

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.