

Gwynedd Destination Management Plan 2013-2020



May 2013



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Whilst every effort has been made to ensure accuracy in this publication, Gwynedd Council cannot accept any responsibility for any errors, inaccuracies or omissions.

The Destination Management Plan was produced by Arwel Jones and Associates in conjunction with Yellow Railroad, in partnership with Gwynedd Council, the Gwynedd Economic Partnership Tourism Sub Group and key stakeholders.

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1. FOREWORD

It is our pleasure to present you the Gwynedd Destination Management Plan.

This is an important document that will ensure that the tourism industry in Gwynedd will continue to thrive in a world that is increasingly competitive. The document outlines the vision for the future and considers the links between various elements relating to the experience of visitors and residents in our destinations.

Tourism's contribution to the economy and communities of Gwynedd is of significant importance and ensuring the growth of this sector, in addition to the growth of the local economy is imperative to ensure the sustainability of our communities in Gwynedd.

People – and that important connection between people, culture and heritage and the local environment; are at the heart of each and every destination. We are confident that this plan will provide a strong and realistic foundation for the management and development of our destinations in Gwynedd for the benefit of all.

This plan cannot be implemented by one organisation in isolation. Its success depends on the ability of a number of organisations and bodies in the public, private and third sectors to collaborate successfully to realise its objectives and priorities.

We hope that you will welcome the Gwynedd Destination Management Plan as an important step forward as we work in partnership to ensure the best experience for visitors and the local community.

Our aim is to develop an unique international destination that everyone can be proud of here in Gwynedd – we look forward to working with you to achieve this aim.

Counc. John Wynn Jones

Cabinet Member for Economy and Community
Gwynedd Council

Anwen Jones

Chair, Tourism Sub-Group,
Gwynedd Economic Partnership (PEG)

2. INTRODUCTION

Gwynedd is a rich and varied county in terms of its natural beauty and dramatic landscapes, from Snowdon's summit to the beaches of the Llŷn Peninsula and Meirionnydd and the living green countryside that separates them.

According to Gwynedd Council figures, in 2011, tourism was estimated to be worth some £917 million to the county's economy, supporting almost 16,000 jobs, 80% of which were direct employment in tourism. Over 7 million people visit Gwynedd every year, with over 21 million tourist days, including almost 18 million overnight stays (source: *Gwynedd Destination Management and Marketing Audit Data Review 2012*).

Destination management is all about looking at the whole picture, not just the sum of its parts. For the visitor, their holiday experience is influenced by everything that happens during their visit, including all the activities and services that they encounter the comfort of their accommodation, the friendliness of the welcome, the quality of the food and the cleanliness of public spaces, as well as the available attractions and activities.

A Destination Management Plan sets out a wide-angle vision for the future, exploring the connections between various elements related to the experience of visitors and residents, and mapping out a positive common direction. This destination management plan covers the period up to 2020 and includes an integrated and rolling three year action plan which allows all those concerned with tourism in Gwynedd to play their effective part in delivering a quality experience which does full justice to the magnificence and grandeur of this most beautiful part of Wales. It concerns all aspects of the visitor experience, from pre-visit and decision making, to the visit itself through to the journey home and lasting impressions.

This plan accords with ***Tourism 2020***, the Welsh Government Strategy for Tourism 2013-2020, which emphasises the importance of outdoor tourism, the environment, culture and events, as well as promoting Wales to Welsh residents. The strategy also notes the significance of place building, including destination management, setting strategic priorities, supporting regeneration, and ensuring authentic experiences and sustainable ways of working.

The underpinning vision of the Gwynedd Destination Management Plan is:

Gwynedd as a top class integrated quality visitor destination valued for its internationally renowned special landscapes, its spectacular built environment and its unique Welsh culture.

The main aims of the Gwynedd Destination Management Plan 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.

3. CONTEXT AND BACKGROUND

The national picture

Numerous national, regional and local organisations give priority and have responsibility for tourism in Wales.

The Programme for Government of the Welsh Government gives considerable priority to the development of tourism activity and niche markets and to securing maximum benefit from major events in our high profile venues. It also aims to Promote Wales as a destination by making a high quality tourism offer and working to extend the tourism season and associated benefits. It also notes the aim of identifying funding opportunities to improve the visitor infrastructure and product in Wales and to support investment in staff training and management to support a high quality tourism industry.

In addition to the national tourism strategy *Tourism 2020*, the **Welsh Government** has recently published its new regeneration strategy *Vibrant and Viable Places*, which recognises that *the historic environment is an outstanding asset which contributes to quality of life and economic viability. Its contributions to regeneration include: physical assets, local distinctiveness and a sense of place, narratives which bind communities and give confidence and a sense of belonging (and) attractions for visitors.*

Visit Wales has challenged every local authority in Wales to develop a destination management plan in pursuit of nationally recognised issues of sustainability, quality, competitiveness and partnership within the tourism industry.

The regional and local picture

At the regional level in Gwynedd, both Tourism Partnership North Wales and Tourism Partnership Mid Wales are supporting the process and actively involved in its development.

Tourism Strategy North Wales 2010-2015 identifies a two-fold challenge:

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

The Mid Wales Regional Tourism Strategy, which includes Meirionnydd provides a framework to support the tourism sector in the region to maximise the potential of the industry for the benefit of businesses and local communities. The strategy notes the following as some of its strategic priorities:

- *To provide the appropriate infrastructure and high quality, sustainable, distinctive destinations, facilities and services, that will encourage more visitors to visit throughout the year, thereby encouraging growth in the visitor economy.*
- *To encourage more local people to follow and develop worthwhile careers in the tourism industry.*

The Snowdonia National Park Management Plan 2010-15 commits the National Park Authority to *increase the sustainability of tourism, as established in regional strategies, by improving skills across the public and private sectors and communicating sustainability principles to tourism businesses and visitors.*

Gwynedd Council's new Strategic Plan contains elements designed to strengthen the resilience of businesses and keep economic benefit local, improve access to work and overcome barriers. It makes specific reference taking advantage of our strengths, the rural agenda and putting the customer first.

Gwynedd Economic Partnership (PEG) is an open and inclusive membership body which includes public, private and third sector representation. PEG's tourism sub-group has been asked to oversee destination management in Gwynedd, to set long term strategic aims and objectives and roll out an action plan.

The tourism offer and product

A full analysis of the following can be seen in **Appendix A**.

- **Visitor attractions**

Gwynedd is home to iconic natural and heritage attractions that include Snowdon, the Snowdonia National Park, an Area designated for its Outstanding Natural Beauty (AONB), one of the longest sections of the new Wales Coastal Path, blue flag beaches and marinas, North Wales' largest forest, over 100 lakes, 2 UNESCO World Heritage sites, as well as the Dyfi Biosphere Reserve. Gwynedd's slate mines are also currently on a UK shortlist for World Heritage Site status.

The area is a vital part of the Welsh heartland, with over 69% of the population being fluent Welsh speakers.

Two of the county's strongest sectors include the outdoors and heritage and two of Wales' top ten paid tourist attractions are in Gwynedd – Portmeirion and Caernarfon Castle, which together account for over 431,000 visitors in 2011.

There are some 170 visitor attractions in total, including steam railways, museums and heritage centres, art galleries and activity parks. Gwynedd has a wide array of quality pubs, restaurants, theatres and leisure facilities and the area is home to over 200 outdoor activity operators.

Two significant consortia are actively involved in promoting attractions in the area; these are Ten Top North Wales Attractions and Attractions of Snowdonia.

- **Accommodation**

According to the 2011 Gwynedd Bedstock Survey, over 78% of its 125,000 tourist bed spaces are within the caravan and camping sector, almost 13% in self-catering, over 6% in serviced accommodation and the rest in other forms of accommodation. From STEAM 2011 bedstock analysis for North Wales as a whole, 67% was in caravan and camping, 11% in self-catering and 12% in serviced accommodation (STEAM is a model for assessing trend, volume and value of tourism activities).

The serviced accommodation sector is less well represented in Dwyfor (11.9%) than the other parts of the county, i.e. Arfon (27.8%) and Meirionnydd (22.6%).

Only a small number of accommodation in Gwynedd has been graded by Visit Wales – only 26%. This suggests that an increase in the volume and quality of serviced accommodation in certain parts of the county may be required, especially where additional demand is generated by the development of significant new facilities such as Plas Heli at Pwllheli.

- **Visitor activities**

Gwynedd is home to a number of renowned activity centres and many new centres of excellence are being developed to reinforce the importance of the activity sector to the county. E.g Plas Menai National Watersports Centre, Tryweryn White Water Centre, and Coed-y-Brenin Forest Park and Mountain Biking Centre, the Eryri Centre of Excellence, Plas Heli – the Welsh National Sailing Academy and Event Centre in Pwllheli, and a Coastal Tourism Centre of Excellence in Aberdaron.

As with attractions, some of the most popular activities relate to the outdoors and the heritage of the area. From recent Gwynedd Council data walking is by far the most popular rural holiday activity at 31%, followed by mountain biking at 16%, adventure and multi-activities at 13% and water activities at 12%. Climbing accounted for 10% of activity, then wildlife and bird watching at 8% and trekking at 5%.

- **Cultural attractions**

In addition to the area's many historical attractions, it has cultural centres such as Gwynedd Museum and Gallery, the Welsh Slate Museum at Llanberis, local museums, galleries and cultural centres, and the new £44 million performing arts and innovation centre PONTIO in Bangor, due to open in 2014.

- **Conference centres**

Gwynedd has excellent facilities for conferencing and conference tourism can be an effective way of attracting business visitors and providing facilities at different times of year. Conference tourism can also be combined with activity tourism in relation to management training course and team-building exercises.

- **Events**

Gwynedd has demonstrated its capacity and ability to host a wide range of events and festivals and many more localised events.

Festivals such as Wakestock in Abersoch and Festival No 6 at Portmeirion have proved highly successful and sports events such as the Snowdonia Marathon, Snowdon Race and Etape Eryri continue to attract many national and international athletes to the area, contributing over £5 million to the local economy during 2012-13.

The Welsh National Sailing Academy and Event Centre in Pwllheli hosts a number of international events which helps to raise the area's profile internationally. In addition, local events and festivals such as village fetes and shows, weekly choir recitals and concerts provide a real experience of cultural life. Events can be a significant means of attracting visitors for specific reasons and generating year-round tourism activity to boost the visitor economy.

- **Other developments**

Other relevant initiatives include Cadw's Our Heritage and Princes of Gwynedd projects, the Experience Gwynedd Rural Development Plan project, recent investment in the 300 km of Wales Coastal Footpath in Gwynedd, the INTERREG Outdoor Tourism Project, the Natural Resources Wales Communities and Nature programme, significant investments in the Mon a Menai Strategic Regeneration Area and Blaenau Ffestiniog, plus the Green Seas Coastal Communities Project.

Visitor profile and motivation

A full analysis of this information is available in **Appendix B**.

According to the Gwynedd Visitor Survey 2009, the following proportions of visitors stating their main reasons for visiting Gwynedd as:

- Scenery / landscape (54%),
- Coast (48%),
- Previous visit (44%),
- Peace and quiet (35%),
- Sightseeing / attractions (28%).

93% of visitors said they would return to Gwynedd and 78% would recommend others to visit the area.

The age profile of visitors to Gwynedd is similar to Wales overall in that visitors tend to be older, rather than younger – “young middle-aged”. There were however, slightly fewer 55+s in Gwynedd (36% compared with 42% on average) and slightly more 35-44s (26% compared with 22% North Wales/19% all Wales).

The demographic profile of visitors to Gwynedd reflects that of visitors to North Wales, i.e. ABC1 (62%) C2DE (36%)

Unsurprisingly, the type of break/holiday taken by visitors to Gwynedd reflects the trend for North Wales as a whole:

- Short break (38%),
- Main holiday (36%),
- Secondary holiday (26%).

Gwynedd has a disproportionate dependence on non-serviced accommodation (86% of bedstock), even compared to north Wales as a whole. As international visitors largely stay in serviced accommodation the current tourism accommodation product offer in Gwynedd lends itself more to domestic than international visitors.

As with Wales as a whole, international visitors represent a small percentage of all visitors. Domestic UK – and particularly English visitors represent by far the largest market for Gwynedd, both currently and for the foreseeable future.



Dolgellau

4. CONSULTATION

A key part of the development of this Destination Management Plan was consulting with the main public, private and third sector organisations and individuals directly or indirectly involved in the development and delivery of tourism in Gwynedd. This was done in two different ways.

a) **An online business survey** (results can be seen in **Appendix C**).

Overall, the business survey indicated a number of core issues and areas for improvement. The main issues raised were:

- Roads, parking and other public services,
- the need for more action and engagement at the local level, e.g. service provision, business support, information flow, marketing and promotional support.

Many of these observations and recommendations have informed or been incorporated into the action plan which should benefit both the visitor experience and the life of Gwynedd residents.

b) **A one-day seminar and workshop at Plas Tan y Bwlch**

An event was hosted at the National Park Study Centre in Maentwrog, the main aim of which was to explain the destination management planning process and why it was important to engage with key stakeholders at an early stage.

The main points covered in presentations in addition to the main findings of the discussions are included in **Appendix D**.



Dolbadarn Castle, Llanberis

5. SOME KEY ISSUES

Gwynedd's current position can be summarised in the following SWOT analysis, which has been informed by the consultation process described in section 4 above.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • World class beautiful landscapes and coastline • Spectacular built environment and historic features • A unique and accessible culture • Proximity to domestic markets • Wide range of visitor attractions • Good supply and variety of holiday accommodation • A destination for activity or peace and quiet 	<ul style="list-style-type: none"> • Seasonality of tourism activity • Needs better tourism and public facilities • Dependence on lower cost self-catering sector • Lack of high quality serviced accommodation • Few major all-weather visitor attractions • Relative weakness of the retail offer
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Better partnership working between sectors • Further development of year-round outdoor tourism • Development of quality hotel accommodation • Tourism development linked to centres of excellence • Heritage and cultural tourism growth • Quality shopping based on local products • A wider range of events for visitors and residents • More coordinated marketing 	<ul style="list-style-type: none"> • Other rural and outdoor tourism destinations • More aggressive and effective marketing by other areas • Economic decline of rural areas and market towns • Decline in relevant skills and quality of visitor welcome • Decline in quality of the public realm

Accommodation Development

The limited range of serviced accommodation (particularly quality hotels) restricts opportunities to extend the season through short breaks; while the limited range of indoor attractions and night-time activities is not conducive to growth from the families and youth sectors. However, attracting investment is hard in the current economic climate.

Skills Development

Visitor satisfaction in Gwynedd is slightly lower than in Wales as a whole, with 53% for Gwynedd vs. 58% for Wales (source: Gwynedd Destination Management and Marketing Audit Data Review 2012). While this is not particularly statistically significant, is this as a result of an underlying problem relating to customer service skills and attitudes?

Finding ways to address the needs of recruiting, training and, where possible, retaining key staff is a first step towards improving customer service skills.

Attracting Investors

The current economic climate is not conducive to attracting investment, particularly where returns on investment may be longer-term, as in the tourism sector. However, given Gwynedd's limited range of serviced accommodation and the likely continued growth in the type of visitors who find Gwynedd attractive (such as activity enthusiasts and empty-nesters seeking a tranquil escape in scenic countryside), a weather eye should be kept out to attract investment in quality serviced accommodation – and particularly hotels.

An increase in quality serviced accommodation could help Gwynedd grow its tourism by attracting visitors from a market segment that currently underperforms in Gwynedd, compared to its performance elsewhere in the UK.

Shopping: An Under-Appreciated Opportunity?

One area in which Gwynedd “fails” to match visitor satisfaction with North Wales as a whole is in shopping: Shopping was only rated positively by 34% of visitors across Gwynedd compared with 41% on average for North Wales. 13% of the business survey respondents cited the need for improved shops and shopping opportunities (source: Gwynedd Destination Management and Marketing Audit Data Review 2012).

More significantly, in terms of economic impact and given that shopping represents the largest single item of expenditure by visitors to Gwynedd, as well as the largest beneficiary of employment generated by visitors according to the 2011 STEAM Report, there is a strong case for improving the shopping offer in Gwynedd.

6. MARKETING

Gwynedd as a tourism destination area is promoted under the marketing area banner of Snowdonia Mountains and Coast. This is an apt title for the wider area, it is physically distinctive and descriptive.

The Snowdonia Mountains and Coast Marketing Area partnership was established in 1995 covering the whole of Gwynedd, rural Conwy (i.e. the area to the south of the A55) and Hiraethog and is promoted in partnership by Gwynedd Council and Conwy County Borough Council.

Current marketing activity includes the annual production and distribution of over 100,000 copies of the **Snowdonia Mountains and Coast** brochure. In addition specialist guides are produced e.g. activities and fishing.

A strong emphasis is given to social media and the website to promote other tourism products in the area. With over 500,000 visits to the Snowdonia Mountains and Coast website during 2012 digital content will provide greater opportunities to market and promote the area over the next three years.

The area, based on previous marketing activities, will look at new opportunities for solus activity in partnership with the public and private sectors.

The marketing of Gwynedd sits within the context of the marketing of Wales as a whole, particularly when considering international markets. Therefore synergies with the national marketing of Wales will be sought.

Collaborating with key partners will also be imperative when promoting Gwynedd efficiently and effectively as a short break, holiday or day visit destination.

Gwynedd's Market Appeal

Gwynedd offers an appealing mix of nature, culture, heritage, and activities, with a concentration of strong, iconic tourism attractions. A full analysis of the area's market appeal can be seen in **Appendix E**, but the following can be noted as examples:

Nature:

- Mt. Snowdon and a significant number of the highest mountains in Snowdonia,
- 300 km of coastline, much of which includes the Wales Coastal Path,
- Visit Wales' *Evaluation of UK Consumer Campaigns* in January 2009 suggested that Gwynedd – and Snowdonia in particular – was the most visited part of Wales amongst these respondents (27% of survey respondents had visited Snowdonia).

Culture/Heritage:

- A key part of the Welsh speaking heartland where 69% are Welsh-speaking. 68% of visitors to Gwynedd considered this to be an asset,
- A distinctive heritage dating from prehistoric times through the Roman period, post industrial and to the present day,
- Significant buildings such as Caernarfon and Harlech Castle World Heritage Sites, and more recent architectural wonders such as Penrhyn Castle and Portmeirion.

Activities:

- Over 200 outdoor activity providers established in the area,
- National Centres of Excellence in outdoor activities,
- Golf – 16 golf courses, championships links courses, Royal St. David's Harlech, Aberdovey and Nefyn listed in *Golf Monthly's* top UK and Ireland golf courses.

The **North Wales Outdoor Sector Vision and Action Plan 2009 - 2015** highlights Gwynedd's significant competitive strengths in the activities sector:

The high concentration of outdoor activity centres, specialist activity providers, coaches and guides marks Gwynedd out as a destination which can provide consistently high quality opportunities across an impressive array of activities.

Recent work by **Blue Sail** for the **INTERREG Wales-Ireland Outdoor Tourism Project** places the North Wales offer among the best in Europe and a serious challenge to regarded World leaders in the field such as New Zealand. They go on to say that:

We think that the main opportunity for North West Wales is to promote Conwy and Gwynedd as one destination for outdoor tourism; branding, repositioning and packaging the offer for a new larger dabbler and taster market which is where growth potential lies; and continue to inspire and cater for enthusiasts via the infrastructure of skills, centres, events and the quality of the destination offer.

Clear recommendations are also provided to develop the outdoor sector in Gwynedd and Conwy.

Market Focus

Gwynedd's Market Focus will be the following segments:

- "Independent Explorers" – those that shun the tourist honey pots, they like to interact with the place to understand culture, to meet its people,
- Day visitors – those within 2 hours drive,
- UK short-breakers – empty nesters, couples, families, and activity enthusiasts,
- UK longer holiday market – families,
- Overseas markets – activity, cultural and heritage tourism.

The Marketing messages will be:

- Dramatically beautiful scenic landscape (mountains and coast) and softer scenic lowland areas,
- Tranquillity (likely to be more focused on 'young middle-aged' and empty-nester segments),
- Adrenalin fuelled activities (likely to be more focused on younger, adventure enthusiasts),
- Accessibility (proximity to major market conurbations of the north west and midlands),
- Culture and heritage (built and natural),
- Authenticity (people, culture and language).

Marketing and Promotional Tools

The aim will be to promote the area as an all year round destination and attract day visitors, tourist looking for short breaks and holidays.

Various key messages and straplines will be developed to develop marketing platforms to promote the area.

Annual work programmes will be developed to communicate the key messages and to target the various priority segments.



Dwyrdd Estuary and Portmeirion

7. PRIORITIES AND ACTION PLAN

In order to ensure the success of the Gwynedd Destination Management Plan, collaboration with key stakeholders in the area and identifying and developing their roles at an early stage will be essential.

From the preceding destination management and marketing audit and its analysis, in addition to the consultation process strong indicators for action have emerged.

From the online survey that was carried out as part of this exercise (**Appendix C**) the following can be noted 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.

This indicates the need for a combined approach which tackles the provision and management of facilities for both visitors and residents, or in other words improving visitor satisfaction while seeking to improve the local economy, the environment and the quality of life of the local community.

This calls for an approach which:

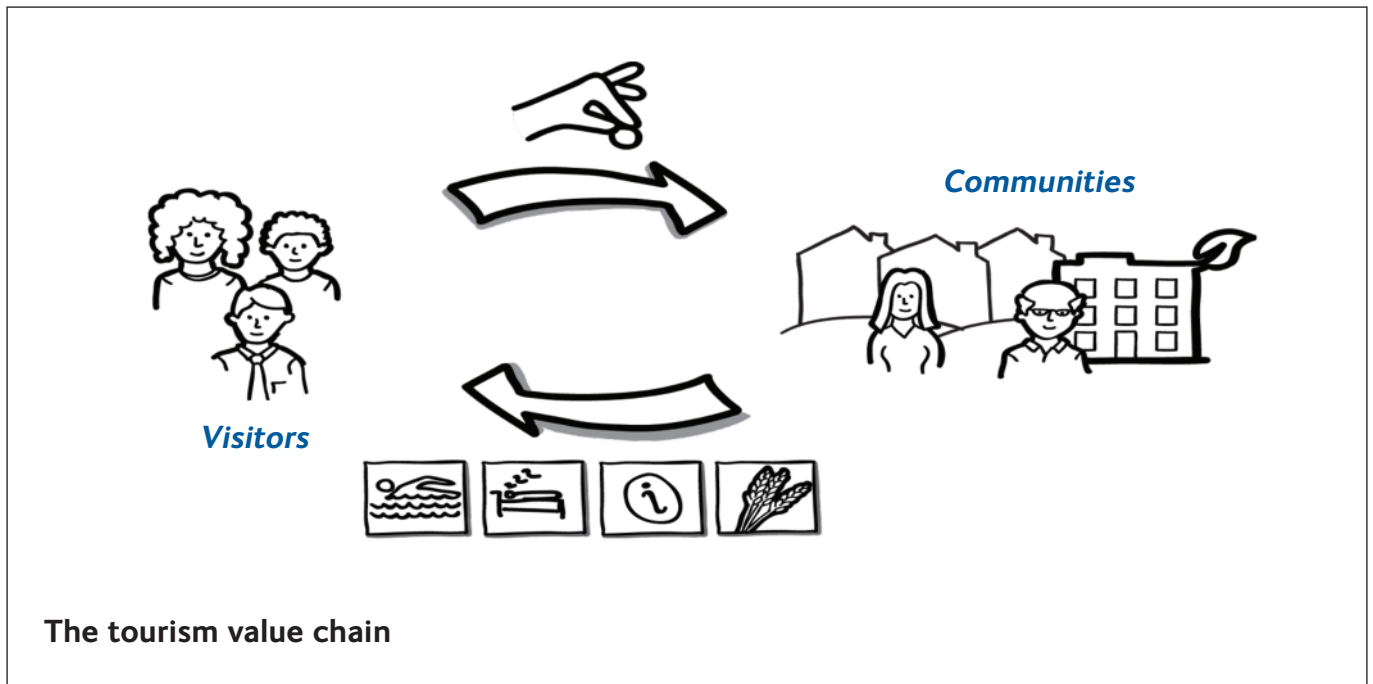
- creates the right structures to ensure that all stakeholders are working together to an agreed strategy,
- addresses all aspects of the quality of the visitor experience within the tourism value chain, from pre-visit images and contact, to booking and information, initial welcome and orientation, quality of all facilities, services and infrastructure, farewell and after-visit contact,
- Pursuing a cyclical quality management process involving identifying needs, setting standards, undertaking improvements, and monitoring impacts on visitors, local people, tourism enterprises and the environment.

The diagram on page 16 illustrates the mutually supportive tourism value chain sometimes called the circular economy whereby visitors and residents interact in terms of local goods and services, accommodation, attractions, activities and information, with visitor spend ideally returning to the local economy for the further development of sustainable communities.

This systematic approach will ensure that the main issues identified at this stage are clearly addressed and reviewed periodically in the light of the action plan, its outputs and subsequent effects.

The Gwynedd Destination Management Plan will consider:

- Gwynedd's image as a holiday destination and quality destination,
- The reality of the visitor experience,
- The split in market sectors and relative performance,
- The effectiveness and return on private and public sector investment.



The Plan will also revise the strengths, weaknesses, opportunities and threats and respond to these in partnership. These include:

- Accommodation mix and standards,
- The catering sector,
- Local and sub-regional attractions,
- Information and interpretation.

Infrastructure requirements (include the whole of the built and natural environment of the area) will be explored, including:

- Parking and traffic management provision,
- Streetscape,
- Signage.

All these elements will be considered in the production of the action plan, from which will cascade a number of agreed and itemised outputs that will be costed and prioritised, with identified lead bodies and time allocations included.

The outputs will in turn feed into the destination management plan, including a monitoring system which will ensure a co-ordinated approach to implementation and review.

Working with agreed systems will help to ensure accurate monitoring of outputs and introduce modifications where necessary to provide a seamless experience for the visitor from initial interest to departure. It will also give the trade valuable visitor feedback and provide an early warning system of any problems facing visitors or residents in the area.

Monitoring

A monitoring system, using both quantitative and qualitative data, will be used to measure the effectiveness of the plan. The recently developed European Tourism Indicator System for the sustainable management of destinations and reports produced by the Tourism Intelligent Unit will be used.

Surveys will also be undertaken to measure the effectiveness of the various marketing campaigns that will be undertaken. Qualitative methods such as customer service surveys, visitor satisfaction surveys and feedback from operators will also enable us to monitor how effective our destination management plans have been and highlight areas for improvement.

Potential sources of funding to deliver the Destination Management Plan

Many funding sources exist to facilitate the implementation and delivery of his plan. The following can be noted as some sources for further investigation and targeting:

- Vibrant and Viable Communities Regeneration Strategy,
- European Funding 2007-2013 and 2014-2020,
- Gwynedd Council Strategic Plan,
- Tourism Investment Support Scheme,
- Development of visitor giving schemes,
- Lottery funding,
- Arts Council of Wales.

Developing the action plan

The following format has been proposed for the structure of the plan.

Following the consultation process and in accord with Tourism 2020, the following action headings will form the Gwynedd Destination Management Action Plan:

- **ENVIRONMENT,**
- **KEY PRODUCTS,***
- **PUBLIC REALM, ACCOMMODATION AND CUSTOMER SERVICES,**
- **MARKETING.**

**Key products include outdoor adventure, culture and heritage, food and events.*

In addition, the plan will be further subdivided into the three areas of Gwynedd, namely Arfon, Dwyfor and Meirionnydd. With a table highlighting the four key areas noted above per area. This will ensure that it is both co-ordinated and closely targeted according to topic and location.

Next Steps

This Destination Management Plan cannot be delivered without working in partnership and through true collaboration.

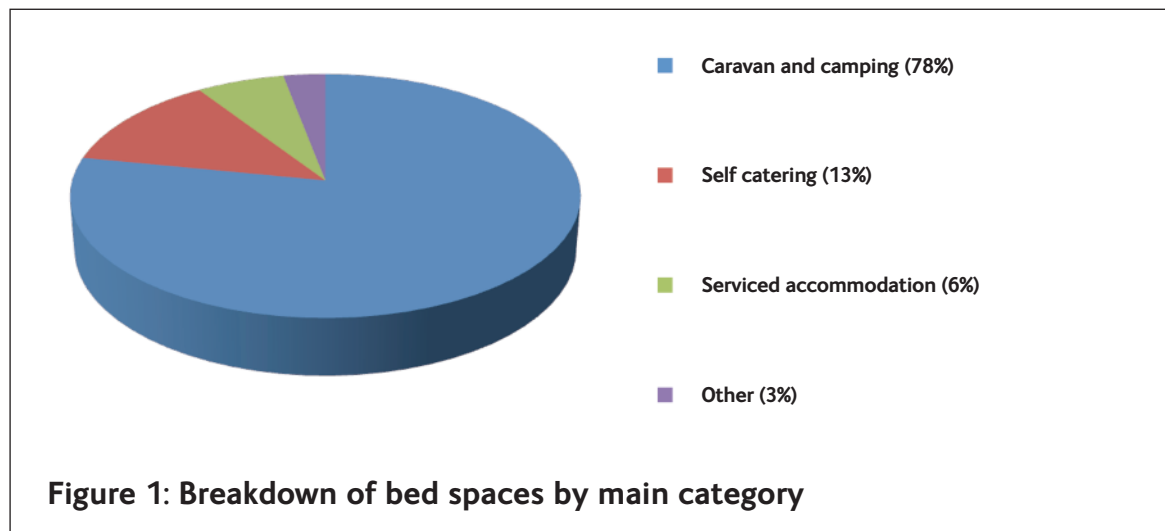
The Gwynedd Economic Partnership Tourism Sub Group will provide strategic direction for the development, implementation, monitoring and delivery of the Action Plan of the Destination Management Plan. The Sub Group will also be responsible for ensuring the support of all elements of the tourism sector for the Plan.

The delivery of the Destination Management Plan and its Action Plan will be led by the Tourism, Marketing and Customer Care Service of Gwynedd Council in collaboration with relevant Gwynedd Council Departments and key organisations and stakeholders in Gwynedd.

APPENDIX A

A full analysis of the Tourism Offer and Product in Gwynedd

- **Accommodation**



According to the 2011 Gwynedd Bedstock Survey, over 78% of its 125,000 tourist bed spaces are within the caravan and camping sector, almost 13% in self-catering, over 6% in serviced accommodation and the rest in other forms of accommodation.

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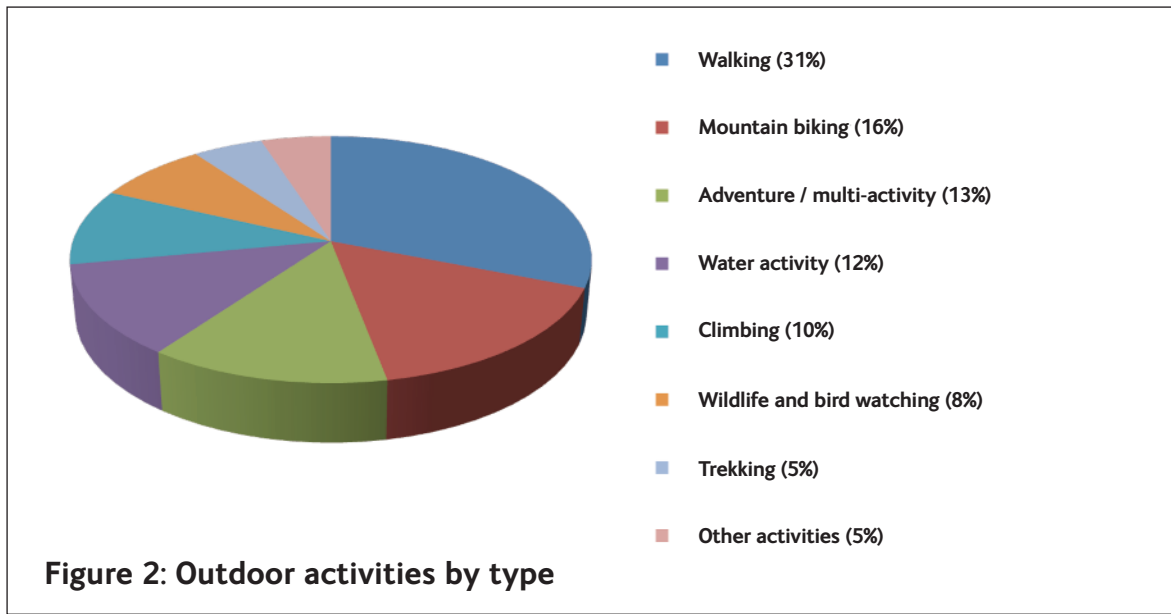
The serviced accommodation sector is less well represented in Dwyfor (11.9%) than the other parts of the county, i.e. Arfon (27.8%) and Meirionnydd (22.6%).

Only 26% of those who responded to the survey noted that they were graded by Visit Wales or other grading boards, meaning that over 74% were not graded. This suggests that an increase in the volume and quality of serviced accommodation in certain parts of the county may be required, especially where additional demand is generated by the development of significant new facilities such as Plas Heli at Pwllheli.

- **Visitor activities**

As with attractions, some of the most popular activities relate to the outdoors and the heritage of the area. From recent Gwynedd Council data walking is by far the most popular rural holiday activity at 31%, followed by mountain biking at 16%, adventure and multi-activities at 13% and water activities at 12%. Climbing accounted for 10% of activity, then wildlife and bird watching at 8% and trekking at 5%.

Gwynedd also includes a number of renowned activity centres such as Plas Menai National Watersports Centre, Tryweryn White Water Centre, and Coed-y-Brenin Forest Park and Mountain Biking Centre. It also has several new centres of excellence, including the recently established Eryri Centre of Excellence **Snowdonia one big adventure** focusing on southern Snowdonia, Plas Heli – the Welsh National Sailing Academy and Event Centre in Pwllheli, and a Coastal Tourism Centre of Excellence centred on the area around Aberdaron.



- **Cultural attractions**

In addition to the area’s many historical attractions, it has cultural centres such as Gwynedd Museum and Gallery, the Welsh Slate Museum at Llanberis, local museums, galleries and cultural centres, and the new £44 million PONTIO performing arts and innovation centre in Bangor, due to open in 2014.

- **Conference centres**

As well as excellent facilities at Bangor University and other colleges, specialist centres such as Plas Tan y Bwlch National Park Study Centre and Nant Gwrtheyrn National Language and Centre are available as conference venues, along with a number of larger hotels throughout the county. Conference tourism can be an effective way of attracting business visitors and providing facilities at different times of year. Conference tourism can also be combined with activity tourism in relation to management training course and team-building exercises.

- **Events**

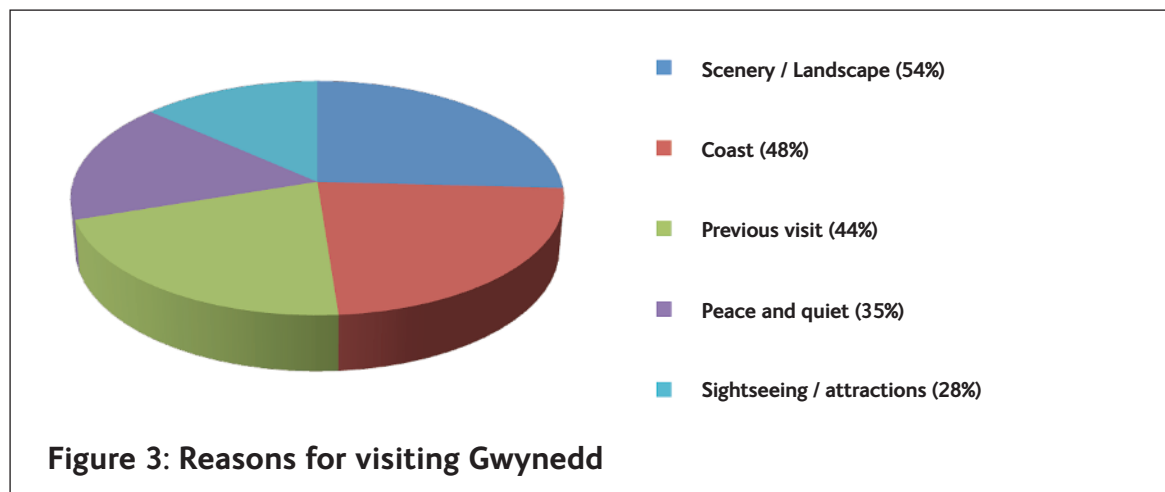
Gwynedd has demonstrated its capacity and ability to host a wide range of events and festivals and many more localised events. Festivals such as Wakestock in Abersoch and Festival No 6 at Portmeirion have proved highly successful and sports events such as the Snowdonia Marathon, Snowdon Race and Etape Eryri continue to attract many national and international athletes to the area, contributing over £5 million to the local economy during 2012 -13. The Welsh National Sailing Academy and Event Centre in Pwllheli hosts a number of international events which helps to raise the area’s profile internationally. In addition, local events and festivals such as village fetes and shows, weekly choir recitals and concerts provide a real experience of cultural life. Events can be a significant means of attracting visitors for specific reasons and generating year-round tourism activity to boost the visitor economy.

- **Other developments**

Other relevant initiatives include Cadw’s Our Heritage and Princes of Gwynedd projects, the Experience Gwynedd Rural Development Plan project, recent investment in the 300 km of Wales Coastal Footpath in Gwynedd, the INTERREG Outdoor Tourism Project, the Natural Resources Wales Communities and Nature programme, significant investments in the Mon a Menai Strategic Regeneration Area and Blaenau Ffestiniog, plus the Green Seas Coastal Communities Project.

APPENDIX B

Visitor profile and motivation



According to the Gwynedd Visitor Survey 2009, the following proportions of visitors stating their main reasons for visiting Gwynedd as:

- Scenery / landscape (54%),
- Coast (48%),
- Previous visit (44%),
- Peace and quiet (35%),
- Sightseeing / attractions (28%).

93% of visitors said they would return to Gwynedd and 78% would recommend others to visit the area.

The age profile of visitors to Gwynedd is similar to Wales overall in that visitors tend to be older, rather than younger – “young middle-aged”. There were however, slightly fewer 55+s in Gwynedd (36% compared with 42% on average) and slightly more 35-44s (26% compared with 22% North Wales/19% all Wales).

The demographic profile of visitors to Gwynedd reflects that of visitors to North Wales, i.e. ABC1 (62%) C2DE (36%)

Unsurprisingly, the type of break/holiday taken by visitors to Gwynedd reflects the trend for North Wales as a whole:

- Short break (38%),
- Main holiday (36%),
- Secondary holiday (26%).

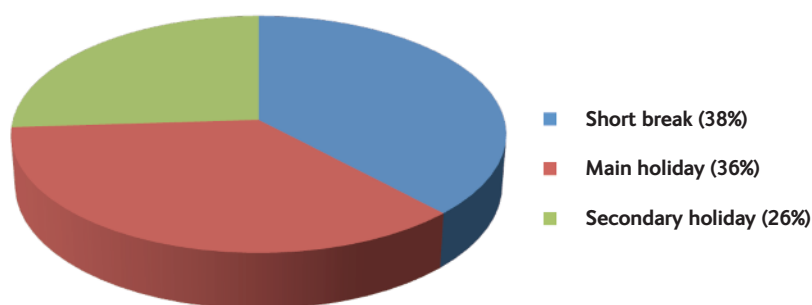


Figure 4: Type of holiday in Gwynedd

Gwynedd has a disproportionate dependence on non-serviced accommodation (86% of bedstock), even compared to North Wales as a whole. As international visitors largely stay in serviced accommodation (particularly hotels and bed and breakfasts), the current tourism accommodation product offer in Gwynedd lends itself more to domestic than international visitors.

As with Wales as a whole, international visitors represent a small percentage of all visitors. Domestic UK – and particularly English visitors represent by far the largest market for Gwynedd, both currently and for the foreseeable future.

The key markets for Gwynedd are residents of conurbations which are 1.5 – 3 hours drive away in the north west and midlands around Liverpool, Manchester and Birmingham i.e. domestic rather than international.

Table 1

Analysis by Sector of Expenditure: (£'s millions) 2011	
Direct Revenue:	
Shopping	192.77
Accommodation	102.38
Food & Drink	143.80
Transport	72.88
Recreation	59.31
Total Direct Revenue	571.15
Indirect Expenditure	230.72
VAT	114.23
TOTAL	916.09

Table 2

Sectors in which Employment is supported: (FTE's) 2011	
Direct Employment:	
Shopping	3757
Accommodation	3653
Food & Drink	3074
Recreation	1539
Transport	696
Total Direct Employment	12719
Indirect Employment	3187
TOTAL	15906

Figure 5: Gwynedd STEAM data 2011

APPENDIX C

Results of surveymonkey business survey

Results are given for the most frequently given responses and the top ten are listed. Some totals exceed 100% where multiple answers were given to questions.

Where do most of your visitors come from?

England	39%
Wales	29%
Manchester	21%
Cheshire	21%
West Midlands	17%
Europe	13%
Germany	13%
Australia	9%
South east	6%
Gwynedd	3%

Why do you think they visit the area?

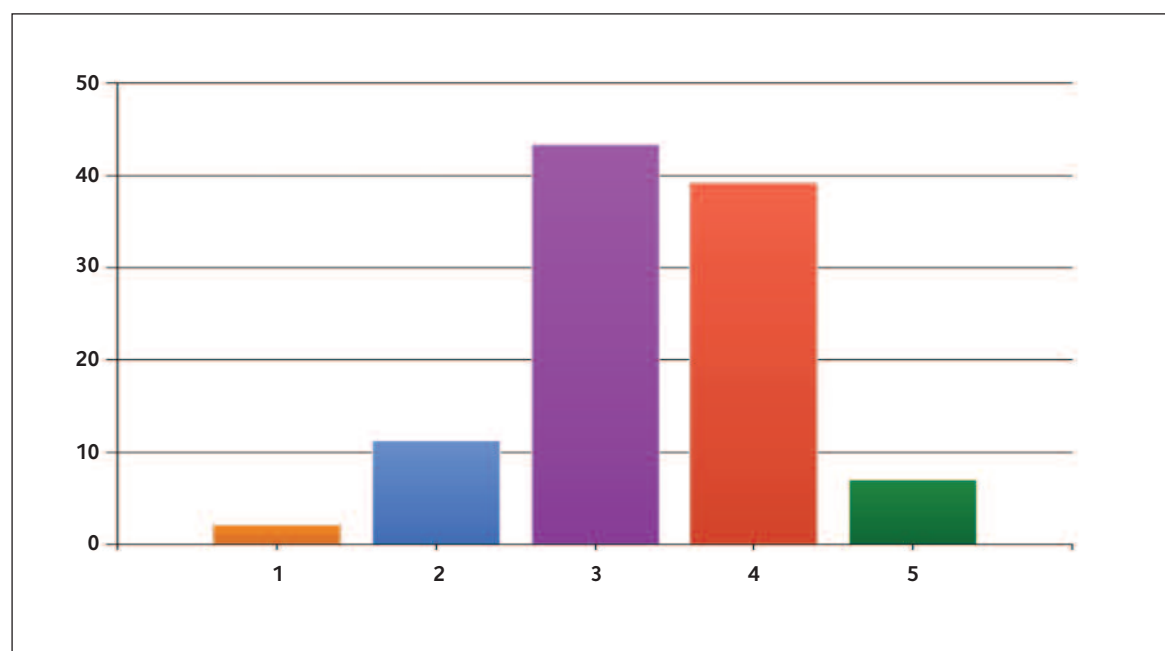
Beaches	27%
Mountains	23%
Beauty	17%
Activity	13%
Family	12%
Peace and quiet	6%
Wales	5%
Trains	4%
Break	4%
Cycling	4%

Gwynedd's main competitors?

Scotland	23%
Cornwall	20%
Peak district	16%
Wales	15%
Anglesey	9%
Coast	8%
Brecon Beacons	7%
Abroad	6%
South West	5%
Lake District	2%

Quality of the visitor experience?

On a scale of 1-5 (5 being the best), how would you rate the quality of the visitor experience to Gwynedd?



If improvements are needed, what are they?

Better visitor facilities	28%
Better public facilities	28%
More and better attractions	21%
Better parking provision	20%
Better local services	19%
More tourist friendly engagement	17%
Improved shops and shopping opportunities	13%
Better road and pedestrian access	8%
Improved bins, refuse and litter management	2%
Better outdoor activities promotion	2%

Infrastructure improvements?

Better public services	26%
Improved roads	20%
Better public transport	19%
More visitor support and information provision	16%
Better parking provision	14%
Better train services	12%
Improved public toilets	8%
Better rail connections and information	4%
Improved hospital provision	4%
Improved signage	4%

Better partnership working?

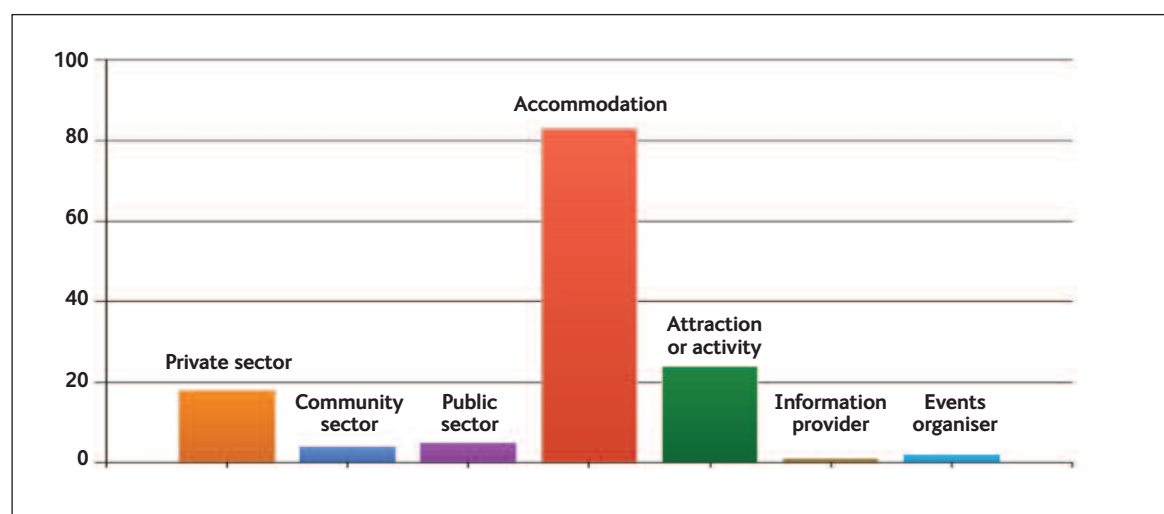
Greater support for local businesses	23%
More local engagement	23%
Improved tourist support and services	23%
Better tourism sector liaison	20%
Better parking provision	9%
Key role of Gwynedd Council	9%
Grants for local business development	5%
More and better marketing, including joint marketing	5%
Better local contact with tourism providers	4%
More and better promoted events	4%

Anything else?

Increase awareness of what Gwynedd has to offer	27%
Improved tourist information services	25%
Attract different types of visitor across age and interest ranges	24%
More attractions, including indoor and natural ones	20%
More local support and promotion	19%
Help with marketing	12%
Improved public services and amenities	8%
More advertising	7%
Reduce restrictions, e.g. parking and planning	4%
Improve quality	3%

Type of business or organisation?

Please indicate your type of business or organisation:



Respondents were asked finally to insert their email address if they wished to be further informed of developments with the destination management plan and associated activities and the majority did this.

Appendix D

Main points and workshop conclusions from stakeholder seminar 23 November 2012, Plas Tan y Bwlch.

Case Studies

CATALUNYA

- An autonomous region with a strong sense of identity and language,
- A diversity of tourism offers,
- A tourism strategy based on the principles of sustainability, competitiveness and social responsibility,
- Good stakeholder partnerships between public and private sector agencies and actors,
- Includes a territorial vision, not just a sectorial one.

SPEYSIDE

- The brand = the big idea – “*Scotland’s Natural Adventure*”,
- A critical mass of medium-large businesses,
- Commitment by local leaders/ambassadors,
- A results focus – targeting bed nights,
- Emphasis on branding & marketing (PR, web, social media),
- Skills base – outdoor activities,
- Public sector support (c.£120k – 50/50),
- “Anchor tenant” i.e. key organisation to harness the initiative,
- Community on board – extensive face-to-face consultations,
- Link to Visit Scotland national strategic framework (sub-sectors: golf, activities, wildlife, attractions),
- Leisure and conference sectors.

LOCHABER

- The brand = big idea – “*Outdoor Capital*”.
- Activity – youth emphasis / adrenalin sports (cf. Queenstown, New Zealand),
- High profile events – reflect brand / “sense of place”,
- Commitment by local leaders/ambassadors,
- Year-round.

Both the Scottish examples depended ultimately on the following key factors:

- A big brand idea,
- Community leaders and leadership,
- Strong community involvement.

ERYRI CENTRE OF EXCELLENCE

- EU backed project to develop Meirionnydd's outdoor adventure sector by spreading economic and social opportunities to surrounding businesses and communities,
- The associated Snowdonia – one big adventure project is based in four sustainable tourism sites,
- The project utilises south Snowdonia's outstanding natural resources to establish a coordinated and integrated activity hub as a catalyst to further develop tourism,
- It facilitates community involvement in the development of outdoor activities to ensure tangible economic benefits for the local population,
- It provides high quality, year-round experiences and opportunities for visitors and residents.

Workshop conclusions

MEETING VISITOR DEMANDS

- We need to do more to understand our visitors' needs and to capture information on their expectations through the use of websites, apps and suitable questionnaires during their visits;
- This would help to inform future customer care and product development aspects;
- Areas that might need attention included public facilities and infrastructure, suitable information provision, and amending opening hours to fulfil customer requirements more closely;
- There would also be merit in gauging the needs of local residents, in order to see where common benefit might be achieved;
- Working together more closely as a sector, and involving the wider community were suggested, along with further development of cultural networks for promoting events and activities;
- There was broad agreement that improving the welcome and the quality of accommodation and catering would be beneficial.

INFORMATION AND COMMUNICATION

- Better targeted communication, both in terms of conveying information and listening to visitors, and using a range of effective media, was highlighted;
- There was a need for cross-communication between different sectors engaged with visitors, in order to develop and agree common aims;
- One-to-one communication, in the form of local ambassadors, could be effective, as could more effective working with existing partnerships and resources;
- Tourist Information Centres were still vital to the local economy, but should become community hubs as well as information services for visitors, showcasing local products, events and activities, and possibly acting as one-stop shops for tourism and local economic development;
- More could also be done to impart pride in heritage and culture and promote local distinctiveness or sense of place.

COUNTY INFRASTRUCTURE

- It was important to keep local infrastructure up to standard in the face of economic pressures, including public transport and other facilities. Some of this may be achieved by responsible public departments working strategically and more closely together;
- Some of the most common issues raised included toilets, transport, roads and parking, as well as the need for better Internet and mobile phone coverage;
- Better maintenance and management of beaches and countryside sites, historic town centres, paths and other routes, and the provision of recycling hubs, possibly supported by a visitor gifting scheme, were also highlighted.

COLLABORATIVE STRATEGIC MARKETING

- Snowdonia Mountains and Coast was already well recognised as a key joint marketing initiative, but perhaps other sub-destinations needed to be identified within the area;
- A number of marketing organisations were discussed, with the observation that they could be working more effectively together;
- It was important not to try and do everything, but to do what the organisation was best at and resourced to deliver, but economies of scale could be achieved;
- The use of new media provided powerful and cost-effective opportunities to target different segment markets and be bolder with strong messages.



Penrhyn Castle, Bangor

APPENDIX E

Full analysis of the area's market appeal

NATURE:

- Mt. Snowdon, and a significant number of the highest mountains in Snowdonia;
- Other ranges include the Carneddau, Glyderau, Migneint, Rhinogydd and Rivals;
- 300 km of coastline, much of which includes the Wales Coastal Path;
- An Area designated for its Outstanding Natural Beauty (AONB) and Special Areas of Conservation (SAC), in addition to Snowdonia National Park;
- Visit Wales' **Evaluation of UK Consumer Campaigns** in January 2009 suggested that Gwynedd – and Snowdonia in particular – was the most visited part of Wales amongst these respondents (27% of survey respondents had visited Snowdonia).

CULTURE / HERITAGE:

- A key part of the Welsh speaking heartland where 69% are Welsh-speaking: this reinforces the distinctive, authentic “Welshness” of Gwynedd, which was considered an asset by 68% of visitors to Gwynedd;
- A distinctive Celtic history dating from prehistoric times through the Roman period, post industrial and to the present day;
- Corresponding artefacts and monuments including standing stones, hill forts and other features;
- Significant buildings such as Caernarfon and Harlech Castle World Heritage Sites, and more recent architectural wonders such as Penrhyn Castle and Portmeirion.

ACTIVITIES:

- Over 200 outdoor activity providers established in the area;
- Walking – 3,328km of footpaths, 291km coastal path, Slate Valleys paths and much more themes and way marked routes;
- Hiking, Mountain Walking and Climbing – 15 peaks over 3,000ft, and home to famous ranges such as Y Carneddau, Y Glyderau, The Moelwynion and The Arans;
- Cycling, Mountain and Downhill Biking – Gwynedd Recreational routes with around 50km off road paths, world class mountain biking routes at Coed y Brenin and new world class down hill biking routes in Blaenau Ffestiniog;
- Fishing – game, coarse and sea fishing opportunities in over 100 lakes and rivers and 300km of coastline;
- Golf – 16 golf courses, championships links courses, Royal St. David's Harlech, Aberdovey and Nefyn listed in *Golf Monthly's* top UK and Ireland golf courses;
- Sailing and other water sports – world class marinas and sailing opportunities including Plas Menai National Watersports Centre and the Sailing Centre of Excellence in Pwllheli.



Wakestock, Pwllheli