibynnu arno. Mewn rhai ardaloedd twristiaeth yw prif gynhaliwr yr economi.
- Mae 18,000 o fusnesau yn y diwydiant ar hyd a lled Cymru, busnesau teuluol bach a chanolig yn bennaf.
- Rydym yn croesawu 10 miliwn arhosiad dros nos ac 89 miliwn o ymwelwyr undydd.
- Daw 80% o'r enillion o farchnad y DU, gwyliau teulu traddodiadol yn bennaf
- Mae cefnogaeth Llywodraeth Cymru trwy Croeso Cymru'n hanfodol os yw'r diwydiant wireddu'r twf posibl, ac felly hefyd y cyfrifoldeb i gynnal hinsawdd ystyriol o fusnes
- Mae cysylltiadau gwaith cynhyrchiol gyda Llywodraeth San Steffan yn bwysig, os ydym i wireddu posibiliadau twf y diwydiant yn enwedig mewn marchnadoedd tramor
- Ar wahân i'w chyfraniad at swyddi ac enillion, mae twristiaeth yn helpu ein diffinio fel cenedl a chadw ein hynodrwydd
- Trwy gydweithio â'r Llywodraeth, gall y diwydiant wneud mwy fyth o gyfraniad at ffyniant Cymru

- 1.1** Ffurfiwyd **Cynghrair Twristiaeth Cymru (CTC)** pan sefydlwyd Cynulliad Cenedlaethol Cymru a datganoli'r cyfrifoldeb dros dwristiaeth. Datblygodd CTC drwy'r blynyddoedd ac mae bellach yn cael ei gydnabod yn eang fel llais y diwydiant yng Nghymru. Mae'n cwmpasu pob sector o'r diwydiant gan gynnwys sefydliadau cynrychiadol llety â gwasanaeth, hunanarlwyo, parciau gwyliau, carafanau teithiol a gweryslla, atyniadau ymwelwyr, gwyliau gweithgareddau, busnesau bach, cymdeithasau twristiaeth, cwmnïau twristiaeth rhanbarthol a thywyswyr ymwelwyr proffesiynol.
- 1.2** Ein swyddogaeth yw ysbrydoli, cyfrannu at y drafodaeth ac anfon sylwadau'r gymuned dwristiaeth i Lywodraeth Cymru ac i San Steffan o ran materion perthnasol i'r diwydiant sydd heb eu datganoli. Gwnawn hyn mewn amrywiaeth o ffyrdd gan gynnwys cadw cyswllt ag awdurdodau lleol, sy'n chwarae rhan bwysig yn y diwydiant, ac â sefydliadau cyfatebol yng ngwledydd eraill y DU a thrwy gyfarfodydd gydag Aelodau'r Cynulliad ac Aelodau Seneddol.
- 1.3** Diben y cyfarwyddyd hwn yw:
 - Tynnu sylw at bwysigrwydd y diwydiant ymwelwyr i Gymru a'r heriau a chyfleoedd sy'n ei wynebu
 - Awgrymu'r polisiau y gallai Llywodraeth Cymru nesaf eu cefnogi i ateb yr heriau hyn a gwireddu'r cyfleoedd
 - Pwysleisio swyddogaeth Aelodau'r Cynulliad wrth atgoffa Llywodraeth Cymru o'i rhan mewn cynorthwyo sicrhau dyfodol y diwydiant ymwelwyr.

Pwysigrwydd y Diwydiant Ymwelwyr i Gymru

- 2.1 Yn ôl y Swyddfa Ystadegau Gwladol (SYG) cafodd Cymru, am y tro cyntaf ers dechrau Arolwg Twristiaeth Gwledydd Prydain yn 2006, dros 10 miliwn arhosiad dros nos y flwyddyn yn 2013, gyda nifer y nosau gwely gwirioneddol yn cyrraedd dros 34 miliwn. Ar ben hyn roedd 89 miliwn o ymweliadau undydd.
- 2.2 Amcangyfrif o'r Gwerth Ychwanegol Crynswth bob blwyddyn yw £3.1 biliwn y flwyddyn ac mae'r cyfraniad llawn, gan gynnwys effeithiau drwy'r gadwyn gyflenwi, buddsoddiad cyfalaf a gwariant y llywodraeth, yng nghyffiniau £6.9 biliwn neu 13.9% o'r economi llawn. Mae hyn yn fwy na'r cyfraniad at yr economi yn Lloegr (8.5%) ac yn yr Alban (10.5%) gan ddangos pa mor ddibynnol ydym yng Nghymru ar y diwydiant pwysig hwn.
- 2.3 Mae'r diwydiant yn cyfrif am ryw 117,400 o swyddi ac 88,600 arall yn anuniongyrchol. Mae'r ffigur llawn o ryw 206,000 bron 15% o gyfanswm cyflogaeth yng Nghymru (SYG, 2014). Rhaid cymharu hyn â 10% o'r swyddi yn yr Alban yn ymwneud â thwristiaeth ac ychydig dan 5% yn Lloegr.
- 2.4 Er i'r diwydiant ymwelwyr fod yn flaenllaw yn adferiad economaidd y DU, gan ddangos twf cyson cyflymach na holl ddiwydiannau eraill bron, mae cyfleoedd twf ychwanegol pwysig yn dal i fod. Ar wahân yn llwyr i'w gyfraniad economaidd mae'r diwydiant, drwy'r sail ymwelwyr sy'n cael ei chynhyrchu ganddo, yn helpu cynnal gwell cyfleusterau nag a fyddai fel arall, er budd y boblogaeth leol. Mae twristiaeth hefyd yn cyfoethogi ein hunaniaeth fel Cenedl ac yn helpu cynnal ei hetifeddiaeth ddiwylliannol a'i threftadaeth adeiledig trwy ddenu ymwelwyr i'w chyfleusterau ac achlysuron diwylliannol.

Nodweddion y Diwydiant

- 3.1 Mae'r diwydiant yn bwysig ar hyd a lled Cymru ond mae'n cynnal yr economi mewn rhai cymunedau, ac mewn eraill datblygodd y diwydiant yn ddiweddar. Nid oes modd amcangyfrif yn rhy uchel y cyfraniad mae'n ei wneud i'n cymunedau gwledig trwy hunangyflogaeth; gweithio hyblyg; ac annog pobl ifanc i aros a chyfrannu at atgyfnerthu hunaniaeth a diwylliant lleol.
- 3.2 Mae aml agwedd arno gan gynnwys ymwelwyr undydd ac arhosol; darparwyr llety mewn gwestai; gwely a brecwast; ffermdai; parciau gwyliau; gwersylla a hunanarlwyo; atyniadau ymwelwyr; gwyliau gweithgareddau; achlysuron diwylliannol a chwaraeon; a thwristiaeth fusnes.
- 3.3 Bu'n ddiwydiant sefydlog a chydnerth ac, heblaw am ychydig o gymorth ariannol i rai datblygiadau newydd, ni fu gofyn am gymorthdaliadau i fusnesau unigol. Mae ei 18,000 o fusnesau at ei gilydd yn rhai teuluol bach a chanolig, ond gyda rhai gwestai canol dinasoedd a pharciau gwyliau'n cynrychioli cwmnïau cenedlaethol a rhyngwladol mwy. Chwaraewyr mawr hefyd yw Amgueddfa Genedlaethol Cymru, yr Ymddiriedolaeth Genedlaethol a Cadw trwy eu canghennau ac eiddo lluosog.
- 3.4 Y farchnad wyliau sydd bennaf oherwydd parch mawr ymwelwyr at ein tir a'n morweddau; mae 25% yn Barc Cenedlaethol neu Ardal o Harddwch Naturiol Eithriadol.
- 3.5 Mae twristiaeth seiliedig ar ddinasoedd yn dod yn fwyfwy pwysig gydag ymwelwyr busnes, chwaraeon ac achlysuron eraill yn hybu'r twf. Mae Caerdydd yn unig yn cyflogi 17,200. Tra bo'r seilwaith cyfleusterau ar gyfer cynnal achlysuron ymwelwyr mawr wedi gwella, mae angen yn dal am welliannau i isadeiledd er mwyn cynnal gwyliau a digwyddiadau ledled Cymru, gan gynnwys darparu gwell gwasanaeth trenau a chysylltedd gydag wasanaethau bws lleol.

- 3.6 Mae dros 40% o nosau gwely gwyliau a 70% o welyau mewn parciau carafanau a gwersylla. Ynghyd â'r sector hunanarlwyo, mae cymaint â hyn yn bwysig ohono'i hun ac oherwydd ei fod yn cynnal ein heconomi twristiaeth i gyd.
- 3.7 O'r cyfraniad o £3.1 biliwn at CMC, daw 80% ohono o wariant ymwelwyr o'r Deyrnas Unedig ac 20% oddi tramor. Y gwariant ar gyfartaledd fesul ymwelydd tramor sy'n aros yw tua £680 o'i gymharu â £280 fesul ymwelydd o'r DU sy'n aros.
- 3.8 Mae Arolygon Bodlonrwydd Ymwelwyr yn dal i gofnodi bodlonrwydd mawr ymhlith ymwelwyr a hyder yn y cynnyrch Cymreig, sy'n dystiolaeth o sail sgiliau a phroffesiynoldeb y diwydiant sy'n gwella'n barhaol.

Yr Heriau sy'n Wynebu'r Llywodraeth a'r Diwydiant

- 4.1 Yn ei Strategaeth Dwristiaeth – Partneriaeth ar Gyfer Twf – ar gyfer y diwydiant mae Llywodraeth bresennol Cymru wedi cyflwyno'i gweledigaeth o gynyddu 10% neu fwy ar enillion twristiaeth yng Nghymru erbyn 2020. Mae'r diwydiant yn cydnabod yr her yn hyn.
- 4.2 O fewn y fframwaith hwnnw bydd busnesau newydd yn ceisio sefydlu eu hunain a busnesau presennol yn ceisio cynyddu eu helw. Fodd bynnag, byddant yn masnachu mewn hinsawdd economaidd a bennwyd gan ffactorau cenedlaethol y DU a rhyngwladol y byddant yn gorfod ymateb iddynt ac y bydd Llywodraeth Cymru'n gorfod eu cydnabod wrth ddatblygu ei pholisi ar gyfer y diwydiant, yn aml oddi allan i'w rheolaeth. Fe all grym ac effaith sylwadau Llywodraeth Cymru i Lywodraeth San Steffan ar faterion perthnasol ond heb eu datganoli fod o arwyddocâd materol enfawr.
- 4.3 Yr her i Lywodraeth Cymru fydd datblygu ei dealltwriaeth o'r diwydiant cyfan a'i amrywiol sectorau er mwyn gallu pwyso am y polisiau cywir fydd yn galluogi cyflawni targedau'r cynllun datblygu.

Y Cyfleoedd

- 5.1 Gyda'r polisiau cywir, gall y diwydiant ymwelwyr wneud mwy fyth o gyfraniad at fywyd Cymru nag a wna ar hyn o bryd. Fel un o ddiwydiannau'r sector gwasanaeth, mae twristiaeth wrth reswm yn tueddu i fod yn llafurddwys gyda chyfyngiadau cysylltiedig ar y gallu i awtomeiddio mewn llawer achos. Mae ei wasgariad yn golygu y gall gynnig cyfleoedd cyflogaeth ledled Cymru gydag amrywiaeth eang o swyddi crefftus a galwedigaethol ar gael. Mae cymaint o fentrau bach a chanolig teuluol yn rhoi sail strwythurol i'r diwydiant sy'n ffafriol i dwf ond bod modd sefydlu hinsawdd o hyder a'i fod yn gallu talu ei gostau gweithredu, gan gynnwys cyflogau. Y wob'r fydd twf busnesau brodorol ar hyd a lled Cymru'n cyfrannu at gymuned fwy sefydlog.
- 5.2 Fe all y cadwyni gwestai a chwmnïau parciau gwyliau cenedlaethol a rhyngwladol mawr presennol a busnesau ymwelwyr mawr eraill all gael eu denu i Gymru gynnig cyfleoedd cyflogaeth yrfa ac amrywiaeth o swyddi crefftus galwedigaethol. Yr hyn sy'n bwysig iddynt yw bod gan Gymru hinsawdd ystyriol o fusnes a'r amgylchedd deddfwriaethol cywir sy'n cefnogi ac yn meithrin busnesau newydd.
- 5.3 Bydd y cyfle a gaiff ei greu trwy ehangu'r diwydiant ymwelwyr yn dod â mwy o ffyniant ledled Cymru. Bydd hefyd yn rhoi mwy o gymorth i'n treftadaeth hanesyddol a'n hamgylchedd naturiol trwy fwy o wariant ymwelwyr mewn atyniadau a thuag at ddatblygu ein bywyd diwylliannol.
- 5.4 Yn olaf, bydd datblygu'r diwydiant ymwelwyr yn gyfle i dynnu sylw'r byd at Gymru gan wella ei statws fel cenedl ar y llwyfan byd-eang.

Agenda ar gyfer Llywodraeth Cymru

- 6.1 Gweld bod Croeso Cymru'n cael yr adnoddau i gynnal y diwydiant.** Mae Croeso Cymru'n gymorth hanfodol i'r diwydiant a dylai fod â staff ac adnoddau digonol i wneud ei waith. Dylid adolygu ei le yng ngweinyddiaeth Llywodraeth Cymru er mwyn sicrhau y gall wneud ei ran yn effeithiol a thrafod unrhyw newidiadau arfaethedig gyda'r diwydiant. Dylid derbyn bod marchnata twristiaeth yn arbenigedd sydd angen ei hadlewyrchu wrth benodi a datblygu gyrfa staff ac wrth benderfynu ar amseriad a natur ymgyrchoedd marchnata.
- 6.2 Ar y cyd â'r diwydiant gwneud Adolygiad o Strategaeth Dwristiaeth bresennol Llywodraeth Cymru – Partneriaeth ar Gyfer Twf.** Byddai'n amserol i'r Llywodraeth newydd adolygu'r strategaeth.
- 6.3 Datblygu gwell dealltwriaeth o'r diwydiant.** Mae dealltwriaeth gywir o anghenion y diwydiant yn un o ragofynion llunio polisi cywir. Ar ôl ymgynghori â CTC dylai'r Llywodraeth newydd adolygu'r trefniadau presennol ar gyfer cael barn y diwydiant er mwyn sicrhau eu bod yn addas i'r diben ac nad oes unrhyw ganlyniadau annisgwyl all ddigwydd o ganlyniad i weithredu'r rhaglen ddeddfwriaethol nesaf.
- 6.4 Cefnogi dyfodol y diwydiant trwy sefydlu cysylltiadau gwaith cynhyrchiol gyda Llywodraeth San Steffan.** Mae penderfyniadau Llywodraeth San Steffan yn effeithio ar y diwydiant ymwelwyr yng Nghymru ac mae angen sefydlu cysylltiadau gwaith da gyda Gweinidogion ac Adrannau perthnasol yn San Steffan. Dylid sicrhau bod Aelodau Seneddol o etholaethau Cymru'n cefnogi polisiâu fydd yn elwa'r diwydiant. Mae CTC wedi sefydlu grwpiau rhyngbleidiol a hollbleidiol cryf yn San Steffan a Chaerdydd. Dylai'r Llywodraeth gefnogi'r ymgyrch i leihau TAW ar lety ymwelwyr ac atyniadau ymwelwyr.
- 6.5 Creu hinsawdd ystyriol o fusnes.** Osgoi'r demtasiwn i ddeddfu ar gyfer popeth sy'n aml yn arwain at faich o reoliadau ar y diwydiant; mae rhai sectorau wedi mynegi pryder bod hyn yn debygol o arwain at ostyngiad yn nifer y newydd-ddyfodiaid sy'n barod i ddod i'r diwydiant. Yn y cyd-destun hwn derbyn bod y diwydiant yng Nghymru'n cystadlu gyda'r diwydiant yn rhannau eraill y DU ac mewn gwledydd eraill a'i bod yn hawdd ei roi dan anfantais gystadleuol ac annog busnesau newydd rhag sefydlu. Dylid bod yn barod i fod yn arloesol wrth gefnogi busnesau, gan ddefnyddio'r offer sydd ar gael i Lywodraeth Cymru, e.e. gallai 'gwyliau' trethi busnes am gyfnod cyfyngedig helpu'r diwydiant trwy gyfnodau o bwysau costau cynyddol.
- 6.6 Datblygu mwy o werthfawrogiad o fewn gweinyddiaeth Llywodraeth Cymru o'r effaith ar dwristiaeth o benderfyniadau mewn meysydd polisi eraill.** Mae gormod o enghreifftiau'n dal o weithio 'seilo' o fewn y weinyddiaeth. Un enghraifft yw'r cynnig i dynnu pwerau cynllunio oddi ar Awdurdodau Parciau Cenedlaethol ar waethaf eu hanes cydnabyddedig wrth gynorthwyo cadw tirwedd wych 20% o Gymru, sef y cyfalaf y bu llawer o'r diwydiant ymwelwyr yng Nghymru'n masnachu arno drwy'r blynnyddoedd. Un arall yw peidio â derbyn y berthynas symbiotig rhwng twristiaeth ac amaethyddiaeth, wrth lunio'r Cyngor Partneriaeth arfaethedig ar gyfer y diwydiant amaeth.
- 6.7 Buddsoddi yn natblygiad y diwydiant.** Pan nad oes ffynonellau arian masnachol ar gael, dylai'r Llywodraeth ddal i fod yn barod i gefnogi buddsoddiad yn natblygiad cynhyrchion twristiaeth newydd, yn ôl gofynion y farchnad.
- 6.8 Ar ôl ymgynghori ag Adrannau San Steffan, dylai'r Llywodraeth ddal i geisio gwella darpariaeth ac ansawdd ystadegau twristiaeth.** Nid yn unig mae hyn yn angenrheidiol i fesur gwir berfformiad y diwydiant dros gyfnod penodol, mae angen gwneud mwy i ddatblygu ymchwil marchnata a galluoedd darogan y gall y diwydiant eu defnyddio'n ddibynadwy. Rhaid i fusnesau ymwelwyr unigol hefyd fod yn barod i chwarae eu rhan yn y gwelliant sydd ei angen mewn gwybodaeth ystadegol, gyda mwy o bwyslais ar ddefnyddio cyfryngau electronig i roi diweddariadau byw ac ar y pryd. Hefyd dylid ystyried ymchwil ansoddol trwy astudiaethau achos i fesur effaith ffactorau arbennig ar fusnesau unigol, e.e. effaith rhaglenni hyfforddi arbennig ar broffidioldeb.

- 6.9 Buddsoddi mewn seilwaith twristiaeth.** Dylai'r Llywodraeth ei hun, a thrwy annog awdurdodau lleol, fod yn barod i dalu am fuddsoddi mewn seilwaith sy'n cynorthwyo'r diwydiant ymwelwyr ac elwa'r boblogaeth gartref.
- 6.10 Dylid ymgymryd â rhaglen newydd o fentrau cymunedol ym mywyd y Cynulliad nesaf.** Dylid ystyried posibiliadau twristiaidd trydaneiddio'r rheilffordd rhwng Paddington ac Abertawe a rhwydwaith y Cymoedd a phosibilrwydd gwella gwasanaethau yn y Gogledd o ganlyniad i ddatblygu HS2, fel y dylai gwella gwasanaethau trenau eraill gyda phosibiliadau twristiaidd.
- 6.11 Rhoi sylw ar frys i flaenoriaeth uchel gwella cysylltedd band eang.** Mae diffyg cysylltedd band eang mewn rhai ardaloedd yn llesteirio marchnata'r diwydiant; ar ben hynny mae ymwelwyr yn disgwyl darpariaeth o'r fath a chaiff argraff wael iawn o'r wlad ei chreu lle nad yw'n bodoli.
- 6.12 Mae'n bwysig rhoi sicrwydd i ymwelwyr ynghylch ansawdd safonau twristiaeth yng Nghymru.** Gan gydnabod arwyddocâd cynyddol adolygiadau ar-lein, dylai Croeso Cymru, ar ôl ymgynghori â'r diwydiant, ddal i adolygu ansawdd cynlluniau graddio.
- 6.13 Buddsoddi mewn pobl.** Dylai'r Llywodraeth hyrwyddo'r diwydiant fel un sy'n creu cyfleoedd swyddi crefftus a gyrffâu hirdymor a phosibilrwydd sefydlu busnesau twristiaeth llwyddiannus hefyd. Dylai'r Llywodraeth a darparwyr hyfforddiant ateb y galwadau cysylltiedig am hyfforddiant addas y gall y diwydiant ei gydnabod a'i ddeall, gan leihau a chanolbwyntio'r myrdd o gyrsiau a chymwysterau AU ac AB sydd ar gael ar hyn o bryd. Mae arwyddion bod Cymru'n colli tir i wledydd eraill yn y DU o ran darparu hyfforddiant. Un maes allweddol y teimlwn sydd mewn perygl o gael ei esgeuluso yw darparu 'talpiâu' o hyfforddiant i berchennog-reolwyr oddi allan i gyrsiau addysg neu hyfforddiant ffurfiol. Maes arall, fel gyda diwydiant yn gyffredinol, yw diffyg medrusrwydd peirianyddol a thechnegol. O'i ran ei hun rhaid i'r diwydiant ymroddi i sicrhau datblygiad proffesiynol parhaus ei staff a chynnal a gwella safonau gwasanaeth ymhob haen.
- 6.14 Buddsoddi mewn marchnata.** Gan weithio ar ôl ymgynghori â'r diwydiant mewn partneriaeth ystyrlon, rhaid i'r Llywodraeth glustnodi digon o arian i farchnata Cymru'n effeithiol fel cyrchfan ymwelwyr. O dderbyn ei natur dameidiog nid yw'r diwydiant mewn sefyllfa i ymgymryd â'r swyddogaeth hon. Fel canllaw, dylai'r adnoddau sy'n cael eu clustnodi i farchnata twristiaeth adlewyrchu maint cyfraniad y diwydiant i'r economi at ei gilydd. Mae angen cydbwysu'r ymgyrchoedd marchnata'n well, gan ddeall mai'r marchnadoedd craidd, o ble mae angen hybu ailymweliadau, yw teuluoedd ac aelwydydd lle gadawodd y plant. Nid yw hyn yn nacáu'r angen i ddatblygu meysydd cynnyrch yn ogystal. Dylid gwneud darpariaeth hefyd ar gyfer cyllideb marchnata tactegol; dyma'r unig ffordd y gallwn gystadlu ochr yn ochr â'r chwaraewyr mawr newydd fel TripAdvisor ac OTA eraill gyda chyllidebau amlwladol a chyrhaeddiad byd-eang.
- 6.15 Gweithio gyda Visit Britain a'r ymgyrch GREAT i ddatblygu marchnadoedd tramor addawol.** Dylai Croeso Cymru ddal i weithio gyda Visit Britain i ddatblygu marchnadoedd tramor allweddol ac ymgymryd â mentrau marchnata uniongyrchol ynddynt pan fyddant yn gost-effeithiol, yn y Bartneriaeth ar Gyfer Twf mewn marchnadoedd strategol yn Ewrop a Gogledd America. Mae angen mwy o bwyslais ar apêl Cymru fel cyrchfan ddiwylliannol arwahanol.
- 6.16 Datblygu meysydd awyr porth.** Dylai'r ymdrechion i ddatblygu llwybrau i mewn i faes awyr Cymru Caerdydd barhau, ond gallai trydedd redfa yn Heathrow hefyd fod yn fanteisiol iawn fel y gallai ceisio datblygu dyfodiad ymwelwyr â Chymru trwy feysydd awyr Birmingham, Manceinion a Lerpwl sydd â gwasanaethau helaeth ac wedi hen sefydlu at i mewn. Gallai'r bwriad i ddatblygu rhedfa ychwanegol ym Manceinion a'r gwelliannau i gysylltiadau a fyddai'n dilyn fod yn arbennig o bwysig yn y pen draw i dwristiaeth yng Ngogledd Cymru. Mae'n hollbwysig cysylltu â'r pyrth hyn.
- 6.17 Datblygu mwy ar farchnad llongau mordeithio.** Cynyddodd glaniadau teithwyr o longau mordeithio sy'n galw ym mhorthladdoedd Cymru ac mae ganddo ragor o le i gynyddu enillion busnesau ymwelwyr yn y cyffiniau. Yn y cyd-destun hwn ni ddylid anwybyddu agosrwydd porthladdoedd Lerpwl a Bryste at Ogledd-ddwyrain a De-ddwyrain Cymru.

Ymroddiad CTC

- 7.1** Byddai CTC yn barod i drafod yr Agenda uchod gyda phleidiau gwleidyddol a bydd yn chwilio am drafodaethau gyda'r Llywodraeth nesaf. Bydd yn ceisio bod yn bartner adeiladol gyda'r Llywodraeth yn ystod y Cynulliad Cenedlaethol nesaf ar ddatblygu'r diwydiant yng Nghymru.
- 7.2** I'r un graddau bydd CTC yn ceisio cyfarfod aelodau ymgeisiol y Cynulliad ac mae'n bwriadu dal i gyfarwyddo Aelodau'r Cynulliad yn ystod y Cynulliad Cenedlaethol nesaf, drwy Grŵp Rhyngbleidiol Twristiaeth Aelodau'r Cynulliad i helpu iddynt ddal i bwysu ar y Llywodraeth ynghylch dyfodol y diwydiant ymwelwyr yn eu swyddogaeth fel Aelodau'r Cynulliad.
- 7.3** Tra'r ydym yn deall na fyddwn bob amser yn gweld llygad yn llygad â Llywodraeth Cymru neu Fwrdd Cyngori'r Gweinidog ar Dwristiaeth, yn wir, rydym yn chwilio am berthynas adeiladol at y dyfodol.

Tachwedd 2015