



Ceredigion County Council

Tourism & Visitor Economy Strategy for Ceredigion 2011- 2020

FINAL REPORT



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15 The Southend | Ledbury | Herefordshire HR8 2EY | UK | T: +44 (0)1531 635451

155 High Street | Teddington | TW11 8HH | UK | T: +44 (0)20 3328 3580

thetourismcompany.com | cevans@thetourismcompany.com

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1. Introduction

Why tourism matters

Tourism (the visitor economy) has an important part to play in contributing to local prosperity and quality of life in Ceredigion. The County needs to pursue tourism because, first, this is where its natural comparative advantage lies and, second, there are few alternative sectors for the County given the uncertainties surrounding public sector employment and agriculture, the other mainstays of a somewhat fragile economy in the County¹. Tourism already supports a significant number of jobs and injects much needed revenue into the local economy. It also supports the development of vital infrastructure and other economic activities.

According to the STEAM model²:

- Total spend by day and staying visitors was estimated at £268m in Ceredigion 2009.
- This spending was estimated to support 5,712 jobs (FTE) in and around the County.

In addition, tourism:

- Supports cross-cutting services and infrastructure which benefit local people and can result in greater variety of cultural and leisure provision e.g. transport links, the range of shops and services, restaurants and bars, local heritage and cultural facilities; and
- Helps promote a positive image of the County to the outside world which, in turn, can attract investment and make people feel better about the place in which they live.

Why we need a strategy for tourism

Given the need for a diversified economy, it is important that tourism is developed and managed in such a way as to ensure long-term prosperity and success. Tourism is, however, a complicated industry involving both the public and private sectors. The private sector comprises many businesses, most of them small. Working alone, these enterprises cannot manage and sustain tourism across a destination. They also cannot train and develop a skilled workforce without some assistance. Similarly, there are many public agencies and departments within agencies that contribute to tourism development and management. For tourism to be successful and make a constructive contribution to the local community, all parties need to co-ordinate activity and work to common goals.

Tourism can also have negative impacts. It can affect the natural environment and general character of an area. The growth in visitors can create unwelcome development pressures for the local community, recruitment issues and congestion on the roads and at key sites. Tourism can't therefore just be left to develop unchecked; it has to be managed in a sustainable way, to maximise the benefits and reduce the negative impacts.

¹ Ceredigion: Challenges and changes, Victoria Winckler of The Bevan Foundation, 2008

² Appendix I: Economic impact

This is therefore a plan for all those with an interest in the future of tourism in Ceredigion. This includes:

- The private sector, responsible for meeting the day-to-day needs of visitors;
- Council departments, responsible for destination management and maintenance;
- Politicians, who have to make the difficult decisions and allocate resources;
- The local community that is concerned about tourism related opportunities and possible impacts upon their way of life; and
- Providers of tourism related learning and development in Ceredigion and the wider region.

This strategy sets the parameters for tourism development within Ceredigion for the next ten years (2010-2020) although the Action Plan needs to be implemented over the short-term i.e. the next 2-5 years.

In preparing this report, we have consulted extensively with the Council officials, private sector stakeholders and other interested parties and we acknowledge the assistance that has been given to us in helping to formulate the report.

The structure of the document

In the following chapters (2-8) we look at the current state of tourism in the County and the challenges it faces in the future. We then go on to outline a strategy (chapter 9) and the action that is required over the next five years (chapters 10-14).

Our brief

The Tourism Company was commissioned by Ceredigion County Council (CCC) and the University of Wales Trinity St David (TSD) in September 2010 to prepare this strategy for the visitor economy (2011-2020). The brief highlighted that:

- The new strategy and action plan should be aligned with the national tourism strategy 'Achieving Our Potential' and be in accordance with CCC's Corporate Strategy, Community Strategy, LDS and vision for 2020;
- The new strategy will need to be forward-looking, sustainable, inclusive, distinctive, deliverable and relevant to the public, third and private sectors. It should:
 - Provide a framework for development in the context of a depressed economy and changing consumer behaviour;
 - Continue to employ an IQM approach³;
 - Employ a collaborative partnership approach involving all stakeholders in consultation and gaining their support for the strategy; and
 - Provide a marketing strategy with reference to the national strategy for destination management and marketing.

The brief refers to the need to address local skills requirements in the context of recent trends in tourism demand and make proposals for skills needs at all levels and also in terms of support for local enterprise. Within the strategy, UWTSD is looking for an informed direction in which to take future course development and research activities and to develop its commercial

³ Integrated Quality Management is an approach to managing a tourism destination which focuses on an ongoing process of improving visitor satisfaction, while seeking to improve the local economy, the environment and the quality of life of the local community. This approach, developed for the EU by The Tourism Company, has been adopted by Visit Wales.

business arm in a way that is relevant to the needs of the tourism sector.

THE EXISTING SITUATION

2. Perceptions of Ceredigion

Location and character

Ceredigion is the traditional name for what was called Cardiganshire from 1888 to 1974, a discrete and independent entity in physical, historical and social terms.

In physical terms, the County is set in the west of the Mid Wales region and embraces 60 miles of the Cardigan Bay coast to the west with dramatic cliffs, beach coves, resorts and wonderful marine and birdlife⁴. The County is also clearly defined to the north and the south by the major estuaries of the Dyfi and the Teifi. To the east, lie the Cambrian Mountains with forests and moorland which for centuries provided a physical barrier to communication with surrounding areas. The undulating rural hinterland between the coast and the mountains is dissected by the Aeron, Ystwyth, Rheidol and other streams.

Ceredigion has a long history dating back to the 5th century '*Kingdom of Ceredig*'. In social terms, it remains a predominantly Welsh-speaking community with its own distinctive character based in part on its physical isolation, traditional non-conformism, mercantile, mining and farming heritage and renowned sense of independence⁵.

Ceredigion is thinly populated with only 78,000 residents spread across 150 settlements within its 1,800 km². The landscape remains largely unspoilt by development.

Access to and around Ceredigion

There are four major gateways by road. These are via:

- The A487 from the north via Machynlleth towards Aberystwyth;
- The A44 from the east to Aberystwyth;
- The A484 from the south east via Carmarthen towards Cardigan, New Quay, Aberaeron and the Teifi Valley; and
- The A487 from the south west via Pembrokeshire.

For the more intrepid, there are the spectacular minor routes over the Cambrian Mountains from Rhayader to Cwmystwyth and from Builth Wells to Tregaron.

By rail, the only access is to Borth and Aberystwyth on the Cambrian Railway Line from Shrewsbury. Trains run every two hours from London to Aberystwyth. Frequency will be improved next year with a planned hourly service. The large majority of visitors therefore arrive by car (83%)⁶. For those that don't come by car (mainly the older and younger visitors), and for those who would prefer not to use the car after arriving, Ceredigion is relatively well served by regular local buses, although services are less frequent in the rural hinterland. These services are important for walkers along the coast path between New Quay and Borth. On the coast between Cardigan and New Quay, the Cardi Bach bus service is to operate all year round from 2011.

⁴ The Coast and Countryside Strategy for Ceredigion provides an excellent description of the natural resources of the County

⁵ The County also has the lowest level of recorded crime in England and Wales.

⁶ Ceredigion visitor survey, 2010

Within the County, roads are mainly single carriageway and the local geography means travelling times are relatively slow but the roads are largely uncongested and the routes attractive. Driving is still a pleasure in Ceredigion. Slow access to and within Ceredigion is seen as a challenge by some, but an attraction by others.

Local awareness

There have been no formal awareness studies done of the County i.e. to establish the public perception of Ceredigion but anecdotal information suggests that although people are aware of the general area, there is a low level of awareness of the name Ceredigion, its location and what is on offer, particularly outside Wales.

The table below looks at the relative popularity of six area destination names as measured by the number of visitor-orientated searches conducted on Google using these destination names.

Table 2.1: Destination awareness measures

Destination name	Average monthly no. of searches on google.co.uk
Aberystwyth	9,291
Cardigan	3,063
Cardigan Bay	228
Ceredigion	216
Cambrian Mountains	0
Cardiganshire	0

Note: Each destination total is derived by totalling the average monthly number of searches conducted for a series of 5 visitor-orientated search terms. These were 'hotels in (destination name)'; 'holiday (destination name)'; 'visit (destination name)'; '(destination name) short breaks' and 'accommodation in (destination name)'.

The area's public profile is probably due to some awareness of Aberystwyth as a University town and a place on the weather map and the rising awareness of some individual products at a national level; the Harbourmaster Hotel, Rachel's Dairy, Fforest Camp Site, fishing on the Teifi etc.

From discussions with operators, the County is perceived to be a long way from the major markets, particularly the South East. Any perception of inaccessibility, however, needs to be put in context.

Relative travel distances

- The Ceredigion border is 220 miles from central London (on the A44) while the Cornish border at Launceston is 240 miles distant. (AA routefinder)
- London to Newquay (Cornwall) is 280 miles (5hrs 16 mins), London to New Quay (Ceredigion) is just 244 miles (5 hrs 1min).
- Similarly, trains take 4 hours 40 minutes from London to Aberystwyth which compares favourably with a train journey to Truro in Cornwall which usually takes the same time.
- Travel to Ceredigion is also less liable to congestion and delays than a trip to the South West.

Published guidebooks provide a useful independent view of a destination – and are critical promotional tools. The area's low profile in tourism terms is borne out by coverage in guidebooks.

Footprint Wales, is perhaps the most positive:

“The area known today as Ceredigion .. is a ribbon of coastal communities stretched out along Cardigan Bay.... dotted with hidden bays and pretty fishing villages. It’s a great place to come for marine wildlife watching and there are some lovely beaches too. The main settlement is the Victorian resort of Aberystwyth, now a lively student town. But if you take your time you’ll also discover pretty seaside villages which feel almost Cornish in character, such as Georgian Aberaeron and bustling New Quay – a favourite haunt of the poet Dylan Thomas.”

The Rough Guide to Wales refers to the Cambrian Coast as:

“The Cambrian Coast starts where the rugged seashore of Pembrokeshire ends, continuing in much the same vein of great cliffs, isolated beaches and swirling sea birds, punctuated with stony offshore reefs largely exposed at low tide.” A rather negative image is posted with the observation... *“large sand fringed sections are peppered with low-key coastal resorts, peopled in the summer by families from the English Midlands. The presence of English-dominated resorts and the influx of rat-race refugees to this staunchly nationalistic part of the country has, on occasions, fuelled local antipathy although visitors are unlikely to see anything more controversial than the odd piece of graffiti.”*

The Lonely Planet Guide focuses on Mid Wales and does little to raise the profile of Ceredigion as a destination. It does however feature Cardigan as... *“a pleasant and picturesque stopover”* and, more positively, refers to Aberystwyth as having an *“excellent range of options for eating out, drinking and taking in some great Welsh culture.... A buzzy town.... That retains a cosmopolitan feel year round”*. The Vale of Rheidol railway is featured as a highlight.

The Ceredigion product is much deeper and richer than suggested.

Perceptions of Ceredigion: Key points

- Ceredigion is an authentic and coherent, physical and cultural destination.
- Ceredigion has a relatively low level of awareness in terms of visitor-oriented searches on the web and there are potential misconceptions around its accessibility.
- The County as a whole has a relatively low profile and does not feature strongly in guide books.

3. Ceredigion: The tourism offer

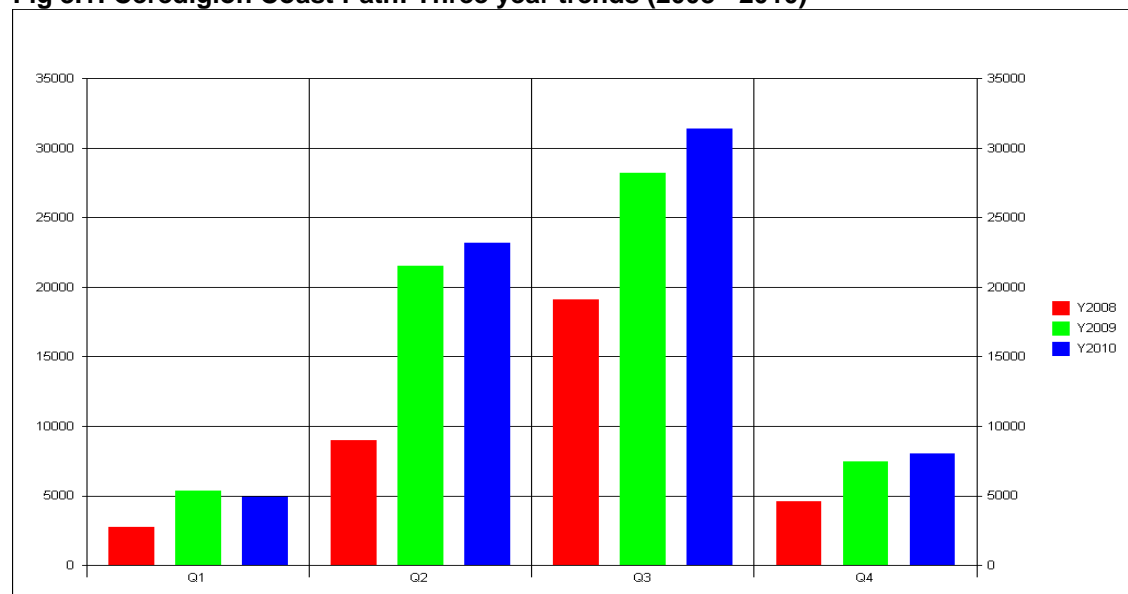
The main attractions of Ceredigion are natural. The coast, Cambrian Mountains and river valleys are all defined as Special Landscape Areas.

Coast and beaches

The coast and beaches are the key strength for the area. Borth, Clarach, Aberystwyth, Llanrhystud, Aberaeron, New Quay, Cwmtedu, Llangrannog, Tresaith, Penbryn, Aberporth and Mwnt have attractive, clean, safe, award winning beaches. Five received Blue Flag status in 2010 with excellent facilities including RNLI life-guarding. The extensive sand dunes of Ynyslas add another dimension to the beach environment. Much of the coastline has Heritage Coast status and the whole length has now been drawn together with the opening of the Ceredigion Coast Path in 2008 as part of the all-Wales coast path, supported by the Cardi Bach bus, guide book⁷, website (www.ceredigioncoastpath.org.uk) and the new Cab-a-Bag scheme.

The Coast Path has been a major success with significant increases in usage of the coast path and bus service. Figures on coast path use in 2010 show over 67,000 path users at six locations along the coast. This represents year-on-year growth and an extended season. Ceredigion would appear to have arrived on the 'walkers' map'.

Fig 3.1: Ceredigion Coast Path: Three year trends (2008 - 2010)

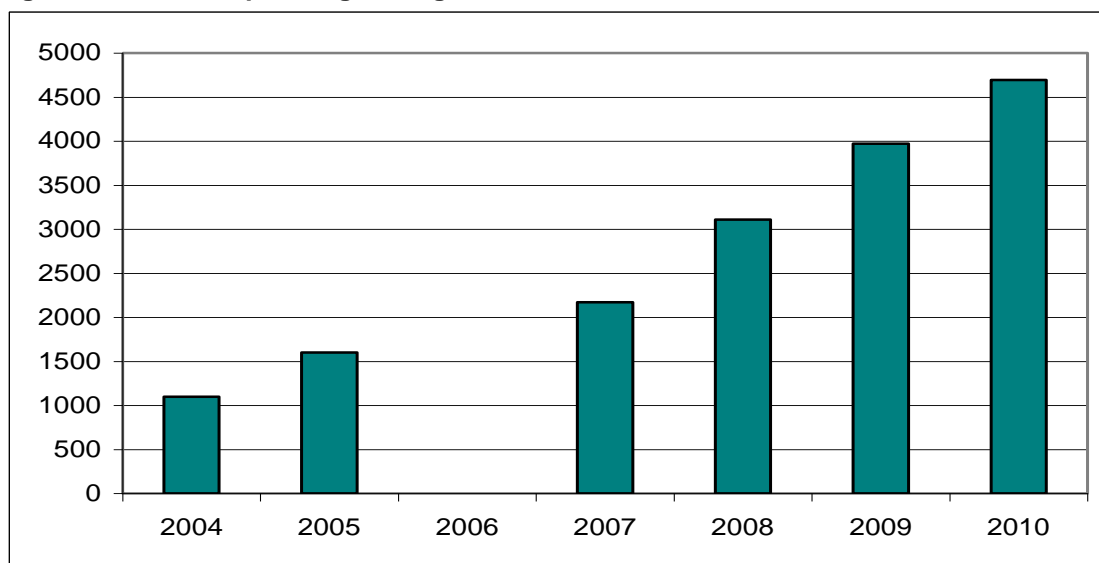


Source: Coast Path use is independently monitored by Linetop Ltd

The use of the 'Cardi Bach' coastal bus also shows an increase in use. In 2009 the private bus operator noted a higher percentage of passengers utilising local hotels travelling on this bus than in past years. They also reported on the number of overseas and domestic visitors who used the Cardi Bach for walking down the Ceredigion coast and linking with the Pembrokeshire Coast National Trail.

⁷ Ceredigion Coast Path, CCC Official Guide, 2008

Fig 3.2: Cardi Bach passenger usage



Source: CCC

The coastal waters also represent a major tourism resource for those interested in nature and water sports. Cardigan Bay is an internationally important area for marine wildlife designated as a Special Area of Conservation and was the UK's first Marine Heritage Coast. It has some of Britain's rarest bird and marine species including a resident population of 200 bottlenose dolphins – one of only two resident populations in the UK – as well as porpoises and grey seals. The wildlife can be observed from boats and from the coast path. The coast also offers excellent sailing, kayaking, fishing - and surfing at Borth.

Code of Conduct

There is some concern about marine wildlife disturbance although Cardigan Bay SAC's Code of Conduct has been largely successful http://www.cardiganbaysac.org.uk/?page_id=100. The 'Cardigan Bay Boat Place' at New Quay highlights the importance of conservation in the Bay.

The Countryside

The countryside comprises the dramatic upland areas of the Cambrian Mountains and the rural hinterland of undulating countryside that is dissected by a series of attractive river valleys; the Teifi, Aeron, Ystwyth, Rheidol, Dyfi.

Within this context are a large number of rights-of-way and managed access sites including sites owned by CCC, Countryside Council for Wales (CCW), the Forestry Commission Wales (FCW), the National Trust, RSPB, Wildlife Trust, Woodland Trust and others. The importance of this resource is reflected in the plethora of designations. There are two SPAs in the County, two Ramsar Sites, seven SACs, eight National Nature Reserves, 100+ SSSIs and over 22 miles of Marine Heritage Coast⁸. The areas of greatest natural history interest, besides the Heritage Coast, would be the Dyfi Valley, now designated a Biosphere Reserve and the Cambrian Mountains with adjacent Cors Caron. Hafod Uchtryd is recognised as one of the finest examples in Europe of a Picturesque landscape.

⁸ Full details are given in the Ceredigion Coast and Countryside Strategy, 2000

The Dyfi Biosphere is one of eleven such designations in the UK and is the only one in Wales. The designation reflects the importance of local bio-diversity which embraces the coastal waters, estuary, dunes, salt marshes, peatlands, native oak woodland and many important bird and other animal and plant species.

The Cambrian Mountains with lakes, forests and rivers offer dramatic hill walking, cycling, riding, leisure driving and bird watching, most notably for Red Kites. The silver and lead mining heritage provides a theme for a series of local walks ('Spirit of the Miners'), adding interest to the local landscape.

The Rheidol, Ystwyth, Aeron and Teifi rivers rise in the upland areas and dissect the rural hinterland with very attractive valleys. The Teifi is an important fishing river with water sports being important at Llandysul and Cardigan. The river and a series of walks link the market towns of Tregaron, Lampeter, Llandysul, Newcastle Emlyn and Cardigan. There are trails down the Aeron from Abermeurig to Aberaeron via Llanerchaeron, down the Rheidol from Devil's Bridge to Aberystwyth and down the Ystwyth from Tregaron to the coast. These provide very attractive walking and cycling.

Built environment

As in many other parts of Wales, the built environment is not a strong selling point. There are some attractive towns and villages in the County; Aberaeron must be one of the country's most picturesque towns while New Quay, Cardigan and Aberystwyth have the benefit of wonderful settings and the inland market towns have a character of their own. However, most are not sufficiently distinctive to draw people in their own right. In many cases, these towns could be greatly enhanced through better maintenance of property, public realm improvements, animation and capitalising further on indigenous attributes and their 'sense of place'. Much has been done over recent years by local communities e.g. in Cardigan and there is now a major restoration project for Aberystwyth seafront under the aegis of Regeneration Area status.

Cultural and physical heritage

The area has a long and interesting history of settlement. Most of the historical sites are now just ruins with varying degrees of interpretation and access.

Ancient sites

There is the prominent iron-age fort of Pen Dinas and the castles in Aberystwyth and Cardigan (and Cilgerran) have strong connections with the Normans and the early Welsh struggles for independence. Strata Florida Abbey is a site of great religious/cultural significance in Wales.

A more recent historical theme is the largely 19th century mining heritage of the Cambrian Mountains, notably in the upper Ystwyth and Rheidol valleys where there are physical remnants of the industry including an underground mining experience at Llywernog. Recent initiatives such as the Spirit of the Miners and Plwm have sought to draw out this heritage and make it more accessible. Another relevant theme is that of faith or church tourism; UWTSD at Lampeter is a centre of study, and there are several historical associations. There is also a strong maritime heritage. Cardigan, Aberaeron, New Quay and Aberystwyth have town trails based around their local heritage.

Ceredigion is inordinately well-endowed with arts facilities thanks in large part to the support of the two universities. Aberystwyth Arts Centre is a nationally important arts and entertainment venue (attracting 200,000 paying visitors and a footfall of 750,000 pa) supplemented by Theatr Mwldan in Cardigan, Theatr Felinfach, Pafiliwn Bont at Pontrhydfendigaid, the Small World Centre and a host of local venues. There are galleries at the Ceredigion Museum, the University's School of Art, the National Library⁹ and the Arts Centre. Ceredigion punches above its weight in terms of the scale and range of cultural activity on offer¹⁰.

There is a full programme of exhibitions, events and festivals throughout the year ranging from sports events to the performing and visual arts and from food markets and festivals to agricultural shows and regattas. Many of these are small and primarily of local significance such as the 16 local eisteddfodau but some, like the ceramics festival, can attract 1000 visitors, many from abroad.

Major events

Events that currently draw visitors in from outside the area include the Arts Centre programme (the Summer Season and niche festivals such as the MusicFest, Ceramics, Digital Story Telling and Horror Film Festivals), the trotting festival at Tregaron, Rally GB, canoeing events at Llandysul e.g. the Teifi Tour, the cob and seafood festivals in Aberaeron and the European Film festival in Cardigan. Recent cycling events in Aberystwyth and Cardigan have attracted a different type of visitor more inclined to competitive cycling

Perhaps more important is the more intangible social heritage of the County - the strong sense of local community and its historical associations. This is still very much alive in the form of language and local activities but more difficult to access.

Outdoor activities

Outdoor activity is a strong theme for the area with walking as the main attraction. There are no National Trails in the County but three regional routes including the Ceredigion Coast Path, the Aeron Trail and the Borth to Devil's Bridge Trail. Other routes include the informal (and challenging) Cambrian Way and a number of recreational routes, community paths and other stretches of an extensive rights-of-way network. Devil's Bridge, Tregaron and Llandysul have 'Walkers are Welcome' status, others are considering it.

Nature watching forms an integral part of walking and there are some honeypot sites and opportunities including:

- The coast and marine wildlife around New Quay and Cardigan;
- The Dyfi estuary (biosphere), including Ynyslas, Ynyshir, Cors Fochno, Cors Dyfi (with new Osprey project) etc;
- The Teifi estuary including the Teifi marshes; and
- The Cambrian Mountains including Bwlch Nant yr Arian (Special for Red Kite feeding) and Cors Caron.

⁹ The National Library of Wales attracts around 100,000 visitors, most of whom are readers. It also has a range of exhibitions e.g. the photographic festival LENS and talks by prominent individuals. Over the last two years the Library has worked with the Hay Festival to bring groups of 50 visitors on tailor made tours of the Library.

¹⁰ The Aberystwyth Arts Centre is estimated to support £10.65m of additional Welsh economic output. This economic activity is likely to create or safeguard over 175 full time equivalent jobs.

Wildlife icons

The wildlife and general nature interest is widespread but there are iconic products; dolphin watching in Cardigan Bay – from the shore and boat - and bird watching, notably the red kites of the Cambrian Mountains.

Angling is an activity of national repute. The County offers sea, shore, freshwater and coarse angling. There is world-class fishing on the Teifi although the river has not fished quite so well in recent years. Sea angling is also excellent. A network of Ceredigion accommodation providers promote themselves as catering specifically for anglers.

Watersports on the sea and inland are very popular and include boating¹¹, sailing, coasteering, kayaking and surfing. Kayaking is particularly important at Llandysul and Cardigan on the Teifi where they hold some significant events.

Cycling is an emerging strength. The country roads and landscape are wonderful for touring and racing although some of the cycling can be challenging for casual or family cycling. Long distance routes exist such as Lôn Cambria linking Aberystwyth & Shrewsbury (Sustrans National Cycle Network route 81) and Lôn Teifi linking Aberystwyth and Fishguard (Sustrans National Cycle Network route 82); Aberaeron/New Quay, Lampeter/Tregaron and Cardigan are three of eleven 'Cycle Breaks Centres' in Wales with a number of cycle routes at each location. A number of off-road routes have been developed to complement the mountain biking experience at Bwlch Nant yr Arian which is one of a suite of mountain biking centres across Wales developed in partnership with Local Authorities, FCW and VW (then WTB).

Horse riding routes exist in the north of the County using a good network of bridle paths, forestry trails and other permissive routes including routes up Pumlumon. There is a current RDP-funded initiative, Holidays with Horses, looking to promote riding in the County. Routes have also been developed in the southern part of the Cambrian Mountains linking Tregaron with the Doethie Valley and the Elenydd Trust hostels at Dolgoch & Tyncornel.

There are several independent activity operators working in the area covering surfing, watersports, walking, cycling, birdwatching and adventure sports including bushcraft.

There are 10 golf courses in Ceredigion.

Shopping and eating out

Shopping is not perceived as a local strength in recent visitor surveys, perhaps because of the paucity of high street chains of any size. However, Aberystwyth and Cardigan – and the other towns - offer a range of small independent shops that hold appeal for many groups. Amongst these are some excellent speciality shops, markets and farm shops for food, drink, arts and crafts and designer clothes. Local food produce is a particular strength of the area with some major names (Rachel's Organic, Ty Nant) and small producers including various cheeses, beer, wine, honey, cakes and preserves as well as locally produced Welsh lamb and beef and fish from Cardigan

¹¹ Moorings are available at Aberystwyth where there is some capacity in the marina, Aberaeron (full), New Quay (full) and Cardigan where there is capacity. There is a shortage of visiting berths but potential is limited by the lack of a 24 hour port in the County. There appears to some demand for more off-water boat storage.

Bay. There are initiatives to brand and market local meat (Cambrian Mountains Initiative) and Teifi cheeses (through a new cluster group).

Eating out did not get an overwhelming endorsement in the visitor survey either. However, there is a view that there is now an emerging body of exceptionally good restaurants across the County. Of particular note is the prevailing use of local produce in these good restaurants which adds distinctiveness and quality to the offer.

Restaurants of note include: Ynyshir Hall (4 AA rosettes and AA Inspector's choice), the Conrah (2 rosettes), the Harbournmaster (Good Food Guide), Ty Mawr (2 rosettes, GFG) and The Hive in Aberaeron, the Hungry Trout and Traeth in New Quay, Gwesty Cymru, Ultracomida (GFG) and the Orangery (GFG) in Aberystwyth, the Ship in Llangranog, Falcondale (2 rosettes) and the Talbot in Tregaron.

Visitor attractions

Ceredigion has a number of visitor attractions. The main facilities are shown below.

Table 3.1: Visitor attractions in Ceredigion (with approx. visitor numbers and adult price)

Attraction	Owner *	Category	Visitors	Charge	Grade
National Library, Aberystwyth	WGSSB	Library/gallery	100,000	Free	
Aberystwyth Arts Centre	University	Gallery	200,000	Varies	
Bwlch Nant yr Arian	FCW	Forest Centre	125,000	Free	
Devil's Bridge	Private	Waterfalls	39,000	£3.50	
Denmark Farm	Private	Conservation	2,000	Free	Approved
Llanerchaeron	NT	Heritage site	32,000	£6.90	Approved
Strata Florida Abbey	CADW	Heritage site	5,000	£3.00	Approved
Llywernog Silver-Lead Mine	Private	Museum	6,000	£7.50	
Ceredigion Museum	LA	Museum	35,000	Free	
Museum of Internal Fire	Private	Museum	6,000	£4.75	Approved
Aberystwyth Cliff Railway	Private	Railway	58,000	£3.20	
Vale of Rheidol Railway	Private	Railway	39,000	£13.50	Approved
Animalarium	Private	Wildlife	36,000	£8.00	Approved
Butterfly House	Private	Wildlife	10,000	£5.95	
New Quay Honey Farm	Private	Industrial	35,000	£3.75	
Cardigan Bay Marine Wildlife	Private	Wildlife	20,000	Free	
Teifi Valley Railway, Henllan	Private	Industrial	N/a	£6.00	
Tregaron Kite Centre	Private	Wildlife	N/a	Free	
Reptile World	Private	Wildlife	N/a	£3.50	
Cardigan Bay Karting	Private	Leisure	N/a	Varies	
Fantasy Farm Park	Private	Leisure	N/a	£6.95	Approved
Welsh Gold Centre	Private	Gallery	N/a	Free	
Cae Hir Garden	Private	Garden	N/a	£5.00	
Pentre Bach	Private	Industrial	N/a	£5.00	
Rainforest Centre	Private	Wildlife	N/a	£4.50	Approved
Rheidol HEP Visitor Centre	Private	Industrial	N/a	Free	
Rock Mill	Private	Industrial	N/a	Free	
Cardigan Island Farm	Private	Wildlife	N/a	£3.90	
Ynys-hir Reserve	RSPB	Wildlife	N/a	£3	
Cenarth Falls	Private	Waterfalls	N/a	Parking	
Sculpture Heaven	Private	Gallery	N/a	Free	
Llanon Cottage	LA	Heritage site	N/a	Free	
Quilt Centre, Lampeter	Private	Gallery	N/a	£5.00	Approved
Aberystwyth Castle	LA	Heritage site	N/a	Free	
St Padarn's Church	Church	Church/heritage	N/a	Free	

Source: The Tourism Company, VW, attractions * Private includes commercial and Not-for-profit operators

These attractions are generally small and low key but offer good variety including family attractions (wildlife and leisure) as well as heritage, galleries and museums for adult groups along with a number of other informal local collections, craft and local produce shops.

Given the catchment population of residents and visitors, it is difficult to develop and sustain an attraction of larger scale. Few are open all year.

Accommodation stock

The last update of the accommodation stock in Ceredigion was undertaken in 2000. A more recent analysis has been undertaken but final analysis is awaited. In the meantime, we have used the old figures which, broadly, are those used in the STEAM model¹².

Table 3.2: Visitor establishments and bedspaces in Ceredigion

Sector	No. establishments	Bedspaces:	% Bedspaces
Caravan & Camping	190	36,192	78%
Hostels	14	3,020	7%
Self Catering	280	2,732	6%
Serviced	369	4,056	9%
Total	853	46,000	100%

Source: 1988-89 Ceredigion Bedstock Survey, updated: 1995 & 2000. VW grading list 27/10/10

The accommodation stock is dominated by the caravan / camping sector which provides around 80% of the total available bedspaces in the County.

The geographical spread of accommodation is overwhelmingly towards the coast. Only 16% of accommodation establishments are located inland (Pumlumon, Tregaron, Lampeter and Llandysul) and just 8% of the bedspaces.

Along the coast, the number of establishments is spread evenly from Borth to Cardigan but when analysing the number of bedspaces, Aberystwyth, Borth and New Quay predominate, given the quantity of student accommodation and larger hotels in the former and the volume of caravans in the two latter locations.

Fig 3.3: Accommodation establishments

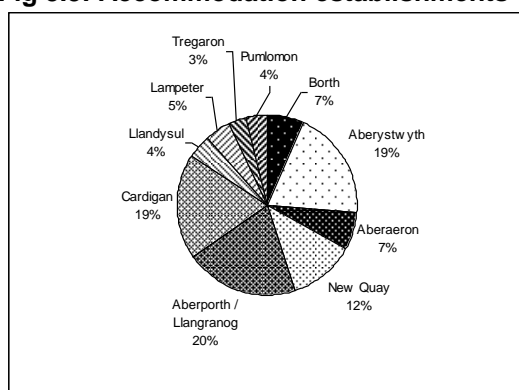
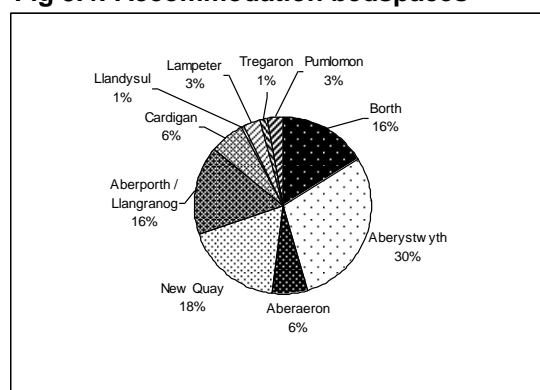


Fig 3.4: Accommodation bedspaces



¹² Licensing details from the Environmental Health Dept of CCC suggest there has been some rationalisation.

Table 3.3: Graded establishments in Ceredigion

Sector	No. of establishments	No. Graded
Caravan & Camping	190	24
Hostels	14	13
Self Catering	280	157
Serviced	369	97
Total	853	291

Source: 1988-89 Ceredigion Bedstock Survey, updated: 1995 & 2000. VW grading list 27/10/10

Although there is no formal time series, anecdotal information suggests there may have been:

- Some rationalisation in the number of caravan and camping establishments although the number of bedspaces remains similar;
- A loss of hostel accommodation;
- An increase in the number of self-catering establishments and, perhaps more so, in terms of bedspaces; and
- A loss of serviced accommodation establishments, although a relatively smaller loss of bedspaces.

Serviced accommodation

Of the 360 hotels and guest houses in Ceredigion, only 21 are recorded as having more than 10 rooms and only 1 has more than 50. The Cliff is the largest hotel with 70 rooms and is the only one, along with the Marine, Park Lodge and Belle Vue Royal, capable of accommodating coach parties. The larger hotels are listed below.

Table 3.4: Serviced accommodation with more than 10 rooms

Hotel	Location	Grade	Rooms	Group/Consortium
Gwesty'r Marine	Aberystwyth	3*	46	
Llety Parc / Park Lodge	Aberystwyth	3*	36	
Belle Vue Royal	Aberystwyth	3*	36	
Harry's	Aberystwyth	2*	22	
Queensbridge	Aberystwyth	2*	20	
Conrah	Aberystwyth	3*	17	
Four Seasons	Aberystwyth	3*	16	
Richmond	Aberystwyth	3*	15	
Penrhos	Llanrhystud	3*	15	
Gwesty Cymru	Aberystwyth	5*	12	Welsh Rarebits
Plas Antaron	Aberystwyth	2*	11	
Helmsman	Aberystwyth	2*	11	
Harbourmaster	Aberaeron	5*	13	Welsh Rarebits
Feathers Royal	Aberaeron	3*	13	
The Penrallt	Aberporth	3*	26	Welsh Rarebits
Highcliffe	Aberporth	2*	15	
The Cliff	Gwbet	3*	70	
Falcondale Mansion	Lampeter	4*	19	Welsh Rarebits
Black Lion	Lampeter		18	Brain's
The Hafod Hotel	Devil's B.	3*	16	
The Talbot	Tregaron	3*	15	
TOTAL			462	

Source: The Tourism Company, VW grading list 27/10/10

These larger hotels represent a mix of traditional resort hotels, country house hotels and some new boutique style hotels. Gwesty Cymru and Harbourmaster stand out as superb new 5 star hotels (both in the Good Hotel Guide and Alistair Sawday's Special places to Stay) albeit small in scale. Most of the other hotels are now of good quality and there are a number of other exceptional establishments of 10 or less rooms that are of superior quality e.g. Ynyshir Hall, Ty Mawr (both in the Good Hotel Guide) and 3 Pen Cei.

At the time of writing, all but one of the 21 larger establishments are graded. In addition, there are 47 graded B&B/farmhouses and 20 guesthouses.

Eleven of the 21 establishments (231 rooms) are in Aberystwyth. Only four of the hotels (68 rooms) are away from the coast. What else is notable from this list is the lack of any major branded hotel groups and, in particular, a lack of major branded budget accommodation. This is an unusual distinction for Ceredigion (and Mid Wales as a whole) and indicates the difficulty of successful commercial hotel development in the area. At least five of the larger hotels listed above have been grant-aided by Visit Wales (VW) in recent years. This is also evidenced in the recent occupancy data from VW which shows how weak, relatively speaking, the market is for Ceredigion hotels.

Table 3.5: Serviced accommodation occupancies 2009

	Wales	Mid Wales	Ceredigion
Room occupancy	52%	49%	38%*
Bed occupancy	38%	38%	31%

Source: VW * Endorsed by visitor survey at 40%

The overwhelming majority of serviced accommodation businesses are small B&Bs, guest houses, farmhouses and pubs. For many, it is a lifestyle commitment, an act of faith or a supplementary source of income that often requires external support. Sustainability appears to be an issue and although pub closures have not hit the County in quite the same way as other parts of the country (many are privately owned by local families), there is evidence of this trend.

Operator survey

The survey carried out for this study¹³ provides some evidence of current performance and confidence:

- Occupancy rates vary but the overall room average is 40% which is close to the VW estimate;
- 60% are turning away business in July/August, 30-40% are turning it away in shoulder months; and
- There is an even split between those who felt business had declined or grown over the last three years but significantly more operators were confident about the next three years.

There has been relatively little pressure for new hotel development in the County although we are aware of initiatives in both Aberystwyth and Cardigan at the present time.

¹³ See Appendix

Self catering

There is a relatively large number of self catering establishments (280), many of which are single cottages/houses but a significant proportion are in the form of small complexes. Some of these are promoted as local consortia including Ceredigion Rural Holidays, Coast & Country Holidays, 'Under the Thatch'.

This stock is also notable for some very high quality accommodation. Well over half of all establishments are graded, much of it 5 and 4 star. This may be the cause of a shift away from the family market in some self-catering. It includes the major new luxury camping development at Fforest. It also includes Ceredigion Rural Holidays a consortium of Welsh-speaking local accommodation providers who seek to offer a special local experience.

Figures from VW suggest that overall, Ceredigion occupancies are similar to the national average (around 50%) but with a much greater degree of seasonality, peaking at 80-95% in July and August.

Traditionally, the good quality accommodation in this sector has performed well although the recent VW Business Survey suggests self-catering has had a weak summer across Wales.

Caravans and camping

The accommodation stock is dominated by static and, to a lesser extent, touring caravans. There are 190 caravan and camp sites providing around 8,400 pitches or 36,000 bedspaces. According to a planning department analysis, 64% of the stock is in the coastal belt.

Large sites are generally defined as being over 250 units. There are only two such sites in the County. Quay West in New Quay (540 pitches) and Brynowen in Borth (377 pitches) are both owned by national groups. There are nine sites with over 200 pitches and 25 sites with over 100 pitches. The other sites are smaller, family-run operations with some families owning two or three sites. Although planning policies constrain the development of caravan sites, there has been some consolidation of sites through the transfer of licences. Larger sites enable the provision of more central facilities.

Table 3.6: Major caravan parks (200 pitches+)

	Location	Tourer pitches	Static pitches	Grade
Quay West (Bourne Leisure)	New Quay	0	540	
Brynowen (Park Resorts)	Borth	0	377	3*
Searivers Caravan Park	Ynyslas	0	240	
Clarach Bay Holiday Village	Clarach	0	230	
Aeron Coast Caravan Park	Aberaeron	0	200	5*
Morfa Bychan	Llanfarian	0	200	4*
Helyg Fach	Aberporth	0	200	
Brownhill Farm	Cross Inn	33	160	
Glanymor	Clarach	0	160	
Aberystwyth Holiday Village	Aberystwyth	52	152	
Greenfields Caravan Park	Plwmp	50	146	
Pencnwc	Cross Inn	150	142	5*

Source: CCC database, VW grading list 27/10/10

Unfortunately, there is no record of the number of static caravan pitches that are let (formally or informally). It can be assumed that most of the units will be privately owned, say 80-90%. The formal letting fleets on sites will be supplemented by private lettings and use by family members. Evidence from elsewhere suggests that there has been increased demand for letting vans and site owners are re-building fleets as they now see them as an important introduction to a sale.

Data on touring and camping pitches in the County is unclear but there would appear to be around 36 sites offering touring and/or camping pitches. The Caravan Club has a site at Aberaeron (37 pitches) and the Camping & Caravanning Club has a 90 pitch site at Llwynhelyg. Both clubs have a number of Certificated Locations.

Many of the caravan park sites in Ceredigion offer a range of leisure facilities including eating out, entertainment and sports facilities. In some cases, these facilities are available for use by local residents.

In qualitative terms, only four of the major sites are graded, and 24 in total. From observation, many of the sites are well landscaped and there have been recent efforts to improve landscaping and layouts.

As elsewhere in the country, holiday parks in Ceredigion report that they have been performing well, benefiting in part from the staycation trend. 2010 has seen volumes being maintained although the discretionary spend in bars and restaurants has gone down¹⁴.

Development proposals

There are a number of tourism related projects in hand, in the pipeline or under consideration. Most important is the current 313 submission by Adfywio Ceredigion Regeneration for funding under the RDP Business Plan 2 (“Driving Higher Value Tourism in Ceredigion”). A decision is currently awaited on this proposal. The project will encourage tourism development within Ceredigion, by focussing on:

1. Stimulating the County’s equine tourism product through route improvements and by improved marketing of existing equine sports;
2. Renovating and improving facilities which relate to outdoor pursuits;
3. Supporting accommodation which will add value to the tourism outdoor activity product; and
4. Targeted marketing that exploits the environmental and cultural assets of the county.

Some other ongoing and planned initiatives include the following, although not all will come to fruition:

- Regeneration proposals for Aberystwyth under the aegis of the Regeneration Area to include improvements to transport, the promenade and public realm;
- Cardigan Castle restoration supported by HLF;
- Enhancement works at Strata Florida (Cadw);
- Enhancement works & conversion to hydro-power generation at Dyfi Furnace (Cadw)

¹⁴ Figures from VW suggest that overall, Ceredigion static caravan occupancies are similar to the national average but touring pitches do not fare as well.

- Improvements to, and development of, the rights-of-way network and community routes through the Coastal Access Improvement Programme (EU/WG), 'Explore Dyfi' (recreational trails) and the 'Paths for People' project (RDP);
- Packaging of activities under the 'Tourism Clusters', 'Holidays for Horses' and 'Sustainable tourism in the Teifi Valley' (RDP funded, on-going);
- Various other RDP proposals including 'Sense of Place' and Arts Centre projects in Aberystwyth, Pafiliwn Bont, Dolgoch Hostel, Llangrannog Equine Centre, Rural Events Programme, Plwm heritage and Tregaron Uplands heritage projects;
- Various enhancements to attractions including the National Trust's work at Llanerchaeron;
- A new artificial reef in Borth will act as coast protection and could possibly improve surfing conditions; and
- A host of private sector proposals for additional accommodation.

Visitor satisfaction

The Ceredigion Visitor Survey¹⁵ shows the rating visitors to the County have given to various aspects of the tourism product:

- As a place to visit, 89% rated it overall as very good or excellent. A further 8% rated it as 'good' meaning that in total 97% of visitors gave it a positive rating as a place to visit;
- 69% of visitors said they would 'definitely' re-visit the area and 80% would definitely recommend the area to friends or family;
- 78% of visitors to Ceredigion rated the attractions and places to visit positively (15% excellent, 63% good);
- Two thirds of visitors (65%) rated the food and drink facilities in Ceredigion positively (23% excellent, 42% good);
- The shopping facilities were not seen as Ceredigion's strongest feature, with 37% in total rating them positively (4% excellent);
- Nearly all the visitors to Ceredigion found the people there to be friendly; 89% in total rated the friendliness of the people positively (45% excellent) and a further 5% said it was average. Only 1% gave a negative rating;
- In terms of the welcome received, 93% in Ceredigion rated this positively (42% excellent);
- 80% of visitors rated the feeling of having a distinct Welsh experience as good or excellent (34% excellent); and
- Around half of all respondents rated the accommodation *excellent* across all three areas of quality, value and service, and over a third rated it *good*.

The evidence suggests visitors are generally very positive about the destination although people who are interviewed within a destination have usually chosen to come there and tend to be positive about the place. Some are frequent visitors and come back because they like it.

We are not aware of any formal research on the perception of Ceredigion or its individual destinations by non-visitors. However, VW research¹⁶ shows that while recent visitors to Wales are very positive about their experience, non-visitors, and

¹⁵ Ceredigion visitor survey 2010, September 2010, Beaufort Research

¹⁶ VW SMAP op cit

those who have not visited for 5 or more years, have a different view. Their impression of Wales is coloured by persistent stereotypes, particularly the notion that, although Wales is endowed with plenty of natural beauty, there is little else to see and do here. Unlike those who have visited, many non-visitors are not aware of the range of events, attractions and activities that Wales has to offer. This probably applies to Ceredigion as well.

The tourism offer: Key points

- Ceredigion has a superb range of natural and cultural resources.
- The primary attraction is the coastline and beaches serviced by the main resort settlements of Aberystwyth, Aberaeron, New Quay and Cardigan, linked by the Coast Path.
- The countryside in the upland areas is attractive and often dramatic.
- Walking, nature watching and the cultural heritage are major strengths and opportunities. Dolphins and red kites are iconic attractions.
- The wider outdoor activity sector is also very important with some packaged offers.
- The natural and cultural resources are sensitive to development. Activity needs to be managed.
- Shopping and eating out are evolving assets for the area.
- Like the activities, visitor accommodation is concentrated along the coast. There is very little in the rural hinterland.
- Serviced accommodation is relatively limited with few large or even medium-sized hotels. There are some very good small hotels including traditional seaside hotels, country house hotels and iconic boutique hotels.
- Hotel occupancies are low on average and some are struggling. New commercial development is, and will be, difficult to fund.
- Caravan accommodation dominates the bedstock. The caravan and camping sector includes some good quality sites and, in general, is buoyant, supported by recent market trends. This is where growth could be found but there are restrictive policies on growth to protect the local natural environment.
- There is a large stock of generally high quality self-catering stock that has been performing relatively well. There is a view that supply is now outstripping demand.
- There are few major projects in the pipeline other than the regeneration of Aberystwyth Seafront and refurbishment of Cardigan Castle. Much will depend on the outcome of the current submission to RDP.
- Existing visitors show high levels of satisfaction with the destination.

- Ceredigion undoubtedly has some superb natural tourism assets that compare favourably with better known destinations in Wales and the UK but does not have the tourism infrastructure (accommodation and built attractions) of other competing destinations e.g. Lake District, Devon & Cornwall and Pembrokeshire.

4. The visitor market

This section summarises the scale and nature of existing visitor activity in Ceredigion. It draws on existing research and surveys supplemented by discussions with operators. The term visitor includes staying and day visitors and people on holiday, business trips or visiting friends and relatives.

The local market

The local catchment population for Ceredigion is relatively small. There are just 225,000 people within one hour's drive of Aberystwyth.

Catchment area

The nearest conurbations are 1.5 hours drive away. From the largest town, Aberystwyth, Swansea, to the south, is 70 miles (110 km) away; Shrewsbury is 75 miles (121 km) to the east; and Wrexham, to the north, is approximately 80 miles (130 km) away. The capital, Cardiff, is over 100 miles (160 km) from most parts of the county.

The scale of visitor activity in 2009

In 2009, it is estimated that Ceredigion attracted 1.34m staying visitors and 1.4m day visitors¹⁷.

The overnight visitors stayed an average of 5.4 nights although this varied between 1.9 nights in serviced accommodation and 6.5 nights in self-catering accommodation i.e. the large majority of nights (90%) were spent in self catering accommodation, primarily caravans. Just 4% of all staying visitors are staying with friends and family.

Table 4.1: Volume of tourism in Ceredigion 2009

	Visitor trips (000s)	Nights/days (000s)
Staying visitors	1,338.6	7,220.8
Day visitors	1,432.7	1,432.7
Total	2,771.3	8,653.5

Source: STEAM 2009

Table 4.2: Staying tourism in Ceredigion 2009

Accommodation used	Visitors (000s)	Visitor days (000s)
Serviced accommodation	217.7	416.9
Non serviced	1,000.4	6,517.1
Staying with friends/relations	120.5	286.8
Total	1,338.6	7,220.8

Source: STEAM 2009

¹⁷ Ceredigion County Council STEAM report 2009

Tourism trends

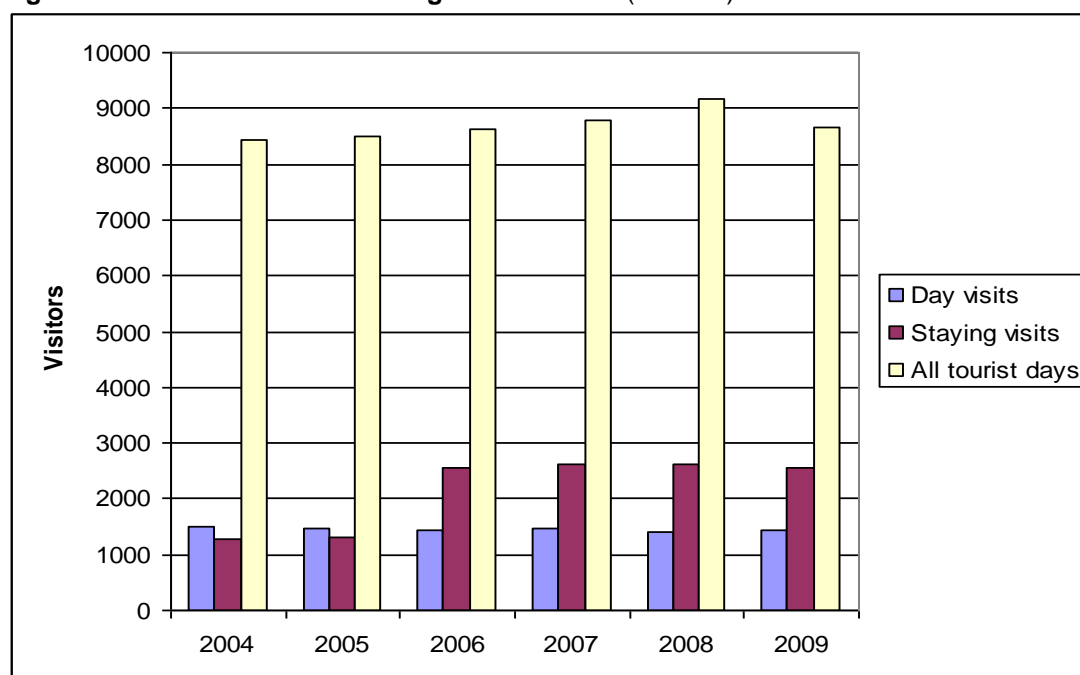
STEAM data is available for 2004-2009. These figures suggest:

- A continuous rise in the number of tourist trips (<1% pa), tourist days (+2% pa), revenue (+2.5% pa) and employment (+1.4% pa) between 2004 and 2008;
- The volume of staying visitors in 2009 declined 7.4% from 2008 while the volume of day visitors rose by 1%;
- The length of stay was broadly the same in 2008 and 2009;
- Expenditure in 2009 fell by 7% from 2008 (-13% for serviced accommodation, -7% for self-catering). Day visitor spend showed a marginal increase in 2009;
- Employment figures have been virtually flat over the period with a drop of 4% in 2009. This trend is concerning given it is over a period of relative growth in the national economy; and
- 2009 is the first year the figures have declined year on year since modelling started in 2004.

One needs to be careful reading too much into these figures as tourism impact modelling is notoriously fragile. It is probably realistic to assume concern rather than panic, based on the experience of the rest of the country and consultations with operators.

In terms of confidence, the recent business survey by VW¹⁸ suggests the accommodation sector has had a mixed year in 2010. The caravan and camping sector has performed relatively well but the serviced and self-catering sector is down, largely for economic reasons. Attractions have had a good summer, increasing their visitor numbers. These perceptions have been mirrored in our local consultations.

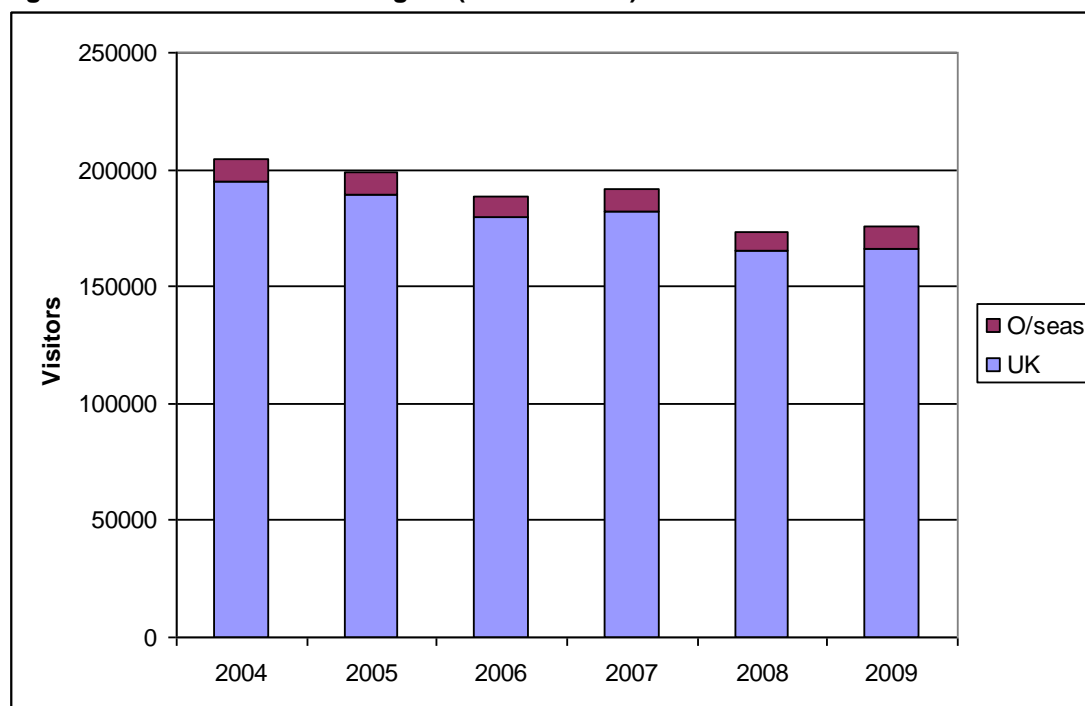
Fig 4.1 Trends in visits to Ceredigion 2004-2009 (STEAM)



¹⁸ Visit Wales 2010 Business Wave Survey

The number of visits to the five TICs in Ceredigion has declined by around 12% since 2004, largely through a significant, unexplained drop in Aberystwyth¹⁹.

Fig 4.2: Visits to TICs in Ceredigion (Source: CCC)



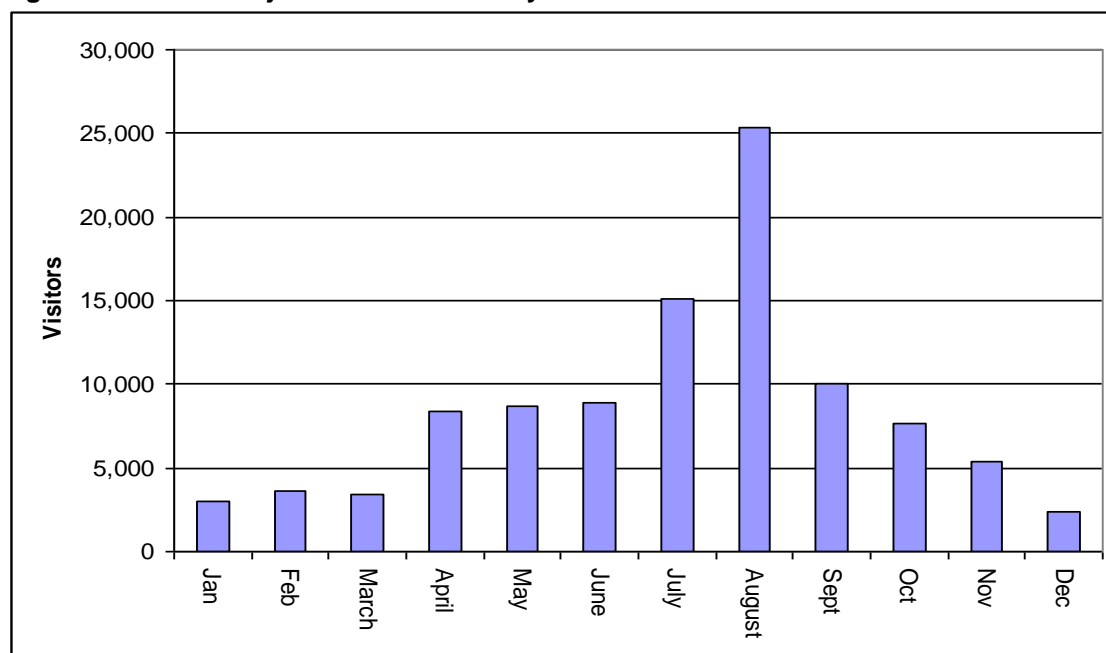
	2004	2005	2006	2007	2008	2009
Aberaeron	43,053	43,452	43,167	44,977	40,594	36,232
Aberystwyth	84,813	76,175	66,390	58,981	58,943	60,649
Borth	8,052	8,930	7,818	8,691	4,659	4,855
Cardigan	37,993	41,016	36,642	36,399	35,595	41,290
New Quay	30,221	29,556	34,825	42,330	33,771	32,793
Total	204,132	199,129	188,842	191,378	173,562	175,819

The operator survey indicates the seasonal nature of tourism in the County, much like the rest of Wales. July and August are generally very busy with a significant degree of business being turned away. In the shoulder months around one third of operators are turning away business but only 10-15% at other times.

The pattern of visits at the TICs gives further indication of seasonality. Aberystwyth and Cardigan TICs received 40% of all their visits in July and August with 43% in the five shoulder months of April, May, June, September and October.

¹⁹ Accurate measurement of visitor numbers at TICs is difficult.

Fig 4.3: Visits to major TICs – seasonality



Profile of visitors

Table 4.3 shows the business mix reported by the accommodation sector in the operator survey where holiday related tourism accounts for 85% of business.

Table 4.3: Visitor profiles

	Hotels, GHs, B&Bs	Self-catering
Short breaks	50%	69%
Longer holidays	20%	24%
VFR/weddings	15%	-
General business	15%	-
Visitors from Wales	23%	29%
Visitors from elsewhere in UK	60%	64%
Visitors from overseas	15%	10%
Regular visitors	34%	45%
Couples	54%	35%
Families	18%	57%

Source: Operator survey.

Between May and September 2010, a total of 1,150 face to face interviews were conducted across seven sites in Ceredigion amongst a selection of day and staying visitors²⁰. This built on a smaller sample survey in 2009. In summary:

- Ceredigion attracted a lower proportion of day visitors (21%), compared with Wales as a whole (37%);
- About 35% of visitors are from Wales, 60% from the rest of the UK and 5% from overseas;
- In terms of the age of visitors, Ceredigion had a very similar profile to Wales, being made up of more older visitors than the young;

²⁰ Wales visitor survey 2009, Ceredigion report, September 2010, Beaufort Research

- At 67% ABC1 (professional and non-manual) and 33% C2DE, (skilled and unskilled manual occupations and non-working groups,) the socio-economic profile of visitors to Ceredigion was similar to Wales.
- The largest group of visitors to Ceredigion are *Empty Nesters* accounting for 48% of visitors. The next largest group are *Families* (22%), closely followed by *Older Independents* (20%). The smallest group are *Young Independents* who account for 10% of the sample overall.
- The majority (83%) were reliant on a private car/van – although this is slightly less amongst the younger and older age groups; and
- The most-mentioned method of booking accommodation was *direct with the establishment* – mentioned by nearly two thirds (65%) of visitors. This was followed by *other websites/ internet/ email* (17%). Just 1% booked via a Tourist Information Centre.

The main reasons for choosing to visit given by visitors to Ceredigion were the scenery/landscape and countryside – and the coast. This is also the view of local operators in the survey for this research. Other noted features of interest are:

- Food and drink;
- Local heritage and culture;
- Walking;
- Local towns and villages; and
- Nature interests.

A commentary of the main market segments and their relevance to Ceredigion is given below based on a general market analysis and feedback from operators.

Holiday tourism

There are two distinct holiday segments in Ceredigion.

1. The traditional family holiday market (longer holidays but generally a week plus, highly seasonal) still persists with families staying in the many caravans and self-catering units and, to a lesser extent in the serviced accommodation. Most, but not all, of the caravan users are on a budget while much of the self-catering is of sufficient standard to attract a discerning and more affluent customer. This is in line with the 'back to the sea' trend referred to below.

The associated market is the older couple doing the same, although they may come at off-peak times as well. Many of these visitors will be caravan owners and are therefore regular visitors to the area, increasingly on short breaks; north of Aberaeron they generally come from the West Midlands, south of Aberaeron generally from South Wales.

2. The second segment is made up of the more affluent, often older couples who come to stay for the weekend in one of the interesting/superior new hotels, self-catering or camping sites in the County. This market has a longer season. They are attracted by the accommodation, the food, local sightseeing, shopping for local produce etc and casual walking.

Both segments include those on an activity holiday i.e. attracted by the chance to indulge a special activity such as hill walking, nature watching, fishing or golf – with increasing numbers going camping. Holidays where outdoor activity forms the main purpose are a relatively small market (accounting for 20% of all holidays in Wales).

However, 78% of holidays involve some activity as part of the experience so activities are important. Walking is by far the most prevalent activity. Other specific activities such as cycling, water sports etc are much smaller in terms of participation but nevertheless can be important drivers of business for some areas; fishing and bird watching, for example, in the case of Ceredigion. VW has done some interesting work in this area looking at segmentation, dividing people into samplers, dabblers, learners and enthusiasts.

These holiday segments largely originate from within a 2 hour drive although some may come from further afield. We know that short breaks account for around half of room nights in serviced accommodation but a higher proportion of nights in self catering (69%). Longer holidays of a week or more, are fewer in number, highly seasonal and are more evident in self catering and on the caravan parks.

Day visitors

Notwithstanding its location and small catchment population, according to the STEAM model, Ceredigion attracts a relatively high proportion of day visitors. Most of these are probably generated from other holiday areas and residents within an hours drive as well as Ceredigion residents. There is some evidence that people are increasingly reluctant to drive long distances to attractions although specialist events can draw people from further afield.

In Ceredigion, day visitors are probably drawn in for:

- Special events such as the trotting races and other cultural festivals;
- Outdoor pursuits such as walking and kayaking; and
- The beach and seaside. We have had it reported that the dolphin trips have received day visitors from the home counties!

Visits to friends and relatives / social events

This involves people staying overnight to visit friends and relatives and attend social functions such as weddings, funerals or parties. In Ceredigion, the Universities drive a considerable volume of such business e.g. visiting parents and alumni. VFR is an important market for hotels and guesthouses and driven by the size and nature of the resident population. The STEAM model estimates that 9% of visitors and 4% of nights are visiting friends and relatives in the area.

Business tourism

This is driven by the businesses and organisations located in Ceredigion, largely in Aberystwyth. Aberystwyth University is also increasingly successful in attracting conferences, and UWTSU campus at Lampeter also attracts visitors to events. Overnight business tourism accounts for 9% of tourism trips to Mid Wales. The operator survey suggests the figure is 15% in Ceredigion, perhaps reflecting the draw of Aberystwyth as a business destination. The recession has had an impact on this sector of the market.

Other market segments

The operator survey suggests that 10-15% of staying visitors are from overseas. There is a reported niche market in the Ceredigion diaspora who use the National Library, the Ceredigion Archive and Museum to research their ancestry and Welsh culture and

other contemporary niche cultural visitors e.g. drawn by the Ceramics festival, MusicFest etc.

Other special interest segments include:

- Walking throughout the year (and in all weathers);
- Nature watching (wildlife, gardens, plants)
- Cycling;
- Riding.... and trotting;
- Fishing;
- Watersports;
- Faith, language and other cultural visitors.

Group/coach parties include those doing various activities, notably school and college parties e.g. Gwersyll yr Urdd Llangrannog, visitors to the Summer Season and general touring. The stayover market is restricted by the size of the hotels but the University has seen particular growth in its accommodation. Attractions report that around 40% of their business comes in groups.

The visitor market: Key points

- Ceredigion attracts c1.34m staying visitors and just over 1.4m day visits each year, according to STEAM.
- The volume and value of tourism fluctuates but the reported long term trend has been upward - until 2009.
- Tourism, as elsewhere in Wales, is markedly seasonal.
- Half of all visitors are on short breaks, 20% are on longer holidays with 15% VFR and 15% on business.
- Staying visitors show a close proximity to the general profile of visitors to Wales i.e. attracting an older age group with two thirds of visitors being ABC1. Visitors come mainly from the West Midlands and South Wales. The main driver for visits is the countryside and coast.
- The holiday market is divided into two very distinct segments; the larger, longer-stay family holiday market, largely based in caravans on the coast in the season and the smaller, higher spending, short stay, less seasonal market using some of the new superior serviced accommodation (and self-catering).
- Other markets include activity tourists (overlapping with the above two segments), day visits, VFR and some business tourism.

5. Destination management and marketing

National organisation of tourism

Government at national and local level supports and maintains the business environment for tourism enterprises through the provision, maintenance and management of basic services and infrastructure within the destination, support for destination marketing and other related services such as training facilitation, quality upgrade initiatives and others.

Dissatisfaction with current arrangements (see operator survey), the economic climate and the outlook for public expenditure make it necessary to find new (and hopefully more effective) ways to improve the way in which national, local and other agencies work together to support the tourism industry.

A review of Destination Management and Marketing within Wales was commissioned by VW in 2009. The review provided the basis for a series of proposals for change and a preferred model for delivering destination management and marketing in Wales that would:

- Provide a simplified structure;
- Encourage a more integrated approach;
- Be adaptable to local circumstances;
- Strengthen the role of local government; and
- Provide a stronger role for the private sector

The Welsh Government (WG) has given lengthy deliberation to the review and has attempted to agree certain core principles to describe how central and local government might better work in partnership to deliver more sustainable tourism benefits. WG has identified that the challenge is not about the imposition of unnecessary new structures or tiers but rather:

- The need to improve the quality of the visitor experience at the destination level; and
- The need to make declining marketing resources, used jointly, deliver more tourism spend for Wales.

The principles which form the basis of a new Wales Tourism Partnership Framework are listed below

Wales Tourism Partnership Framework Principles

1. The central role in leading brand-building and national awareness campaigns for Wales and in developing effective partnership working within tourism, at all levels, aiming to ensure that the quality of the visitor experience underpins the marketing promise to improve and sustain Wales' competitive position will be undertaken by VW.
2. Destination management will present a challenge across all sectors of the destination community. The engagement of all partners at the destination level will be led by Local Authorities.
3. Destination marketing will need to be delivered alongside the arrangements for destination management in line with local needs. This may involve a clustering of local authorities to support more efficient use of resources.
4. Destination communities at the local level will comprise public/private and third sectors. The public sector will include all departments of national and local government whose roles

and responsibilities impact on tourism and the destination. VW and Local Authorities will seek the assistance of the Wales Tourism Alliance and the Wales Council for Voluntary Action to ensure effective representation of those sectors within the partnership framework at the destination level.

5. To enable successful functioning of the new approach, VW will provide funding, via the Regional Tourism Partnerships to facilitate effective adoption of the national framework agreement at the destination level.
6. Better integration and coordination is needed to ensure that the new framework arrangements support opportunities for more, rather than less, funding in support of sustainable socio-economic benefits from tourism. In order to target achieving that aim, all sources of funding to support the development, management and marketing of tourism in Wales are to be identified.
7. Parties within the Wales Tourism Partnership Framework will agree the functions, roles and responsibilities expected of destination communities.

The Framework concentrates on the need to improve more integrated working between the two main tiers of government within Wales i.e. Local Authorities and WG in the fields of destination marketing and management. This will involve establishing informal destination partnerships or communities at the local level involving the public, private and third sectors to achieve a coordinated approach. The public sector partners involved within this proposed framework will invite the industry's constructive engagement with the proposed framework at all levels.

In essence, the situation with regard to sub-Wales structures remains fluid but it is clear that VW is keen on the idea of local authorities working with private sector associations on destination management (and marketing) and would like to see arrangements put in place for this to happen in Ceredigion as part of an agreed strategy.

Some comparators

VW is not proposing to be prescriptive about how local partnerships should be formed; each area is to decide what is best for them. However, the models pursued in South West Wales is well regarded and offers lessons for Ceredigion i.e. an informal county based partnership, involving the Local Authority, a local Tourism Association and the Regional Tourism Partnership as the core group, with an outer group including other stakeholders such as local voluntary/civic groups and key agencies etc. The new Brecon Beacons model differs in structure but has similar objectives.

The new national marketing strategy

In parallel with the new arrangements for destination management and organisation, a new VW Marketing Plan has now been approved by the Minister²¹. The key features are:

- The focus of promotion is shifting to *“the left hand end of the customer journey”* with greater effort on raising awareness of Wales;
- VW is to focus on PR and on-line marketing with significant investment in a Digital Tourism Business Project. A key element of this is for destinations to share content for on-line access and promotion;
- In domestic marketing, the priority segment will continue to be ‘independent explorers’; those inclined to plan their own trips;
- Overseas marketing is now more focused (on France, Germany, Netherlands) and seen essentially as a VW activity;

²¹ Strategic Marketing and Action Plan (SMAP), Visit Wales, 2010-2013

- Marketing Areas, including Ceredigion, will remain. Some may combine in future because of declining budgets but VW is now less prescriptive about the size and number of marketing areas; and
- There will continue to be local area features and links on the VW website, including Ceredigion. The priority for local areas is to create inspirational on-line content e.g. good stories, special events etc which can then be used by VW via their web presence, e-mail marketing, E-CRM, search marketing, third party networks etc.

Regional tourism co-ordination

Tourism Partnership Mid Wales (TPMW) is the Regional Tourism Partnership for Mid Wales, funded by VW as a partnership of public and private sector interests, whose aim is to assist the development of tourism at the regional level. Ceredigion has two places on the TPMW Board.

TPMW has a joint Tourism Advisory Group with all the LAs and other bodies represented although there is a view that the local authorities are not yet fully engaged in the activities of this group.

TPMW's main roles are:

- Integrating the private and public sector agendas;
- Advocacy and support for public sector financial support and private sector investment in the tourism industry;
- Industry leadership and brokering of partnerships between national agencies and regional and community groups; and
- Direct financial support (for research, marketing and promotion, product development, HRD).

Current programmes/projects include:

- Providing core funding to support TPMW's tourism training programme, Medrwn;
- Supporting marketing initiatives with advice, tools, research etc; and
- Providing support for destinations and products e.g. co-ordinating the tourism aspects of the Cambrian Mountains Initiative, co-ordinating 'Mid Wales Local Food Talks', supporting communities to develop their 'Sense of Place'.

TPMW commissions Mid Wales Tourism (a private company) to deliver certain key initiatives, most notably its industry communication and networking. This includes:

- A membership scheme that seeks to enable networking and link regional members together and to the Wales Tourism Alliance, as well as VW;
- Various membership services, most notably online marketing and booking including through their own website; information and communication work;
- Communication and networking across the region e.g. PR activity for the region, organising conferences, signposting to support services; and
- Coordination of events.

Independently MWT undertakes, on contract, amongst other things:

- Data management with/for VW;
- Facilitating the South East Wales Tourism Forum.

Local destination management and marketing

CCC plays a major role in the development and management of the County as a destination through the provision of a range of facilities and services for residents and visitors through a number of its departments.

Specific tourism services in CCC fall under the Communications and Tourism Service within the Chief Executive's Department and are largely to do with tourism project implementation, managing the TICs and marketing initiatives.

The core tourism management team is small for the wide range of work it undertakes, consisting of a Group Manager, Senior Communications & Marketing Officer and a Tourism Support Officer, all of whom have wider remits within the Council, plus a dedicated Tourism Development Officer. This team of four represents 2.7 full time equivalents. This core team is supported by a temporary Project Officer for the RDP tourism programme (until March 2011) and the TIC staff.

Core tourism activities include:

- Strategy development and communication with the industry as required;
- Gathering data and commissioning research;
- Project implementation e.g. the current tourism clusters initiative;
- Management of five TICs;
- Hosting a tourism website www.tourism.ceredigion.gov.uk and associated activity websites;
- Production of various tourism publications;
- Supply of editorial copy/images for magazine and newspaper articles and assistance to VW with press visits to the area;
- Participation in VWs' marketing activity;
- Management of the public's use of the County's bathing beaches; and
- Promotion of Ceredigion's beaches and coastline via award applications.

CCC infrastructure and services for tourism

- The development and maintenance of the Coast Path, countryside access areas, various walking/cycling trails and paths and the rights-of-way network and related publications;
- The maintenance of 48 award-winning toilets throughout the County, mainly on the coast;
- The management of the public use of beaches including beach safety, maintenance and cleaning of beaches including -Blue Flag Awards, Seaside Awards and Green Coast Awards;
- The maintenance and cleaning of the public realm;
- Life guarding on 8 different beaches (RNLI);
- Conservation of wildlife and the physical environment;
- Management of the Cardigan Bay SAC;
- Management of harbours, maritime bye-laws, coastal protection etc;
- Gateway signs to Ceredigion on main roads;
- Ceredigion Museum;
- Leisure centres and theatre support;
- Traffic management including car parks, tourism signposting;
- Provision of public transport including the Cardi Bach summer service;
- Business support, advice and training;
- Planning, licensing and statutory monitoring of tourism activities;
- Involvement in regeneration initiatives e.g. Cardigan Castle; and
- Community grants, notably for local events.

The core tourism budget for 2010/11 was £388,000 comprising salaries, marketing and non-controllable overheads) which is less than the average gross tourism budget

(£439,000) that was found in a survey of English local authorities²². The cost of running the five TICs accounts for between half and two thirds of the budget²³ which appears in line with, or below, the gross average expenditure of English local authorities. In addition, there is £124,000 for beach management and additional project funding for RDP and other projects. The budget remains much the same for 2011/12 but, clearly, future budgeting is uncertain.

The range and quality of the tourism infrastructure provided and managed by CCC is exceptional and generally acknowledged to be so by the local industry. There are few local authorities that maintain 5 TICs, sustain 16 award winning beaches including 7 potential Blue Flag Beaches and a seasonal lifeguard service and maintain 48 public conveniences, besides the range of other services.

However, because this tourism infrastructure is provided by a range of CCC departments, it is not always clear to the outsider who is responsible for what. There is a view that there could be more internal co-ordination of activity.

CCC is, de facto, the Destination Management Organisation for Ceredigion but acting largely on its own. Since the demise of the Ceredigion Tourism Working Group (CerTWG) which was set up to help steer the implementation of the TGA action plan and involved the trade and Menter groups, there has been no trade body or grouping to represent or contribute the views of the trade at County level²⁴. The general view is that membership of MWT, as a regional organisation, does not fulfil this role.

However, under the auspices of the RDP programme, CCC has facilitated the formation of a number of themed cluster groups of tourism operators and relevant stakeholders in order to present or help promote the respective clusters:

- Outdoor activities;
- Cab-a-bag;
- Faith tourism;
- Walkers are Welcome;
- Gardens and growers; and
- Teifi Valley Cheese makers.

This is seen as a very positive initiative and embraced by the private sector.

In terms of destination marketing, the budget is £97,000 which is spent largely on the brochure and other publications (60%, in partnership with private sector) and VW campaigns (30%). The estimated incremental spend in Ceredigion as a result of the Council's marketing activities was £5.7m in 2008 and £6.3m in 2009²⁵.

There is, however, a view within the local trade that the Council's marketing priorities now need to be reviewed. In particular, there is much discussion about the form and function of the CCC tourism website and tourism publications.

CCC's tourism website includes:

- A graded only accommodation list with links;
- Information on local areas, attractions, TICs, beaches & tides, activities (walking, cycling, fishing, golf) with downloads;
- Events list with links to major venues;
- Travel information (public transport, maps etc); and
- Brochure request.

²² Research by The Tourism Company for Visit England

²³ The exact figure is unclear as some roles and functions overlap.

²⁴ There is a Ceredigion chapter of BH&HPA.

²⁵ Ceredigion conversion research, Strategic Marketing 2008 & Beaufort Research, 2009

CCC tourism publications include:

- Ceredigion - Cardigan Bay & the Cambrian Mountains brochure;
- Ceredigion Angling Guide - freshwater/coarse/sea angling;
- Ceredigion Harbours, Beaches and Marine Conservation Guide;
- The Rheidol and Ystwyth Trail leaflets;
- Ceredigion Golf leaflet; and
- Ceredigion Tide Tables.

There are also differences of opinion over branding; some say Ceredigion is an unworkable title, others feel it is distinctive, authentic, here to stay and should be built up. Some feel that promotion should be at individual destination level e.g. Aberystwyth, Cardigan Bay and the Cambrian Mountains, others feel the County should be promoted through product themes.

Destination management and marketing: Key points

- The organisation of tourism management and marketing in Wales is currently under review.
- The national priority is to have robust destination management plans in place, developed and implemented at local level with the active engagement of the private sector and other stakeholders.
- At present, there is no prescribed structure for destination management at the sub-regional level but this tri-partite approach is seen as critical.
- A new Strategic Marketing Plan for Wales has been agreed which will require the active involvement of local destinations.
- TPMW has an important facilitating role in the management and marketing of tourism in the Mid Wales region.
- Ceredigion currently invests significantly in the development and maintenance of tourism infrastructure; there is general appreciation of this commitment – but some concern over the sustainability of services in the current economic climate e.g. TICs.
- At present, the only trade organisation is at a regional level and there is a view that this does not serve the Ceredigion trade as well as it might.
- There is a perceived lack of communication between the trade and those providing these public sector services - and within these two groups.
- There is now a need to review destination management in Ceredigion.
- There is some concern about the priorities and means of marketing the County, notably through the website, the role of the brochure and the need for more proactive marketing of the destination.

6. Human resources for tourism

Secondary education

There are seven comprehensive schools in Ceredigion, varying in size from about 320 pupils to 1400 pupils. Two of these schools are designated as bilingual schools.

All secondary schools offer a number of programmes specifically relevant to employment in tourism, leisure and hospitality in years 10 to 13 including:

- Applied Vocational GCSE in Leisure and Tourism;
- AS and A levels in Travel and Tourism;
- AS and A levels in Design and Technology, Food Technology, Home Economics, Nutrition & Food Technology;
- AS and Advanced GCE in Travel and Tourism;
- BTEC First in Travel and Tourism and BTEC First in Sport.

However, anecdotal evidence suggests that many students participating in these vocational programmes have little interest in tourism, leisure or hospitality as a long-term career choice. Others view participation as a route into higher education outside of Ceredigion, to which they may not return after graduating. As elsewhere, this vocational provision does not necessarily attract the most able students.

It is important to note that the school population in Ceredigion is falling steadily at a time when the WG Learning Pathways initiative requires a broader range of 14-19 provision, including vocational options relevant to employment needs in the area. This is challenging for Ceredigion, even though the requirements can be met by collaborative provision involving a number of schools and other training providers.

CCC has developed plans for some re-organisation of primary and secondary provision, including the introduction of three 3-19 all-through schools at Lampeter, Tregaron and Llandysul. The Ceredigion 14-19 Network, a partnership including CCC, secondary schools, Coleg Ceredigion and several work-based learning providers, has also been established to ensure that an appropriate range of experiences can be delivered to young people. Tourism-related vocational provision is expected to remain as one of the key vocational subject areas within the 14-19 curriculum in Ceredigion in future years.

As well as vocational options, secondary school students can also learn about career opportunities in tourism in a number of other ways. Career guidance in schools and Careers Wales West can provide information for interested students, and some schools participate in the Springboard UK Ltd *FutureChef* competition. Many young people also work part-time in tourism-related jobs. However, the Springboard Ambassador scheme, where young managers in the hospitality and tourism sector visit schools, has no participants in Ceredigion.

Vocational education and training

Vocational education and training in tourism, leisure and hospitality is available from a number of providers including Coleg Ceredigion, Ceredigion Training and a number of commercial providers²⁶.

Coleg Ceredigion

Coleg Ceredigion is the only college in the county. It offers a range of full and part-time provision in hospitality and catering, and travel and tourism on both the Aberystwyth and Cardigan campuses. This currently includes:

- NVQ level 2 Professional Catering and Hospitality;
- NVQ level 3 in Catering and Hospitality: Hospitality Supervision;
- NVQ level 3 in Professional Cookery (Food Preparation and Cookery);
- BTEC Level 2 Business, Travel and Tourism;
- BTEC National Award in Travel and Tourism.

From September 2011, hospitality and catering programmes will change from NVQs to delivery of the Diploma in Hospitality at levels 1 and 2. A level 3 Diploma programme may be offered from 2012. The college is also considering whether to offer the People 1st WorldHost short course in customer service, but no decision has yet been made.

Hospitality programmes recruit well in both Aberystwyth and Cardigan and are usually full (16 entrants on each programme), although there would be insufficient demand for additional provision. A majority of students who successfully complete hospitality programmes seek and obtain employment locally.

The college also provides a range of short courses aimed at businesses in the county, which range from a half-day to four days in duration. This includes:

- First aid;
- Food hygiene;
- Health and safety;
- Licensing, including door supervision and security;
- Management development tailored to suit the requirements of a business in areas such as customer care, human resources, strategic management and IT.

Demand from tourism sector employers is reported to be strong for short courses linked to statutory requirements, such as food hygiene, health and safety, door supervision and first aid, and increased in 2010. However, there is negligible demand from tourism employers for other provision, such as NVQs or management development.

Ceredigion Training

Ceredigion Training (HCT) forms part of the Education and Cultural Services Department of CCC and operates from learning centres located in Aberystwyth, Lampeter and Cardigan. Although Ceredigion Training does not offer any specific

²⁶ Learn Purple offers a Level 2 Food Hygiene & Food Safety Certificate via online distance learning.

tourism, leisure or hospitality programmes, its business and management related provision could be of benefit to tourism operators or individuals seeking employment in this sector. This includes:

- Foundation level 2 and 3 Modern Apprenticeships in Business Administration;
- Foundation level 2 and 3 Modern Apprenticeship in Customer Service;
- OCR NVQ Management level 4 and the ILM level 4 Award in Management.

Ceredigion Training reports that, despite considerable marketing effort, it is almost impossible to persuade employers from the tourism sector to support customer service or business administration apprenticeship programmes or to provide candidates for management training.

Ceredigion Training has an opportunity this year to bid for funding for tourism-specific apprenticeship programmes and would be interested in delivering these. However, they do not believe that these programmes would be supported by employers. They have also considered delivering the People 1st WorldHost short course in customer service, but again do not believe that there would be much demand.

Food Centre Wales, Horeb

The Centre was set up in 1996 as a dedicated food technology centre by CCC as part of its Economic Development strategy. It is an advice and consultancy facility offering technical services to business start-ups, SME's and existing food manufacturers. The Research and Development building, opened in 2001, has fully equipped process areas and manufacturing facilities. It is also used as a "launch pad" for new and innovative ideas in the Welsh Agri-Food Industry. The Food Centre delivers in-house designed courses to meet HACCP directives to the meat, dairy and catering sectors.

Cambrian Training Company

The Cambrian Training Company is one of the leading post-16 training providers in Wales and has one of its centres in Aberaeron. It specialises in delivering work-based learning in the following occupational areas:

- Hospitality and catering;
- Food and drink manufacturing;
- Team leading and management;
- Customer service and retail skills;
- Business administration.

Cambrian Training is an approved centre with Edexcel to deliver qualifications from the hospitality industry. It also offers the Applied Ability Awards for chefs – AAA awards.

Medrwn

Medrwn is a part of TPMW. It provides a limited range of short courses, workshops and seminars for tourism businesses in Ceredigion and elsewhere in Mid Wales. These programmes are now selected to reflect the key priorities of TPMW, such as food tourism, rather than developed in response to specific industry requests, the approach favoured by Gallu, the equivalent organisation in South West Wales, which is able to offer a more extensive programme.

Caravan Industry Training

Caravan Industry Training (CITO) is a part of SkillsActive UK Ltd, the sector skills council for active leisure, learning and wellbeing. CITO's programme of work continues to be supported and guided by the British Holiday & Home Parks Association and the National Caravan Council on behalf of the UK parks industry. CITO provides a Park Management Certificate through distance learning, which is available in Ceredigion. Some CITO technical training for holiday parks in Ceredigion has been funded under the RE:ACT programme.

Higher education

Undergraduate and postgraduate programmes relevant to the tourism sector are offered by both University of Wales Trinity St David (UWTSD) and Aberystwyth University, both of which are also involved in tourism-related research and consultancy activities.

University of Wales Trinity St David

UWTSD programmes include:

- BAs in Tourism, Tourism Management, Outdoor Education and Arts Management;
- MA Heritage Tourism;
- MBA Tourism Management and MBA Arts Management;
- MA/Postgraduate Diploma/Postgraduate Certificate in Outdoor Education;
- MA Landscape Management and Environmental Archaeology.

UWTSD has undertaken a number of consultancy projects related to tourism human resources including projects for the former Tourism Training Forum for Wales and VisitWales.

UWTSD is the first university sector institution in Wales to offer learndirect's Learning through Work provision. This enables staff within organisations to gain relevant and quality assured learning and qualifications while limiting the time they spend away from the workplace. Programmes are demand-led and can be tailored specifically to the work-related needs of the employer and the individual. These could be developed for tourism.

The Centre for Outdoor Education Research is a recognised research centre and a provider of professional development opportunities for mountaineering, rock climbing, canoeing and kayaking; a valuable resource for activity providers in Ceredigion.

The School of Theology, Religious Studies and Islamic Studies undertakes research on church tourism in Wales.

UWTSD has a Memorandum of Understanding with local colleges, including Coleg Ceredigion. The University's wider agenda is considered below.

Aberystwyth University

Aberystwyth University offers the following undergraduate programmes:

- BSc in Tourism Management, Tourism with French and Tourism with Spanish;
- BA Museum and Gallery Studies;
- BSc Sport and Exercise Science;
- FdSc/HND/BSc Countryside Recreation and Tourism.

The university offers a number of degrees in theatre, film and television studies, which could be relevant to the arts sector in Ceredigion. The Creative Units Projects offers a creative hub for arts businesses, arts development agencies, artists and craft workers.

The Aber-Bangor Skills Centre is engaging with businesses and third sector organisations in Mid and North Wales to inform the development of skills provision in the area. This £10.9m Higher Education Funding Council for Wales funded partnership is a pioneering collaboration that is based on the research capabilities of Aberystwyth and Bangor Universities. The Skills Centre has entered discussions with local businesses to identify the range of skills that they require, and those they would like to see developed in their region in the future, concentrating on the four key areas of ICT, BioScience, Environmental and Creative Industries. It includes the Centre for Coastal Research and the Centre for Integrated Research in the Rural Environment.

Higher education in hospitality

The provision at UWTSD and Aberystwyth does not include hospitality management, and Ceredigion therefore does not benefit from a local pool of hospitality graduates, the opportunity to employ hospitality undergraduates on a part-time basis, hospitality short course provision at higher education level, or specialist research and consultancy services related to hospitality in the local area.

Hospitality management degrees in Wales are offered by University of Wales Institute, Cardiff, University of Glamorgan and Coleg Llandrillo Cymru. Neath Port Talbot College offers an HNC in Hospitality and Food Management, and Coleg Menai an HNC in Hospitality Management.

Demand for external training

Overall, the match between the provision of vocational education and training for the tourism sector and demand for education and training is good. Survey respondents and consultees generally found no problem when seeking business advice and training. For the small proportion who had some difficulty, reference was made to obtaining business advice for managers, food preparation and service, reception/admissions, housekeeping and activity instruction/guiding.

However, demand for training provision from employers is considered to be fairly weak – even in areas such as food preparation and customer service where there are identified skill shortages. 65% of respondents in the operator survey did not currently access external business advice or training for themselves or their employees, which links with reports of low demand from providers²⁷.

This low demand is probably to be expected in an area where small and micro businesses predominate²⁸. Business owners believe that they can provide any training

²⁷ Notwithstanding, a significant proportion were interested in accessing business advice. The areas of interest were business management, marketing, customer care and local product knowledge.

²⁸ In the operator survey, 60% of respondents had two or less permanent staff and 62% had two or less seasonal staff.

that is required on-the-job (and without spending any money). Their actual ability to develop appropriate skills is likely to vary considerably – some will devote considerable time and resources to training with excellent results, others probably provide little beyond a basic induction.

Low demand also links to managers/owners ratings of the skills of their staff – most operator survey responses indicated that the skills of their employees were good or excellent (other than in relation to the Welsh language). However, some stakeholders perceive that the skills base is less good than that reported by operators.

There appears to be limited enthusiasm for apprenticeships or management development programmes. Providers are unlikely to increase provision unless demand increases.

Learning and development in employment

As outlined above, the majority of employers undertake their own training in-house. They may, of course, recruit those who have successfully completed further or higher education programmes. For example, Llandysul Paddlers has recruited graduates from UWTSO and a number of hotels have recruited those completing hospitality programmes at Coleg Ceredigion.

A number of employers used Coleg Ceredigion for health and safety, food hygiene, fire training and door supervision training. One also reported using training delivered in these areas at Coleg Sir Gâr in Carmarthen.

Medrwn provision has also been accessed by employers in Ceredigion, but this is now more limited in scope than in former years.

Antur Teifi provides business advice and development support for tourism businesses in Ceredigion, although we were unable to obtain information on the extent that these services are used by tourism operators.

Recruitment and retention

Some tourism sector employers in Ceredigion report difficulties in recruiting staff. In the operator survey, around 21% of respondents experienced some problem in recruiting or retaining food preparation staff and a similar proportion experienced difficulties in recruiting or retaining Welsh speaking/bilingual staff. The operator survey also highlights some difficulties in recruiting and retaining food and drink service, reception/admissions staff, housekeeping staff and activity instructors/guides. Our consultations suggested the problem of recruitment was significant. Many operators reported having to go outside the local area to find staff. A number of employers employ staff from Eastern Europe, particularly the larger hotels and caravan parks.

Consultations indicate that recruiting chefs is the most difficult problem. This is a national problem and skill shortages for chefs has been highlighted as a priority problem area by People 1st. Chef recruitment was highlighted specifically by a number of employers.

JobCentre Plus reports that the unemployed in Ceredigion are generally unenthusiastic about applying to fill notified vacancies in the tourism and hospitality sector, other than immigrants from Eastern Europe. The reasons given for this include seasonal contracts, long and/or unsocial hours, low rates of pay, transport difficulties and difficulties in obtaining appropriate childcare. However, part-time time opportunities in particular are appealing to some jobseekers.

Within this overall picture, some employers report no difficulties in recruiting employees. It would appear that larger employers and those with 'status' e.g. conservation/arts bodies or activity operators, experience fewer problems.

Front-line hospitality roles are often filled by students or other people without formal qualifications or experience in the tourism, leisure or hospitality sector. This can result in skills gaps, particularly in relation to customer service.

According to People 1st, annual turnover in Wales is 31% and Ceredigion is likely to conform to the national pattern. Although labour turnover is probably no worse than in other areas, this retention level exacerbates recruitment problems and can discourage employers from investing in staff training.

Staffing problems were reported by 9.4% of the operator survey respondents as a barrier to growth.

Skill gaps

The operator survey highlighted that 15.3% of respondents considered that the Welsh language skills of their staff could be improved. Otherwise the percentage of employers that reported skill areas that could be improved was very small.

However, there is anecdotal evidence that customer service, product knowledge and sales skills could be improved among front-line employees, and that there is a need for improved opportunities for management development in Ceredigion to up-skill owners and managers of tourism enterprises.

People 1st consider that the key skill gap areas in Wales are in food preparation, customer service, and management and leadership. Creative & Cultural Skills, the sector skills council for the creative industries, also considers management and leadership, particularly of small enterprises, to be a key challenge for the future of the sector.

Human resources for tourism: Key points

- Tourism is offered in all Ceredigion schools but is rarely seen as a first choice career option.
- The provision of vocational education and training generally meets demand from individuals and employers. Capacity is expected to remain stable in future years.
- Higher education provision from UWTSU and Aberystwyth provides a pool of graduates for the tourism sector, but provision does not include hospitality.
- Generally, operators do not find difficulty in accessing their training needs.

- Demand for training from tourism sector employers is generally weak, apart from in areas where there are statutory requirements, such as food hygiene, and health and safety. A majority of employers do not access external training or business advice but rely on on-the-job-training.
- Recruitment is a problem for some employers, particularly smaller businesses that cannot offer career progression opportunities. It is especially difficult for chefs.
- Front-line hospitality roles are often filled by students or others without formal qualifications or experience in this sector. This can result in skills gaps, particularly in relation to customer service.
- Unemployed people are generally unenthusiastic about applying for vacancies notified to JobCentre Plus by tourism sector employers, other than immigrants from Eastern Europe.
- As elsewhere in Wales, retention is an issue particularly within the hospitality sector.

7. Strategic context

National policy

At a national level, there are numerous policy documents that have a bearing on tourism in Wales. Of these, the key documents are:

- ‘One Wales’, 2007;
- ‘Economic Renewal: A New Direction’;
- ‘The Wales Spatial Plan: People, Places, Futures’, updated 2008; and
- ‘Making the Connections: Delivering Beyond Boundaries’.

Essentially, these documents seek to build sustainable communities, promote a prosperous economy (addressing skills and supporting investment in infrastructure in particular), value the environment, improve accessibility and respect local culture and distinctiveness. References are made to the role of tourism in meeting these broad goals.

In specific tourism terms, there is a raft of relevant policy, under the umbrella of ‘Achieving Our Potential’, The Welsh Government’s Tourism Strategy (and the Wales Sustainable Tourism Framework). The vision is to achieve “a customer responsive, innovative, sustainable and profitable industry which makes an increasing contribution to the economic, social, cultural and environmental well being of Wales”.

The national tourism strategy is built around meeting 5 challenges that must be central to any strategy for Ceredigion. The emphasis, and one of the document’s strategic aims, is to acknowledge the need to secure a sustainable, long-term future through responsible destination and business management.

Achieving Our Potential: 5 Challenges

1. **Distinctive Branding.** A strong brand identity must be reinforced at all levels of the industry. The priorities are to link branding of destinations to the Wales brand, encourage iconic attractions and pursue less seasonal markets.
2. **Higher Quality.** Wales will be a high quality destination that offers a distinctive experience throughout the year. The priorities are to increase investment, tackle low quality accommodation and encourage more top end luxury.
3. **Easier Access.** Wales’ tourism products will be easily accessible to the key markets via online visibility and other more traditional channels. The priorities are ICT and bookability; public transport; air links; provision for people with special needs.
4. **Better Skills.** The tourism industry will offer year round employment with good career prospects and equal opportunities. The priorities are professionalism, employment conditions, training that meets industry needs, links between Higher Education and industry and career choice.
5. **Stronger Partnership.** Tourism in Wales will be competitive, sustainable and based on a distinctive Welsh offer. Intervention from the public sector will be targeted at operators or products that meet the needs of the future growth markets. All tourism stakeholders will work together to ensure appropriate coordinated action at national, regional and local level. The priorities are to encourage partnerships and local community engagement and more joined up government.

More specific national strategies and action plans have been developed for cultural tourism, food tourism, activity tourism (including specific strategies for walking, cycling, riding, golf, watersports and adventure tourism) and coast and countryside access.

Of particular relevance is the 'Coastal Tourism Strategy' (2008), commissioned as input to the Wales Spatial Plan. The strategy is built around 5 themes:

1. Coastal Towns and Resorts. Resorts are seen as continuing to be a major focus for tourism. The strategy recommends ways for them to strengthen attractiveness including improved accommodation quality, public realm/environment, beach management and integrated transport.
2. The Rural Coast. This is a strong resource throughout Wales and needs management. The approach includes strengthening community involvement, coastal/marine management agreements and good practice codes, innovative public transport solutions; capitalising on the Coast Path, cycling and riding.
3. Coastal Activities (land and sea). The strategy calls for further development and promotion of coastal land and water recreation, notably nature and wildlife tourism as an all-season activity, the Coast Path and associated accommodation, marina development and expansion of capacity, regional zoning and management of use of Personal Water Craft.
4. Coastal Culture. The potential of food, heritage and culture should be exploited with a coastal events programme that should include new activities at certain times of year.
5. Coastal Management. This reiterates the need for environmental enhancement and sound destination management based on IQM.

The priorities relevant to Ceredigion are the Wales Coastal path, resort enhancement, improvements in accommodation stock and strengthened community involvement.

The report notes, in relation to central Wales, that the area does have significant potential with regard to nature tourism.

Coastal Tourism Strategy: Elements to consider in the Central Wales Spatial Plan Area:

- To improve accommodation provision at the coast;
- To improve access to water, parking at Aberaeron, Cardigan and New Quay;
- To develop Aberystwyth as a strategic centre of national importance and explore how it can benefit and expand its tourism role;
- The provision of visiting berths at harbours and yacht stations around Cardigan Bay;
- To exploit the potential of a wider strategy for heritage tourism;
- The preparation of an events and promotion strategy for Cardigan Bay; and
- To consider the improvement of beach access and facilities at beaches along the Cardigan Bay coastline.

Regional policies

The new Mid Wales tourism strategy²⁹ acknowledges that the regional tourism role is changing; it is now more about supporting the work of local destinations and Visit Wales in the context of the new national framework. The strategy sets out how regional partners can contribute to local and national objectives, focusing on the issues and opportunities that affect the development of tourism - at local destination and national level - that can best be resolved, managed and/or capitalised upon at regional level. These include:

- Organising tourism across the region, helping to set up appropriate structures, plans and related marketing support;

²⁹ Mid Wales Regional Tourism Strategy, Draft Final Report, May 2011

- Helping to provide the appropriate infrastructure and high quality, sustainable, distinctive destinations, facilities and services, that will encourage more visitors to visit throughout the year with a particular emphasis on quality products and improved transport infrastructure
- Encouraging more local people to follow and develop worthwhile careers in the tourism industry; promoting tourism careers and improving skills amongst existing operators; and
- Maximising opportunities for tourism development with and between different agencies i.e. enhanced advocacy and brokerage supported by better research and evaluation.

'Enhancing Inland Tourism in Central Wales' (2007) is an Action Plan commissioned by the TPMW, to identify opportunities and requirements for enhanced inland tourism. The area defined by the WSP as Central Wales area has a "fuzzy" boundary but excludes the coast and therefore the bulk of Ceredigion's tourism. However, the objectives are relevant i.e.:

- Increasing the quality of visitor experience and supporting infrastructure;
- Increasing leisure, heritage and cultural opportunities for visitors and locals;
- Developing key sectors for sustainable growth;
- Attracting high spend staying visitors;
- Extending the tourism season; and
- Strengthening the area's senses of identity on a sub regional / local basis.

Similarly, an Action Plan was developed which is relevant to Ceredigion:

<i>'Enhancing Inland Tourism in Central Wales'</i> : Action Plan	
Product	<ul style="list-style-type: none"> • Developing and extending the activity product; • Improving quality and range of accommodation sector; • Promoting and encouraging innovation in Green Tourism; • Encouraging investment in the attractions sector; • Restoring, extending and enhancing the network of recreation trails.
Places/Infrastructure	<ul style="list-style-type: none"> • Developing distinctive destinations as tourism 'hubs'; • Improving the retail, catering and evening economy; • Securing investment in infrastructure to improve accessibility; • Developing/promoting events to extend the season and attract new visitors.
People and Organisations	<ul style="list-style-type: none"> • Securing ongoing training and workforce development; • Integrating tourism within community regeneration; • Coordinating delivery of information provision incorporating ICT; • Securing effective industry participation; • Providing effective leadership and integration in public and voluntary agencies; • Coordinating appropriate branding, marketing and promotion; and • Improving market intelligence, data collection and dissemination.

Local policies

The last tourism plan for the County was the *'Ceredigion TGA Implementation Plan'* (2002). The vision and objectives of that plan reflected those of the Mid Wales strategy and supported the implementation of a range of initiatives.

The 'Ceredigion 2020: Community Strategy' and 'Ceredigion Corporate Strategy' identify broad community goals such as healthy living, a vibrant economy, learning and environmental management. Tourism is referred to indirectly as a potential contributor to these goals.

The emerging Ceredigion Local Development Plan seeks to support sustainable development of tourism, focusing on the most important settlements. In tourism terms, however, policy limits further development of caravans on the coast. Hotel, attraction – and camping - development is supported on the coast, subject to conditions. There is a desire to protect against the loss of serviced accommodation and enforce against breaches of planning law through the use of touring sites by static vans.

The Ceredigion Rights of Way Improvement Plan 2008 and the Coast and Countryside Strategy set out the County's broad strategy towards the conservation and enhancement of the County's environmental resources for wider goals to do with quality of life but recognising their contribution to tourism and local recreation.

Potential funding for tourism

Private sector projects in Ceredigion are hampered by the lack of value in major property schemes and the more widespread difficulty in raising finance. Support funding has been necessary to get many projects off the ground. This challenge is highlighted when the objective is to create the high quality products that are needed to attract new markets.

For infrastructure projects, Ceredigion has limited resources for tourism and local authority budgets are set for significant cut-backs. In recent years, external project funding has come from a number of key sources including:

- The European Objective 1 programme;
- WG's Rural Development Programme (RDP);
- Convergence funds including the Local Investment Fund (LIF);
- ERDF funding for local and social enterprise projects, coastal protection etc;
- ESF funding;
- Interreg; and
- WG/VW through the TGA and SIF.

The problem has been, and continues to be, the availability of funding from in-house resources or central funds (eg Targetted Match Funding) to match contributions from these external funds. However, if this can be found, opportunities do exist. The RDP (2007-2013) has been particularly important with a number of innovative projects being successful in the first round. The decision on the Business Plan 2 application is awaited with keen interest.

Sources of external funding

- RDP. Some projects under Business Plan 1 may be re-profiled to extend into 2011. In Business Plan 2, a number of new projects remain on the reserve list.
- Convergence, Environment 4 Growth strategic projects:
 - Communities and Nature. This includes the CCW project 'Explore Dyfi', funding interpretation, a local path network and sustainable tourism and 'Wild Fishing Wales'. Tenders invited;
 - Heritage Tourism. Cadw is delivering some projects in house but is also inviting bids around three cultural themes in 2011 including 'Spiritual and inspirational landscapes' which is particularly relevant to Ceredigion but also 'Origins' covering prehistory, the

Roman invasion and settlement and 'Wales, the first industrial Nation'. The HTP will fund packages to deliver heritage based festivals and events.

- Coastal Tourism: Green Seas Partnership. Bids are invited from local authorities/ beach managers. A major aspect for bids will be compliance with and/or moving towards guidelines on water quality but money can be spent on infrastructure, interpretation, information, beach access, links to coast path, slipways and access to water etc. The Coastal Tourism Strategy forms the basis for this initiative. Projects to be implemented 2011-12.
- Intereg 4 is in its early stages. There may be opportunities for support for destination management with destinations working together. There has been a recent award for coastal waters under 'Smart coasts: Sustainable Communities' and an industrial heritage project 'Metallinks'. Interreg has also provided funding for projects at higher education institutions, such as the Creativity and Innovation in Micro-Enterprises (CIME) project in which UWTSD is involved.
- Heritage Lottery Fund.
- Regeneration Area funding in Aberystwyth.
- WG for various programmes e.g. RoW Improvements, Coastal Access, Sustainable Travel Centre.
- WG training support schemes e.g. People 1st, apprenticeship schemes, services offered via National Training Skills Coordinator/RTPs.
- EU Lifelong Learning and other Programme funding for higher education initiatives.

VW has recently taken back some control over WG resources for tourism support and established a new Tourism Investment Support Scheme (TISS). This new discretionary scheme aims to improve the quality of facilities in existing private sector tourism businesses as well as encourage investments in new quality facilities and businesses with potential for high growth and profitability. This will apply to additional and/or upgraded accommodation, attractions, activities, golf clubs etc³⁰. Any project relating to additional capacity will only be considered if the result is to grow the tourism economy of Wales, as opposed to causing displacement. If there is a destination management plan that points to the need for, say, improved accommodation, this would help an applicant's case.

TISS: The 'small print'

Tourism businesses awarded support must meet specified capital expenditure, job and private sector funding targets, achieve Croeso Cynnes Cymreig status, take part in the VW Occupancy Survey, achieve and maintain the relevant VW quality grading and accreditation (or a suitable alternative). All serviced accommodation will have to achieve an agreed or improved quality grade as a result of the investment. A complementary objective of the scheme is to encourage tourism businesses to develop facilities, or procedures, which directly result in energy efficiency and environmental improvements. Priority will also be given to excellence in the quality of design, professional management teams, ensuring access for all, membership of a local tourism association and a commitment to providing a distinctive Welsh experience. The maximum level of support allowable, in the form of a grant or repayable grant, will vary (up to 25% or £300,000).

At a local level, Ceredigion has a small Social Enterprise Growth Fund.

A key role for the higher education sector

The higher education section in the County is important to tourism development in Ceredigion has a potentially broader role to play. For example, UWTSD, a co-sponsor of this strategy, is looking to develop a role in destination management beyond that of helping to improve skills as an educational institution. Their remit is to take a holistic

³⁰ See <http://wales.gov.uk/docs/drah/publications/Tourism/110420newcapupgrade.pdf>

approach to community development and they plan a more pro-active role in regeneration that draws on their skills development background and their wider facilitation experience. The University, as a partner in tourism regeneration projects, is in a position to help draw down funding from a range of different sources, to provide expertise to assist in the management of projects and to assist businesses to participate in tourism destination management initiatives.

More specifically, UWTSO is delivering the following projects of relevance to the tourism sector:

- **Relating Experience: Advancing Collaborative Tourism (RE:ACT):** European Lifelong Learning Programme Leonardo da Vinci funding is being used to work with tourism SMEs to develop an online training programme in social media for the tourism industry;
- **Creativity and Innovation in Micro Enterprise (CIME):** this INTERREG funded project aims to support businesses using creativity techniques that stimulate innovative practice and therefore raise the competitiveness of the participating micro-enterprises or SMEs;
- **Heritage and Culture for Learning, Empowerment and Sustainable Tourism (HERCULES):** an INTERREG project to assist communities to develop sustainable cultural tourism products built on the notion of a 'sense of place'.

Plans for UWTSO to combine with other higher education institutions in Wales are also likely to provide new opportunities for it to support tourism destination management initiatives in Ceredigion.

Strategic context: Key points

- National policy is all about building sustainable communities, valuing the environment, respecting local culture etc.
- There is a raft of tourism policy, under the umbrella of 'Achieving Our Potential', focusing on the need for distinctive branding, higher quality, easier access, better skills and stronger partnership.
- The coastal tourism strategy emphasises the potential of the coast and wildlife tourism to Ceredigion.
- Regional policy reflects the national strategy but emphasises the need for better packaging of local resources, more distinctive branding around niche markets, business support and skills development, better information, better research and a partnership approach.
- The last tourism strategy for the County was the Ceredigion TGA Plan which provided a helpful context for the implementation of a range of initiatives.
- Broader policies for the community – and the countryside - identify goals such as healthy living, a vibrant economy, learning and environmental management. Tourism is referred to indirectly as a potential contributor to these goals.
- The emerging Local Development Plan seeks to support sustainable development of tourism but limiting further development of caravans on the coast.

- Funding of tourism has become a particular challenge for private developers and the public sector.
- UWTSB is in position to play a more pro-active role in local community tourism regeneration projects.

8. The external environment and tourism

Future patterns of tourism in Ceredigion will be partly determined by what happens on the ground but also influenced by external factors outside local control such as economic and social change. We summarise some of the key influences below.

A changing and difficult economic situation

Over recent years the economic context has shifted between optimism, growth, recession and pessimism. In the past 5 years we have seen steady growth taken over by:

- Uncertainty over the global economic status;
- Unprecedented government bail out of the banking sector;
- Falling house prices;
- Considerable reductions in consumer spending;
- Rising unemployment rates;
- The weakening of the sterling against the dollar and euro; and
- The lowest interest rates for over two decades.

Notwithstanding recent figures from the Treasury³¹ that indicate that GDP is expected to rise by 1.6% in 2010 and 1.8% in 2011, there is a general level of uncertainty about the future – but still some confidence amongst Ceredigion operators. Higher levels of unemployment and constraints on wages will also impact on consumer spending. Even if there is modest growth next year, the pace of recovery is expected to be slow thereafter.

At a local level, this uncertainty is justified. Ceredigion relies upon public sector employment and farming along with tourism. As a consequence of the current budget deficit, there is likely to be significant restraint on public sector spending over the next few years which will have an impact on national and local authority budgets, the resources available for tourism marketing and infrastructure, and the funding available to support tourism skills and business development.

A changing population

The UK population is more or less stable in terms of numbers (0.7% annual growth in 2006-2016³²) 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 and breaks at home and has been important for Wales with its strong walking and outdoor product, but patterns are changing and an age group that has grown up with holidays abroad may be reluctant to change their travel instincts.

³¹ Forecasts for the UK economy; A comparison of independent forecasts, October 2010 (HM Treasury)

³² Population projection by Government Actuary / Office of National Statistics. 2006 based projection

Limited population growth, and the out-migration of key cohorts, will impact on future labour supply. 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; and
- 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 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;
- Discerning, sophisticated and ‘streetwise’ consumers who are widely travelled, know what they want and pride themselves in getting value; and
- 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.

The environment

The environment is firmly on the political agenda and there is an increasing focus on climate change throughout government and business communities. There is a high level of probability that significant global warming will occur during this century. There will be implications for biodiversity as conditions change for many species and there are likely to be significant shifts in farming patterns. Coastal erosion continues to have an impact. These factors will affect the Ceredigion countryside and coast.

Amongst consumers, this concern 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 which 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;
- The growing interest in green and ethical choices will begin to have an impact amongst a section of consumers;

- 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; and
- Wales may see a warmer climate as a result of climate change, although more unpredictable weather is the likely scenario.

The quality and diversity of Ceredigion's environment is a unique strength. A future challenge will be to retain and improve current management regimes which in turn will demand the care and stewardship skills necessary to maintain the landscape. The next decade will be crucial in ensuring the maintenance of these skills.

Technology

Technology continues to move on apace. The internet has had an enormous impact on tourism. It is now the preferred route for booking and information collection 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 are bypassing 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 and it is becoming more difficult to make yourself heard. VW is embracing this change through its Digital Tourism Business Initiative.

Technological changes, particularly in relation to tourism marketing, also have implications for the skills required by tourism businesses, particularly those of owners and managers.

Increasing competition

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.

Meanwhile, in this country, there are a number of competing destinations also seeking to exploit the domestic tourism market. Ceredigion undoubtedly has natural tourism assets that compare very favourably with better known destinations such as Pembrokeshire, Snowdonia, Devon & Cornwall, the Lake District, the Peak District and Brecon Beacons but the lack of awareness of what is on offer demands greater effort. In this environment, simply keeping position and retaining market share becomes a challenge let alone breaking into new markets and developing new business.

Tourism prospects

Tourism is closely linked to all these factors (along with health and security issues). UNWTO report that international tourism may only grow at 3-4% in 2010 but in Europe, growth will be minimal. Long term forecasts³³ by Tourism Economics suggest that global tourism will return to 2008 volumes in 2011 and continue to grow strongly after that. VW expects the global economy *"to gradually return to modest growth. The long-*

³³ Long term forecast, Tourism Economics from Visit Britain website.

*term future growth trend will be significantly slower than over the past decade in those markets that are most important to the Wales visitor economy.*³⁴

Inbound tourism to the UK has followed this pattern. It fell by 5% in 2009 and is expected to grow by less than 1% in 2010. Volumes may not return to 2008 levels until 2012. Wales has a relatively limited share of UK inbound tourism and it has not shown much growth over the past decade.

Domestic tourism, however, has been given a bit of a boost by the current economic situation - although the Ceredigion STEAM figures for last year do not show this. Business tourism overnight trips may be down as companies cut back on travel in the recession, but holiday tourism is up as people have opted to holiday at home. This has particularly benefited the self catering caravan sector and visitor attractions also report increased attendance. This represents a welcome change as over the past decade the evidence suggests domestic tourism in the UK and Wales has been static. It is difficult to know whether this is a temporary fillip which will disappear when the economic situation improves; experience suggests it would be unwise to base a strategy on such a short-term change. However, it is fair to say that coastal holidays have been boosted in recent years; not only is the holiday park market doing well but there is a renewed interest in short breaks at good quality hotels with good restaurants at the coast.

The most likely outlook for the next five years or so is that the domestic and overseas demand for tourism in Wales and the UK is likely to remain at around the same level. This means that destinations can't rely on a rising tide to grow tourism but will need to capture market share from elsewhere.

The external environment and tourism: Key points

No-one can say with certainty what the cumulative impact of these changes will be. Some of these drivers may cancel each other out.

The message is that:

- Tourism growth is not guaranteed and may have to come from capturing market share from elsewhere;
- Public sector funding and support is likely to be constrained in the short to medium term; and
- Competition is increasing and the market is more sophisticated and less loyal.

Success will depend upon:

- Making, and reminding, people of what Ceredigion has to offer, and where it is;
- Understanding the market and changing consumer requirements;
- Exploiting new media and making it easy to access information, and arrange last minute, flexible packages tailored to the individual;
- Raising sights and looking outside the area to match and exceed what the competition is offering;

³⁴ VW Strategic Marketing Action Plan Summary

- Continuously investing in and upgrading the product and infrastructure and the skills of the tourism workforce;
- Offering a range of quality experiences to delight, excite and enthuse; and
- Creating places that are distinctive, authentic, and enriching places to visit.

THE STRATEGY

9. The strategy

Having reviewed the existing situation, this section of the report looks to the future. It sets out the main issues before addressing the overall approach that should be taken to developing the visitor economy through an aim and strategic (priority) objectives for the next five years and beyond.

Where are we now?

In brief, the main strengths of Ceredigion as a tourist destination are its superb coast and wider landscape and the opportunity for various activities within this environment. There are traditional, established resorts and there has been much investment in the caravan sector and also in a range of small boutique hotels and self-catering cottages. The Council has invested considerable sums into the local infrastructure.

However, there are areas for concern. Ceredigion needs to attract more visitors, develop its visitor economy and thereby support a fragile economy. The self-catering/caravan sector has performed well but it is difficult to sustain commercial levels of business in serviced accommodation and other facilities given the current volume of largely seasonal visitors. The tourism sector lacks a shared vision and co-ordination between public and private sector to address these issues.

Looking to the future, Ceredigion faces a number of pressing challenges if it wants to retain and grow its visitor economy although it shares these with many other destinations. The challenges are:

- Increasing competition from other destinations. This requires efforts to raise the profile of Ceredigion and its proximity to existing and potential markets;
- A sluggish domestic tourism market and few overseas visitors. This means that market growth has to come from capturing business from other domestic destinations;
- Adapting to the needs of changing market requirements and aspirations. Tourism is market led; if we can't provide the sort of experiences (facilities and service) that people want then they will go to competing destinations;
- Pressure for new, inappropriate development in the countryside could threaten the quality of the environment and its appeal for tourism;
- Getting all stakeholders to collaborate and coordinate effort to more effectively overcome some of these challenges; and
- Striving to meet these challenges while facing constraints on public sector resources which currently underpin much of the tourism infrastructure – and financial constraints on the potential higher value visitors that are needed to grow the visitor economy.

The key points arising from consultation and our analysis of the current situation are summarised in the form of a SWOT analysis (Table 6.1).

Strengths	Weaknesses
<ul style="list-style-type: none"> • Beautiful coastline / distinctive resorts • Coast Path • Designated marine wildlife area • Excellent, safe beaches • Watersports • Beautiful countryside and exceptional natural resources • Opportunities for walking and cycling • Good caravan parks • High quality serviced accommodation • High quality self-catering accommodation • High proportion of graded accommodation • Improved opportunities to eat out • Niche retailing • Distinctive local culture/Welsh language • Excellent cultural venues • Five TICs • Local produce • Two universities providing ambience, visitor draws, workforce development • Plethora of training opportunities • Two distinct visitor markets • Lack of congestion 	<ul style="list-style-type: none"> • Low profile of Ceredigion • Small catchment population making it difficult to sustain commercial businesses • Low values for commercial development • Over reliance on long-holiday market • Seasonality • Perceived remoteness • Over-reliance on the caravan sector • Large number of small operators • Lack of co-ordination/co-operation within industry • Lack of joint working between public and private sectors at County level • Differences over marketing approach • Limited destination marketing • Limited packaging • No major family attractions • Few events capable of providing reasons to visit in their own right • Local staff recruitment • Lack of a fully integrated IQM approach • Quality/distinctiveness of built environment • Limited public transport in rural hinterland • Lack of connectivity between coast and rural hinterland • Low demand for workforce and management development
Opportunities	Threats
<ul style="list-style-type: none"> • The 'staycation' concept becomes reality • General appetite for 'new' / distinctive destinations • Rising profile of the coast and distinctive resorts • Increasing demand for 'active' holidays • Appeal of wildlife tourism linking coast, Cambrian Mountains, Dyfi Biosphere • Appreciation of environmentally-aware destinations • Aberystwyth Regeneration • Improving access to the countryside • New commitments/responsibilities of VW and RTPs • New partnership working opportunities including the private sector and UWTSD • Low cost, wide reach digital marketing for small operators 	<ul style="list-style-type: none"> • Continuing economic recession impacting on visitor numbers and/or spend • Budget cut backs in the public sector • Difficult funding for private sector • Failure to adapt to growth markets • Competition from other destinations • Inappropriate development • Coastal erosion • Poor management of sensitive marine and other natural resources • Declining interest in tourism as a career • Ineffective marketing of Wales and/or Ceredigion • Public/private sectors in conflict • Lack of co-ordination between agencies/ council departments • Lack of investment in product / infrastructure • Lack of clear vision and direction

The strengths, opportunities and the investment to date mean it makes sense to ensure that Ceredigion continues to develop and derive benefit from tourism and that this carries on into the future.

This won't just happen by itself and any past success will not necessarily guarantee survival in the future. It will be essential to make people aware of what is on offer, give them a reason to visit and satisfy or exceed their expectations when they are here.

An overall approach; key principles

Tourism doesn't exist in isolation and needs to complement and support existing policies and strategies if it is to contribute to wider objectives. Our review of these suggests the tourism strategy should embrace the following key principles and themes, based, in large part, on IQM:

1. Work in partnership to make most efficient use of resources whether it is between authorities and agencies or between public, private and voluntary sectors;
2. Draw on the natural and cultural resources of Ceredigion to create and promote a special, distinctive place, distinguished from other competing destinations;
3. Provide and promote the facilities, attractions and services that will help encourage more visitors to visit throughout the year;
4. Support the tourism industry by encouraging more local people to follow worthwhile careers in the tourism industry;
5. Strive to do things to a high quality, improving the overall experience for the visitor as the route to enhancing value; and
6. Follow the principles of sustainable development i.e. balancing the environmental, social and economic impacts of tourism, taking action to reduce any negative impacts and using tourism to bring clear positive benefits for the conservation of natural and cultural resources, the quality of life of local communities, and the performance of the local economy.

The Overall Aim of the tourism strategy should be to:

“Develop a high quality, viable and sustainable all year visitor economy which sensitively capitalises on the distinctive natural and cultural qualities of the County, maximises the value of tourism and brings net benefits to the local population in the form of jobs and amenities for all.”

Target

We recommend that Ceredigion should aim for modest growth in both the volume and real value of tourism over the next decade. This is a challenge in the current situation but we think a realistic target to aim for is a 1-2% growth pa, or 15% overall growth over the next decade.

Strategic objectives

We have identified five, inter-related, strategic objectives which form the backbone of the strategy and which should drive activity and shape priorities over the next 5-10 years. Under these objectives are a series of 16 Action Points³⁵:

³⁵ These objectives draw on, and adapt, the more specific elements of the IQM model.

1. To create an effective new structure for tourism in the County

Ceredigion does not have an appropriate inclusive framework for supporting the tourism industry in the County. A new structure will bring the County into line with best practice elsewhere.

Action Points:

1. Establish a representative private sector group
2. Establish a CCC Destination Management Group
3. Create a new tourism partnership working arrangement in the County

2. To encourage more visitors to Ceredigion

Ceredigion needs more visitors, particularly in off-peak periods. There is a need to raise the profile of the destination and encourage those who are already familiar with it to return more often.

Action Points:

4. Market Ceredigion in partnership with VW
5. Local marketing initiatives by CCC
6. Local marketing initiatives by the private sector and other local groups

3. To invest in a quality product

Ceredigion needs to enhance the quality of its offer at all levels. It is the better quality destinations and enterprises, often irrespective of price, that perform the best. Quality facilities mean better occupancies and a longer season and, in Ceredigion, this is where growth is going to have come from.

Action Points:

7. Invest in the built environment
8. Enhance access to the coast and countryside
9. Enhance the accommodation sector
10. Coordinate local events and activities, off peak

4. To invest in a skilled tourism workforce

Ceredigion needs to create more jobs. Tourism offers a range of opportunities but they do not currently appeal to local job-seekers. The skills of the workforce are a key component in the ability of tourism operators to offer a high quality experience and to succeed in meeting their business objectives.

Action Points:

11. Encourage young people to choose tourism careers
12. Deliver customer service and product knowledge training
13. Promote management development for small businesses
14. Address chef recruitment and training
15. Boost demand for training amongst operators

5. To establish quality management processes for the tourism sector

Quality management involves careful monitoring. Ceredigion needs to establish a series of practical, realistic performance indicators.

Action Points:

16. Establish a set of performance indicators

Taken together these will put the visitor economy of Ceredigion onto a sounder footing and lay the foundations for future success.

Taking the strategy forward

This strategy is the first step in a process; it is not an output. It is a flexible framework for action by – and a reference point for - a range of stakeholders in the context of rapidly changing circumstances and on-going initiatives.

The overall strategy needs to be endorsed by each stakeholder, each of whom should assess their own contribution against the recommended action plan, under the auspices of the proposed new Ceredigion Tourism Partnership (CTP), and monitor progress.

For CCC, the main potential resource implication is in marketing where additional resources are needed to maximise the opportunities. If they not available, some re-appraisal of resources will be required. Many local authorities are cutting information services to find savings. This may be necessary in Ceredigion but we recommend waiting for the outcome of the review of the value of TICs planned for later this year by VW.

For many of the Action points, external project funding will need to be sought out.

The overall responsibility for co-ordinating the strategy and promoting its implementation by stakeholders should rest with CCC acting as a partner within CTP.

The CTP, working with partners, should produce an annual review of progress against each of the numbered action areas, and of performance against the list of indicators. The strategy should be reviewed in 2015/6.

The Action plan

In the following pages we outline the specific actions required under each Strategic Objective in turn. The implications are summarised in tabular form at the end.

ACTION PLAN

10. Strategic objective 1: To create an effective new structure for tourism

IQM requirements:

- The destination to be based on a well defined geographic or administrative area, easily recognised externally and internally, where it makes sense for people to work together.
- A recognised organisation to take the lead in managing and co-ordinating tourism in the destination. This organisation needs to have the support of all the local stakeholders. It needs to be capable of forging a partnership approach and co-ordinating the efforts of all those contributing to the experience of visiting Ceredigion. Integrating the work of different local authority departments which impinge on tourism is important.
- A mechanism for tourism enterprises to relate effectively to each other and to the destination as a whole and to feel involved in the process.
- Keeping local organisations, communities and interested individuals well informed about tourism benefits, issues and opportunities.

Overview

- Ceredigion is a distinctive, geographic and administrative area, notwithstanding concerns over market awareness;
- There is no industry representation and little engagement between the public and private sectors at the County level;
- MWT acts as the industry co-ordinator at a regional level but there is a view that the interests of the industry in Ceredigion might be better served through County representation;
- There is some concern that private operators may be reluctant to engage and work together - and across the whole County with its own internal differences - but many are keen to explore the opportunity to form a unified voice, network and collaborate;
- A 'federal' community-based approach favoured by some is unlikely to be sustainable;
- CerTWG worked well and although it faded away as its remit became less clear, it shows that such a tourism partnership can be made to work. The Ceredigion Regeneration Partnership also provides a precedent;
- CCC acts as the DMO for Ceredigion and, to a large extent, is acknowledged as having done well with infrastructure development and management. Issues have been raised in terms of:
 - Marketing priorities;
 - Co-ordination between departments that interface with tourism; and
 - Communication with the industry.
- There is a lack of understanding of the role and realistic reach of Council departments;
- A formal TA will not only provide a voice for the private sector but also provide a simplified conduit for CCC to address the private sector; and
- Better partnership working involving the local authority, the private sector and other stakeholders (including UWTSO) will allow for a more efficient, creative and cost-effective way of managing the destination.

Action point 1: Establish a representative private sector group

It is recommended that CCC formally approaches TPMW to help them create a Ceredigion Tourism Association (CerTA). This would be open to all businesses that engage with visitors (accommodation, attractions, restaurants, local producers, arts bodies, event organisers etc) that would benefit from having a representative voice.

Tourist Associations in SW Wales

The TAs in SWW have proved to be successful in many respects but most important, they are now involved, collaborating in and influencing what is being done by others in destination management and marketing in a constructive way without the sense of conflict that often comes with non-representative parties trying to change the system in an ad hoc manner.

There is a strong view that it would be best not to create a totally new organisation and to adapt what already exists. This suggests the establishment of a Ceredigion 'chapter' of MWT which already has around 180 members in Ceredigion, two County board members and organises some county based events would provide one clear option for consideration³⁶.

The structure, constitution, membership criteria and objectives of the CerTA should be down to potential members to decide but it is recommended that the group creates/ elects a representative steering group to act on their behalf. Other TAs have found it helpful to create thematic sub-groups, some of which are already in existence in Ceredigion thanks to the RDP 'Clusters' project. These sub-groups could each be asked to find a representative for the steering group.

Possible funding

It is suggested that the CerTA might be considered as an 'umbrella' cluster, part of the natural evolution of this successful RDP project and, thereby, eligible for project funding from this programme. (The Brecon Beacons TA is a 'cluster' under the Interreg programme Collabor8.)

It is anticipated that the CerTA will take on limited responsibilities in the short-term, to allow it to evolve in a sustainable way. It is crucial that the group does not take on too much too early. The priorities will be to:

- Provide a formal two-way conduit between the private sector, the County Council and other public sector stakeholders including UWTSB; and
- Provide a networking opportunity for members through meetings and e-newsletters, and the opportunity to collaborate on shared opportunities and best practice.

In practical terms, there is likely to be a need for a TA facilitator, along the lines of that provided by MWT for the SE Wales Tourism Forum. This is a part time post, probably two days a week during the inception phase, reducing to one day a week. The role will be to:

- Provide a secretariat and contact point;
- Promote membership and a database of all operators in the County;
- Develop an e-newsletter; and

³⁶ MWT already has an experienced secretariat team in place. MWT not only runs the regional Mid Wales membership scheme with marketing support and a range of other services for members but also facilitates the SE Wales Tourism Forum.

- Organise an annual conference for all members plus ad hoc meetings etc.

Other functions may evolve over time, subject to identified needs and resources e.g.:

- Dedicated local research;
- B2B trade events;
- Career promotion in schools;
- Helping with fam. trips and PR specifically for Ceredigion³⁷;
- Creation of niche marketing campaigns;
- Annual awards.

Action point 2: Establish a CCC Destination Management Group

It is recommended that CCC creates an internal tourism group, chaired by the Tourism team but comprising senior representatives from the other key departments, notably:

- Regeneration;
- Education/cultural services;
- Highways;
- Planning;
- Coast/Countryside; and
- Environment.

The main purpose of this group - comparable to the cross-departmental Coastal Group - will be to encourage greater co-ordination of in-house tourism related work and, crucially, to help make sure that tourism is on the agenda throughout the Council. The DMG will also provide clear contact points, thereby facilitating better communication between the trade and the different departments dealing with tourism-related matters. In effect, the tourism department could act as a point-of-contact for enquiries, signposting people to the right person in the Council and help co-ordinate any necessary cross-departmental response.

This group of departments also needs to communicate pro-actively with the trade; making them aware of the role, objectives and constraints on individual departments. We suggest a series of workshops on tourism planning policy, signposting on the highway, environmental health, rights-of-way etc would raise awareness of what is done by the Council and the issues faced in trying to support the tourism industry³⁸.

The Tourism Development Officer in CCC will be responsible for this key co-ordinating role as well as driving the overall strategy forward, monitoring its progress and effectiveness and consulting on any proposed changes in direction through the CTP.

Action point 3: Create a new tourism partnership working arrangement in the County

In order to facilitate the clear need for better dialogue and potential collaboration between the private and public sectors, it is recommended that a new formal

³⁷ MWT already provides a PR service for TPMW at a regional level

³⁸ E.g. Environmental Health workshops for the caravan sector

partnership is established between CCC, the new CerTA - and TPMW as observer and representative of VW. This partnership should also include 'associate' representatives or an 'outer circle' of other relevant stakeholders e.g. UWTSD, CCW, FCW, the Ceredigion Local Access Forum, public transport operators, Menter groups who could be invited to attend as required.

The Secretariat could be provided by CerTA with a revolving chair but again, the structure, constitution, membership and objectives of the Partnership should be down to constituent members to decide.

The Partnership should meet quarterly and at other times as required, although it is anticipated that there will be a regular informal dialogue between members. It is recommended that the meetings cover core subjects such as:

- Marketing and PR plans;
- Event calendar;
- Planning, licensing, signposting applications;
- Infrastructure proposals (rights-of-way, beaches, parking, TICs etc);
- Learning and development issues;
- New project ideas;
- Project updates e.g. CMI, Dyfi Biosphere, Clusters etc;
- Research and data; and
- AOB.

The Partnership should develop appropriate communication protocols for local communities and other stakeholders.

11. Strategic objective 2: To encourage more visitors to Ceredigion

IQM requirements:

- Effective, accurate communication pre and post visit. Marketing should project positive accurate images that avoid false expectations. Communication mechanisms should be high quality and helpful to visitors, enabling ease of booking, and appropriate contact should be continued afterwards to encourage loyalty. Opportunities to work within other campaigns, rather than duplicate them, should be pursued as appropriate.
- A warm welcome and effective orientation/information. The provision of information for visitors where and when they want it, with a particular emphasis on initial welcome and orientation after arrival, through contact with local 'hosts and ambassadors such as shop assistants and taxi drivers. Information should be accurate, user friendly and accessible.

Overview

- The Ceredigion product has reached a degree of maturity and now there is an over-riding need to attract more visitors, particularly off-peak, and to attract more higher-spending visitors;
- Ceredigion has a low profile within the UK and a low awareness of what is on offer and, when recognised, it is perceived as remote;
- The resources available for destination marketing at all levels are limited; there is a need for CCC to work with others to maximise the reach and effectiveness of marketing;
- Access to online information and services is pervasive and demanded by today's consumers. Potential visitors seek information, opinion and advice from a wide variety of sources, and successful destinations are those that are discussed and recommended in many online places. *"Use of the internet for everything, including travel planning and purchasing, will only increase."*³⁹
- In terms of communication, the emphasis is shifting towards pro-active, high level PR supported by digital target marketing at both national and local level;
- Marketing and PR initiatives need to be based on distinctive hooks, stimulating stories and original ideas to encourage action;
- There is general agreement with the current strategy of VW promoting Wales internationally and domestically as an umbrella for local destinations;
- VW is however looking to focus on new and lapsed markets while local destinations - supported by the RTPs - focus on maintaining existing markets. *"Relationships with existing customers are better managed at a level closer to the customer's purchase."* (VW);
- This will require close collaboration between destinations and VW who are keen to develop this partnership approach;
- CCC's local destination marketing strategy therefore requires review in the light of this new approach, market trends, new media – and budget constraints;
- The private sector in Ceredigion is not yet organised to work in a co-operative way although this is addressed in this strategy; and
- A new collaborative approach to marketing is required involving a range of cross-supporting parties.

³⁹ VW SMAP op cit

Action point 4: Market Ceredigion in partnership with Visit Wales

VW is looking to work with partners and stakeholders to communicate the reality that Wales and its constituent destinations offers a rich landscape in which there is plenty to see and do i.e. a shared objective with Ceredigion. The main targets will be those visitors who will be most valuable to Wales but: *“The amount they spend, the time of year they come and their willingness to tread lightly must be balanced to ensure sustainable growth in the Wales visitor economy”*⁴⁰. Again, this is a shared objective with Ceredigion.

VW has prioritised the product areas that deliver significant actual and potential benefits in terms of building reputation and motivating sustainable visits. Ceredigion can offer top quality product and potential in most if not all of these areas, again reinforcing the synergy between national and Ceredigion objectives:

- Adventure Activities;
- Business Tourism;
- Culture and Heritage;
- Family Attractions;
- Food;
- Golf;
- Mountain Biking/Off-road Cycling;
- Sustainable Tourism; and
- Walking.

VW’s strategy involves balancing the need to generate new demand with retention of the existing market; another shared objective with Ceredigion. VW, however, now sees its role being more geared to the former (building reputation and enabling advocacy) and local destinations (with the help of the RTPs) taking more responsibility for the latter, largely through database marketing.

Both strands involve moving to a more efficient and cost-effective marketing approach involving PR and digital marketing. The VW strategy, which embraces this twin-pronged approach - and continuing promotional campaigns - emphasises the need to build *“strong statements of opinion... substantiated by content that showcases the specific products offered by Wales”* rather than rely on bland, generic claims that any other destination could make. The strategy emphasises the need to work in partnership to access this stimulating product information for all media.

VW marketing plan

VW is proposing to work closely with those who shape consumer preferences and facilitate their purchases, developing *“a cost-effective programme for travel trade communications using predominantly online channels”* but also media visits to Wales. VW will ensure that content for the media is available for direct-to-consumer use, and will develop new media partnerships in order to maximize positive editorial coverage of Wales.

In addition, VW will:

- Continue to develop appropriate awareness-raising promotional campaigns;
- Work to take full advantage of the potential reach of intermediaries in the media and the travel industry;
- Ensure that the content in their communication channels, particularly the website, is flexible and tailored to their needs. When customers do not use VW channels, VW will take content to the places where customers are making destination decisions.

⁴⁰ VW SMAP

The Digital Marketing Plan (SMAP AP3) is crucial.

SMAP Action Point 3: Develop and implement VW's Digital Marketing Plan

"The challenge is to align our digital marketing with consumers' online lifestyles. We will clarify the role that Visit Wales plays in bringing visitors to our online media, and taking content from our partners and our current visitors to the places where our potential visitors converse.

"Visit Wales will develop and implement a plan for digital marketing that makes the best use of content from Wales to improve our organic search performance and our social media presence. It will set out a coherent approach to the media we own, the paid-for media we target, and the online coverage we earn through the provision or aggregation of motivating content."

In practical terms, VW is looking for regular information that will get attention for Wales and for individual businesses via the website, social media sites and other channels. *"News, events and offers are always welcome. We would also especially appreciate you sharing your interesting stories with us so that we can share them with our media and trade contacts and with the widest possible audience of potential visitors."*

CCC will need to make sure Ceredigion gets its fair share, if not more, of exposure in VW's national initiatives and campaigns. The tourism team already undertake much work in this area with VW. Building on the work already done by the core team, the specific actions that are suggested are:

- Establish regular email, telephone and face-to-face dialogue with key staff within VW;
- Gain early access to VW business plans and market campaign plans;
- Rapid and full responses to any circulars, requests for media or PR information;
- Proactively solicit PR and media stories from Ceredigion-based tourism enterprises for supply to VW;
- Attendance at relevant VW-organised stakeholder meetings;
- Active promotion of VW initiatives, meetings and campaigns to Ceredigion tourism enterprises; and
- Maintain existing contributions to VW campaigns to help raise awareness of the Ceredigion brand.

How local marketing initiatives contribute to this wider VW initiative will be the subject of discussion between partners (led by the RTP). The priority is expected to be target marketing of previous visitors and enquirers making use of national and local databases, with communications that *"reinforce a consistent brand message"*. (See below)

In summary, given the constraints on resources and the general agreement on the approach to marketing Wales, and its relevance to Ceredigion, VW's marketing plan should be the umbrella and a principle driver for marketing Ceredigion.

Action point 5: Local marketing initiatives by CCC

CCC, with its key partners, needs to prepare an annual marketing plan for its own activities and co-ordination with the work of others. Again, building on current initiatives, the priorities are to:

- Gather more intelligence on existing and potential visitors to the County;

- Define target markets;
- Agree a brand image with appropriate core values;
- Review current means of communication with existing and potential visitors; and
- Review in-destination marketing.

Visitor research

CCC has, in the past, commissioned research as part of the Wales Visitor Survey, and independently. This should be sustained. Ideally, it would be beneficial to explore profile information in more depth, notably purpose of trip and activities undertaken.

There is also a need for more intelligence on non-visitors and in particular their perceptions of Ceredigion. It is important to understand how visitors and non-visitors see Ceredigion in relation to its competitors and what drives their destination decisions so that appropriate detailed marketing messages can be developed. This does not necessarily mean commissioning additional research but piggy-backing on VW and other formal surveys.

In addition, there may be scope to work with the proposed Tourism Association and its members e.g. getting access to individual surveys and/or developing a shared questionnaire that can be distributed to guests for online completion. Anecdotal information from operators about their customers can also provide valuable information. This should be gathered methodically through a simple regular operator survey.

Defining target markets

Visitors to Wales are, for the most part, participative holiday makers. They visit attractions and attend events, take walks or sample more strenuous activities, and interact with the destination to meet its people and to get a sense of the local culture. This reflects a significant proportion of the Ceredigion market. VW describes this values-based segment as 'Independent Explorers' which is subdivided into 'Family Explorers' (with children aged 5-15), 'Personal Explorers' (Empty Nesters) and 'Active Explorers'. Values-based segmentation is best used for defining marketing messages.

Independent Explorers

Omnibus Survey research in the UK⁴¹ suggests that up to 43% of the UK population can be described as 'Independent Explorers' in terms of their attitudes to holiday taking. Just under three in ten of the population not only displayed the holiday-taking attitudes of Independent Explorers but had also taken holidays or breaks in the UK and Ireland in the 12 months prior to the research.

Independent Explorers are more likely to take domestic UK holidays than average, and are significantly more likely to consider Wales as a holiday or break destination than the UK population generally. Of Independent Explorers who had taken holidays in the UK in the previous 12 months, over half were likely to visit Wales in the near future. Not surprisingly, those Independent Explorers who had been to Wales itself in the previous 12 months were even more likely to consider a return visit – 82% were likely to come back within the next few years.

⁴¹ TNS Independent Explorer Research 2005.

In socio-demographic terms, the existing and therefore 'warmest' target markets in Ceredigion appear to be:

- Families living within a 2-3 hour catchment (West Midlands, South Wales/ Bristol) looking for a main, additional or short holiday, in a new destination. This includes budget and premium accommodation options;
- Adults of any age from within the same catchment looking for an active break, in a new destination⁴² including 'dabblers', 'samplers' and 'specialists'. Again, this includes budget and premium accommodation options;
- Adults of any age from within the same catchment, and further afield (down the M4 corridor), looking for an indulgent or cultural break in great accommodation with opportunities for good food and casual shopping/sightseeing; and
- Day visits, primarily from within an hours drive, by local residents and visitors to adjacent areas (Pembrokeshire and Snowdonia) for countryside activity, visits to the coast and cultural activity/events.

In thematic terms, the discrete identifiable target markets are:

- Beach holiday families (large, cross-cutting but amorphous);
- Nature/wildlife groups (large, cross-cutting);
- Outdoor activity groups; and
- Cultural/arts groups.

Secondary and smaller markets, that are important because they are less seasonal, appear to be:

- Business visitors looking for a new, attractive place for a meeting or training;
- The local population in and around Ceredigion, especially those who are looking for places to entertain visiting friends and relatives; and
- Special interest groups e.g. church tourism, industrial heritage, local diaspora, Welsh language groups.

There are several areas competing for these groups. Ceredigion will have to brand itself as somewhere new, distinctive and special; the 'New Cornwall' or 'New Pembrokeshire'.

Agreeing branding

Ceredigion, like Wales as a whole, is a destination much appreciated by those who have visited but non-visitors do not recognise the name or know what is on offer. Some local stakeholders say the promotional name should be changed to a more recognisable name; some feel there are three distinct destinations within the County; Cardigan Bay Coast, Cambrian Mountains and Aberystwyth that need to be promoted independently. Others feel the Ceredigion title is fixed politically and/or there is a growing awareness of it as a destination that should be nurtured for the long-term benefit of having an authentic and distinctive name.

Our recommendation is that it is not viable or affordable to promote three individual destinations but rather, there should be thematic marketing that embraces what these

⁴² Including walkers, cyclists, riders, water sports enthusiasts, bird watchers, golfers, fishermen etc.

three destinations offer under the broader umbrella of Ceredigion, an authentic, clearly defined destination entity⁴³.

Ceredigion should be promoted as a series of relevant places and experiences that fit well with the over-arching Wales brand and related themes. The Ceredigion brand values to project through all media, consistent with the above are:

- Dramatic coast, beautiful rivers and dramatic upland;
- Fantastic wildlife, easily accessible;
- A distinctive place with a vibrant and authentic Welsh culture;
- The range and quality of outdoor activities for all levels;
- Local products and events;
- Warm, friendly people with a sense of humour;
- A quiet, uncongested and safe place to relax or meet; and
- An environmentally-sensitive destination.

In promoting Ceredigion as the over-arching destination brand for the area, two points need to be acknowledged and reflected in any branding strategy and associated communication initiatives:

- Ceredigion is potentially a strong brand but is starting from a very low base of consumer awareness;
- Within the lifespan of this strategy, it is unlikely that there will be sufficient resources available to develop a traditional 'above-the-line' (paid for) campaign to promote the brand.

The issue is therefore about how Ceredigion, as a destination brand, can gain 'traction' in the marketplace. The aim should be to link the Ceredigion brand to the area's best-known assets. The strength of the wildlife offer in the County - and in particular the dolphins - offers potential for providing a simple yet distinct positioning for the County⁴⁴.

It is for a more detailed branding strategy to look at these issues with the local industry in more depth and to develop the best and most effective mechanisms to develop an effective brand. However, the issues highlighted in this section need to form part of any brief set for brand development.

Once established, local tourism operators and related businesses should be encouraged to use the brand in all communications.

Means of communication

The traditional marketing model of distributing printed information to a large number of potential customers hoping to get a proportion to respond has had some success in the past as shown by the conversion figures. However, this approach is being overtaken by new media that are more targeted and cost-effective.

⁴³ VW is not going to prescribe the number of marketing areas but it is clear that 'less is more'.

⁴⁴ There will be some concern over the higher profile given to dolphins and other wildlife and its potential impact. Activities will have to be carefully managed and monitored. However, good protection usually requires a realisation of value which can be generated through careful promotion.

Ceredigion Brochure

The existing Ceredigion brochure has traditionally served the important role of providing a prompt for an audience of potential visitors (mainly those who have requested the brochure from VW or directly from CCC but also some pick-ups in TICs) for a range of small operators who would not otherwise gain that reach. The brochure also acts as the main in-destination reference document.

The conversion research shows the net benefit from this approach has been worthwhile. The estimated incremental spend in Ceredigion as a result of the Council's marketing activities in 2009 was £6.3m – up from £5.7m in 2008. Distribution of the brochure via VW accounted for an additional £1.4m – down from £2.5m in 2008, mainly due to VW cutting back on their campaign budgets.

It is argued that there is still a role for a brochure that serves the visitor with a familiar approach. It is, however, a reactive tool that has to be all things to all visitor groups. The new priority is to be more targeted and pro-active, to compete with other destinations who are taking this more cost-effective way approach.

The traditional printed brochure therefore has a limited life in the new marketing environment. A more forensic approach is now possible, targeting those with an interest in a relevant activity rather than those simply interested in the area. We recommend that CCC considers withdrawal of the existing brochure in consultation with the industry over the next few years, phased to coincide with the development of a new marketing strategy.

NB: Whatever its shortcomings, the design and production costs of the brochure are covered by the income generated from advertising. The brochure therefore has limited impact on internal CCC budgets other than the considerable time needed to coordinate the production process. On the other hand, the private sector investment could well be used more effectively through other channels.

This new approach to sustaining existing markets (and generating new customers) is based on pro-active PR and digital marketing, complementing the VW approach at national level. This will involve a number of initiatives.

First, there is a need to re-vamp the Ceredigion tourism website, with the new branding. The existing site has a number of shortcomings.

Key issues with the existing CCC tourism website:

- The site needs to have much higher visibility on search engines;
- The website's look and feel could be more distinctive;
- Usability and design issues impact adversely on its effectiveness; and
- The website needs to offer more ways to encourage continued engagement and retention of website visitors.

The website needs to be a high quality, accessible and stimulating medium for dealing with enquiries and assisting with planning. The website (and other media) will need to be populated with up-to-the minute, stimulating content on a thematic basis, as referred to above. Interesting local events and products should be exploited and new opportunities created e.g. wildlife spotting competitions, sporting competitions etc.

Best Practice features for the new Ceredigion website

Search engine optimisation

- The website should be optimised for the most commonly used destination-specific keyword phrases (e.g. holiday Aberystwyth)⁴⁵.

Design and navigation

- Main navigation needs to be clear and consistently located across all pages;
- Content and design need to provide information, inspire and entice;
- Content should be designed for how people read on-screen ie sub-headings, bullet points;
- A mobile version of the site's content should be developed for those with mobile devices⁴⁶.

Key functions

- Visitor information based on key themes;
- Visitor information (e.g. maps) should be easy to find;
- Travel information, not just links, should be provided.

Accommodation

- A link to accommodation information should be prominently displayed on the homepage and accommodation should form part of the site's main navigation;
- Listings for accommodation should be more than a directory listing available elsewhere such as on Google Local, Yell etc. Include photos, descriptions, website and email details;
- Accommodation listings should be able to be sorted, filtered and searched via a range of criteria;
- Ideally, online availability and booking of accommodation should be offered via the site linked to any national platform. NB: At the time of writing the National Tourism Open Platform (NTOP)'s future is being reviewed. (See below for more information about the NTOP);
- The site should communicate the benefits to users of choosing assessed accommodation.

Events

- Highlights of current or forthcoming events should be included on the homepage making use of existing databases;
- Users should be able to search, sort and filter events information on a range of criteria, including:
 - Event type e.g. music, family events, theatre, opera, sports etc;
 - Time periods e.g. today/tonight, this weekend, next week and next month as well as during specific time periods;
 - Major versus local events.
- Events data should also be able to be distributed via the NTOP.

Activities

- Care should be taken on presentation of detailed route information used by walkers, cyclists etc. The focus should be on presenting appetising overview information with clear indications of how more detailed information can be obtained e.g. online overview maps with links to sectional maps;
- The site should offer easy ways to book or find out about activity opportunities. Where possible, pre-bookable packages should be developed and promoted.

Interaction and retention

- The website should offer easy ways to encourage customer retention, loyalty etc including sign-up to e-newsletters, links to social network profiles etc.

Seeding of content

- Content from the website should be 'seeded' to other relevant destination websites e.g. VisitCardigan.com, Mid Wales Tourism, visitAberystwyth.com etc

⁴⁵ More information on how to optimise destination websites for search engines can be found in the 'topics' section of The Tourism Company website <http://bit.ly/b1142E>

⁴⁶ Mobile technology is now accessible to many and increasingly will be used by visitors to access tourist information once in the destination (subject to reception constraints) through GPS and photo-recognition software.

About the National Tourism Open Platform (NTOP)

The NTOP is the national platform for the collation and distribution of information on the UK's tourism product. The platform comprises details of accommodation, attractions, events and other products held in the National Tourism Product Database with over 50,000 accommodation providers, 13,000+ attractions and thousands of events. The platform provides comprehensive and up-to-date listings on VisitBritain's international websites, VisitEngland's domestic and international websites and VW's destination websites. It also distributes to third party channels. The product data is collated and managed by tourist board partners across the country. The NTOP also facilitates real time availability / pricing for accommodation providers. Consumers are then 'referred' to booking service operators to complete their bookings. The platform provides this availability service to VisitBritain's websites and to other public and private sector partners e.g. lastminute.com. More information on NTOP can be found at:
www.visitbritain.org/opportunitiesadvice/activities/onlineopps/ntop.aspx

The website will need to be designed and optimised and will require on-going review and management. Much of the cost is up-front and could be spread over a five year period but data collection, monitoring and refreshing is an on-going commitment. Development and management of the website can be retained in-house but we recommend an options appraisal that should include:

1. A Ceredigion micro-site aligned to the Mid Wales Tourism website. This could take as its starting point the Ceredigion pages of the Mid Wales site but with CCC adding additional destination information via the Mid Wales Tourism Content Management System. Working in conjunction with MWT on a micro-site would provide a low cost way of offering online availability and booking of accommodation. It would also mean that Ceredigion information on events, accommodation etc was also available through sites working with the NTOP such as VW, Visit England and Visit Britain. The micro-site could be linked to the current Ceredigion tourism web address. A partnership agreement between CCC and MWT would clarify scope roles and responsibilities. MWT's local and national links - and potential involvement with the proposed CerTA – would be beneficial.
2. A revamped presence hosted on the Ceredigion Council website but with dynamic content provided via a NTOP-compliant white label provider i.e. Guestlink or Visit Britain. This would enable online availability and booking of accommodation to be provided without the need to develop these functions independently. Other content could be developed and managed by the Council based on the recommended best practice (above).

At present, only those who advertise in the Ceredigion brochure can go on the website. This diminishes the value of the website and frustrates many small operators who do not see the value of the brochure. The access policy needs to be reviewed along with appropriate charges for the website.

Future mailings of the brochure offer the opportunity to request previous visitors and enquirers to sign up to receiving information electronically via **e-newsletters** with related ideas and reasons to visit including special offers. We are not suggesting movement to full Customer Relationship Marketing (CRM) at this stage but it will be important to develop a database of email addresses and some categorisation of targets by their areas of interest (amongst other profile factors). This will have to be built up over time (subject to legal constraints) combining any existing database with that of VW along with other (low-cost) options e.g:

- Get TICs to ask for email addresses and relevant profile information i.e. interest areas from visitors using a self-completion card;
- Get local residents to sign up and encourage their friends and relatives to do so. This could be promoted as a high profile, 'community pride' scheme;
- Invite private operators to share mailing lists. This can be difficult but some may feel it worth contributing to raising the profile of the County as a whole to a wider audience.

'Share a Little Sunshine'

This is a campaign encouraging Florida residents to invite out of state friends and family to visit them in Florida. At the centre of the campaign is a website www.sharealittlesunshine.org. From here people can choose one of a selection of e-invites to send to friends/family. Some of the e-invites contain videos of Florida whilst all contain discounts and special offers for attractions located near to the sender's postcode. Those that send out an invite are entered into a quarterly prize draw. In the last 12 months the campaign saw over 10,000 invites sent and 40,000 discount vouchers redeemed. Additional VFR spend associated with the campaign is at \$7.5m.

The campaign is very upfront about conveying the importance of tourism. The website proclaims "The more people we share our state with, the more our local economies benefit." Campaign materials include a poster that says "85 visitors = 1 job".

The campaign dovetails with social media, including as it does a Facebook page where people who live or who have visited the State can upload images.

www.facebook.com/FloridaSunshine.

Social media

In addition to website and email marketing, Ceredigion needs to evaluate the potential of social media. Although setting up social media profiles doesn't incur much by way of upfront costs, an effective presence requires regular updating and monitoring. This requires considerable personnel resources. Similarly, one of the attractions of social media to consumers is that it enables two-way conversations to be had with organisations, destinations etc. However, this can be challenging; the Council will need to commit to engaging in a public forum with those with complaints as well as those wanting to offer praise.

If a decision is made to utilise social media, it is recommended that Ceredigion adopts a general policy of using social media tools that are available and being used already rather than seeking to create its own. It is also recommended that a social media strategy is drawn up in order to guide action in this area and clarify objectives for participation.

If Ceredigion is to make a step-change and draw from the untapped market of those currently unaware of the destination, the County will need to complement VW's efforts at a national level by playing a local role in developing proactive, creative PR campaigns.

PR and related media communications are powerful marketing tools because they can generate independent recommendations to new audiences from trusted third party sources (travel writers and niche tour operators in relevant sectors). However, because there is no direct cost attached, it should not be assumed to be free. Significant effort is required to create an effective PR machine; to identify a stimulating story or original idea, to write it, to collate photos, to choose the right medium (digital or traditional) and to have the right contacts to run with it – or even to get them interested in the area via a fam trip.

Ceredigion has the great advantage of having a number of distinctive wildlife 'hooks'. These should be exploited at every level. It would be great to attract a TV series that featured the dolphins or similar but it is also possible to have a major impact through

simple creative ideas e.g. the National Trust bottled and distributed fresh air; the idea generated enormous publicity.

Ceredigion already has a PR team but it is not dedicated to tourism and there are other calls on staff time. There is a need for a dedicated person or external agent, backed up by the Strategy Officer. To support this role, there is a need to develop an (online) photo library.

Again, the underlying aim of this PR initiative is to encourage customers – and give them the tools to become advocates for Ceredigion. Traditionally, this has been the simple word-of-mouth recommendation, now there are opportunities through a range of other media including social networking platforms, websites and traditional printed media.

In-destination marketing

Ceredigion has 5 **Tourist Information Centres** (TICs) with well-informed staff and a wide range of material, including numerous attraction leaflets, commercial guides/books of walks and the destination brochure. TICs are being closed all around the country but, if budgets allow, they remain a valuable resource upon which many attractions and some accommodation rely. TIC staff represent the formal face of tourism and have an important role to play in pro-actively promoting the whole County; they need to be able to offer a range of original ideas and itineraries, encouraging visitors to explore the County.

This formal role of the TIC staff would, ideally, be backed up by **local ambassadors**, trained in customer care and local product knowledge. This could be developed as a local pride initiative. (See Action point 12 under Strategic Objective 4 below.)

Kent Greeters are volunteer residents who want to share the area they love with visitors to the county. They will provide a 1 to 4 hour visit of a chosen area for a maximum of six people. They can also show visitors hidden, unusual places off the tourist trail and answer any questions on the area. A group with a special interest can be matched with a Kent volunteer who shares that interest, whether it be local history, culture, architecture, art or shopping. Requests need to be made before arrival. All greeters and visitors travel on foot or on public transport. For more information, [view the Kent Greeters video](#).

Brecon Beacons National Park Ambassadors are tourism businesses passionate about the National Park and who wish to impart that knowledge to visitors. Ambassadors attend a three day training programme which helps them to discover and understand what makes a visit to our National Park special. There are around 40 businesses acting as Ambassadors who promote their willingness to help via their websites and on-site signage. All National Park Authority information and visitor centre staff have achieved Ambassador Status,

Consultation suggests that in-destination marketing could involve another approach to presenting what is on offer. In particular, we suggest that **new material** is produced (downloadable online and ideally in print) that summarises and presents the best of the local offer in a more creative way e.g. by getting a number of local operators and residents to present their recommendations for (themed) activities targeted at their typical market group⁴⁷. (The alternative but more expensive option would be to get some celebrity choices.) This should be updated each year, supplemented by the events calendar. This initiative could be undertaken by the Trade Association. Print runs would be considerably shorter than the existing brochure.

⁴⁷ This is already done as simple A4 handouts for guests at the Harbourmaster in Aberaeron.

Criteria for this local guide should include:

- A5 format for easy transport;
- A selection of recommendations geared at the target markets but may include: a caravan operator, a boutique hotel operator, a restaurateur, a wildlife enthusiast, an outdoor junkie, a culture-vulture, a historian, a local resident etc;
- A selected choice of routes that encourage exploration of the whole County (by car and public transport).

Many consultees have referred to the need for better 'long distance' **trunk road signage** e.g. signage at Carmarthen for New Quay / Aberystwyth / Mid Wales / Ceredigion Coast.

Organisation

CCC will require the tourism marketing officer to be a full-time post to develop and take forward these marketing initiatives as part of the tourism strategy, supported by the Tourism Development Officer. There may be more flexibility on time if the website is out-sourced. The main tasks are:

- To develop, schedule, budget, implement and monitor all marketing initiatives;
- To co-ordinate research;
- To work with VW, the TA and other stakeholders who currently promote tourism activity in Ceredigion;
- To develop and manage the website and digital marketing strategy⁴⁸;
- To drive the pro-active PR effort, including fam trips and the image library;
- Where any of these tasks are contracted out, to manage the contracts effectively.

All this marketing activity requires, and would gain from, the constructive input of the private sector. The proposed Ceredigion TA should appoint a marketing liaison sub-group to collaborate with CCC on the marketing strategy.

Action point 6: Local marketing initiatives by the private sector and other local groups

Destination marketing has traditionally been the preserve of the public sector. In the light of public sector budget constraints, the private sector will need to take on more responsibility. The proposed TA offers the vehicle for organising such effort.

Through the proposed Partnership, we suggest that the TA should be involved in strategic decisions on marketing approach but their own commitment/responsibility should, in the short-term, be to:

- Encourage private operators to promote their own businesses under the umbrella of the Ceredigion brand;
- To encourage local groups e.g. Menter groups, Cambrian Mountains, Dyfi Biosphere to promote their local area under the umbrella of the Ceredigion brand;
- To encourage and facilitate collaborative marketing within thematic groups (existing and new clusters). An idea might be a gourmet map or revived local

⁴⁸ This is a rapidly changing playing field; there may be advantages in farming out this task.

produce map. This type of collaboration commenced under the auspices of the clusters programme with the support of CCC (walking, outdoor activity churches etc);

- To encourage collaborative marketing between operators, from simple 'bundling' to eye-catching joint packages⁴⁹ and working with niche operators and the CCC PR team to promote them⁵⁰;
- Looking to develop special new event products, quirky experiences and other hooks e.g. 'The Do' lectures, star-gazing, Dylan Thomas events and – in particular – wildlife events on the coast, a walking festival in the Cambrian Mountains and the Dyfi Biosphere, cycle races and identify other stories to help drive the PR and e-marketing campaigns at national and local level⁵¹.

NB: Even where the private sector is active e.g. the tourism clusters, there is usually significant public sector support and CCC will continue to play a facilitating role in any private sector-led initiatives.

The Stay Play Explore package

Overnight stays booked at local accommodation in Leicestershire as part of the Stay Play Explore short break increased from 2,040 in summer 2009 to 3,668 in the same period in 2010. These bednights have contributed almost £390,000 to the visitor economy. The Stay Play Explore package allows a family of four to visit three local attractions from a choice of five and enjoy a night's accommodation at a participating local hotel for just £99. .

Product 'bundling' is about providing complementary products to like-minded travellers. It is not about dictating the experience that a visitor will have through a specific package, but rather making them aware of what the business AND the destination have to offer with a 'smorgasbord' of activities. 'Bundling' will assist in making a visit to the area more appealing and help maximise the revenue from these experiences that will stay in the area. 'Bundling' can be done in many ways. It could be as simple as having links to other organisations' websites or it could involve joining forces with other businesses in the area to create more substantial marketable offers. Most importantly, the key to effectively 'bundling' an experience is to cross-promote like-minded experiences that enhance the overall visitor experience in the County.

⁴⁹ Particularly in the Cambrian Mountains, based primarily around quality accommodation (including bunkhouses) and outdoor activities and linking into the culture and heritage of local communities.

⁵⁰ This is particularly important for the serviced accommodation market. Hotels need to offer such packages to attract off-peak business e.g. fishing, golf etc.

⁵¹ VW is looking to engage with local tourism associations to agree the most appropriate way of working together on product areas, and getting access to motivating content. (SMAP, Action 1).

12. Strategic objective 3: To invest in a quality product

The Integrated Quality Management of tourist destinations requires the delivery of a quality experience for visitors. However, in so doing, it is concerned with the relationship between visitors, communities, the local economy and the environment.

IQM requirements:

- A range of tourism facilities to meet market needs. Attention should be paid to the supply and quality of accommodation, catering outlets, attractions, events and opportunities for leisure and recreation, to meet the needs and expectations of existing and future markets.
- Efficient and effective transport and other services. Visitors must be able to access Ceredigion and travel around it with ease and in safety without causing problems for local residents. Good reliable public transport is important and visitors' needs must be taken into account. People with special needs and disabilities need to be catered for.
- An attractive and safe environment. The quality of the environment is a major element in overall destination quality for visitors, as well as being important for sustainability reasons and for local residents. An integrated approach to environmental quality and management is required, involving local communities, tourism enterprises and visitors themselves, resulting in attractive landscapes and townscapes which are inviting, safe, and well maintained.

Overview

- The core tourism product (the attractive and safe natural environment) and associated infrastructure and activities is generally considered to be largely in place, accessible and of a high standard;
- There is no over-riding requirement for new attractions and facilities although there is always scope for additions and improvement. Good management of these resources is crucial;
- There is, however, an on-going need to improve and, where possible, extend the offer in physical and seasonal terms e.g. Llanerchaeron is opening up new parts of the estate and moving to full year opening;
- Developing the product, whether in the towns or countryside, should focus on drawing out the 'Sense of Place' exploiting the distinctiveness of Ceredigion through excellent interpretation;
- Priorities should be related to 'greening' tourism in the County. These priorities are:
 - Greater investment in the physical environment of towns and villages;
 - Further access routes for walkers, cyclists and riders in the countryside;
 - Greater investment in environmental management in the accommodation sector; and
 - The development, maintenance and promotion of off-peak activities, notably events.
- Financial cutbacks will constrain these opportunities and is a concern for on-going maintenance of infrastructure and operations e.g. trails and WCs which are needed to support an extended season.

Action point 7: Invest in the built environment

Visitors spend a large proportion of their time and money in the towns and villages of any destination. They want to see and experience towns in good heart; they are

looking for safe, attractive and interesting places to relax in or be stimulated by. The quality of the environment is imperative if the visitor experience is to be optimised and the potential for additional revenue is to be maximised.

The quality of the environment involves a complex mixture of architectural style, public open space and landscaping, land uses (particularly retail and catering outlets), levels of activity (including events) and the more abstract elements of a locally distinctive 'Sense of Place' – and, of course, the standard of maintenance of this environment.

With a few notable exceptions, the towns and villages of the County are of limited architectural interest but each has a distinctive quality and they do have the advantage of great landscape settings. Problems are usually to do with the maintenance of individual properties, particularly in the context of pub and shop closures and low levels of business turnover in the villages and smaller towns. There are also opportunities for public realm improvements from street furniture upgrade to wider townscape schemes e.g. Cardigan's heritage improvement initiatives.

Development of the key settlements was seen as a priority in the Spatial Plan and 'improving the look and feel of the towns and villages' of Ceredigion was one of the top priorities in the operator survey. Investment by either the public or private sector is going to be difficult in the short to medium term financial/development climate but there are opportunities that need to be planned for and implemented when possible.

In tourism terms, the priority is Aberystwyth and its seafront where comprehensive improvements are required – and planned. Aberystwyth is an identified Regeneration Area and the focus of additional expenditure as the flagship destination within the County, enabling it to exploit its advantages as a vibrant university town and short break destination. This Action Point endorses and reinforces the tourism-related actions in the Regeneration Plans that are of strategic importance.

Aberystwyth Regeneration Plans (Tourism-related)

Aberystwyth Regeneration Area was established in October 2009 with funding of £10.3m over three years. The Action plan has five themes, four of which should directly benefit tourism:

- Town centre revitalisation including THI bid;
- Promenade enhancement; vibrancy, animation, dealing with empty properties, looking for potential hotel uses etc;
- Addressing economic inactivity, working with young people; and
- Sustainable travel. Reviewing car parking, improvements to rail station, interchange facilities and improved rail services to Birmingham.

The key theme for tourism is the seafront initiative. This 'jewel in the crown' is under-performing; it needs redevelopment, animation, promotion. A plan is being prepared to address these points including future of key sites, (the old Bay Hotel and adjacent site and the Grade 1 Old College site).

Aberystwyth has a great deal to offer, particularly in cultural terms. Much work has already been undertaken in an effort to develop the town's 'Sense of Place' (research, branding, heritage interpretation etc). Other ideas to consider include:

- Developing the links (physical and promotional) between the town centre and the cultural facilities on Penglais Hill;
- Seeking further commercial development (leisure, retail) around the harbour;
- Marshalling and promoting the other attractions in the town and surrounding area (Rheidol Valley) as part of an integrated offer;
- Ongoing management of the night-time economy along the lines of the current successful CCC scheme; and

- Providing accessible, attractive, promoted links into the surrounding countryside including Pen Dinas.

Cardigan also has an important role to play as a gateway town. Much has been done in recent years to enhance the quality of the environment but more could be done. In particular, the restoration of Cardigan Castle is an on-going project that will have a significant impact; it will transform the centre of the town in visual terms - and provide a new attraction. Appropriate, new/enabling development must be fostered in the town centre including the riverside.

For all towns and villages, there is a need to identify the key focal areas and to draw up plans for improvement and interpretation. Every community should be encouraged to work together to these common ends, building where appropriate on the 'Community Welcome Audits' undertaken across Ceredigion in 2006 and still being taken on by some of the Menter groups and other initiatives. Much can be done at relatively low cost, from litter picking e.g. Tregaron, to gathering stories for interpretation and specific tourism-related projects e.g. the Victoria Hall in Lampeter⁵². There is however, often the need for assistance in getting started; setting out goals, deciding priorities, looking for sources of funding etc. This should probably be done in the context of a wider community regeneration project but with a tourism focus; a potential role for UWTSD's holistic approach.

Town and village enhancement schemes

Visitors are looking for destinations that are attractive, welcoming and offer the opportunity to explore and learn about the local community. This is complementary to the goals of most residents who want to live in such places and take pride in their local culture. The objective is often defined as creating a 'Sense of Place' i.e. drawing out the particular qualities of a community that resonate with residents and visitors including physical and cultural attributes. There are various guides on how best to do this including a new Fáilte Ireland publication '*Historic towns in Ireland Guidelines*', a practical guide providing towns with a step by step approach they can take to influence and improve their visitors' experience by improving areas in the town.

CADW's Heritage Tourism interpretation projects might be relevant to local community plans i.e. the 'Origins' Project on pre-historic Wales, 'Wales, the first industrial nation' and 'Spiritual and Inspirational landscapes'.

Action point 8: Enhance access to coast and countryside

The landscape – and access to it – is the core attraction for Ceredigion. The Coast Path has revealed the benefits to be gained from well developed and managed access. There is now the need to extend the network of routes for walkers and other users in a strategic plan and promote them well, with associated public transport.

The Rights-of-Way network comprises 2,500km in the County although only 50% of the network is open and available, less than the Welsh average⁵³. There is a target for raising this proportion. At the same time, CCC is building up a picture of the wider access opportunities available through the Woodland Trust, CCW and FCW land holdings. There is significant scope for enhanced access but there needs to be a

⁵² Cadw has commissioned several interpretation plans to develop a consistent, coherent and compelling set of storylines to bring alive the key stories of Welsh heritage.

⁵³ It is recognised that the whole network can not be maintained to the same standard and some prioritisation is needed as stated in the Rights-of-Way Improvement Plan.

strategic approach to provision. A 'Primary Path Network' has now been devised by CCC enabling resources for path management to be targeted

There are various opportunities based on extending the strategic route network and/or more local provision. The former is more onerous but potentially higher profile while the latter relies on local initiatives and may be of greater use. Options include:

- Completion of the Coast Path with links to Pembrokeshire and Meirionnydd (notably, a Dyfi crossing) - and the eventual promotion of the whole path as a National Trail;
- The development of a Teifi Trail – or a series of interlocking circular routes - an idea espoused by the Ramblers and others that would involve all cross-agency and cross-boundary working. This would, with the walks that link Borth to Pontrhydfendigaid and the Coast Path, create a circular route around the County⁵⁴;
- Promotion and development of the Cambrian Way for experienced walkers;
- The development and promotion of a series of short, circular loops around villages (including the villages along the Teifi Valley i.e. an alternative to the linear Teifi Trail). There are two existing initiatives underway:
 - The 'Paths for People' project which has superseded the Community Path Scheme funded through the RDP. CCC is currently working with 9 of the 44 Community Councils and devising a series of web walks; and
 - Darganfod Dyfi - Explore Dyfi, a series of recreational links to improve access to the special places of the Biosphere.

For many, access to nature/wildlife is via the formal centres or reserves. The on-going development and improvement of such sites e.g. the various sites around the Dyfi estuary is very important.

Cycling routes are increasingly popular (touring, family routes and mountain bike trails). Further improvements are needed to the Ystwyth trail i.e. off-road sections linking Tregaron to Cors Caron and at Tynygraig and other opportunities for off-road cycling should be taken where possible e.g. at Bwlch Nant Yr Arian, working with local land owners. Priority should also be given to developing more on-road, waymarked and well-promoted routes for more experienced cyclists e.g. the circular route linking Tregaron and Lampeter, working with local cycling groups.

Further **riding** routes can be created by combining rights of way, 'green lanes', quiet country roads and permissive routes, working with local riding groups and land owning agencies. Specific priorities include links to the Ystwyth and Prince Llewelyn trails and on to Borth beach) as resources allow.

River and sea access is important in Ceredigion. Kayaking is an important activity attracting significant business to Llandysul. There are however, major (national) problems around access to inland water for paddlers. This remains a largely unresolved issue which significantly impacts on the potential of developing the sector. Voluntary agreements should be brokered with private land owners and public agencies encouraged to enable access to water owned by them. Access to the sea for boaters is restricted by the lack of berths and/or off-water storage. Individual opportunities for increasing capacity should be explored where possible.

Access by **motor vehicle** remains the only option for certain groups (some elderly groups, those with disabilities etc). Although it would be preferable to encourage the

⁵⁴ With the alternative, shorter Aberaeron to Lampeter trail along the Aeron Valley.

use of public transport, this is not always feasible e.g. for those with disabilities. We suggest a number of driving leisure routes are prepared, linking the coast to the rural hinterland and the Cambrian Mountains in particular.

Public transport

Whilst many visitors will arrive in Ceredigion with a car, and base most of their visits around the car, many will choose not to do so. The aim should be to try to separate the visitor from his car whenever possible. There are a number of public transport initiatives that can be implemented to help/encourage visitors to use public transport including:

- Develop partnerships between public transport operators, tourist enterprises and public agencies to address the needs of the visitor and help promote local destinations e.g. themed trips to the rural hinterland from the coastal accommodation bases;
- Ensure that bus routes go to places that the visitor will want to go, and when;
- Brand appropriate routes with memorable, destination-related names e.g. the Ceredigion Coast Explorer or the Teifi Explorer, not route XXX;
- Develop walking routes based around public transport routes; and
- Identify attractions on timetables.

Improved infrastructure for local users will be further justified if the services are used more by visitors e.g. bus shelters, route and timetable information, rover tickets, cycle carriage.

Action point 9: Enhance the accommodation sector

There is unlikely to be significant tourism growth from additional bedstock supply; it will have to come from improved occupancies and/or increased revenue based on better value.

Constraints on development

- There is an aspiration for additional, high quality serviced accommodation to add to the draw and encourage more high value, staying visitors. Unfortunately, new development of this kind are hard to fund without significant public sector support and require significant and creative marketing effort to be sustained in the local market;
- There is, however, demand for more caravan sites but this is resisted in order to protect the natural environment, particularly along the coast; and
- The supply of self-catering cottages is now considered to be at capacity.

Growth will require building on, and better marketing of, the existing product (see above) and raising the quality of provision e.g:

- Extended and enhanced accommodation and central facilities (particularly inland pubs and hostels well-located for walking) supported by incentives to improve design, décor, grading, including provision for the disabled;
- Enhanced external presentation of sites, supported where appropriate by caravan site extensions and consolidations through the exchange of licences;
- Improvements in environmental management of operations including the introduction of energy and waste saving measures; and
- Greater use of local food, arts, crafts etc to support local distinctiveness.

There is a case for allowing more flexibility in provision for touring and camping sites (including new formats) i.e. temporary units, as long as there is capacity for enforcement.

All parties need to maintain a focus on improving the quality of existing provision. This will include:

- Awareness programmes through communication of case studies, site visits and peer group presentations;
- Financial incentives via TISS and any other public funding;
- Marketing support through the use of appropriate quality labels and certification schemes.

Action point 10: Co-ordinate local events and activities, off-peak

New commercial attractions of any scale will be difficult to develop in the short to medium term. Events are key to drawing in more visitors and there is a need to look at better promotion of existing events, growing them and where relevant developing new ideas subject to detailed sustainability criteria. Some of the cultural events e.g. the ceramics festival, already offer important hooks for attracting (high value) business.

For international visitors to Wales in particular, the Welsh people are vital components of the visitor experience. International visitors count “going to a pub and socialising with the locals” as one of the most important parts of the Wales holiday experience⁵⁵.

There is a range of existing cultural events and visitor experiences amongst the strong local arts, crafts and food outlets that could be promoted in a co-ordinated way, perhaps under the umbrella of a ‘Ceredigion Cultural Festival’, similar to the old Mid Wales Festival of the Countryside which linked a wide range of activities, events, local produce outlets into a promotable product.

h.Art

At a smaller scale, h.Art is Herefordshire's Open Studios event, giving exclusive access to artists' studios, workshops and special exhibitions. There are five different trails around the County, identifying various makers.

Such an initiative would help promote many of the smaller events and cultural businesses, enable visitors to more easily access the local culture, add to the visitor offer and contribute to the overall ‘sense of place’.

Allied to this is the concern about seasonality which constrains opportunities further. As awareness of the County grows and the market develops, off-peak business should grow but otherwise it is a ‘chicken and egg’ argument. Operators have to be confident the market is there before they invest in additional facilities and staff. It is more difficult in Ceredigion which does not have the local population to underpin demand.

Despite the small local market, much of the cultural product in Ceredigion, notably the arts products in Aberystwyth, is offered year-round and offers particular potential for tourism in this respect (Wales One World Film festival in March, the Opening Doors Children’s Festival in April and the proposed new photographic and comedy festivals).

Llanerchaeron is also leading the way with its new developments and longer opening hours. These initiatives – which would be central to a wider Ceredigion Cultural Festival - need to be built upon with particular support for more off-peak events, activities, exhibitions etc.

The other sectors also have a role to play and the opportunity to do so e.g. winter walks and rides, linked perhaps with nature interests, sports events including boating.

⁵⁵ IPS 2007: Activities undertaken by Visitors from Overseas in the Nations and Regions of the UK.

13. Strategic objective 4: To invest in the tourism workforce

IQM requirements

Working with stakeholders on training and improvements. Working with tourism enterprises and other stakeholders on the development and delivery of training programmes and advisory services in ways that will encourage participation and take up.

Overview

The skills of the workforce are a key component in the ability of tourism operators to offer a high quality experience and to succeed in meeting their business objectives. At present:

- The school system in Ceredigion opens the door to tourism careers but this needs reinforcement. A holistic approach is needed to promote the industry involving schools, educational institutions and the trade through the 14-19 Network;
- Training providers in Ceredigion and surrounding counties offer a good range of further and higher education programmes, as well as short courses and other learning opportunities. There is, however, no higher education provision in hospitality in Ceredigion;
- Although demand for training is relatively weak both for front-line staff and for managers/owners, some operators were definitely interested in accessing business advice. The areas of interest were business management, marketing, customer care and local product knowledge. This potential demand needs to be harnessed and attractive provision offered to meet it;
- There are some skill shortages and recruitment is an issue, particularly for chefs. Skill gaps also exist in relation to customer service, food preparation and service, management and leadership, and product/destination knowledge;
- Survey respondents felt the skills were excellent or good, with the exception of Welsh language skills. However, there is anecdotal evidence that this is an optimistic view of the skills base;
- Existing skill gaps in areas such as customer service may worsen in future years as customer expectations rise;
- It will be important to look for opportunities to boost demand for management and business development activities, particularly among owners and managers of small and micro businesses; and
- Many of the potential training initiatives might best be co-ordinated and delivered at regional level.

Action point 11: Encourage young people to choose tourism careers

It will be vital to ensure that young people participating in 14-19 education and training in Ceredigion have easy access to a range of tourism-related programmes, particularly hospitality courses.

It will also be important to continue to build upon other activities that provide information on, and encourage enthusiasm for, tourism careers e.g. the work of Careers Wales West and the Dynamo Scheme⁵⁶.

Some schools already participate in the Springboard Wales *FutureChef* competition. Partnership activities with Springboard Wales could be extended, for example, by participation in the Springboard Ambassadors scheme, which has been successful elsewhere.

There is an important role here for the private sector and training institutions (including UWTSD); to promote career opportunities in schools by talking to students, focusing on the breadth of what they would learn and how they could apply it, organising open days in educational institutions and giving them the chance to get first-hand experience through work experience and placements. In consultation, a number of operators offered to help.

It will be important to ensure that those graduating with relevant degrees from the universities in Ceredigion are aware of all local employment and career opportunities in tourism.

It will also be important to ensure that young people undertaking work-experience with tourism employers or working part-time in the tourism sector while in full-time education are given a positive experience and encouraged to think about career opportunities. Further guidance may be needed by employers to ensure that they are able to offer a positive experience and highlight future career options to those working on a part-time or casual basis.

Action point 12: Deliver customer service and product knowledge training

Customer service skills have been highlighted as a skills gap across the visitor economy. Employers can deliver customer service training in-house, and larger employers such as Bourne Leisure offer high quality, externally recognised programmes. However, it would be very desirable for a short, external customer service training programme to be available in Ceredigion. Introducing the new *Croeso Cynnes Cymreig* initiative would be a relatively easy and cost-effective option, although there are doubts about whether operators would be willing to release staff and meet the costs of participation. (Funding to support delivery may be available to People 1st in the next year.)

An alternative would be to develop a new customer service/product knowledge programme specific to Ceredigion. From experience elsewhere e.g. Blackpool and Cornwall, this option would be more likely to gain operator enthusiasm and could include specific Ceredigion product and destination knowledge, although it would incur development as well as delivery costs. An initial target might be to identify and train 100 Ambassadors over two years.

⁵⁶ Dynamo Role Models are business owners who have been recruited and trained to enthuse young people and convey positive messages about entrepreneurship. Over 300 Role Models are currently registered and used by Careers Wales to deliver presentations in the classroom based on their experiences of owning and running a business.

The proposed CerTA could help to clarify demand for customer service training and the specific needs of employers, and link with an appropriate provider to deliver a suitable programme as part of a Ceredigion Tourism Ambassador programme. UWTSD has already been involved in consultancy work to develop customer service training programmes for tourism operators in Wales on behalf of the former Tourism Training Forum for Wales, and there could be a valuable role for the university in working with the proposed CerTA, particularly in relation to development activities.

Action point 13: Promote management development for small businesses

While there is no strong evidence of unmet demand for management development for small and micro businesses, future business success is likely to be dependent on ensuring the owners and managers have first class skills. Stakeholders consider that many operators could benefit from developing their skills further in areas such as human resource management, financial management, sustainability, marketing and IT.

Providers of training, management development and business advice will need to work hard to create demand from operators, looking in particular at how and where this service is provided, perhaps involving mobile, in-destination, short courses for clusters of businesses and/or open/blended learning. The most important issue is to provide the right programmes. Location and timing of learning and development events are crucial in Ceredigion where travel can be an issue. It can be preferable to market provision as workshops, master classes, seminars or networking events, rather than 'training courses', as these can be often be of greater appeal to small and micro business operators. Involving respected tourism operators in the marketing of provision can also help persuade operators to participate.

There is a key promotional and developmental role here for UWTSD (including through their LearnDirect scheme), as well as vocational training providers active in Ceredigion (and further afield) and the relevant trade association(s).

Action point 14: Address chef recruitment and training

Existing skill shortages for chefs are predicted to worsen in future years. Rather than always trying to recruit trained chefs, employers may need to be more willing to train chefs, for example, through apprenticeship schemes for which WG funding is available⁵⁷.

Action could also be taken to overcome food preparation skill gaps through in-service training of staff, both through formal courses and through the delivery of master classes and demonstration events.

Chef training could also help to promote use of local produce, thereby creating a stronger 'sense of place' in food and beverage operations. Medrwn has been active in promoting training events linked to local produce and this work should continue.

⁵⁷ Programmes leading to recognised qualifications would be eligible for public sector funding.

Ceredigion College and other providers would be keen to increase provision but need evidence of demand to do so. The trade association(s) needs to work with providers and with People 1st to marshal support from the industry (across the region) to address this very particular problem.

The forthcoming partnership between UWTSD and UWIC, which offers well-respected hospitality programmes, may offer new opportunities for UWTSD to become involved in chef development.

Action point 15: Boost demand for training amongst operators

Demand for training is relatively weak from the majority of small and micro businesses in Ceredigion. New ways should be found of generating interest in improving skills, helping enterprises identify their own needs and then facilitating the support they require. Ideally, action needs to be taken to boost demand through:

- Encouraging employers to view external training as an investment rather than a cost, for example, through the development of case studies showing the business benefits of investment in skills development;
- Assisting operators to undertake training needs analyses;
- Ensuring that short course provision is tailored to specific industry needs and marketed effectively;
- Encouraging operators to work together to identify and meet training needs. For example, sector collaboration, such as among caravan park operators, or geographical collaboration, say in a particular resort or inland town;
- Offering flexibility in terms of on-site training etc as referred to under Action point 13; and
- Linking training to other initiatives, such as Walkers are Welcome.

The Gallu initiative in South West Wales has been successful in generating additional demand for training. Medrwn could perform a similar role, but does not currently have the resources to pursue this course. This should be addressed as demand is identified. This integrated approach of developing demand and delivering against specific needs might benefit from the holistic approach of UWTSD working with the regional agencies including Medrwn.

The proposed CerTA should also assist in boosting demand for training by helping networking between enterprises (peer pressure), promoting careers to young people and the unemployed, and setting up awards to reward good practice.

15. Strategic objective 5: To establish quality management processes

The final element of IQM is about a cyclical process of assessment, standard setting, improvement and monitoring.

IQM requirements:

- Understanding visitor needs and seeing they are met. A range of surveys and feedback including image surveys amongst non-visitors, regular visitor surveys to test expectation and satisfaction, and mechanisms for obtaining feedback from all visitors directly or through people who have contact with them.
- Monitoring environmental, economic and community impacts. Mechanisms in place for measuring: the contribution of tourism to the local economy; the performance of enterprises and their needs; and the environmental impact of tourism on local communities and the environment. Ensuring that this information is fed back, digested and used to inform corrective action.
- Setting, checking and communicating standards. The use of existing or specially created performance measures, benchmarks and quality standards measures against which the quality of facilities and services in the destination can be judged and publicised. These need to be checked and monitored on a regular basis.

Overview

- Statistical data on tourism in Wales (volume and value) is gathered by VW and disaggregated to the sub-regional level. However, sample levels at local level mean that data is susceptible to error;
- Similarly, occupancy surveys and business confidence surveys are undertaken at the regional level;
- In terms of impact, CCC commissions the STEAM model each year, giving a comparative analysis of economic impact (tourism revenue and employment). Despite questions over its accuracy, it does provide a comparative index; STEAM might be strengthened through improved networking and more regular procedures for data collection e.g. accommodation stock;
- In recent years, CCC has commissioned an attitudinal survey as part of VW's national survey. This gives a general overview of how existing visitors perceive the County as a destination but does not include non-visitors;
- The survey also provides some profile information but it is not comprehensive;
- There is no up-to-date audit of accommodation in the County;
- We are aware of surveys done by the National Trust and perhaps others. There may be scope for more information sharing;
- There is no environmental or community impact research.

Action point 16: Establish a set of performance indicators

Monitoring of the success of the strategy should take place against a set of performance indicators. An overall target for tourism growth has been set in the strategy but beneath this, it may be helpful to set some more specific targets. We have

put forward a series of possible indicators. Specific target setting should be the role of the local industry.

The following performance indicators are suggested as being relevant to the overall strategy and the four previous Strategic Objectives. They could be amended and added to over time.

Overall strategy

- Volume and share of business:
 - Visitor trips, nights, spending in the County – annually, by visit type;
 - Percentage of Wales' visitor trips, nights and spending – annually, by visit type.
- Business performance:
 - Serviced and self-catering accommodation occupancy – total annual average and indexed against Welsh average;
 - Percentage of enterprises indicating that levels of business had increased over previous year (broken down by type of enterprise);
 - Business confidence levels;
 - Percentage of visitors satisfied with the overall experience and services received (these could be listed).
- Seasonality:
 - Percentage of total nights spent in third quarter (July, August September);
 - Number of attractions and accommodation establishments open all year (base level to be established).

SO1: Structures

- Number of enterprises in membership of the new tourist association;
- Number of meetings of key stakeholders;
- Percentage of tourism enterprises satisfied with destination services for tourism (these could be listed).

SO2: Marketing

- Consumer database development;
- Ceredigion features in VW promotions;
- Media stories and related value;
- Website performance;
- Response to direct marketing activity;
- Use of local brand image;
- TIC visitor numbers;
- No of local ambassadors;
- Enterprise participation in relevant marketing campaigns;
- Other marketing effectiveness KPIs to be agreed.

SO3: A quality product

- Business development:
 - Investment levels in public realm;
 - Number of community plans;
 - Access routes in countryside;

- Accommodation and attractions stock;
- Number of planning permissions granted for accommodation development;
- Number of new facilities and events with levels of investment.
- Quality/sustainability:
 - Number of enterprises (by sector) participating in quality grading and other schemes e.g. Walkers are Welcome, and distribution of grading levels;
 - Number of enterprises (by sector) featured in other monitored listings e.g. guide books;
 - Percentage of enterprises participating in environmental training programmes and in GTBS, Green Dragon award or equivalent;
 - Percentage of visitors using public transport;
 - Number of Blue Flag and other award beaches;
 - Benchmarked comparison with other destinations in Wales/UK.

The Global Sustainable Tourism Criteria

More specific sustainability criteria are available for individual businesses. See:

http://www.sustainabletourismcriteria.org/index.php?option=com_content&task=view&id=13&Itemid=47

SO4: Investment in Workforce

- Number of new jobs created by enterprises;
- Salary levels within a constant sample of representative tourism enterprises (based on survey every two years);
- Number and range of accredited tourism related courses in the region;
- Attendance at training courses and take up of advisory and support services;
- Number of schoolchildren taking tourism courses;
- Number of chefs trained locally;
- Number of Ambassadors trained
- Level of employers' and participants' satisfaction with tourism courses.

15. Summary of Action Points

	Action Point	Priority	Phasing (years)	Lead agency	Support agencies	External funding contribution	Relevance to key principles
SO1: 1. To create an effective new structure for tourism in the County							
1	Establish a representative private sector group (CerTA)	1	1	TPMW	CCC, PS	TPMW RDP BP2 Axis 4 Membership fees	P1: Work in partnership to make most efficient use of resources etc
2	Establish a CCC Destination Management Group	1	1	CCC tourism	Other relevant CCC depts	-	P1
3	Create a new tourism partnership working arrangement in the County	1	1	CCC, CerTA, TPMW	CCW, FCW Cadw, UWTSO, Local groups, Etc	-	P1
SO2: To encourage more visitors to Ceredigion							
4	Market Ceredigion in partnership with VW <ul style="list-style-type: none"> • Dialogue with VW • Responding to requests for media information • Solicit media stories from Ceredigion • Promotion of VW initiatives to local tourism enterprises • Contributions to VW campaigns 	1	1-5	CCC, VW	TPMW, CerTA	VW, TPMW PS	P2: Draw on the natural and cultural resources of Ceredigion to create and promote a special, distinctive place, distinguished from other competing destinations; P3: Provide and promote the facilities, attractions and services that will help encourage more visitors to visit throughout the year;

	Action Point	Priority	Phasing (years)	Lead agency	Support agencies	External funding contribution	Relevance to key principles
5	Local marketing initiatives by CCC <ul style="list-style-type: none"> • Market research • Define target markets, branding • Means of communication: <ul style="list-style-type: none"> ○ Website ○ Digital marketing ○ Media work • In-destination marketing: <ul style="list-style-type: none"> ○ Guide book ○ Signage 	1 1 1 2	1-5	CCC	CerTA, VW, Local groups	TPMW/VW PS RDP BP2? WG RA	P2 and P3
6	Local marketing initiatives by the private sector and other local groups <ul style="list-style-type: none"> • Support the Ceredigion brand • Facilitate collaborative marketing • Develop special new event products. 	1	1-5	CerTA	CCC, Other agencies Local groups	CerTA members TPMW RDP BP2? TISS Other project funding as appropriate	P2 and P3

	Action Point	Priority	Phasing (years)	Lead agency	Support agencies	External funding contribution	Relevance to key principles
SO3: To invest in a quality product							
7	Invest in the built environment	2	1-5	WG, WG (RA), CCC	Private sector Local groups Cadw UWTSD	WG RA TISS RDP BP 2? <ul style="list-style-type: none"> Measure 41: Enhancing Quality of Life in Ceredigion Communities Measure 321: Ceredigion: A Better Place to Live HLF Cadw Heritage Tourism	P3 P5: Strive to do things to a high quality etc. P6: Follow the principles of sustainable development
8	Enhance access to coast and countryside <ul style="list-style-type: none"> Footpath network Other access trails Public transport 	2	1-5	CCC CCW FCW WG	Private sector, Local groups including access groups, Transport agencies	<ul style="list-style-type: none"> RDP inc BP2? (M323: Connecting People, Nature and Heritage) WG (RoWIP, Coast access, Glastir, sustainable transport) Cadw Heritage Tourism projects CCW including (Dyfi Biosphere under CAN) Green Seas HLF 	P3, P5 and P6

	Action Point	Priority	Phasing (years)	Lead agency	Support agencies	External funding contribution	Relevance to key principles
9	Enhance the accommodation sector	1	1-5	CerTA, PS	VW	PS TISS RDP BP2?	P3, P5 and P6
10	Coordinate local events and activities, off-peak	1	1-5	CerTA, PS, Local groups	CCC, TPMW Other agencies	Private sector TISS TPMW Arts agencies HLF Green Seas?	P3, P5 and P6
SO4: To invest in a skilled tourism workforce							
11	Encourage young people to choose tourism careers <ul style="list-style-type: none"> • Schools promotion • Springboard Ambassadors • Open days 	1	1-5	Ceredigion 14-19 Network	Careers Wales West, PS, All training providers	TPMW WG	P4: Support the tourism industry by encouraging more local people to follow worthwhile careers in the tourism industry;
12	Deliver customer service and product knowledge training	1	1-3	CCC, CerTA, TPMW	UWTSD, Ceredigion College or other training providers	People 1st, PS Other project funding?	P4
13	Promote management development for small businesses	2	1-5	UWTSD or other training providers TPMW	CerTA, VW	-	P4
14	Address chef recruitment and training	1	1-3	Ceredigion 14-19 Network	CerTA, People 1 st PS	WG	P4
15	Boost demand for training amongst operators	2	1-5	TPMW, UWTSD and other training providers	CerTA,	TPMW	P4

	Action Point	Priority	Phasing (years)	Lead agency	Support agencies	External funding contribution	Relevance to key principles
SO 5: To establish quality management processes for the tourism sector							
16	Establish a set of performance indicators	1	1-2	CCC	CerTA, TPMW, VW	-	All

Acronyms

CCC	Ceredigion County Council
TPMW	Tourism Partnership Mid Wales
VW	Visit Wales
PS	Private sector
CerTA	Ceredigion Tourism Association (proposed)
CTP	Ceredigion Tourism Partnership (proposed)
CCW	Countryside Council for Wales
FCW	Forestry Commission Wales
UWTSD	University of Wales Trinity St David
RDP (BP2)	Rural Development Plan (Business Plan 2)
WG (RA)	Welsh Government (Aberystwyth Regeneration Area)
TISS	WG's Tourism Investment Support Scheme
IQM	Integrated Quality Management
HLF	Heritage Lottery Fund