Destination Management Plan & Partnership Review

GWYNEDD COUNCIL

BLUE CHIP TOURISM & RJS ASSOCIATES – FINAL DRAFT 11TH OCTOBER 2019

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1   Introduction

1.1 Project Aims

This report, commissioned as an extension to the 'Benefitting from Tourism' study, has five distinct but related purposes which can be described as:

i.   Summarise the strategic and policy context in which the council and its partners operate at local, regional and national levels – citing their key and most relevant contents

ii.   Summarise the key findings of the mid-term review of the current Destination Management Plan 2013-2020 and other recent research

iii.   Provide an action plan for the remaining period of the Destination Management Plan, taking into account recent developments in policy at a local and national level

iv.   Analyse the current structure of the Destination Management Partnership and its suitability for current and future arrangements

v.   Provide options for the evolution of that structure, with particular reference to the 'Benefitting from Tourism' report and wider developments.

1.2 Existing DMP Objectives

The Gwynedd Destination Management Plan (DMP) 2013-2020 provides the framework for tourism development in the county, mirroring national Visit Wales destination management priorities. The DMP articulates the key assets, markets and opportunities for Gwynedd and sets out strategic priorities for the period.

Its aims are:

- To Extend The Tourism Season
- To Increase Visitor Spend
- To Improve The Quality Of The Visitor Experience
- To Improve Integration Of Tourism With Other Aspects Of Life
- To Enhance The Natural, Built And Cultural Environment
- To Build And Maintain Quality Public Infrastructure And Amenities
- To Provide Well Paid, Year-Round Quality Jobs And Skills Development.

The DMP identifies the following as key issues to address:

- Better visitor facilities
- Better public facilities, e.g. visitor superstructure such as holiday accommodation and dedicated activities to infrastructure elements including roads and other public spaces
- Quality visitor attractions
- Parking provision
- Better local services
- More tourist friendly engagement
- Improved shops and shopping opportunities.

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The Gwynedd Destination Management Plan (DMP) sits within a framework of national, regional and local policies. Some of these have been developed after the DMP – e.g. the Well Being of Future Generations Act (2015) and its associated delivery strategy, Prosperity for All (2017). In addition, Visit Wales is developing a successor strategy to Partnership for Growth (2013- 2020). Themes that are being explored include: meeting changing market needs; attracting international visitors; focusing on adventure, outdoors & culture; social and Welsh cultural benefits; partnership work; the digital challenge; quality; travel to and in Wales; and sustainability. A consultation exercise has resulted in the recent (10th September) publication of a draft 'road map' for tourism.

Appendix 1 provides a detailed synopsis of relevant policies and their relevance to the visitor economy in Gwynedd, what follows is a brief description of each document.

2.1 National Policy

A. The Well Being Of Future Generations Act 2015- is an overarching and long-term Act. The Act sets out seven goals for all the public bodies in Wales (including local authorities and the Ministers) to consider when making and implementing their decisions and **places a duty on them to do so**. The Act has four key themes: Prosperous and Secure; Healthy and Active; Ambitious and Learning; and United and Connected.

B. Prosperity For All – The National Strategy For Wales (2017)- the Welsh Government's primary policy document. It proposes a range of actions against the four key themes which will deliver the goals of the Well Being Act, each of which have supporting objectives beneath them.

C. Prosperity For All – Economic Action Plan (2017) -follows on from the strategy and sets out how the Welsh Government intends to achieve the objectives the strategy sets out. The document provides strong support for tourism, naming it as one of four foundation sectors and giving priority to matters such as regional inequality.

D. Light Springs through the Dark: A Vision for Culture in Wales (2016)- notes the huge interconnections between culture and tourism, the importance of cultural events, the nation's heritage, partnership working and the emerging significance of Welsh food and drink. It contains a number of commitments including the programme of themed years and the establishment of the A55 cultural corridor.

E. Partnership For Growth 2013-2020, 2016 Review & 2019 Consultation- the Welsh Government's primary strategy for tourism. Consultation in mid 2019 resulted in a draft 'road map' being produced, setting out a revised ambition, goals and approach. There are three defined elements of the offer for Wales: 'Outstanding Natural Landscapes, Creative Culture and Epic Adventure' and in the very strong emphasis given to Welsh culture and identity, especially the Welsh language. Implementation will be achieved through a number of methods including an internal restructure but, of most relevance to this study, a 'review of delivery at local level' and a 'new approach to partnership delivery'.

2.2 Regional Policy/Strategy

F. North Wales Growth Deal (2018)-developed by the North Wales Economic Ambition Board (a combined authority brought together by the six North Wales Councils) focusses on other sectors including energy production and advanced manufacturing but does contain a headline commitment to tourism.

G. Eryri/Snowdonia National Park Local Development Plan 2016 -2031 (2019 update) -As a National Park, Snowdonia is required to have a development plan in addition to the council's own document. The Park covers both Gwynedd and Conwy Boroughs and defines permitted development and management priorities.

H. Anglesey and Gwynedd Joint Local Development Strategy 2011-2026 (JLDP) (31st July 2017) – the joint development plan for the two local authorities recognises the key role of the visitor economy and sets out a positive and proactive approach to its development and management.

I. CADW Castles WHS Management plan 2018-2028- Two of the four castles within the 'Castles and Town Walls of King Edward in Gwynedd World Heritage Site' are in the borough of Gwynedd – i.e. Caernarfon and Harlech.   There is an encouraging focus on the visiting, use and engagement with the castles, rather than simply the buildings themselves.

2.3 Local Policy/Strategy

J. Gwynedd Council Plan 2018-2023 -lists seven well-being objectives (understandably focussed on residents rather than visitors) and seven improvement priorities in a corporate introduction followed by headline service plans for the council departments.

K. Gwynedd Destination Management Plan 2013-2020 (May 2013)- Details regarding the Destination Management Plan (DMP) can be found in the introduction (Section 1.2) and the Action Plan review and Forward plan (sections 4 & 6 respectively)

L. Slate Landscape World Heritage Nomination Documents (2018)- sets out the reasons for inscription and the anticipated outcomes. World Heritage is seen as an important economic driver with tourism at its heart. The cultural landscape is viewed as an important counterpoint/addition to the natural environment of the National Park.

L. Llŷn Area of Outstanding Natural Beauty (AONB) Management Plan 2015-2020- notes some concerns about tourism but also recognises its critical importance to the area's economy and overall wellbeing. The management plan encourages tourism which will sustain and support local language and culture, extend the season, develop a greater understanding of (and/or are compatible with) the special qualities of the AONB and sustain local services.

2.4 Summary Policy Analysis

A number of cross-cutting themes can be identified from this strategic review, particularly at the national level. These are summarised in the following table, along with comparable policies in the Gwynedd Destination Management Plan.

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Strategic Theme	Comparable Gwynedd DMP Policy
Prosperity	Extend the tourism season
	Increase visitor spend
	Improve the quality of the visitor experience
	Build and maintain quality public infrastructure and amenities
	Provide well paid, year-round quality jobs and skills development
Resilient / sustainable	Enhance the natural, built and cultural environment
Healthy	n/a
Equal	n/a
Cohesive Communities	Improve integration of tourism with other aspects of life
	Build and maintain quality public infrastructure and amenities
Vibrant culture	Enhance the natural, built and cultural environment
Learning and skills	Provide well paid, year-round quality jobs and skills development

The DMP reflects high level strategic themes – the exceptions are in terms of specific linkages to health and equality agendas.

At a broad level the strategic context is extremely positive for the tourism sector and, more especially, for Gwynedd. It demonstrates that:

- There are clear and consistent policies that support the growth of tourism at national, regional and local levels
- National level tourism policies are concerned with marketing, people and skills, facilities, delivering major events, product quality, productivity and partnership. These themes are all recognised in the DMP aims.
- Whilst some policies within the National Park and the Llŷn AONB are, understandably, more balanced (in terms of promoting and preserving special environmental qualities, and developing the quality of existing product rather than new product), there is an overall recognition and support for visiting and enjoying the natural environment
- The visitor economy is well placed to support wider strategic priorities (e.g. prosperity, skills and culture) at all levels and receives inclusion and recognition of this in documents such as 'Prosperity For All' and the North Wales Growth Bid
- There is strong support for partnership working amongst key partners such as CADW, neighbouring local authorities and the National Park Authority
- Gwynedd's 'offer' and strategic direction is aligned with Partnership for Growth - the national strategy of Visit Wales (e.g. Adventure Tourism, Events); it is well placed to contribute to the current consultation on the new national strategy and maximise the emerging priorities
- Gwynedd is recognised as a major strength for the country as a whole: Snowdonia is a flagship destination for Wales, the high numbers of Welsh speakers locally contributes to the 'sense of place' and distinctive culture and identity, key priorities for Visit Wales
- The promised review of partnership delivery and local delivery by Visit Wales makes this document especially opportune and relevant
- Strategic product-led initiatives such as the Welsh Slate WHS nomination and the Toursim Attractor investment in Caernarfon are enhancing the appeal and experience in a significant manner.

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That said, there has been an evolution in the national policy framework and the DMP may benefit from a revision to its aims and objectives (see section 6 below).

3   Performance and Market Information- Trends Analysis

This section contains a full analysis of destination, service and sectoral performance since the DMP publication in 2013. The headlines (2018 data except where noted) are:

- ➢ 11% increase in the number of visitors to 7.37 Million
- ➢ Tourist nights & Days have also increased by 11%
- ➢ 23% increase in Economic value to £1.12 Billion
- ➢ 15,500 jobs supported by tourism expenditure
- ➢ 14% growth in the number of accommodation businesses to 3,194 (2011-2019)
- ➢ 6% increase in bedspaces to 132,611 (2011-2019)
- ➢ 47% increase in visitors to the Snowdon Summit Visitor Centre (2014-2017)
- ➢ 102 events supported by Gwynedd Council, adding £34 million to the local economy (2014-2018)
- ➢ 3.1 million users have viewed the official Snowdonia Mountains and Coast website during 4.1 million sessions (2015-2019)
- ➢ Average 580% growth in Official social media channels

3.1 Destination Performance Indicators

Gwynedd receives an annual estimate of its overall destination performance using the STEAM tourism economic impact model. The most recent year for which information is available is 2018, progress measured since the publication of the DMP yields impressive results:

Destination Indicators -Volume & Value			
	2013	**2018**	**% Increase**
Volume and Value Indicators			
Visitors (m)	6.63	7.37	11%
Tourist Nights(m)	16.84	18.73	11%
Tourist Days(m)	20.21	22.53	11%
Economic Value (£m)	907	1,118	23%

Across the headline volume and value indicators, 11% growth was recorded against all volume indicators. 'Economic Value' grew by 23%. On the assumption that inflation/RPI has been allowed for (which may not be the case), this is encouraging as it suggests Gwynedd is attracting higher spending visitors, enhancing the impact of each tourist to the area. The increase in spending could also related to the **increase in customer satisfaction** which showed an 8% growth from 76% to 82%[1].

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[1] All data in Section 3.1 supplied by Gwynedd Council except where identified

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Also in 2018 it was estimated by STEAM that there were **15,500 jobs supported by tourism expenditure** (the second highest concentration of such jobs in England and Wales by resident population-15%). Gwynedd has **the highest percentage of tourism businesses** in Wales with 3,194 accommodation providers providing 132,611 tourism bed spaces.

Key **tourist attractions** in Gwynedd who provide data to the national survey of visits to tourist attractions in Wales[2] show similar increases, albeit with some exceptions which can be attributed to major investments. It should be noted that there are notable exclusions from this table including new attractions such as Zip World (which attracted a cumulative 400,000 visitors across 3 sites in 2017), Welsh Highland Railway (79,000) and Llŷn Padarn (136,000). Major attractions such as Llechwedd and Portmeirion do not participate in the survey. A full list of attractions attendances since 2014 can be found at Appendix 4.

Gwynedd: Visits to Attractions					
Attraction	2014	2015	2016	2017	Increase 2014-17
Caernarfon Castle	175,216	195,352	195,151	204,675	17%
Criccieth Castle	43,528	45,715	47,935	42,863	-2%
Coed Y Brenin	131,171	143,233	162,021	147,489	12%
Electric Mountain Visitor Centre	125,000	132,000	-	250,000	100%
Harlech Castle	75,512	89,038	98,877	116,216	54%
Penrhyn Castle (NT)	93,587	111,948	115,561	110,820	18%
National Slate Museum	154,608	140,828	122,007	145,969	-6%
Plas yn Rhiw (NT)	16,252	17,296	17,285	8,637	-47%
Porth y Swnt (NT)	15,136	13,767	12,893	14,591	-4%
Snowdon Mountain Railway	131,144	132,252	117,077	130,266	-1%
Snowdon Summit Visitor Centre	445,890	449,657	465,000	654,077	47%

Two attractions from Gwynedd feature in the 'Top Ten' lists for Wales: Caernarfon Castle is the 8th most popular paid attraction, the Snowdon Summit Visitor Centre is now 2nd in the list of free attractions. Between 2016 and 2017, those attractions in Gwynedd who reported for both years (15) grew visitor numbers by 17%, nationally the figure was 7.1% (143 attractions).

3.2 Accommodation

Accommodation Growth

The supply of accommodation is an excellent indicator of the health and performance of a destination. Whilst supply does not necessarily guarantee demand, it can be reasonably expected that all identified accommodation businesses (in a recent research process undertaken by the Council) are functioning. The tables below shows growth in the number of businesses providing Self Catering and Caravan/Camping provision between 2011 & 2019 with a decrease in serviced accommodation, in line with consumer & national trends. Conversely, the number of bedspaces in self-catering has actually reduced, suggesting a greater number of smaller, individual units are now on the market. Serviced accommodation actually increased in Arfon but reduced in the two other former district council areas.

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[2] Welsh Government/Government Social Research November 2018

Bedspaces in serviced accommodation dropped at a higher rate than the number of businesses, again indicating that it is the larger hotels and guesthouses that have ceased trading and/or converted to self-catering operations, again complementing the national picture. This is reflected in the totals, with a much higher increase (over twice as much) increase in the number of businesses vs. total bedspaces.

Supply of accommodation in Gwynedd 2011-2019						
Type of accommodation	**No. of establishments/businesses**			**Bedspaces**		
	2011	**2019**	**% change**	**2011**	**2019**	**% change**
Self-Catering	2,023	2,413	19.30%	15,844	14,727	-7.00%
Caravan & Camping	340	361	6.20%	97,791	108,266	10.70%
Serviced	400	345	-13.80%	7,927	6,413	-19.10%
Other	44	75	70.50%	3,711	3,205	-13.60%
Total	2,807	3,194	14%	125,273	132,611	6%
AirBnB[3]	n/a	1,897	n/a			

Accommodation Grading

Whilst there has been impressive growth in the supply of accommodation, there has been a decrease in the number of such business who are quality graded by the Visit Wales schemes in the county. This has implications for destination marketing activities, where grading is seen as a prerequisite for listing and inclusion on official websites etc. The number of Gold Awards has dropped in line with the overall reduction but, conversely, the number of businesses participating in the Walkers & Cyclists Welcome scheme has doubled, reflecting a more 'product and experience' based approach to choosing accommodation. The table below identifies the change in the five year period, broken down by accommodation type.

Accommodation Type (Alphabetical Order)	2014	2019	Change
Activity Accommodation	3	3	0%
B&B	55	23	-58%
Budget Hotel	5	5	0%
Bunk House	5	3	-40%
Campus	1	2	100%
Country House Hotel	5	4	-20%
Farmhouse	22	7	-68%
Glamping Site	0	5	N/A
Group Accommodation	3	4	33%
Guest House	66	41	-38%
Holiday Parks/Touring And Campsites	66	57	-14%
Hostels	9	11	22%
Hotel	13	13	0%

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[3] AirBnB data is based on analysis by AirDNA. It provides a figure for the number of entire places and properties offering a private room in August 2018 (NB the figure for January 2018 is 1146). No comparable data is available for 2011 but the overall supply will have grown substantially during this period. No data is available on the extent to which AirBnB listings overlap with known serviced and self-catering provision.

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Accommodation Type (Alphabetical Order)	2014	2019	Change
Restaurant With Rooms	4	4	0%
Self-Catering	122	153	25%
Total	379[4]	335	-12%
Walkers & Cyclists Welcome	75	150	100%
Gold Awards	32	28	-13%

Accommodation Occupancy

During this period occupancies in North Wales (which includes Gwynedd) have increased marginally.

NB. Hotel and guesthouse occupancies are room. Self-catering is unit. Occupancies relate to North Wales. Source: Wales Tourism Accommodation Occupancy Survey, 2017 (Welsh Government)
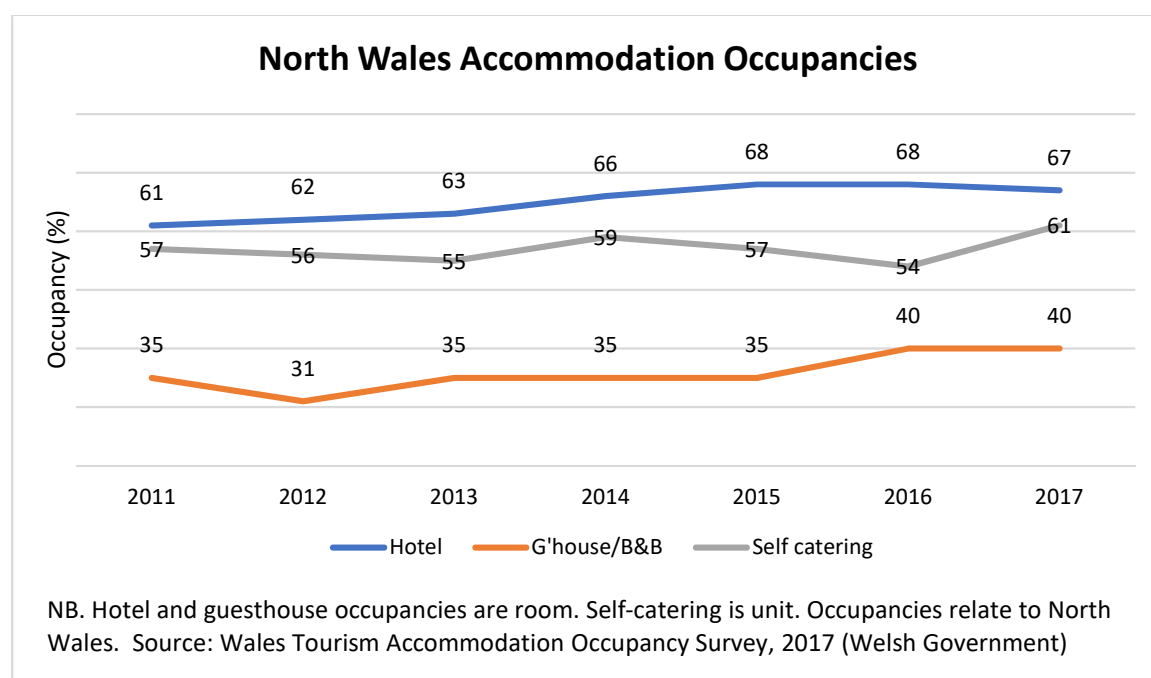
3.3 Service Level Indicators

To add to these high-level destination indicators, there also those relating directly to the activities of the council's tourism service, especially its marketing & information provision activity.

Service Level Indicators			
Social Media	2013	2019	Increase
Facebook (followers)	5,316	39,606	745%
Twitter (followers)	5,244	21,700	414%

The exponential increases in social media followers can, in some ways, be attributed to the overall growth in the use of these channels but is also testament to the quality of the marketing activity of

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[4] Totals are different from those supplied (492 for 2014 and 349 for 2019)- a 29% reduction

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the council under the Snowdonia Mountains and Coast (SMC) brand. The website has also seen significant traffic In the four years from July 2015 to July 2019 it experienced **3.1 million users having 4.1 million sessions leading to 8.9 million page views.** Other activity related indicators include:

- 585,257 YouTube page views (July 2009 – July 2019).
- An audience of 40 million reached by PR campaigns since 2013
- 1 million pieces of print with the SMC brand produced & distributed between 2013 and 2018
- 102 Events were supported between 2014 & 2018, adding £34 million to the local economy
- Approx. £84 million of European funded tourism related and infrastructure projects delivered in the County since 2013 including Pontio - Bangor University Arts and Innovation Centre, Wales Coast Path, Green seas coastal enhancements, Aberdaron Coastal Centre of Excellence and Enhancements of town centres in Caernarfon & Blaenau Ffestiniog and Bangor

3.4 Market/Destination Research

A summary of two recent pieces of research (2016 and undated) can be found at Appendix 2, the headline conclusions from these two include:

- Snowdonia has a multi-dimensional offer – nature is the strongest but its scenic coast, adventure sports and history are all important.
- Explorers are the key market groups. Markets are strongly English (NW and West Midlands), and couples are an important group.
- Snowdonia rates as a strong destination in Wales but rates lower than some of its English and Scottish competitors (possibly an issue of market proximity).
- Compared to Wales as a whole, the market for Gwynedd is younger, more male and much more likely to come from England
- Families with either older children or 'no children' (i.e. older family groups) are dominant
- Satisfaction and repeat visiting rates are very high (the highest in Wales)

4   Strategic Progress against the DMP Action Plan

In 2013 Gwynedd Council produced a four-year plan of DMP actions. This identified approximately 190 projects. These were divided into four different thematic areas (Landscape and the Environment, Visitor Experience, Public Areas and Marketing) and by areas (Arfon, Dwyfor, Meirionnydd and the County as a whole). Detailed analysis can be found at Appendix 3.
Gwynedd Council reviewed progress during the 2017/18 financial year. Key points from this review were:
- Of the total projects, 185 were on-going or completed
- Approximately £111m has been invested through these projects during the four year plan period. This breaks down as follows:
  o £36m in Arfon through 47 schemes
  o £32 m in Dwyfor through 39 schemes
  o £37 m in Meirionnydd through 52 schemes
  o £6 m on Countywide and central projects.

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Although this investment has been spread across the county, a targeted approach in Caernarfon and Harlech has reaped rewards. Within the National park there have been refurbishment projects for footpaths and the development of Yr Ysgwrn, the birthplace of Hedd Wyn, which won a European Heritage/Europa Nostra Award in 2019.

Gwynedd Council has, with partners, been successful in securing funding from the Visit Wales Regional Tourism Engagement Fund (RTEF). From 2015 these projects have generated over £1.1m of project investment and are estimated to have created £23.9m of additional expenditure into North West Wales. Projects have included active promotion of Wales's 'Themed Years' and the North Wales Way and the Coastal Way.

The County has also secured £523k of Visit Wales Tourism Amenities Improvement Scheme (TAIS) funding (improvements include coastal facilities and cycleways) from 2017-2019 and has drawn down nearly £2 million of TISS (Tourism Investment Support Scheme) funding, contributing to 29 capital investments across Gwynedd.

Year	No Projects	Grant Offered
2013-14	11	£581,566
2014-15	7	£346,512
2015-16	5	£378,650
2016-17	4	£278,500
2017-18	2	£350,000
Total	29	£1,935,228

Of the 190 projects in the DMP action plan, approximately twenty could be categorised as strategic projects – i.e. projects that will have a catalytic or major impact on the destination. These include the Wales Coastal Path, Caernarfon and Harlech Castles, Pwllheli Sailing Academy, and Aberdaron Centre of Excellence (see Appendix 3 for the full list). The potential impact of these projects has been scored against six of the DMP's seven strategic objectives (see section 1 above).

The key conclusions from the review of the DMP action plan are:
- Major investment has been delivered into Gwynedd's visitor economy since 2013 with a number of strategic projects potentially delivering significant impacts.
- Against DMP objectives, the strategic projects scored best in terms of visitor experience and extending the season; and more moderately against increasing spend and enhancing the environment.
- They have scored less well in terms of skills and jobs, and integration with the community. This was partly because delivering against these objectives would be a by-product of strategic projects rather their sole aim, and partly because projects delivering these objectives were typically relatively local or small scale and therefore not categorised as strategic.

This analysis can only provide a snapshot in time, the destination continues to move forward with the Welsh Slate World Heritage Nomination and further regeneration works in Bangor, Caernarfon and Harlech as well as major marketing activity supporting the North Wales and Wales Coastal Ways.

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5   Destination Management Partnership

The United Nations World Tourism Organisation (UNWTO) defines Destination Management as follows:

Destination management consists of the coordinated management of all the elements that make up a tourism destination. Destination management takes a strategic approach to link-up these sometimes very separate elements for the better management of the destination. Joined up management can help to avoid overlapping functions and duplication of effort with regards to promotion, visitor services, training, business support and identify any management gaps that are not being addressed.

Destination management calls for a coalition of many organizations and interests working towards a common goal, ultimately being the assurance of the competitiveness and sustainability of the tourism destination. The Destination Management Organization's (DMO) role should be to lead and coordinate activities under a coherent strategy in pursuit of this common goal.[5]

In essence it requires an integrated approach which brings together the numerous stakeholders in providing the visitor experience to consider how to maximise that experience. This can include the tourism sector but also numerous public services such as highways & environmental management, countryside management, regeneration, education & skills etc.

More detail on the activities of Destination Management Organisations (DMO's) is provided at section 7.2

The Gwynedd Destination Management Partnership (DMPS or 'The Partnership') is the body set up to oversee the delivery of the Destination Management Plan for Gwynedd. It:

- Is facilitated by Gwynedd Council but chaired by the private sector.
- Has an agreed terms of reference based on delivering the priorities of the Destination Management Plan
- Has an appointed Chair and Vice Chair
- Has no legal status, secretariat, (outwith the council team) or budget of its own, the council offers management & administrative support and meets all associated costs
- Has a primary role to provide guidance to steer Gwynedd Council's activity. It is regularly consulted by the Council to ensure programmes are meeting the industry's needs.
- Supports and develops new activities and projects; including externally funded projects
- Sits within wider Gwynedd and Visit Wales strategic structures
- Meets 3-4 times a year

The Partnership's 32 members are chosen to represent not just the statutory bodies, but also the approximately 25 associations (based either on geography or sector) that make up the diverse product of the area. These associations are primarily area (rather than sector) focused (see appendices 4 & 6 for the detail).

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[5] UNWTO Website http://marketintelligence.unwto.org/content/destination-management

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6 Destination Management Plan – The Future

The current DMP has successfully delivered a huge range and number of projects (see section 4). However, the national policy framework is evolving. The Well Being of Future Generations Act provides a clear indication of high-level strategic direction. The priorities and focus for tourism will start to emerge as the new Wales Tourism Strategy develops to address national issues. It is already clear that developing integrated destination management practices at a local level will be central to the new strategy, with a need to re-emphasise and re-energise the partnerships responsible. Gwynedd itself is facing significant challenges - e.g. from overtourism (in particular places and at times of the year), AirBnB and second home ownership, funding for tourism related services and pressure on council services including cleansing and refuse collection.

While the DMP is still fit for purpose, moving forward it needs to reflect this evolving framework and context. The objectives for Gwynedd will remain broadly the same as the 2013 DMP but there may need more focus on certain elements. The principal driver for intervention in tourism in Gwynedd should be **economic prosperity** and **employment generation**. Sustainability – both environment and social - and sense of place and Welsh culture will be strong underpinning themes that will drive and influence investment in the destination. The strategic context is changing at national levels and local priorities will need to reflect this. New priorities include:

➢ An enhanced focus on Welsh language and culture and the unique 'sense of place'
➢ Managing tourism for the benefit of local communities-driving local supply chains
➢ Promoting Wales to the Welsh; being accessible & inclusive
➢ Attracting higher value markets & meeting international quality standards
➢ Social tourism and prescribing, emphasising the health and social benefits of tourism
➢ Addressing the carbon footprint of tourism and potential carbon offset schemes
➢ A focus on skills and recruitment, addressing the issues identified by employers
➢ An emphasis on getting the basics of Destination management right – 'Brilliant Basics'
➢ Support for integrated place-making, including events and welcoming communities

The majority of these developments are already contained within the Destination Management Plan but may require a realignment of priorities and a focus on specific actions that will make a difference; enhancing the positive benefits of visitors to the county and minimising negative impacts.

Potential future aims and objectives for the Destination Management Plan could be:

The primary **aim** of the Gwynedd Destination Management Plan is to generate wealth and quality, year round, employment opportunities for the people of Gwynedd while making a positive contribution to social, environmental and cultural well-being of the County.

This will be achieved through the following specific **objectives**:

- Extending the tourism season
- Increasing visitor spend per trip
- Improving the quality of the visitor experience
- Managing tourism to the benefit of Gwynedd's communities and environment. This could include, e.g. marketing less visited sites, management of busier sites, addressing second home ownership and Airbnb issues
- Promoting responsible, sustainable practice amongst the sector and its customers
- Developing Gwynedd's sense of place (including its culture, heritage and Welsh language).

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Target markets, product development and other action areas or projects should be specifically rated in terms of their ability meeting these five objectives. The table below shows a couple of examples:

Example Project	Potential to meet DMP Objectives (5= strong potential, 1=weak potential)				
	Extending the season	Increasing spend per trip	Improving visitor experience	Managing tourism	Sense of place and culture
WHS status and related regeneration programme (LleChi)	4	4	2	3	5
Caernarfon regeneration programme	3	2	5	4	2
Bangor regeneration programme	2	2	4	4	2
Discover the North Wales Way	5	4	4	4	2
Coastal Way	5	3	4	4	2

In terms of markets, the DMP should identify a small number of target audiences that will be relatively high spend, low volume and will visit out-of-season (and ideally have a propensity to visit less pressured sites). While not all action areas and projects will have a market focus, those that do (e.g. events, marketing initiatives) should explicitly target the identified markets.

7 Destination Management Partnership – Future Options

At the time of writing (September 2019), both the local and national circumstances surrounding destination management structures are evolving. Earlier suggestions to give responsibility for overseeing the delivery of the Destination Management Plan to Service Delivery Boards (SDB) (in this case a joint arrangement with Anglesey) have been developed into a more focussed proposal. This sees a Gwynedd Regeneration Board established which will work with the combined SDB. It seems entirely appropriate for an existing sector specific organisation such as the Destination Management Partnership to work with the Regeneration Board. The Regeneration Board will align its delivery through the eight wellness areas:

1. Bangor
2. Caernarfon
3. Llŷn
4. Porthmadog
5. Ffestiniog
6. Dolgellau
7. PenLlŷn (Bala)
8. Tywyn

At a national level, Visit Wales has signified an intention to change both its approach to partnership delivery and review the delivery of its priorities at a local level. As such, it would be prudent to work with that process and not pre-empt it. Nevertheless, Gwynedd Council and its partners need to be

prepared for Visit Wales' proposed changes, and give consideration to the most appropriate options in advance.

The 'Benefitting from Tourism' report recommended that, to take the future agenda forward, a Shadow Board be established under the umbrella of the Destination Management Partnership. There is therefore a need to consider whether and how the partnership should evolve to make its structure more relevant to those new responsibilities.

A future Gwynedd DMP (see above) is likely to place increasing importance on addressing overtourism and managing tourism to benefit the Gwynedd environment and its communities. The Partnership has a potentially key role in this.

The form of the Partnership should follow its function. While a destination partnership can have a wide remit, the future responsibilities of the Gwynedd Partnership will also need to reflect its strengths and weaknesses and the local context.

7.1 Current Situation (see also Summary at Section 5)

The Gwynedd Destination Management Partnership (DMPS or 'The Partnership') is the body set up to oversee the delivery of the Destination Management Plan for Gwynedd. It is facilitated by Gwynedd Council but chaired by the private sector. Its members are chosen to represent not just the statutory bodies, but also the approximately 25 associations (based either on geography or sector) that make up the diverse product of the area. 39 different representatives of 32 organisations attend the Partnership with a total distribution list of 49. The full list of organisations is at Appendix 6.

Type of Organisation	Organisations	No. Representatives	Total Distribution
Area Based Networks	17	17	24
Product/Sector Based Networks	3	4	4
Regional Organisations	3	2	3
National/Visit Wales	4	6	6
Public Sector/CGC	6	10	12
Miscellaneous	2	2	2
Total	**32**	**39**	**49**

Meetings are held on a regular but infrequent basis. The Partnership has no legal status or secretariat, (outwith the council team), budget (the council meets all costs associated with the partnership) or operational priorities. Its primary role is to provide guidance which steers the activity of Gwynedd Council's relevant services and service priorities. The council regularly consults the Partnership to ensure its programmes are meeting the industry's needs.

The 'Benefitting from Tourism' report recommended that, to take the future agenda forward, a Shadow Board be established under the umbrella of the Destination Management Partnership. There is therefore a need to consider whether and how the partnership should evolve to make its structure more relevant to those new responsibilities. As an example, if there is an eventual decision to pursue a Tourism Business Improvement District (TBID), then the Partnership is likely to be the BID promoter and will require legal status and some track record.

The strengths and weaknesses of the current DMPS and the context in with it works are summarised in the table on the next page:

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Strengths	Weaknesses
• Successful destination • Business confidence • Large numbers of businesses • History of partnership working • Goodwill towards Council Team • Key local figures have national roles/profile • Flexible DMP structure – can respond to change • High percentage of 'owner managed' businesses invested in area • Representative structure • High levels of attendance at DMPS events	• Large geographical area • Existence of other large 'membership' or trade bodies with different footprint (e.g. North Wales and Mid Wales Tourism) • Many businesses at small and micro levels with lack of resources/time to contribute • Lack of ownership of 'Gwynedd' (local identities and Snowdonia/ Llŷn have greater currency) • Cross border issues in National Park (partly in Conwy) • Structure and membership requires updating • Lack of flexible structure • Lack of resources/capacity • No track record of delivery as a stand alone organisation

7.2 Destination Management in Principle

Prior to considering the options for the DMPS in Gwynedd, it is worth considering what is actually meant by the term 'destination management'. A definition of Destination Management can be found at Section 5. This part of the report describes a number of interlinked areas of work which make up destination management, are normally led or coordinated by the DMO, and identified in the diagram. The key point is that all activities should contribute to a holistic approach with a focus on the visitor, rather than being delivered by a single organisation.

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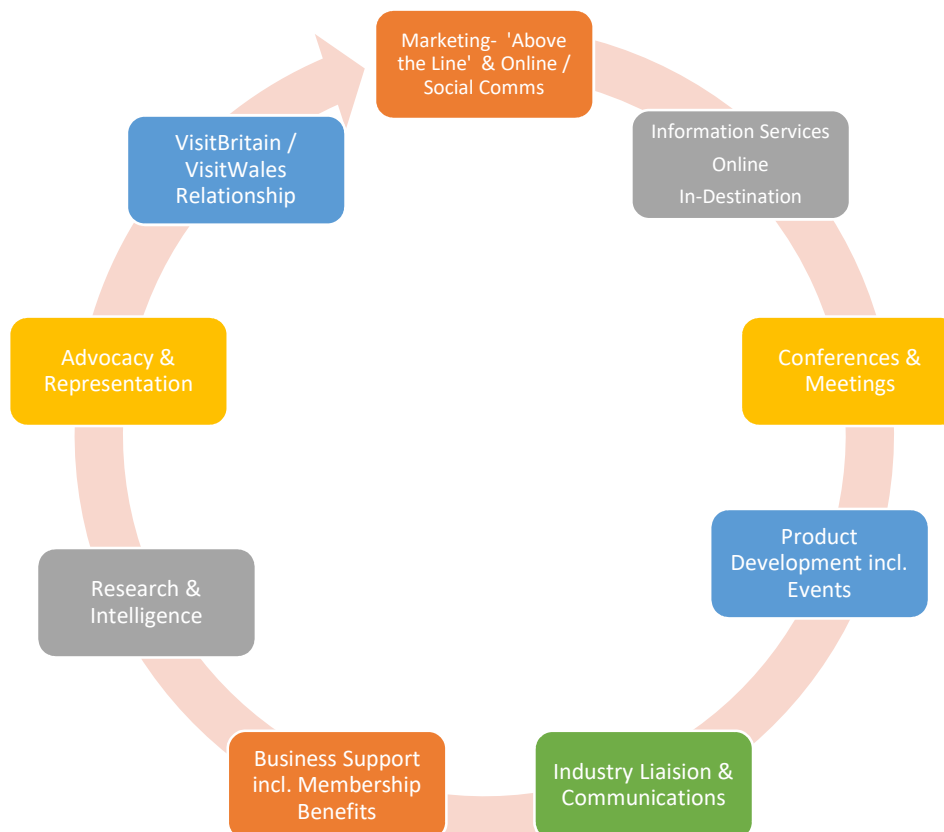
Roles include:

- **Marketing** – the promotion of the destination including brand management, digital marketing, social media and print production/distribution, participation in partner campaigns/activity at regional and national levels.
- **Communications** – generation of positive media coverage and mentions through third parties including review sites (e.g. TripAdvisor); reputation management across the board
- **Product Development** – investment in any 'owned' attractions and services plus working with project promoters (existing and new businesses) to support development; events, development of packages and itineraries to promote to individuals and trade; advising the public services on the needs of visitors (where these are different from residents)
- **Information Services** – advance information is increasingly delivered by third parties such as Google and in-destination services have been dramatically reduced in recent years with an increase of mobile information provision. Nevertheless, there is still a role in providing accurate, impartial information to visitors across a range of venues, even if the central 'tourist information centre' is now relatively rare.
- **Conferences & Meetings** – many meeting and conference organisers will make decisions on a location, as opposed to venue, basis and may have complex needs that require a destination wide solution. Destination organisations respond this to by offering bidding co-ordination and management (including bookings) facilities, normally delivered at city or county level. Local Ambassador schemes are a common activity
- **Industry Liaison** – coordinating the sector through regular communications, networking events and providing a single point of contact for the industry
- **Business Support incl. Membership Benefits** – Destinations and other membership organisation can offer a range of support including training opportunities (customer service has been a focus), advice seminars and networking as well as discounts for utilities, insurance etc.
- **Research & Intelligence** – the commissioning and dissemination of destination level surveys, performance monitoring, and indicator tracking.
- **Advocacy & Representation** – providing the 'voice' of the tourism sector in dealing with local and regional government and representing the destination in regional and national discussions.
- **VisitBritain/VisitWales Relationship** – providing a conduit for the national bodies to work with the local industry, supporting national efforts, seeking funding from national programmes

At the time of writing, all of the applicable elements of this list of activities are carried out by the council team with industry and partner support.

7.3 Headline Future Options

This section describes the options for the future of the Destination Management Partnership across three contexts:
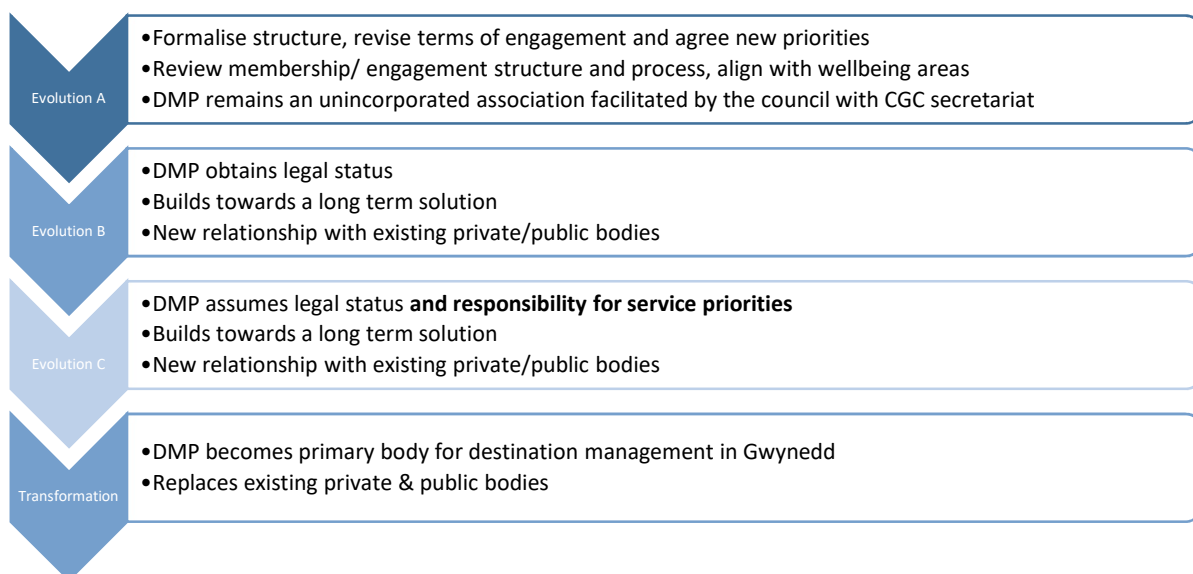
   i.   Functions – what should the Partnership do?
  ii.   Organisational – how should the Partnership be structured
 iii.   Format – which model is best suited to the Partnership and will enable flexibility

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Functions

On the basis that form should follow function, it would be worthwhile to consider which of the functions identified in the preceding section could be taken forward by the DMPS, which should be retained by the local authority and which would be best delivered by 3rd parties including Visit Wales, North & Mid Wales Tourism, the National Park Authority and others. The Partnership will be one of a number of stakeholders carrying out activity and will need to establish a niche based on functions, capacity and skill set. Destination Management is a dynamic process and roles may evolve over time, nevertheless the suggested roles below form a basis for discussion and debate.

Function	Current Situation	Future Delivery		
		LA (CGC)	DMP	3rd Party (e.g. VW/NWT/MWT/SNPA)
Marketing/Comms	SMC Website and related social media accounts delivered by CGC (support from DMP partners) NWT & MWT Marketing activity (regional) Local association websites	✓	✓	✓
Product Development	CGC role working in partnership with e.g. Visit Wales, CADW & SNPA	✓		
Information Services	Primarily digital delivery by CGC	✓	✓	
Conferences & Meetings	CGC on a request/case by case basis	✓		
Industry Liaison	CGC through the DMPS		✓	
Business Support	DMP, Rural Development Programme ,Gwynedd Business Network and Business Wales			✓
Membership Services	NWT & Local Associations			✓
Research & Intelligence	CGC commissions and Visit Wales	✓		
Advocacy & Representation	CGC & DMP represent at national fora and provide media input		✓	
VB/VW Relationship	CGC and individual partners, DMPS involvement	✓	✓	

There are four primary options for developing the Partnership in the next three to five years. Whilst these are described as options they can also be seen as continuous process and are presented in that format.

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Evolution A
- Formalise structure, revise terms of engagement and agree new priorities
- Review membership/ engagement structure and process, align with wellbeing areas
- DMP remains an unincorporated association facilitated by the council with CGC secretariat

Evolution B
- DMP obtains legal status
- Builds towards a long term solution
- New relationship with existing private/public bodies

Evolution C
- DMP assumes legal status **and responsibility for service priorities**
- Builds towards a long term solution
- New relationship with existing private/public bodies

Transformation
- DMP becomes primary body for destination management in Gwynedd
- Replaces existing private & public bodies

In reality, the 'evolution' options are by far the most likely as it will take time to build the capacity and will to move from the current situation to one where the local industry is taking more responsibility (i.e. Transformation).

Organisational Structure And Membership Breakdown

As well as this functional consideration, the composition of the DMPS in terms of its organisational breakdown requires some thought. It is assumed that the evolved organisation will need a board but the structure underneath that board could be based on:

- **Geographical Representation** e.g. the constituent destinations of Gwynedd, the three former district council areas, the five area committees etc. and the eight wellbeing areas (see table below). Whilst the 'Benefiting from Tourism' report recommended the five area committees as the most appropriate pre-existing solution, the situation has clearly evolved and the DMPS needs to align itself through the eight wellbeing areas to be consistent with the Service Delivery Board and Regeneration Board. There is a clear and very strong 'ownership' of the various towns, villages and products of the area which is seen in the large numbers of locally based associations and websites, currently the dominant groups on the DMPS with 17 out of a total of 32 organisations represented (53%). Therefore, although 8 may seem like a large number, it reflects the local situation (even though the National Park is split).

Gwynedd Breakdown	Districts
Former District Council Areas	1. Arfon 2. Dwyfor 3. Meirionnydd
Wellbeing Areas	1. Bangor 2. Caernarfon 3. Llŷn 4. Porthmadog 5. Ffestiniog 6. Dolgellau 7. PenLlŷn (Bala) 8. Tywyn
Area Committees	1. Bangor and Bethesda

Gwynedd Breakdown	Districts
	2. Caernarfon and Llanberis 3. Llŷn 4. Coastal Meirionnydd 5. Rural Meirionnydd

- **Sectoral Representation** – it is common for destination partnerships to be built around a sectoral breakdown. Businesses have more in common with those in similar sectors and of similar sizes. At the moment there are only three such organisations on the DMPS: Snowdonia Active and two Attractions consortia. Such a breakdown could include:

  - Bed & Breakfasts
  - Guest House/Hotels
  - Self-Catering
  - Caravan & Chalet sites
  - Camp Sites

  - Attractions
  - Activity Operators
  - Transport
  - Restaurants and other Catering

- **Functional Breakdown** – in this set up a partnership can be established around particular areas of destination management, for example:
  - Marketing
  - Events & other Product development
  - Finance & Funding
  - Advocacy & Representation
  - Business Support/Training

Within this kind of breakdown, but not exclusively so, 'Task & Finish' groups tend to be set up.

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Organisational Format – Headline Options

Options for the organisational format of the Partnership include:

i. **Informal 'steering' role** – as currently (albeit that this could be strengthened and reformed)
ii. **Unincorporated Association** with strategic board, constitution and appointed officers – delivery retained through local authority (acts as accountable body) but stronger relationship
iii. **Wholly-owned subsidiary company** or Arm's Length Management Organisation (ALMO) of the council with more freedom to trade and attract private sector contributions
iv. **Constituted Body** e.g. not for profit such as Private Company Limited By Guarantee or a Community Interest Company (CIC) or Charitable Incorporated Organisation (CIO)– with management board
v. **3rd Party** to 'host' the organisational/financial requirements of the DMP with work programme steered by strategic board and stakeholders

Option No: 1	Informal Steering Role
Description	DMPS is consulted on strategic work priorities for tourism service and 'steers' the work plan, also functions as consultees on important issues Evolution to a more formal structure aligned with local and national priorities is possible
Advantages	**Disadvantages**
Ease of implementation Incremental Change Could lead to other models	Does not immediately help DMPS to evolve or mature Does not contribute to strategic objectives for industry leadership role
Governance Model	Advisory Board
Staffing Implications	None
Finance Implications	Venue and facilities/translation costs, admin support

Option No: 2	Unincorporated Association
Description	DMP assumes more formal structure with constitution, appointed officers & 'independent' focus
Advantages	**Disadvantages**
Ease of implementation Evolution of current model Enables advocacy role	Potential confusion with CGC roles Does not contribute to strategic objectives for industry role
Governance Model	Advisory Board
Staffing Implications	Small – independent (or in-kind) secretariat would be likely
Finance Implications	Secretariat would require funds

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Option No: 3	ALMO or Wholly-Owned Subsidiary Co
Description	CGC sets up trading company but retains ownership, staff and budgets transferred
Advantages	Disadvantages
CGC retains control of service priorities Increase of commercial freedom Flexibility if priorities change	Lack of industry 'ownership' May reduce eligibility for key funding streams
Governance Model	Advisory Board
Staffing Implications	Existing staff could be seconded into ALMO
Finance Implications	Minimal – set up costs only

Option No: 4	Constituted Body
Description	Establishment of formal entity to deliver some or all of Destination management programme, staff and budgets transferred from council (whole or part)
Advantages	Disadvantages
Enables maturing and evolution of industry/DMPS Meets strategic objectives Could evolve to meet outcome of 'Benefitting from Tourism' process	More complex set up CGC loses control of service priorities Industry readiness/capacity and desire not clear
Governance Model	Management Board
Staffing Implications	Staff could be either seconded or TUPE'd into new organisation, some additional staff may be required (e.g. admin/finance functions)
Finance Implications	Set up costs and potential TUPE implications

Option No: 5	3rd Party Host
Description	A 3rd party is identified to host the new set up, budgets and staff seconded or co-located
Advantages	Disadvantages
Removes need for new organisation and complex set up Adds independence and maturity Could evolve to meet outcome of 'Benefitting from Tourism' process	Potential for confusion No identified 3rd party at this stage May reduce funding eligibility
Governance Model	Advisory Board
Staffing Implications	Staff secondment
Finance Implications	3rd party may require hosting fee to cover costs

7.4 Destination Management Partnership – Recommendation

Given the evolving situation at local and national levels, it is recommended that any major changes to the structure and purpose of the DMPS are delayed until that is clear.   However, the DMPS could become more structured and re-energised by adopting the following:

Adding to the current Chair and Vice Chair by establishing one representative for each Wellbeing Area, an independent Chair and representation from the primary public bodies (one each from Gwynedd Council and Snowdonia National Park) to form an executive committee of eleven. Where possible the eight area representatives should ideally be from different sectors of the tourism industry (e.g. accommodation, activities, attractions).   Executive Committee members will be expected to both represent and report back to their local associations.

Organisation	Number
Chair (Independent)	1
Gwynedd Council	1
Snowdonia National Park	1
Wellbeing Area Representatives	8
Total	**11**

Developing, underneath that executive committee, a wider consultative structure reflecting the eight Wellbeing Areas (or combined areas if this makes sense and has local support), aligned to the Regeneration Board and SDB structures. This should be achieved by bringing together the existing local area-based associations together, maintaining their identity and existence plus any other key local businesses and organisations.

Establishing an annual conference and a more formal meeting and information dissemination process (quarterly as currently). A separate (bi-annual) communication event to the primary marketeers (as currently) should continue for that specific audience. Eventually this could include a Business to Business website/pages (or information source. The Executive Committee should meet bi-monthly, reporting back to the wider membership on a basis that best meets local needs.

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Proposed Revised Structure
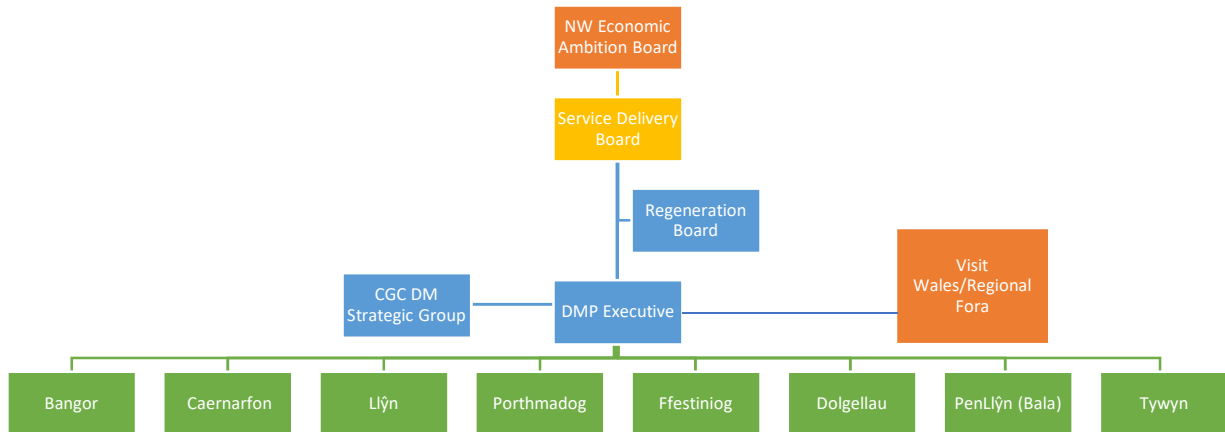
In the longer term the recommendation is that:

- The **Function** should initially be around advocacy and representation of the trade, funding and finance (in terms of managing a visitor giving scheme, and working towards a more sustainable funding solution), and allied to this steering local community and environmental projects.
- The **Board** for the Partnership should have primarily a geographical representation (by the eight Wellbeing Areas), and ideally sectoral representation to cover accommodation, attractions and activity providers/other services
- The **Organisational Format** should initially be an Unincorporated Association (see appendix 4) but moving to a Constituted Body.

7.5 Forward Plan & Timescales

Without access to Visit Wales' timescales, any forward pan can only be indicative. However, the plan below could be adopted for taking forward the interim recommendation.

	2020			
	Q1	Q2	Q3	Q4
Consult on Preferred Option	→			
Secure Council (Member) Approval	→			
Develop New Structure		→		
Consult with existing organisations		→		
Recruit Board		→		
New Structure 'Live'			→	

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Appendix 1: Policy Context

National Policy/Strategy

A review of all the major relevant national, regional and local policy and strategic documents has been conducted for this report. This section summarises the most relevant sections of each report and concludes with a brief analysis.

A. The Well Being Of Future Generations Act 2015

This is an overarching and long-term Act. The Act sets out seven goals for all the public bodies in Wales (including local authorities and the Ministers) to consider when making and implementing their decisions and **places a duty on them to do so**.   The most relevant goal for tourism is the first 'A prosperous Wales' but the sector also contributes to the sixth goal by promoting and protecting Welsh Culture and to the third by encouraging activities, especially outdoor activities in the case of Gwynedd.

- **A prosperous Wales:** An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which **generates wealth and provides employment opportunities**, allowing people to take advantage of the wealth generated through securing decent work.
- A resilient Wales: A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).
- **A healthier Wales**: A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
- A more equal Wales: A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio-economic background and circumstances).
- A Wales of cohesive communities: Attractive, viable, safe and well-connected communities.
- **A Wales of vibrant culture and thriving Welsh language**: A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
- A globally responsible Wales: A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

B. Prosperity For All – The National Strategy For Wales (2017)

Prosperity for All is the Welsh Government's primary policy document. It proposes a range of actions under four key themes which will deliver the goals of the Well Being Act, each of which have supporting objectives beneath them. The four key themes are:

- Prosperous & Secure
- Healthy & Active
- Ambitious & Learning
- United & Connected.

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The most relevant theme is 'Prosperous and Secure' with its economic priorities but tourism can also contribute to the celebration of Welsh identity and language and foster pride in communities as described in the 'United & Connected' theme.

Prosperous and Secure – 'Our aim is to drive a Welsh economy which spreads opportunity and tackles inequality, delivering individual and national prosperity. We will enable people to fulfil their ambitions and enhance their well-being through secure and sustainable employment. We will break down the barriers many face to getting a job, and create the right environment for businesses to grow and thrive[6]'

United and Connected – 'Our aim is to build a nation where people take pride in their communities, in the Welsh identity and language, and in our place in the world. We are building the vital links that make it easier for people to come together, for the economy to grow, and for us to become a confident nation at ease with itself.'

C. Prosperity For All – Economic Action Plan (2017)

The Economic Action Plans follows on from the strategy (above) and sets out how the Welsh Governments intends to achieve the objectives the strategy sets out. The document provides strong support for tourism, naming it as one of four foundation sectors and giving encouragement to matters such as regional inequality. The plan also sets out measures for enhancing Wales' reputation and profile, within which sit the activities of Visit Wales and the wider tourism industry.

Foundation Sectors. As well as setting out how the Welsh Government intends to work with business, and the conditions it will set for funding support, the Economic Action Plan identifies the sectors which it will support. Tourism is identified as one of the four 'foundation' sectors for the country.

> 'The foundation economy provides essential goods and services. We will work to support four foundation sectors – **tourism, food, retail and care** – in a joined-up and consistent way across government. We will work with the sectors to understand the challenges they face and the opportunities for growth and innovation. We will develop cross-government enabling plans to maximise impact.'

The focus on foundation sectors is underpinned by:

- Numbers employed in the foundation economy.
- Provision of essential goods and services.
- Geographic distribution across Wales.
- Stability of goods and services locally produced and consumed.
- Strong links with Prosperity for All, the Better Jobs Closer to Home agenda and connected communities.

Tourism and food: 'we work directly with individual businesses and the sector more broadly on issues as diverse as marketing, skills, **facilities, delivering major events and product quality**. We will build on our work with the sectors.[7]'

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[6] 'Prosperity for All: Taking Wales Forward' p3 (see also pp7-10)
[7] 'Prosperity for All: Economic Action Plan p15

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Protect and Promote Wales' Place in the World. This is one of the three objectives under the 'United & Connected' key theme. The proposal for delivering the aspiration to 'Protect and Promotes Wales' place in the World' is set out in the Economic Action Plan:

'We will promote Wales through:

- *Building on the unified brand for Wales as a place in which to invest, work, live, visit and study.*
- *Developing a strong digital led brand through the Wales Digital Gateway project, with a specific emphasis on wales.com as the unifying website.*
- ***Deploying tourism campaigns as the main flag carrier for our promotion of Wales in the UK and internationally.***
- *Competing to host major sporting and cultural events to build Wales' profile through the global events industry.*
- *Deploying our cultural offer in support of the promotion of Wales' economic and commercial interests and building our image[8]'*

D. Light Springs through the Dark: A Vision for Culture in Wales (2016)

The Cultural Strategy for Wales notes the huge interconnections between culture and tourism, the importance of cultural events, the nation's heritage, partnership working and the emerging significance of Welsh food and drink. Under the 'Prosperous and Secure' theme the strategy notes:

Culture is at the heart of the new Wales brand, which aims to harness our creativity to reveal new stories that complement our country's rich culture. Parts of the culture sector are very significant tourism attractions, boosting visitor numbers, generating demand for transport, accommodation, catering and other tourism-related business. £150 million per year is spent on holidays where culture and heritage is the main activity. More and more people are visiting Wales to experience our culture and cultural heritage.[9]

The strategy commits the Welsh government promoting cultural tourism and to a number of actions, the most relevant being:

Commitment to the 'Themed Years' Approach, building on the success of the 'Year of Adventure' in 2016[10]

We will look to develop more cultural tourism routes and trails, by investing in the visitor experience, and accommodation provision, at our landmark cultural attractions.

Working with partners, we will create the 'A55 Culture Corridor', promoting the tourism value of our world-class castles, mountains, coast, towns and countryside, and turning it in to one of the major cultural routes in Europe.

As can be seen from all of these, tourism is at the heart of the national agenda for Wales at a policy level. Its contribution to wider issues such as image, inward investment, is understood and articulated.

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[8] 'Prosperity For All: Economic Action Plan' p42
[9] 'Light Springs through the dark' p8
[10] And following; 'Light Springs through the Dark' p25ff

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E. Partnership For Growth 2013-2020 & Review

Partnership for Growth (2013), and the subsequent (2016) review document, is the Welsh Government's primary strategy for tourism. It governs and guides the activities of Visit Wales and others involved in the sector. It sets out a range of interventions and actions in six 'focus' areas:

- Promoting the Brand – including themed years and the brand developed in 2016
- Product Development – investing in high quality, game changing products
- People Development – identifying skills shortages and encouraging targeted provision
- Profitable Performance – to enhance visitor spending per capita and increase business viability
- Place-Building – encouraging destination to be distinctive and 'Welsh'
- Partnership – Commitment to work across and with all organisations involved in tourism

The strategy identifies five Areas of Competitive Advantage[11] - listed below with examples of the relevant Gwynedd dimension

- Natural Environment: Snowdonia National Park and the Llŷn are but two of Gwynedd's (and Wales') big hitters in this regard
- Heritage and Culture: The high percentage of Welsh speakers and slate heritage are just two of the area's strengths
- Activities and Adventure: Adventure Tourism has been at the heart of Gwynedd's recent growth
- Events and Festivals: A key investment area for Gwynedd Council, 102 events were supported between 2014 and 2018
- Distinctive Destinations: Portmeirion is cited as an example.

At the time of writing (July 2019) Visit Wales is carrying out a consultation exercise prior to the development of a successor strategy and has issued a consultation document setting out ten questions for the future of tourism in Wales. The table below lists the ten questions, the related issues as put forward by Visit Wales and identifies the context and opportunities for Gwynedd within the potential new strategic approach.

Question	Issues	Gwynedd Context & Opportunities
Who are the visitors of the future?	Change in holiday duration and make-up Seasonality and length of stay Domestic (Wales) market Experience-led tourism	Longer than average length of stay Well placed for multi-generational and experience tourism Far enough from main centres of Welsh population to be 'different' and attractive
How can we be international?	Different visitor needs? Welcome? Wales distinctiveness from UK New markets (previous focus on Ireland, Germany, USA)	Proximity to Irish Sea & Holyhead cruise port Manchester and Liverpool Airports - Gateways Strong Welsh language and culture

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[11] Page 12 'The tourism experience'

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Question	Issues	Gwynedd Context & Opportunities
What do our visitors need?	Expectations of quality and value for money – meet & exceed Service excellence creating repeat visits	Very high level of repeats and loyalty Increasing customer satisfaction scores
Where should we focus our efforts?	Investment priorities? Digital presence & brand Adventure, outdoors & culture	Snowdonia is flagship destination for Wales & UK Aligned with key products Contributing through Wales Way
Why does it matter?	Approx. 10% of people in Wales work in tourism Holistic benefits of tourism to Wales? Support to Welsh language and culture?	15% in Gwynedd but also experiencing some negative impacts including pressure on local services, property prices etc. Benefiting from Tourism project as national exemplar
How can we work together?	Cross government working Sectoral engagement Roles & Responsibilities – who is best placed to do what?	Opportunity to evolve the Destination Partnership and develop strengthened relationships across the private sector
How do we meet the digital challenge?	Comms infrastructure Use of tech/data for research and marketing	Network strengths? Broadband connectivity? Strong online presence for SMC and social channels
How do we increase quality?	Quality of facilities and service Workforce issues Grading systems	Investment in quality attractions has shown the way
Is Wales easy to reach and easy to travel around?	International and national connections Paths & Trails Access for All?	The Wales Way which is a joint brand for the North Wales Way and Coastal way products.
How we do all of this sustainably?	Low-carbon economy Protect key environmental assets Managing physical and social impacts	Benefiting from tourism is a key step to raise awareness and protect key assets.

This consultation exercise resulted (in early September) in the publication of a draft 'road map' for tourism in Wales, ('The Plan on A Page') setting out a revised ambition, goals and approach. There is strong encouragement for Gwynedd in the three defined elements of the offer for Wales: 'Outstanding Natural Landscapes, Creative Culture and Epic Adventure' and in the very strong emphasis given to Welsh culture and identity, especially the Welsh language. 'Staycation' markets include UK cities & Ireland (where Gwynedd has excellent transport links) and there are four key priorities:

- Great Products & Places (including integrated place making and events)
- Quality Visitor Experiences
- An innovative Cymru/Wales Brand
- An engaged and vibrant sector

Implementation will be achieved through a number of methods including an internal restructure but, of most relevance to this study, a 'review of delivery at local level' and a 'new approach to partnership delivery'.

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Regional Policy/Strategy

F. North Wales Growth Deal (2018)

The Growth Deal Bid, developed by the North Wales Economic Ambition Board (a combined authority brought together by the six North Wales Councils) focusses on other sectors including energy production and advanced manufacturing but does contain a headline commitment to tourism:

'We will develop and project the reputation of North Wales as a centre of excellence for high value tourism, building on recent investments and a growing portfolio of globally attractive all-year attractions. This will contribute to the reputation of North Wales, and Wales, as a destination and a place for investment[12].'

G. Eryri/Snowdonia National Park Local Development Plan 2016 -2031 (2019 update) – pp 101-108

As a National Park, Snowdonia is required to have a development plan in addition to the council's own document. The Park covers both Gwynedd and Conwy Boroughs. In a similar format, there is a strategic policy (below), followed by specific policies covering the development of specific sectors including serviced accommodation (which is encouraged provided it meets certain criteria), chalet parks & static caravan sites, touring caravan and camping sites (improvements to existing sites will be allowed but no new sites can be built) and 'alternative accommodation' (yurts, shepherds' huts etc.) which will be permitted but only if they form part of agricultural diversification and meet other criteria. The importance of retail in the existing towns and villages is noted and supported too. New visitor attractions and facilities will be permitted providing they meet a number of conditions including that they 'would not have an adverse impact on the 'Special Qualities' of the National Park'.

Strategic Policy: I Tourism (I)[13]

> *'In order to create and retain sustainable or eco-tourism within the National Park and extend the visitor period while protecting and enhancing the landscape of the National Park and its special qualities the Authority will:*
>
> *i. Support tourism and recreation development that is based on the principles of sustainable tourism.*
> *ii. Identify and promote areas of the National Park that attract visitors while ensuring that the 'Special Qualities' of the National Park are not affected.*
> *iii. Promote sustainable modes of transport for visitors to and from the National Park.*
> *iv. Support the accommodation industry by encouraging the improvement of the sustainability and quality of existing visitor accommodation.*
> *v. Encourage proposals which will promote the opportunity for the public understanding and enjoyment of the 'Special Qualities' of the National Park including proposals that will assist disabled people.'*

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[12] Smart, Resilient & Connected; A Growth Deal for North Wales p.8
[13] SNPA LDP 2016-2031 Page 102

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H. Anglesey and Gwynedd Joint Local Development Strategy 2011-2026 (JLDP) (31st July 2017 Section 6.3 pp 101-9)

Given the importance of tourism to both local authorities, there is a separate section in the Local Development Plan for the visitor economy. The plan also contains support for the Destination Management Plans (DMPs) of both councils and recommends strategic alignment, encouraging developments to take note of the DMP's priorities and recommendations. The summary strategic policy is below:

> **'STRATEGIC POLICY PS 14: THE VISITOR ECONOMY[14]**
>
> *Whilst ensuring compatibility with the local economy and communities and ensuring the protection of the natural, built and historic environment the Councils will support the development of a year-round local tourism industry by:*
>
> *1. Focusing larger scale, active and sustainable tourism, cultural, the arts and leisure development in the sub-regional centre, urban service centres, and, where appropriate, local service centres;*
>
> *2. Protecting and enhancing existing serviced accommodation and supporting the provision of new high quality serviced accommodation in the sub-regional, urban and local service centres and villages;*
>
> *3. Managing and enhancing the provision of high quality un-serviced tourism accommodation in the form of self-catering cottages and apartments, camping, alternative luxury camping, static or touring caravan or chalet parks;*
>
> *4. Supporting appropriately scaled new tourist provision and initiatives in sustainable locations in the countryside through the reuse of existing buildings, where appropriate, or as part of farm diversification, particularly where these would also benefit local communities and support the local economy and where they are in accordance with sustainable development objectives;*
>
> *5. Preventing development that would have an unacceptable adverse impact on tourist facilities, including accommodation and areas of visitor interest or their setting, and maximise opportunities to restore previous landscape damage.'*

The plan also has specific policies for visitor attractions, serviced and non-serviced accommodation, caravan and camping sites. All of which are broadly positive and supportive of the needs of the visitor economy whose significance is recognised in the plan.

I. CADW Castles WHS Management plan 2018-2028

Two of the four castles within the 'Castles and Town Walls of King Edward in Gwynedd World Heritage Site' are in the borough of Gwynedd – i.e. Caernarfon and Harlech. The castles are managed by CADW, the Welsh Government's Heritage Agency. There is a focus on the visiting, use and engagement with the castles, rather than simply the buildings themselves. This is summed up in the introduction to the management plan: '*But, above all, the World Heritage Site is about people.*'

The plan is extremely positive about welcoming more visitors to the castles and sees a number of partnership opportunities, including those created by the recent increase in 'activity tourism'.

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[14] Joint LDP p. 102

'*There is potential cross-over between activity and cultural tourism: collaboration between local authority tourism teams, Cadw and other providers could help provide a joined-up tourism offer.[15]* '

The opening up of the Caernarfon Town walls is a specific aspiration that the local authority may be able to support and there is a commitment to work with the local authorities in developing event programmes.

Local Policy/Strategy

J. Gwynedd Council Plan 2018-2023

The Gwynedd Council plan lists seven well-being objectives (understandably focussed on residents rather than visitors) and seven improvement priorities in a corporate introduction followed by headline service plans for the council departments.

The Economy and Community Department plan[16] commits the Tourism, Marketing and Events service to strategic actions in:

- Digitally re-developing the marketing platform for Snowdonia Mountains and Coast.
- Working with partners to identify priorities to support the main Gwynedd tourist destinations and the wider sector
- Increasing the impact of major events
- Benefiting from Tourism[17]

These commitments are included in Improvement Priority 1 'To improve the conditions to create a viable and prosperous economy whilst aiming towards securing more jobs which offer good salaries**.'** Also included is the commitment to submit the World Heritage Site nomination, to promote and support Gwynedd's town centres and work with partners, to Gwynedd's benefit, on the North Wales Growth bid[18].

K.Gwynedd Destination Management Plan 2013-2020 (May 2013)

Details regarding the Destination Management Plan (DMP) can be found in the introduction (Section 1.2) and the Action Plan review and Forward plan (sections 4 & 6 respectively)

The DMP was accompanied by a more specific action plan which identified projects for three geographical areas (Arfon, Dwyfor and Meirionnydd) and across four themes:

- Landscape And Environment
- The Visitor's Experience
- Public Places, Accommodation And Customer Services
- Marketing.

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[15] P 125
[16] See pages 54-65
[17] Gwynedd Council Plan p. 59
[18] Council Plan pp 55-8

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The area is marketed under the umbrella of Snowdonia Mountains and Coast (SMC) – a concept which also covers the rural part of Conwy and is a Visit Wales designated marketing area.

L. Slate Landscape World Heritage Nomination Documents (2018)

According to the 'Submission For Technical Evaluation' for 'Wales Slate' one of the main outcomes of the hoped for inscription of the Slate Landscape as a World Heritage Site is to '*help safeguard and promote Gwynedd's tourism economy*'[19]. World Heritage is seen as an important economic driver with tourism at its heart. The seven sites proposed for inclusion are located throughout the county and include the existing Welsh Slate Museum based in Dinorwig. The cultural landscape is seen as an important counterpoint/addition to the natural environment of the National Park. The timescale for submission to UNESCO is January 2020 with a decision on status in July 2021.

L. Llŷn Area of Outstanding Natural Beauty (AONB) Management Plan 2015-2020

The Llŷn Peninsula was designated as an Area of Outstanding Natural Beauty (AONB) in 1956. The designated area includes approximately ¼ of the peninsula –a total of 15,500 hectares extending mainly along the coast and reaching inland to include the volcanic peaks of Garn Fadryn and Yr Eifl. The AONB is managed by a small team who undertake a variety of projects.

In line with its statutory duty to maintain and preserve the natural, historical and cultural environment and working to an overall Ecosystem approach, the management plan notes the negative impacts of tourism including the visual impact of caravan sites, littering, footpath erosion (which is not seen as a major current concern), overcrowding at peak periods (especially along the Southern Coast), the impact on house prices and rural depopulation. Nevertheless, it also recognises the critical importance of tourism to the area's economy and overall wellbeing. The management plan encourages tourism which will sustain and support local language and culture, extend the season, develop a greater understanding of (and/or are compatible with) the special qualities of the AONB and sustain local services.

Policies included in the management plan of relevance to tourism include:

GP 9. Support new outdoor leisure activities unless they would place unacceptable pressure on the AONB's natural resources, the landscape or other protected sites.

GP 10. Promote existing, and new tourism initiatives, especially those based on local history and culture, unless they would have an unacceptable effect on the AONB's environment.[20]

MP 5. Monitor visitor pressure in some specific areas in the AONB and take action to manage the situation if needed.

MP 6. Support effective management of beaches and launching areas in the area and maintain them to a high standard.[21]

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[19] Page 5
[20] Page 105 (both)
[21] Pages 114-115

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The 2016 survey by Beaufort Research identified the key characteristics of the current market for Gwynedd and comparisons for Wales as a whole).

The research shows that, when compared to all visitors to Wales, the market for Gwynedd is younger, male and of a higher social grade, as well as being predominantly from England. Despite the area's reputation as a family holiday destination, the research indicated that Gwynedd is only higher than the rest of Wales in categories including 'older children' or 'no children' with even the level of repeat visits being less than in Wales as a whole, perhaps just an indication of travelling distance. This demonstrates the wide appeal of Gwynedd as a destination to varied markets. Significant variances from Wales as a whole are highlighted in the tables below.

Visitor Demographics		
	Gwynedd (%)	**Wales (%)**
Area of residence		
Wales	37	59
England	60	37
Overseas	3	4
Gender		
Male	57	44
Female	43	56
Age		
16 - 24 years	5	7
25 – 34 years	15	15
35 – 44 years	21	20
45 – 54 years	24	19
55 - 64 years	18	18
65+ years	15	20
Refused	1	1
Social grade		
AB	48	32
C1	19	36
C2	21	20
DE	12	13
Refused	1	-

Group Composition and Visiting Frequency		
	Gwynedd (%)	**All Wales (%)**
Type of visiting party		
Couple	30	28
Family with young children	21	32
Family without children	10	7
Friends	9	12
Visiting alone	9	8
Family with older children	8	5
Family with younger and older children	6	3
Organised group / society	3	2
Other	<1	1
Refused	4	1
Average size of party		

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Group Composition and Visiting Frequency		
	Gwynedd (%)	All Wales (%)
Average number of adults	3.0	2.7
Average number of children	0.9	1
Average total number of people	3.9	3.7
Frequency of visiting in last three years (live outside of Wales)[22]		
Once	44	36
2 – 3 times	30	29
4 – 6 times	11	16
7 – 10 times	5	6
More than 10 times	9	12

The survey also showed very high satisfaction rates, with an overall score of 9.4/10 and 92% intending to return. Another function of travelling distance is the high percentage of staying visitors (28% vs 12% in Wales as a whole). Other points include:

- 12% of visitors to Gwynedd are on their main holiday with 11% on a short break
- Average length of stay was 5.8 nights
- 73% of visitors came 'To enjoy the landscape / countryside / beach' (compared to 56% for Wales as a whole) with 41% visiting Gwynedd 'To take part in outdoor or sporting activities' (for the whole of Wales it was 25%).

This brief analysis demonstrates the interest that visitors have in Gwynedd's natural assets, as well as relative affluence, and strong satisfaction/loyalty scores.

Tourism Destinations in North Wales (Welsh Assembly Government-undated) highlights that:

- Of Welsh destinations, Snowdonia Mountains and Coast was the destination people were most likely to visit in the future. However, people were more likely to visit its English and Scottish competitors like Devon, Cornwall, the Lake District, Highlands of Scotland, and Peak District.
- Snowdonia Mountains and Coast also has the highest level of loyalty (in terms of repeat visitors) among Welsh destinations.
- In terms of market segments, the key ones for Snowdonia are Older Cultural Explorers and Scenic Explorer Couples are the main ones. Budget Families and Active Family Explorers are also important.
- The strongest regional markets are the North West of England and the West Midlands, followed by Wales itself.
- Snowdonia is associated with 'Nature, Scenic Coastal, Adventure Sport, and Historic'.
- Snowdonia is more positively rated than Wales as most potential associations. It is particularly strong on 'Breath Taking', 'Beautiful' with a 'distinct and authentic identity'. It is also much more likely to seen as 'exciting, fun and out of the ordinary with lots to see and do' than Wales as a whole.

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[22] Wales resident sample size too small for confidence

Research conclusions:

- Snowdonia has a multi-dimensional offer – nature is the strongest but its scenic coast, adventure sports and history are all important.
- Explorers are the key market groups. Markets are strongly English (NW and West Midlands), and couples are an important group.
- Snowdonia rates as a strong destination in Wales but rates lower than some of its English and Scottish competitors (possibly an issue of market proximity).
- Satisfaction is high.

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Appendix 3: Strategic Progress against the DMP Action Plan

Overview

In 2013 Gwynedd Council produced a Destination Management Plan of actions for the next four years (i.e. 2013-17). This identified approximately 190 projects. These were divided into four different thematic areas (Landscape and the Environment, Visitor Experience, Public Areas and Marketing) and by areas (Arfon, Dwyfor, Meirionnydd and the County as a whole).

Gwynedd Council reviewed progress during the 2017/18 financial year. Key points from this review were:

- Of the total projects, 185 were on-going or completed
- Approximately £111m has been invested through these projects during the four year plan period. This breaks down as follows:
  - £36m in Arfon through 47 schemes
  - £32 m in Dwyfor through 39 schemes
  - £37 m in Meirionnydd through 52 schemes
  - £6 m on Countywide and central projects.

Gwynedd Council has, with destination management partners, been successful in securing funding from the Visit Wales Regional Tourism Engagement Fund (RTEF) and Tourism Amenities Improvement Scheme (TAIS). RTEF projects from 2015/16 to 2019/20 are summarised in the following table.

Project name	Project Details	Total project cost
P4G 2015/16 Year of Adventure	A joint regional coordinated approach that brings together 3 / 4 destination marketing areas (Snowdonia Mountains and Coast, Anglesey, Llandudno / Colwyn Bay, Denbighshire) through jointly initiating the 'heart of adventure' brand.	£48,000
Year of Adventure 2015/16	Development of Ffordd Brailsford Way Cycle Routes, website and business development for Year of Adventure	£92,000
Year of Legends 2016/17	Included soft product development (EcoMuseum), Place Building – and promotion	£167,500
Year of Legends 2017/18	Development of creative content, assets and events, and online and offline marketing / PR campaign	£89,000
Cruise 2017/18	Development of content for the cruise market.	£68,000
The Coastal Way 2018/19	Promotion of the Coastal Way (Gwynedd, Ceredigion and Pembrokeshire) – part of the new product The Wales Way - which included content creation and Marketing. Partner website content creation.	£168,300
North Wales 2018/19	Campaign to increase out of season visits – Get Wrapped Up	£180,000
The Coastal Way 2019/20	Promotion of The Coastal Way – part of the new product The Wales Way, (Gwynedd Council led in partnership with Ceredigion and Pembrokeshire Councils)	£165,000
The North Wales Way (2019/20)	Promotion of The North Wales Way (Gwynedd Council led in partnership with NW Local Authorities and DMPs)	£165,000

Together these projects have generated over £1.1m of project investment and are estimated to have created £23.9m of additional expenditure into North West Wales.

The County has also secured £523,273 of Visit Wales Tourism Amenities Infrastructure Support (TAIS), a capital funding grant scheme. Applications are summarised below.

Applicant	Description	Support
Gwynedd	Harlech improvements- toilets and coach parking space & shelter. Completed 2018	£40,793
Gwynedd	Coastal facilities upgrade including: • Safety warnings/schemes on Blue Flag beaches • Amendments to the toilets in Aberdaron • Improving access to Marian y De Beach South in Pwllheli • Installation of new pavement down to the seaside in Abersoch.	£114,480
Gwynedd	Investment in public toilet facilities-locations Bala, Bethesda and Beddgelert	£120,000
National Trust	Upgraded tourist facilities in two areas-NT Porthdinllaen parking and Porthor car park information facilities	£84,000
Natural Resources Wales	Extension of blue biking route at Coed Y Brenin nr Dolgellau by NRW.	£88,000
Harlech – Business Community	Signs and access project	£76,000

TISS funding table

A detailed list of strategic projects follows, much of which was supported by Visit Wales' Tourism Investment Support Scheme (TISS), a capital grant scheme which has funded nearly 30 projects in Gwynedd during the period. The total grant offered by TISS to schemes in Gwynedd is just under £2m.

Year	No Projects	Grant Offered
2013-14	11	£581,566
2014-15	7	£346,512
2015-16	5	£378,650
2016-17	4	£278,500
2017-18	2	£350,000
Total	**29**	**£1,935,228**

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Strategic Projects

The following table summarises key projects in the Gwynedd Destination Management that have had (or will have) a potential strategic or catalytic impact. The projects have been scored in terms of their potential impact against DMP objectives. A score of 4 means a high potential impact against an aim and a score of 1 is low. It is emphasised that this is an iterative and 'live' document which will be updated on an ongoing and regular basis.

2013-2019 Action Plan Review

Project	Area	Description	Progress and Status	Extend season	Increase Spend	Visitor Experience	Integration with community	Enhance environment	Jobs and skills
Landscape and the Environment									
Footpaths Provision – Snowdonia Route	Arfon	£0.5m project to improve connection routes around the foothills of Snowdon and market them	Complete?	2	1	3	1	4	1
Footpaths Provision – Upland Route	Arfon / Meirionnydd	£200k per annum improvement works to upland routes across the National Park	Ongoing?	2	1	3	1	4	1
Briwet Bridge	Meirionnydd	£20m bridge development across the River Dwyryd, near Penrhyndeudraeth	Complete	1	1	3	2	4	1
Meirionnydd Circular Route	Meirionnydd	Potential route connecting Bala, Dolgellau and Trawsfynydd	Ongoing	2	2	3	3	3	1
Yr Ysgwrn Trawsfynydd	Meirionnydd	£3m scheme to develop Yr Ysgwrn as a destination	Complete	2	2	2	3	1	1
Wales Coastal path	County	Develop and upgrade the Coastal Path in Dwyfor and Meirionnydd	Complete	2	1	3	1	4	1
Visitor Experience									
Caernarfon Castle	Arfon	Part of £19m Cadw HTP scheme. Included improved provision for visitors, interpretation and upgrades to the museum on the Segontium site.	Complete	3	3	4	1	1	2

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Project	Area	Description	Progress and Status	DMP Objectives					
				Extend season	Increase Spend	Visitor Experience	Integration with community	Enhance environment	Jobs and skills
Academi Hwylio Pwllheli Sailing Academy – Plas Heli	Dwyfor	£8.3m develop a National Sailing Academy and Events Centre in Pwllheli	Complete	4	4	3	1	2	3
Aberdaron Centre of Excellence	Dwyfor	£17.5m National Centres of Excellence scheme to develop the Porth Swnt centre in Aberdaron and improvements to visitor provisions in the resort.	Complete	4	3	4	1	1	2
Nant Gwrtheyrn	Dwyfor	£5m project of improved facilities for visitors, meeting room resources, catering, road access and parking.	Complete	3	3	2	1	1	2
Meirionnydd COE Coed y Brenin	Meirionnydd	New visitor centre and blue graded cycling route – approx. £3m project	Complete	2	2	3	1	2	1
Harlech Castle	Meirionnydd	Part of £19m Cadw HTP scheme which included new interpretation and tearooms	Complete	2	2	4	2	1	2
Zip World Bounce Below	Meirionnydd	£600k attraction development in Blaenau Ffestiniog	Complete	4	4	3	1	1	3
Our Heritage Project	County	??£1.7m heritage interpretation scheme in the areas of Gwynedd, Conwy and Snowdonia National park.	Complete	1	1	3	2	3	1
Public Areas									
Town Centre Improvements	Arfon	£8.4m Improvements to Caernafon and Bangor town centres	Complete?	1	2	2	3	3	2
Cwm Idwal visitor centre	Arfon	£1.3m new building for visitors and interpretation	Complete	4	3	3	1	2	1
Caernarfon waterfront and town centre	Arfon	Visit Wales Tourism Attractors Destinations funded (£12m) improvements (for Galeri, Caernarfon Harbour Trust and Welsh Highland Railway)	Ongoing	3	2	3	3	3	2

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Project	Area	Description	Progress and Status	DMP Objectives					
				Extend season	Increase Spend	Visitor Experience	Integration with community	Enhance environment	Jobs and skills
PONTIO project	Arfon	New cultural and artistic provision in Bangor – £10.9m project	Complete	3	2	2	4	1	2
WHS bid	Arfon	World Heritage Site bid for Gwynedd slate area	Ongoing	2	3	3	2	2	2
Marketing									
RTEF campaigns	County	£1.1m series of marketing campaigns from 2015 to 2020 covering a variety of themes. Generated approximately £24m of additional expenditure to NW Wales (see above).	Complete / some ongoing	4	3	2	1	1	1
Total Score Against DMP Priority				51	45	58	35	44	32

Some key project areas have included:

- Footpath provision in strategic areas – i.e. Snowdonia, coastal footpath
- Some major visitor related developments – National Sailing Academy, Aberdaron, Nant Gwrtheyrn, Caernarfon Castle
- Strong progress in public areas with town centre improvements in Caernarfon and Bangor.

Against the DMP objectives these projects have scored best in terms of visitor experience and extending the season. They have scored more poorly in terms of skills and jobs, and integration with the community. In terms of skills and jobs these have tended to be a by-product of strategic projects rather their sole aim. The DMP highlights a number of business development related projects but none of these were rated as strategic / catalytic. The same was the case in terms of integration with the community and this was not typically the principal aim of strategic projects identified. The DMP included a number of projects where community integration would score more highly but these are typically relatively local projects and therefore not listed as strategic.

2019-2020 Action Plan

The following table summarises the main projects that will be delivered in Gwynedd in the next one to two years. Please note this table is a working document and will be subject to change and addition on a regular basis.

Project	Description	Lead / delivery organisation	Partner Organisations	Timescale	Budget
Landscape and the Environment					
WHS status & Related Regeneration Programme (LleChi)	Targeting of World Heritage Site Status for the slate industry in Gwynedd (as a tool for regeneration and economic development) Utilisation of slate heritage in relevant parts of Gwynedd as a lever for increased community pride / cohesion; regeneration and economic development. Includes development of local plans in slate quarrying communities.	CGC		To March 2021	Total £400k
Visitor Experience					
Caernarfon regeneration programme	Rolling programme of regeneration initiatives in Caernarfon; current phase includes new Welsh Highland Railway Station; extension to Galeri Arts Centre (£5m in total) and redevelopment of Slate Quay (£5m).	CGC			
LEADER	Aims to stimulate, trial and disseminate innovative / novel solutions to challenges facing rural areas. Relevant activities include: Snowdonia Giving, Exploitation of dark skies status, Criccieth foodslam, Tourist transport in Harlech, and Pop-up museums.			End 2023	Total investment approx. £4m
Public Areas					
Bangor regeneration programme	Aims to develop a comprehensive regeneration programme for the City of Bangor with a focus on the commercial centre.	CGC		To March 2021	Approx. £2m
Property development loans	Loan fund available for redevelopment of commercial property in Bangor, Caernarfon, Bethesda and Penygroes				£1.5m
Harlech regeneration strategy	Building on the development of a new visitor centre at the castle local and strategic partners are working together to implement a local regeneration strategy including options for redevelopment of former St. Davids Hotel and Harlech College building	CGC			

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Project	Description	Lead / delivery organisation	Partner Organisations	Timescale	Budget
Marketing					
ARFOR programme	A project seeking to generate employment in communities within Welsh speaking heartlands. Relevant activities include advice / funding for businesses generating new employment.	CGC			£500k (to 2021)
Snowdonia and Mountains					
Benefitting from Tourism					
Discover the North Wales Way	Marketing campaign that aims to position Gwynedd (Snowdonia Mountains and Coast), and neighbouring areas as year round tourism destinations through aligning with Wales' thematic Year of Discovery and The North Wales Way.	CGC	VisitWales / neighbouring Local Authorities	April 2019 to December 2020	£165k
Discover the Coastal Way 2019-2020	RTEF project – similar to the project above but focusing on the Coastal Way.	CGC	VisitWales / neighbouring Local Authorities	April 2019 to December 2020	£165k

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Appendix 4. All Attractions Reporting to Visit Wales Performance 2014-2017

Name	2014	2015	2016	2017	Increase 2014-17	Increase 2016-17
Bangor Cathedral				14,860		
Byd Mary Jones, Bala	817	6,466	-	3,300	304%	
Cadair Idris Visitor Centre			20,136	57,166		184%
Caernarfon Castle	175,216	195,352	195,151	204,675	17%	5%
Criccieth Castle	43,528	45,715	47,935	42,863	-2%	-11%
Coed Y Brenin	131,171	143,233	162,021	147,489	12%	-9%
Dyfi Forest				42,397		
Electric Mountain Visitor Centre	125,000	132,000	-	250,000	100%	
Go Below Underground Adventures			36,646	23,000		-37%
Harlech Castle	75,512	89,038	98,877	116,216	54%	18%
Inigo Jones Slate Works				40,000		
Llŷn Mair				13,332		
Llŷn Padarn			108,557	136,550		26%
Morfa Harlech NNR				86,172		
National Slate Museum	154,608	140,828	122,007	145,969	-6%	20%
Oriel Plas Glyn-y-Weddw				126,567		
Penrhyn Castle (NT)	93,587	111,948	115,561	110,820	18%	-4%
Plas yn Rhiw (NT)	16,252	17,296	17,285	8,637	-47%	-50%
Porth y Swnt (NT)	15,136	13,767	12,893	14,591	-4%	13%
Quarry Hospital Visitor Centre, Llanberis			17,547	18,487		5%
RibRide			9,514	15,000		58%
Royal Welch Fusiliers Regimental Museum				112,129		
Snowdon Mountain Railway	131,144	132,252	117,077	130,266	-1%	11%
Snowdon Summit Visitor Centre	445,890	449,657	465,000	654,077	47%	41%
Welsh Highland Railway			84,448	79,464		-6%
Zip World- bounce Below, Caverns & Titan				190,000		
Zip World-Fforest				115,528		
Zip World - Velocity				89,155		

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Appendix 5 List of Existing Destination Management Partnership Members (Organisation)

Association Name	
Area based	
Aberdaron & District Tourist Link	
Aberdyfi Tourism Association	
Bala a PhenLlŷn Tourism Association	
Bangor BID	
Barmouth Publicity Association	
Beddgelert Tourism	
Betws y Coed Tourism Association	
Blaenau Ffestiniog Chamber of Tourism and Commerce	
Caernarfon BID	
Discover Dolgellau	
Harlech Tourism Association	
HWB Eryri Llanberis	
Llanberis Development Group	
Llwyngwril Tourism Association	
Llŷn and Abersoch Tourism Partnership	
Portmeirion	
Tywyn and District Chamber of Tourism and Commerce	
Sub Total	17
Regional	

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Association Name	
Mid Wales Tourism	
North Wales Tourism	
Sub Total	2
National/Visit Wales	
Visit Wales - Manager The Wales Way	
WASCO - Wales Association of Self Catering Operators	
National Trust	
Federation of Small Business	
Sub Total	4
Product Based	
Attractions of Snowdonia	
Snowdonia Active	
Snowdonia Attractions	
Sub Total	3
Council/Public	
Gwynedd Council	
Conwy County Borough Council	
Grŵp Llandrillo Menai	
Snowdonia National Park Authority	
CADW	
Natural Resources Wales	
Sub Total	6

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Association Name	
Miscellaneous	
Ecodyfi	
Greenacres Morfa Bychan (Plas Heli)	
Sub Total	2
Grand Total	34

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