Mid Wales Regional Tourism Strategy




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1. Introduction

Tourism and the Mid Wales region

The Mid Wales Region comprises the Counties of Ceredigion, Powys and part of Gwynedd (Meirionnydd). It is not, however, a tourism destination in its own right. It is simply an administrative area that happens to encompass the existing destinations of the Brecon Beacons, Ceredigion and a range of individual communities across the rest of Powys and Meirionnydd (part of the Snowdonia destination).

Mid Wales might be considered the 'Cinderella' of the four Welsh tourism regions. Although it is the largest and lies in the centre of the country and arguably encompasses the most diverse natural product, access is generally less good, the resident population is smaller and the tourism infrastructure is less well developed and known.

However, it could also be said that the Region has the capacity, scope and attributes to capitalise on the growth markets of the future and that it performs relatively well given the inherent constraints. The Region attracts around 18% of all tourism spending in Wales, 20% of holiday visitor nights and 25% of business nights[1].

The overwhelming 'rurality' of the Region makes it very different. Much of the Region is relatively remote, the communities are small and numerous but often very active, binding tourism and agriculture and community life with common interests in food, management of the landscape and access to the countryside for a range of recreational activities.

Tourism is inordinately important to the region, contributing to local prosperity and quality of life across Mid Wales. Tourism already supports a significant number of jobs and injects much needed revenue into the economy. Gwynedd, Ceredigion and Powys rank 2nd, 4th and 5th amongst the 22 counties in Wales in terms of Tourism Economic Intensity which relates Tourism GVA to overall GVA[2]. It also supports the development of vital infrastructure and other economic activities.

Economic impact of tourism in Wales[3]
Mid Wales has received an average of 1.6 million trips over the last three years with related expenditure of £254m (UKTS). Mid Wales also received, around 80,000 overseas pa over this period (IPS).

GVA of tourism in the Mid Wales Unitary Authorities (2007):
- Ceredigion: £93m, 10% of the county's total GVA, supporting 4,100 FTEs.
- Powys: £122.2m, 7.6% of the county's total GVA, supporting 5,400 FTEs.
- Gwynedd: £206.7m, 11.6% of the county's total GVA, supporting 9,100 FTEs.

Based on the respective **STEAM models (2009),** it is estimated that approximately:
- 22% was spent in Ceredigion
- 52% was spent in Powys
- 26% was spent in Meirionnydd

[1] UKTS, Domestic Tourism to Mid Wales in 2007, 2008 and 2009 (WG).
[2] Tourism Economic Activity in the Sub-Regions of Wales in 2007, Research Paper 2010.3, Calvin Jones, Welsh Economy Research Unit, Cardiff Business School.
[3] Appendix I: Economic impact

This rural region needs to pursue tourism because, first, this is where its natural comparative advantage lies and, second, there are few alternative sectors given the uncertainties surrounding public sector employment and agriculture, the other mainstays of the regional economy. In addition, tourism:

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

The role of the regional tourism strategy in Mid Wales

It is important that tourism is developed and managed in such a way as to ensure long-term prosperity and success. Tourism is, however, a complicated industry involving the private sector, national and local government and various other interested parties. Working alone, these parties cannot manage and sustain tourism. For tourism to be successful and make a constructive contribution to the local community, all parties need to co-ordinate activity and work to common goals. To this end, there is the over-arching national tourism strategy co-ordinated by Visit Wales (VW) and various local destination development strategies. The 'regional' tourism role in this context has been the subject of some debate in recent years and it is clear that this role varies between the regions depending on local circumstances.

As the regional role varies, so will the form of the regional strategy. The previous strategy ('Naturally Different') was seen as a 'destination strategy' with a goal and objectives for the Region but stakeholders do <u>not</u> see it as a destination in its own right and believe the role of the Regional Strategy should be to support the work of the individual destinations under the national umbrella work of VW.

Although the objectives in the old strategy are hard to argue with and much has been achieved, the regional action plan had no active engagement from those stakeholders responsible for implementation. The strategy was not adopted by local destinations, they did not actively work to deliver it or use the strategy to prioritise their own work.[4]

There is now a new national framework for destination management, marketing and investment with a clear allocation of responsibilities between local destinations and VW and recommendations for partnership working within and between the public, private and community sectors. Creative partnership working between all parties will be crucial for all concerned.

The regional tourism strategy in Mid Wales needs to address this new situation and set out how regional partners can contribute to national and local objectives through such creative partnership working. More specifically, <u>there are issues and opportunities affecting the development of tourism - at local destination and national level - that can best be resolved, managed and/or capitalised upon at regional level.</u> There are other issues and opportunities that are shared, or could be addressed, across local destination boundaries either because it is more practical or because it is more resource efficient.

[4] Further analysis of 'Naturally Different' is provided in Appendix II.

The role of this Strategy is to tease these regional issues out, prioritise them and look for the most effective ways of dealing with them. This strategy sets the objectives for regional tourism facilitation for the next five years. The action plan that emanates from the strategy adds value to the efforts of the individual destinations and/or fills strategic gaps, all in the context of the over-arching national strategies.

The departure from the previous Strategy is to leave product development and marketing plans to those with responsibility for them i.e. the local destinations and VW. The new Strategy is more about helping the destinations to achieve their goals more effectively, particularly where the solution lies in co-operative working at a regional level.

Tourism Partnership Mid Wales (TPMW) - which includes the three local authorities, two National Parks and tourism businesses - acts on behalf of VW to help support national and other appropriate local objectives for tourism in Mid Wales. It is a facilitator rather than a direct delivery agent and uses its resources to encourage members of the partnership and other stakeholders to take action to meet those objectives. This strategy is therefore a strategy for the whole tourism sector, not just TPMW, and for a wide range of other agencies with a regional remit that may include, or impact on, tourism.

The structure of the document

The following chapters cover:

- The broader policy context under which the industry works;
- The organisation of tourism in Wales;
- Tourism in the Region now;
- Regional issues;
- The strategy; and
- Summary Action Plan.

Acknowledgements

In preparing this report, the consultants have consulted extensively with TPMW officers and directors, the three other Regional Tourism Partnerships, the three local authorities and two National Parks, officers of VW and the Welsh Government (WG), private sector stakeholders and other interested parties. A workshop was held in Machynlleth on 31 March where the key issues and proposed strategic approach were debated. The consultants acknowledge the assistance that has been given to us by all concerned, helping us to prepare this report[5].

[5] List of consultees in Appendix III.

2. Policy issues in Mid Wales

National policy

At a national level, there are numerous policy documents that have a bearing on tourism across Wales, subject of course to the recent change in Government. Of these, the key documents are:

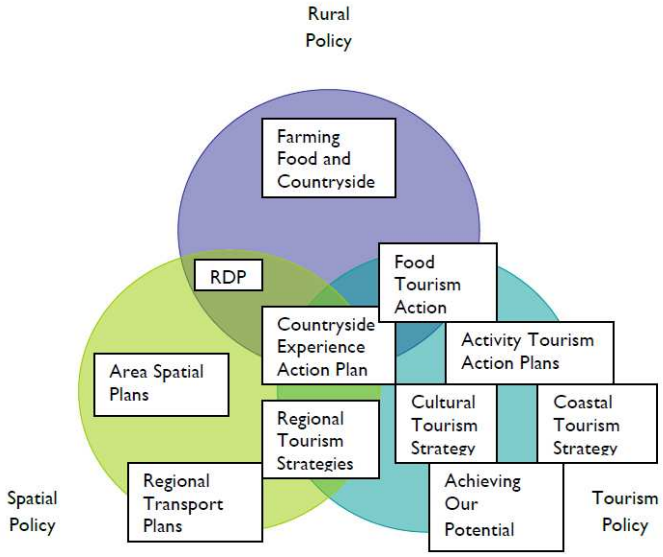
- *'One Wales – A Progressive Agenda for the Government of Wales', June 2007;*
- *'Economic Renewal: A New Direction', 2010*;
- *'The Wales Spatial Plan: People, Places, Futures'*, updated 2008; and
- *'Making the Connections: Delivering Beyond Boundaries'*.

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

The Wales Spatial Plan identifies Central Wales as an *area "that has huge potential for high quality tourism"*. In a broader context, the role of the plan is to make sure *… "decisions are taken with regard to their impact beyond the immediate sectoral or administrative boundaries; that there is co-ordination of investment and services through understanding the roles of and interactions between places and that we place the core values of sustainable development in everything we do."*

In spatial terms, the emphasis is on the key settlements, their relationship with their hinterlands and the mechanisms required to realise opportunities and counter threats to sustainable communities.

Tourism is impacted directly by spatial, rural and tourism policy. The diagram below, taken from the Rural Tourism Working group, reflects those policies that impact in Mid Wales.



Tourism policy

In specific tourism terms, there is a raft of relevant policy, under the umbrella of the national tourism strategy[6] and the Wales Sustainable Tourism Framework. The vision is to achieve *"a customer responsive, innovative, sustainable and profitable industry which makes an increasing contribution to the economic, social, cultural and environmental well being of Wales".*

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

Achieving Our Potential: 5 Challenges

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

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

Rural tourism

In 2011, a report on rural tourism in Wales was produced[7]. *"Tourism is particularly important in rural Wales, not just because of the income it generates but also because of the wider role it can play. It helps keep communities together through job creation; it allows farm diversification; and the provision of services for tourists can also be used by local people."* The committee came up with a number of strategic recommendations including:

[6] *'Achieving Our Potential'*, WG, 2006-13

[7] National Assembly for Wales, Rural Development Sub-Committee Inquiry into rural tourism in Wales, February 2011

Rural Development Sub-Committee Inquiry into rural tourism:
Strategic recommendations

- Review the effectiveness of all policy relating to rural tourism to inform the review of Achieving Our Potential;
- Allocate resources to promote rural Wales as a destination for sporting events in order to increase tourism;
- Encourage collaborative working amongst public bodies to promote tourism, supported by effective information sharing practices between organisations involved in delivering rural tourism as well as by Government;
- The Tourism Investment Support Scheme be evaluated in July 2012 to ensure that it is delivering the necessary support for the rural tourist industry;
- Prioritise rural Wales in the broadband roll out;
- Visit Wales should produce a comprehensive guide to the public transport which is available to and within Rural Wales;
- Visit Wales to produce a year round schedule of events in Wales, with the aim of combating issues around seasonality and to provide greater co-ordination; and
- The Minister for Heritage should work with the Welsh Local Government Association, National Park Authorities and CCW to produce trails including e-trails for all parts of Rural Wales.

Powys, Gwynedd and Ceredigion have benefited significantly from funding for projects under these strategic heads. The RDP remains as the major source of external funding for tourism in the Region.

The Rural Development Plan (RDP) for Wales 2007-2013 covers four areas namely: agriculture and forestry, environment and countryside, quality if life in rural areas and locally based approaches to rural development. Based on SWOT analyses, a series of measures have been defined under four axes. The two axes most relevant to tourism development in Mid Wales are:

Axis 3 – The Quality of Life in Rural Areas and Diversification of the Rural Economy.

- Measures to diversify the rural economy include:
  - Diversification into non-agricultural activities (311);
  - Support for the creation and development of micro-enterprises (312);
  - Encouragement of tourism activities (313).
- Measures to improve the quality of life in rural areas
  - Basic services for the economy and rural population (321);
  - Village renewal and development (322);
  - Conservation and upgrading of the rural heritage (323);
  - Training and information (331); and
  - Skill acquisition, animation and implementation (341).

Axis 4 - LEADER

  - Local development strategies (41);
  - Inter-territorial and trans-national co-operation (421); and
  - Running the local action group, acquiring skills and animating the territory (431).

Coastal tourism

Equally important to Mid Wales is the '*Coastal Tourism Strategy'* (2008), commissioned as input to the Wales Spatial Plan. It sets out the following vision for coastal tourism: *'An integrated year round coastal tourism industry, based on an outstanding natural environment and a quality tourism product that exceeds visitor expectations, whilst bringing economic, social, cultural and environmental benefits to coastal communities'.*

The following strategic aims and outcomes have been identified:

- To ensure that sustainable tourism is making an increasing contribution to the local economy of coastal communities;
- To improve the quality of the visitor experience;
- To achieve an integrated approach to the development and management of coastal tourism; and
- To safeguard and protect the environment and cultural heritage as a key resource for the development of coastal tourism.

Transport policy

Transport is integral to tourism; it enables and drives the sector. Tourists need to reach their destinations and, once there, visit sites through efficient, safe and reliable transport networks. Unfortunately, this fundamental issue is often neglected. Reducing visitors' dependency on the car will help reduce noise, air pollution, CO2 emissions as well as reducing congestion and disruption to local people. Tourists also provide an important source of patronage for local transport services, especially in the more sparsely populated rural areas, helping to ensure their viability.

The Wales Transport Strategy[8] provides the long term framework for transport policy in Wales. It specifies strategic priorities for transport and outlines how these will contribute to outcomes in other policy areas, including tourism. Improving access to visitor attractions, green spaces and the countryside is seen as an important outcome of the strategy as is helping to achieve a more sustainable tourism industry. Delivery is detailed in the National Transport Plan[9].

Short term objectives focus on getting visitors to move around their destination by sustainable forms of transport (bus, cycling, rail, foot) by:

- Providing better information to visitors on what sustainable transport options are currently available;
- Encouraging more local services linked to visitor attractions;
- Offering incentives to visitors to use public transport;
- Simplifying ticketing arrangements including integrated ticketing for different modes of transport; and
- Travel planning for key visitors attractions.

The longer term objectives are to increase the number of visitors using public transport for the main part of their journey (i.e. to get to Wales) through continued investment in public transport infrastructure and services and improving the integration of services and information to facilitate multi modal travel.

[8] One Wales: Connecting the Nation – The Wales Transport Strategy, April 2008
[9] National Transport Plan, WG, March 2010

The overall Vision of the **Regional Transport Plan**[10] is: 'To plan for and deliver in partnership an integrated transport system in the TraCC region that facilitates economic development, ensures access for all to services and opportunities, sustains and improves the quality of community life and respects the environment'

There are 10 priorities in the RTP. Those most relevant to tourism are to:

- Improve the quality and integration of the public transport system including the role of community transport;
- Maintain and improve the existing transport infrastructure (road and rail);
- Improve the efficiency, reliability and connectivity of movement within and between Mid Wales and the other regions of Wales and of England; and
- Deliver a co-ordinated and integrated travel and transport network through effective partnership working.

In 2009, the Sustainable Transport and Tourism Task and Finish Group, established under the auspices of the Sustainable Tourism Forum, produced a report whose aim was to examine ways of improving partnership working between the tourism and transport sectors in order to encourage more visitors to use sustainable forms of transport (rail, bus, cycling, walking etc) as opposed to the private motor car[11].

Local policies

Within the Region, the local destinations are at different stages in preparing their own tourism strategies. Although details are not available at the time of writing, it is clear that there are a number of common objectives i.e:

- Clarification of structures and local partnership arrangements;
- Review of branding and marketing activity;
- Product enhancement and local distinctiveness involving attractions, accommodation and settlements;
- The development of human resources for the industry; and
- Establishing appropriate monitoring procedures.

[10] Regional Transport Plan, Trafnidiaeth Canolbarth Cymru (TraCC, the Regional Transport Consortium for the Mid Wales region),

[11] Sustainable Transport and Tourism Assessment: A report by the Sustainable Transport and Tourism Task and Finish Group, November 2009

3. Organisational issues in Mid Wales

The tourism sector is characterised by its fragmented nature, the interdependence of component elements of the tourist product and the predominance of relatively small scale enterprises and organisations. It relies on the essential involvement of the public and voluntary sectors both directly e.g. information provision and destination marketing, and indirectly e.g. infrastructure development.

National organisation of tourism

A review of destination management and marketing within Wales was commissioned by VW[12]. The review provided the basis for a series of proposals for change and a preferred model for delivering destination management and marketing in Wales that would:

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

VW has now sought agreement on certain core principles to describe how central and local government might better work in partnership to deliver more sustainable tourism benefits. The aim is not to impose unnecessary new structures or tiers but rather:

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

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

Wales Tourism Partnership Framework Principles

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

[12] Destination management and marketing in Wales, The Tourism Company, October 2008

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

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

In essence, there is no prescribed structure for a destination; each area is to decide what is best for them. However, it is clear that VW is keen on the idea of local authorities working in partnership with private sector associations on destination management (and marketing) and would like to see arrangements put in place for this to happen across the country as part of an agreed strategy.

Tourism support funding

VW has recently taken back some control over WG resources for tourism support and established a new Tourism Investment Support Scheme (TISS). This new discretionary scheme aims to improve the quality of facilities in existing private sector tourism businesses as well as encourage investments in new quality facilities and businesses with potential for high growth and profitability. This will apply to additional and/or upgraded accommodation, attractions, activities, golf clubs etc[13]. Any project relating to additional capacity will only be considered if the result is to grow the tourism economy of Wales, as opposed to causing displacement. If there is a destination management plan that points to the need for, say, improved accommodation, this would help an applicant's case.

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

[13] See http://wales.gov.uk/docs/drah/publications/Tourism/110420newcapupgradee.pdf

In addition, there is a considerable amount of funding for farm diversification (business support and grant schemes) and 'innovative tourism' projects under Axes 3 and 4 of the RDP. Funding for tourism has also come via E4G Convergence funding, the Competitiveness Programme and, COLLABOR8. Typical projects include digital marketing support, trails, greening, cluster development and marketing, cultural heritage, signage, food tourism support, festival and event support, training, outdoor activity facilities. This project-led support, such as RDP and COLLABOR8 and Rural Alliances in the Brecon Beacons, is and has been enormously important for tourism development across the region, supporting a range of valuable initiatives including the engagement of communities, sub-destination planning and sustainable tourism programmes.

Other external funding support comes from WG through the Local Investment Fund (Convergence areas), the Regional Priorities Fund, the Aberystwyth Regeneration Area and Finance Wales loans.

The new national marketing strategy

In parallel with the new arrangements for destination management and organisation, a new VW Marketing Plan has been approved[14]. The key features are:

- The focus of promotion is shifting to the early decision-making part of the customer journey with greater effort on raising awareness of Wales;
- VW is to focus on PR and on-line marketing supported by significant investment in a Digital Tourism Business Project[15]. A key element of this is for destinations to share content for on-line access and promotion;
- In domestic marketing, the priority segment will continue to be 'independent explorers'; those inclined to plan their own trips;
- Overseas marketing is now more focused (on France, Germany, Netherlands) and seen essentially as a VW activity;
- Marketing Areas, including Ceredigion, Snowdonia and Mid Wales/Brecon Beacons will remain. Some may combine in future because of declining budgets but VW is now less prescriptive about the size and number of marketing areas; and
- There will continue to be local area features and links on the VW website to the marketing areas. The priority for local areas is to create inspirational on-line content e.g. good stories, special events etc which can then be used by VW via their web presence, e-mail marketing, E–CRM, search marketing, third party networks etc.

NB: Despite moves elsewhere in the UK, WG does not have any current plans to withdraw the official grading scheme although VW has held discussions with the industry on the possible role that social media and user generated content can play as part of a visitor's decision making process. Via its website, VW is due to provide an "opt in" link to Trip Advisor for businesses in order to facilitate this choice.

[14] Strategic Marketing and Action Plan (SMAP), Visit Wales, 2010-2013

[15] The Digital Tourism Business Framework Project is a competitive support scheme for tourism businesses in Wales. The Project will assist tourism businesses and supporting organisations to adopt new technologies and become more competitive in the market place as a result. The vision of the programme is that by end of 2014 Wales' tourism industry will have moved from relative E business immaturity firmly into the digital age.

Regional tourism co-ordination

TPMW, the Regional Tourism Partnership for Mid Wales, is core funded by VW as a partnership of public and private sector interests[16]. Their aim is to achieve sustainable growth in tourism in the area based on the goals of 'Achieving Our Potential'.

TPMW's strategic priorities and operational activities are set out in an annual Remit letter from WG. The RTP has an essential role *"in driving forward partnership opportunities through co-ordination, communication and capacity building to ensure that the resources available for the tourism sector are applied to best effect".* TPMW will be expected to contribute to WG's key economic development priorities and activities to increase employment; raise the quality of jobs; regenerate communities and stimulate economic growth; help businesses to grow and increase value-added per job and earnings; and ensure all economic programmes and policies support sustainable development.

TPMW's identified priorities are to support or develop:

- Skills training in line with industry needs but including Sense of Place and Croeso Cynnes Cymraig;
- A marketing delivery plan as part of the SMAP;
- Quality improvement through effective destination management and marketing, encouraging industry participation in the grading schemes, providing advice on TISS applications and supporting the implementation of the spatial regeneration agenda;
- Research via the Wales Tourism Research Partnership;
- Partnership working at all levels through communication, coordination and capacity building;
- EU tourism projects through appropriate match-funding; and
- Tourism advocacy.

NB: The four RTPs have been tasked by VW with increasing the level of tourism trade skills within their respective regions. VW has also appointed a national training co-ordinator for the four regions; the four RTPs currently have different approaches. In addition the Tourism Business Framework Project has a large up-skilling budget and the RTPs will be the conduit for this.

Mid Wales Tourism (MWT) is a regional trade body involving around 500 members throughout the Region. It does not currently represent the trade at local destination level but it does provide a conduit between businesses across the Region and regional/national agencies including Wales Tourism Alliance. MWT manages a regional website, undertakes regional PR, coordinates events, supports local businesses and groups in their marketing and facilitates networking, working closely with TPMW.

Local destination management structures

Local authorities and National Parks

The three local authorities and two National Parks recognise the important economic and regenerative role of tourism and play a major role in the development and

[16] TPMW has a joint Tourism Advisory Group with all the LAs and other bodies represented.

management of their respective destinations through the provision of a range of facilities and services – through a variety of departments - for the benefit of residents and visitors. The range and quality of services and infrastructure provided and managed by the public sector is significant.

The core tourism activities of LAs and NPAs include:

- Strategy development and communication with the industry as required;
- Gathering data and some local research;
- Project development and implementation e.g. RDP initiatives;
- Management of/support for TICs;
- Hosting tourism websites;
- Production of various tourism publications;
- Supply of editorial copy/images for magazine and newspaper articles and assistance to VW with press visits to the area; and
- Participation in VWs' marketing activity.

In addition, LAs and NPAs provide other infrastructure and services for tourism:

- The development and maintenance of the Coast Path, countryside access areas, various walking/cycling trails and paths and the rights-of-way network;
- Conservation of wildlife, the physical and marine environment;
- The maintenance and cleaning of the public realm;
- Management of harbours, maritime bye-laws etc;
- The maintenance of toilets;
- The maintenance, cleaning and life guarding of beaches (7 Blue Flag Awards in MW);
- Museums, arts centres and leisure centres;
- Traffic management including car parks, tourism signposting;
- Provision of public transport including special visitor services (Snowdon Sherpa, Beacons Bus, Cardi Bach);
- Planning, licensing and statutory monitoring of tourism activities;
- Involvement in regeneration initiatives; and
- Community support, notably for local events.

As this range of tourism infrastructure and services is provided by a number of departments, it is not always clear to the outsider who is responsible for what. There is a view that there could be more effective internal co-ordination of activity within the local authorities.

The private sector

Traditionally, it has been difficult to get the private sector engaged in collaborative effort, at the right level with the right people. However, there is a need to ensure that the industry has an appropriate voice to be represented in shaping policy and investment decisions and to provide a coordinated approach to tourism.

The organisation of the private sector in local destinations is at different stages in the different destinations:

- In the Brecon Beacons, a Tourist Association has recently been established and is now seen as the pro-active representative body for the industry;
- In North Powys, there is currently no local organisation although there has in the past been a ‘Heart of Wales’ Tourism Association;
- In Ceredigion, there are emerging plans for a local TA; and

- In Meirionnydd, private sector representation is to be structured under a number of local TAs who will collaborate under the auspices of the tourism sub-group.

It is important that tourist associations can work effectively to represent their members and liaise with relevant organisations to mutual benefit.

Community and other groups

Communities form a vital part of the tourist experience in terms of the welcome, the cultural experience and the provision of support services and facilities. The interaction of tourism and community development plays a key role in creating a thriving industry with important economic and social benefits. In Mid Wales, the interaction of visitors with host communities is of paramount importance in the determination of customer satisfaction. There is therefore a need to ensure the community is fully involved in tourism development, management and promotion.

Under the auspices of the RDP programme and other initiatives, a number of themed and geographic cluster groups of tourism operators and relevant stakeholders have been created including towns such as Dolgellau, areas such as the Cambrian Mountains and Dyfi Valley (Biosphere) and activity groups such as Cambria and Snowdonia Active and Brecon Beacons Tourism. Their efficacy varies depending on their age, product appeal, the individuals involved and the funding available.

Partnerships

The tourism sector in Mid Wales is both highly fragmented and very interdependent; there is a large number of organisations with an interest in tourism. These include local authorities and their constituent departments, regional and national bodies and a number of voluntary / community based organisations operating at a local level besides the private sector individuals and associations. Consultation has confirmed a high level of confusion with the roles of different parties. To enhance and achieve a step change in tourism, effective partnerships with clear remits are essential. Working arrangements need to be rational to make the most effective use of what resources are available.

In the **Brecon Beacons**, the NPA set up the BB Strategic Tourism Partnership in 2002 to enable partnership working and agreed work programmes to develop. This evolved into the Sustainable Tourism Partnership which meets quarterly and involves 32 bodies. The Partnership now has Marketing and Visitor Transport Coordination Groups. Tourism businesses are sent a twice yearly newsletter giving details of new developments, training courses and are invited to an annual ‘Tourism in Action’ conference, funded largely through COLLABOR8.

In **Meirionnydd**, the area falls under the Snowdonia Coast and Mountains marketing area. In terms of destination management, Gwynedd Council has agreed that PEG, the local regeneration partnership, should take on tourism under the auspices of one of its formally constituted sub-groups which will have the Council at its centre, working with a number of informal partners including the two regional tourism partnerships, local tourist associations, the two regional tourism companies, local chambers, training institutions, the National Park etc. This new sub-group could merge with the marketing arm in due course. It is still to be decided if a separate chapter is to be established for Meirionnydd under this umbrella.

In **Ceredigion,** local structures have been reviewed but there are no plans, at present, for the rest of **Powys**.

Local destination marketing

Consultees report a low awareness of the region's destinations, with the exception of Snowdonia and the Brecon Beacons. In terms of destination marketing, the three existing marketing areas partake in traditional activities such as print production, contributions to VW campaigns, hosting websites and some – usually project funded – thematic packaged promotions. There are plans by all to move into more digital marketing as per the VW plan, funded in large part by WG's digital marketing initiative and/or RDP e.g. Powys. (NB: MWT has a range of existing marketing products and services that are under-utilised.)

There is a plethora of sub-destination marketing efforts using websites and print that need co-ordination if not rationalisation. Individual marketing efforts are restricted by lack of IT knowledge, broadband issues and low level of packaging and collaborative effort. There are, however, some notable exceptions.

4. Tourism product and market issues in Mid Wales

From the consultations, observations, review of the documentation (particularly the Inland Tourism in Central Wales study) and the online survey, a range of issues impacting on tourism development across the Region have been identified.

A polyglot area

- Mid Wales extends over 80 miles (as the crow flies) from Porthmadog in the north to Crickhowell in the south and 50 miles from Aberaeron on the west coast to Presteigne on the English border;
- It is **not a homogenous physical area** being made up of the Cardigan Bay coast (part), the Cambrian Mountains (part), Snowdonia (part), the more gentle rural areas of Montgomeryshire and Radnorshire and the wild, upland area of the Brecon Beacons;
- This local geography suggests **four natural tourism destinations** across the Region i.e. Ceredigion, the Brecon Beacons[17], Snowdonia (part) and that part of Powys outside the National Park;
- The individual destinations within the Region vary in physical and social terms and although there are some common products and themes, **they differ in what they offer**; and
- What the Region does have in common is a generally low population density living in a rural – but varied – landscape where agriculture dominates and there are **common problems associated with the rural economy**.

The Mid Wales product

Transport infrastructure

- Within the Region, **roads** are mainly single carriageway and the local geography means travelling times are relatively slow but with exceptions that can occur in Newtown and Aberystwyth, the roads are largely uncongested and the routes attractive. Driving is still a pleasure within the Region;
- The Region has a network of national **bus routes** (TrawsCambria) and local buses, although the latter are under increasing financial pressure. These services are important for servicing the many rural attractions and the walking route network. The TrawsCambria network is to be upgraded with new buses and improved services. Poor Sunday services remain a problem;
- Despite limited services, the **Cambrian and Heart of Wales lines** allow access to some of the main settlements via very attractive routes; they are attractions in their own right and packaged as such;
- There is a **lack of awareness/visitor information** among tourists on public transport provision (and some affordable ticket deals);
- Overall there appears to be a **lack of integration** between public transport provision and needs of visitors;
- Initiatives like the Snowdon Sherpa and Beacons Bus service have shown how tourism and local transport can be linked effectively; and

[17] Part of the Brecon Beacons NPA is outside the formal Mid Wales boundary.

- The **viability and funding of rural public transport** is a complex area which is being addressed by the Regional Transport Plan as part of the WSP process.

Communication infrastructure

- Given the move to digital marketing, there is a need for both private and public sectors to become more '**web-savvy'**;
- There is limited coverage for **broadband and 3G**; and
- There is a national commitment to provide broadband across the country by 2013 and WG is lobbying OFCOM to demand 100% coverage in the new round of tenders for 4G provision.

Information infrastructure

- **Visitor information** is critical to the overall offer in delivering customer satisfaction for tourists (and local residents with visiting friends and relatives). There is a small number of strategic TICs alongside a network of satellite facilities (some located in shared facilities such as libraries, post offices and shops) and Tourist Information Points;
- Budget constraints have created pressure on traditional means of information delivery to visitors. In particular, a number of TICs have closed and others are under threat. This is of great concern to consultees; and
- A national review is to be undertaken by VW to assess the value of TICs.

Attractions

- The attractive, clean, safe, award winning **beaches,** the attractive coastline, the dramatic uplands and quiet valleys provide a beautiful, unspoilt, uncongested natural environment. A large proportion of the Region has National Park status;
- These resources allied to a large number of rights-of-way and open/managed access sites with 2 of only 3 National Trails in Wales running through the region[18] offer opportunities for walking, cycling, riding, fishing, water sports, wildlife watching. There are various plans for enhancing the route network across the region, funded in large part by the RDP;
- Snowdonia and the Brecon Beacons have established reputations in **the activity (and adrenaline) sector** and there are a number of initiatives and business clusters which have helped to improve market awareness, package and develop the product and services;
- There are issues around the **on-going maintenance, management** and extension of these resources and/or quality standards, particularly as public sector funding comes under pressure;
- The Region already has national centres for outdoor activity including the Plas y Brenin mountain centre and Tryweryn National Whitewater centre. The Eryri Centre of Excellence in Meirionnydd is being developed and other national/ regional centres are being considered for example sailing at Bala, horse riding in Brecon Beacons, walking and cycling in and around Rhayader;
- However despite this investment in the activity product in Mid Wales, there is a concern that the product and promotional packaging have failed to keep pace with the emerging market opportunities;

[18] Glyndwr's Way and Offa's Dyke Path, along with Lon Cambria and Lon Las Sustrans national cycling routes and the Prince Llywelyn National Riding Trail

- There is a continued need to improve the **competitiveness and professionalism** (with a greater year round focus) of the existing sector which is still characterised by many independent, lifestyle businesses;
- There are a number of attractive destinations and most communities are redolent with interesting social history and stories to tell, reinforced with a strong Welsh speaking culture. There is, however, much scope for physical improvement and there are physical regeneration projects in Aberystwyth, Blaenau, the Severn Valley (Llanidloes, Newtown, Welshpool) and the Western Valleys initiative in Powys;
- The Region is inordinately well-endowed with **arts facilities**. Aberystwyth Arts Centre is a nationally important arts and entertainment venue supplemented by a host of other venues and galleries across the Region. There is a programme of exhibitions, events and festivals although more could be done off-peak;
- **Events** can help to establish destinations in their own right and offer an opportunity to showcase local distinctiveness. Whilst the Region does have some major events e.g. The Hay Festival, Brecon Jazz and The Royal Welsh Show[19], most are small. Smaller events can still be important as they offer interesting experiences for members of the local community and visitors predominantly drawn to the Region by other motivating factors. Some may have the potential to grow into regional or even national events e.g bog snorkelling at Llanwrtyd Wells. Some may remain small but gain prominence from their profile e.g. the Ceramics Festival in Aberystwyth. At present, they are operated mainly during peak season, managed and run by volunteers and community groups often with limited funding. There appears to be a **lack of co-ordinated information** available for events in the Region;
- **The quality of shopping** is varied. With a few exceptions, the local population can not support a wide range of High Street shops but there are many local independent shops and interesting, attractive shopping areas e.g. Hay, Crickhowell, Machynlleth, Aberystwyth etc. **Local food** (and craft produce) is a particular strength of the area with some major names (Rachel's Organic, Ty Nant) and many small producers offering cheeses, beer, wine, honey, cakes and preserves as well as locally produced Welsh lamb and beef and fish. The Local Food Talks programme, supported by TPMW has proved very successful in improving supply chains and promoting local food in tourism[20];
- There is a view that there is now an emerging body of exceptionally good **restaurants** across the Region. Of particular note is the prevailing use of local produce in these good restaurants which adds distinctiveness and quality to the offer;
- Major iconic tourism attractions can have significant drawing-power but Mid Wales has relatively few dedicated, large and/or iconic **visitor attractions**. (The main feature is the number of historic railways.) The large majority of attractions are associated with the area's landscape, history, heritage and culture, few of which are of a scale to become attractors in their own right. Again, there are plans for enhancing a number of attractions including Cardigan Castle, Harlech Castle, Llanerchaeron; and
- The majority are seasonal and weather dependent and business performance is varied with related low level investment. *"Overall there is a limited range of interesting, entertaining and informative visitor attractions which are open on a year round basis in Central Wales."*

[19] These are national 'signature' events
[20] Local Food Talks evaluation reports 2009, 2010

Accommodation

- The range, type and quality of accommodation in Mid Wales is mixed;
- There are just under 2,800 accommodation establishments in Mid Wales including around **118,000 bedspaces** (78% caravan and camping, 12% self-catering and 9% serviced)[21];
- Accommodation is focused on the coast; Meirionnydd has 41% of the bedspaces, Ceredigion has 26% and Powys has 33%;
- The accommodation stock is dominated by **static caravans** and, to a lesser extent, touring caravans. Planning policies mean that growth in this sector will be very limited;
- Most of the units are privately owned, say 80-90%. The formal letting fleets on sites will be supplemented by private lettings (and use by family members);
- There is a perception that static caravan users do not contribute significantly to the local economy. The evidence, which is currently being updated[22], identifies an important local contribution is made, endorsed by local consultations in the Mid Wales resorts;
- In qualitative terms, less than 20% of caravan parks are graded[23]. From observation, there have been recent efforts to improve landscaping and layouts by the better parks in recent years;
- As elsewhere in the country, holiday parks in the Region report that they have been performing well, benefiting in part from the staycation trend. 2010 has seen volumes being maintained although the discretionary spend in bars and restaurants has gone down[24];
- **Other non-serviced accommodation** includes a relatively large amount of, often good quality, self-catering cottages as well as the caravan stock. Perhaps even an over-supply? Nearly two thirds of the non-caravan self-catering stock is graded, much of it 5 and 4 star. VW figures suggest that overall occupancies are similar to the national average (around 50%);
- In the **serviced sector**, the majority of hotels are graded 3-star (65%) or 2-star (21%) with no 5-star establishments. In other parts of the sector (B&B, farmhouses etc), 13% are 5-star and 53% are 4-star. Overall, there are just 52 5-star establishments (11%) in the Region but there is a growing number of very good, small new boutique hotels;
- There are few large or even medium-sized hotels. Most are small (average size of serviced accommodation businesses is just under 5 rooms), often lifestyle businesses. Sustainability is an issue;
- Occupancy rates vary but the overall room average is 40% which is close to the VW estimate; and
- There is spare capacity in most areas. Low occupancy rates are partly to do with oversupply, partly quality (60% of establishments are graded). Persistent low occupancy levels have a limiting effect on the ability of accommodation providers to re-invest in the product. Notwithstanding, there are proposals for new hotel development e.g. in Aberystwyth, Bala, Dolgellau.

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[21] These figures should be treated with caution. They are provisional and based on Phase 1 of the VW bedstock survey. Phase 2 will provide more standardised results across the whole of Wales..

[22] New research on the caravan sector in Wales undertaken for VW and BH&HPA is underway.

[23] Grading estimates based on VW bedstock survey.

[24] Figures from VW and Ceredigion suggest regional static caravan occupancies are similar to the national average.

The Inland Tourism Study for Central Wales also highlighted the following:

- A lack of tourist accommodation directly linked to the activity product;
- A lack of innovative accommodation products and inland camping; and
- Whilst there are examples of hotels with ancillary facilities serving the pan-Wales market, notably in Aberystwyth and Llandrindod Wells, there is a lack of accommodation suitable for small conferences (+/- 20 people).

Human resources for tourism

Tourism is offered as a subject in Mid Wales schools but is rarely seen as a first choice career option as attractive, well-paid career paths in the tourism sector are hard to find for many of the locally well-educated young people and the industry generally has a poor record in providing training and career development for the less well qualified and lower skilled staff[25].

As elsewhere in Wales, recruitment and retention is an issue within the hospitality sector, particularly smaller businesses that cannot offer career progression opportunities. It is especially difficult for chefs. Unemployed people are generally unenthusiastic about applying for vacancies notified to JobCentre Plus by tourism sector employers, other than immigrants from Eastern Europe. Front-line hospitality roles are often filled by students or others without formal qualifications or experience in this sector. This can result in skills gaps, particularly in relation to customer service.

Significant efforts to improve skills continue to be made in Wales. There are a number of organisations across the education and training sectors involved in developing the skills and services of tourist enterprises as well as the Medrwn team who have been particularly successful in delivering short, trade-requested courses and fam trips.

The provision of vocational education and training generally meets demand from individuals and employers and capacity is expected to remain stable in future years[26]. Notwithstanding, there is clearly a need for more training amongst those already working in the industry as a priority: *"People employed in the tourism sector tend to be less well qualified and lower skilled than in other sectors and the industry generally has a poor record in providing training and career development. The situation is compounded in Central Wales by the nature of the industry which is dominated by large numbers of micro and lifestyle businesses."*[27]

The four RTPs have different approaches to meeting training needs. The approach taken by Medrwn (TPMW's training programme) has been to look for gaps in provision, remain flexible and put on courses to meet identified policy objectives e.g. Sense of Place, food related events/courses, Croeso (on behalf of VW), sustainability, IT, 'Get Fit for Business' and volunteer training for events. This has been well-received by those who attend such courses[28].

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[25] Local higher education provision from UWTSD, Aberystwyth etc provides a pool of graduates for the tourism sector, but provision does not include hospitality.
[26] In work for the Ceredigion strategy it was found that, generally, those operators looking for training do not find difficulty in accessing their needs.
[27] Tourism opportunities action plan framework; Enhancing inland tourism in Central Wales
[28] Providing short, sharp bits of learning offers the opportunity to cross-sell a wider range of training opportunities.

Visitor satisfaction

Visitor Surveys[29] show that Mid Wales is rated as a very good or excellent place to visit overall i.e. +/-90%. Most would 'definitely' re-visit the area and would definitely recommend the area to friends or family.

We are not aware of any formal research on the perception of Mid Wales or its individual destinations by non-visitors. However, VW research[30] shows that while recent visitors to Wales are very positive about their experience, non-visitors, and those who have not visited for 5 or more years, have a different view. Their impression of Wales is coloured by persistent stereotypes, particularly the notion that, although Wales is endowed with plenty of natural beauty, there is little else to see and do here. Unlike those who have visited, many non-visitors are not aware of the range of events, attractions and activities that Wales has to offer.

The Mid Wales visitor market

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

In summary:

- The local resident population is relatively small. There are just 240,000 people living in the Region but there is a very large population living on the borders of the Region, in the North West, West Midlands and South Wales conurbations;
- Mid Wales attracts c1.75m staying visitors, 80,000 international visitors and 6.5m day visits each year[31]. Staying visitors are split between Ceredigion (36%), Meirionnydd (34%) and Powys (30%)[32];
- The majority of visitors travelled by car to get to Mid Wales in 2009 (88%);
- Around 45% of trips to Mid Wales are taken in the July-Sept quarter; August has been the busiest month in each of 2009, 2008 and 2007 with 24%, 20% and 19% of all trips respectively. Tourism, as elsewhere in Wales, is markedly seasonal;
- Mid Wales needs more visitors, particularly off-peak;
- The staying holiday market appears to have two very distinct segments; the larger, longer-stay family holiday market, largely based in caravans, mainly on the coast in the season and the smaller, higher spending, short stay, less seasonal market using some of the new superior serviced accommodation (and self-catering) and restaurants inland and on the coast;
- Other staying markets include activity tourists (overlapping with the above two segments), VFR and some business tourism. Activity tourism is clearly important across the Region but it is hard to get a handle on the scale of activity from the statistics available; and

[29] Powys visitor survey 2009, Ceredigion visitor survey 2010, Day Visitors to Wales
Wales Visitor Survey 2009
[30] VW SMAP op cit
[31] UKTS and STEAM 2009, respectively
[32] As with the distribution of accommodation, caution must be used with these figures. In this case, sample sizes are very small at County level and so 3 year averages are used.

- Day visitor statistics from STEAM are reported as 6.55m. The key point is that Powys attracts the major share (47%) with Meirionnydd attracting 32% and Ceredigion 21%. Powys and the Brecon Beacons in particular, can draw on the major urban areas of South Wales and the west of England.

Regional visitor profile[33]

- In 2009, 28% of trips were made by 35-44 year olds;
- Socioeconomic group C1 generated some 40% all of trips and accounted for the largest proportion of spend in 2009, contributing 42% of total expenditure by staying UK tourists in 2009;
- In 2009 the average length of stay was 3.75 nights. Average spend per night was £38 and average spend per trip was £144;
- Accommodation made up the largest area of spend – 35% in 2009;
- The main purpose of most trips to the area was holidays (between 83-85% in each of 2009, 2008 and 2007);
- The main driver for visits is the countryside and coast;
- 1-3 night holidays made up 44% of all 2009 trips. 4-7 night holidays made up 35% whilst 8+ night holidays accounted for nearly 4% of all trips in 2009;
- In 2009, caravans (either static or towed) were the accommodation used on 29% of all trips to the region. For around 23% of trips to the region, the home of friends/relatives is the form of accommodation used; and
- A high proportion of visitors to Mid Wales are from the West Midlands (31% in 2009) followed by residents of Wales (16% in 2009). There is a strong dividing line through the Region; those to the north tend to come from the Midlands and North West, those to the south tend to come from South Wales and the M4 corridor.

NB: The regional profile disguises many internal variations but statistics are not available at sub-regional level. It will be important for each destination to undertake its own analysis.

The changing external environment

Future patterns of tourism in Mid Wales will be partly determined by what happens on the ground but also influenced by external factors outside local control such as:

- **The difficult economic situation**. Over recent years the economic context has shifted between optimism, growth, recession and pessimism. Notwithstanding recent figures from the Treasury[34] that indicate that GDP is expected to rise by 1.8% in 2011 and 2.1% in 2012, there is uncertainty about the future. Even if there is growth over the next couple of years, the pace of recovery is expected to be slow. At a regional level, this uncertainty is justified. The Region relies upon public sector employment as well as farming and tourism. There is to be significant restraint on public sector spending over the next few years which will have an impact on national and local authority budgets and the resources available for destination management, marketing and infrastructure.
- **Market changes**. The UK population is more or less stable in terms of numbers but it is ageing. The big change will be the increase in the over 65 age group. Traditionally this group has been more likely to take holidays and breaks at home and has been important for Wales with its strong walking and outdoor product. Other changes are likely to be:
    - More single person households, fewer traditional family households;

[33] Domestic Tourism to Mid Wales in 2007, 2008 and 2009, WG
[34] Forecasts for the UK economy; A comparison of independent forecasts, February 2011 (HM Treasury)

    - Unemployment and reduced disposable income may constrain holiday choice for some; and
    - The probability that many people will have to work longer to fund their retirement.
- **Attitudes towards holiday taking** have changed considerably over recent years as consumers have become more sophisticated and experienced. Changes noted by commentators such as Henley Centre and others include:
    - A shift towards consumers who are 'cash rich, time poor' – leading to shorter, more intensive holidays and added value;
    - The search for authenticity and distinctiveness;
    - The search for well-being and escape from a world where people are full-on, all the time;
    - More discerning, sophisticated consumers who are widely travelled, know what they want and pride themselves in getting value; and
    - Increasing importance of brands and third party recommendation in an era of seemingly limitless choice, fuelled by the internet.
- **The environment.** There is an increasing focus on climate change throughout government and business communities. There will be implications for biodiversity and there are likely to be significant shifts in farming patterns. Coastal erosion continues to have an impact. These factors will affect the Region's key resources. This concern is also reflected amongst tourists. The ramifications on tourism are likely to be:
    - Increasing transport costs and growing awareness of the impact of travel might encourage people to stay closer to home;
    - Sustainable transport options to and from destinations will become more important, which will mean a stronger role for public transport;
    - The growing interest in green and ethical choices will begin to have an impact amongst a section of consumers; and
    - Wales may see a warmer climate as a result of climate change, although more unpredictable weather is the likely scenario.
- **Technology.** Technology continues to move on apace. The internet is now the preferred route for booking and information collection for many people. New ways of accessing and sharing information through social networking sites are by-passing traditional routes and information can now be accessed more readily on the move via mobile phones and 'sat nav'. Meanwhile the internet has made it easier for even the smallest enterprise to reach distant and niche markets but as a result, the marketplace is increasingly crowded.
- **Increasing competition.** Low cost airlines, the growth of the internet and a period of prosperity have meant that over the past decade the world has become more accessible to a larger number of people. The choice of places and experiences is becoming ever greater, both at home and abroad, and these are eating into traditional markets and setting new benchmarks. Meanwhile, in this country, there are a number of competing destinations also seeking to exploit the domestic tourism market. In this environment, simply keeping position and retaining market share becomes a challenge let alone breaking into new markets and developing new business.
- **Tourism prospects**. Forecasts[35] by Tourism Economics suggest that global tourism will return to 2008 volumes in 2011 and continue to grow strongly after that. VW expects the global economy *"to gradually return to modest growth. The long-term future growth trend will be significantly slower than over the past decade in those markets that are most important to the Wales visitor economy."*[36] Wales has a relatively limited share of UK inbound tourism and it

[35] Long term forecast, Tourism Economics from Visit Britain website.
[36] VW Strategic Marketing Action Plan Summary

has not shown much growth over the past decade. Domestic tourism, however, has been given a bit of a boost by the current economic situation – UKTS show an increase in visitors between 2008 and 2009 in Mid Wales (although STEAM figures for 2009 suggest a drop). Anecdotal evidence suggests business tourism overnight trips may be down as companies cut back on travel in the recession, but holiday tourism trips – if not spend - is up as more people have opted to holiday at home. This has particularly benefited the self catering caravan sector and many visitor attractions also report increased attendance. It is difficult to know whether this is a temporary fillip which will disappear when the economic situation improves; experience suggests it would be unwise to base a strategy on such a short-term change. However, it is fair to say that coastal holidays have been boosted in recent years; not only is the holiday park market doing well but there is a renewed interest in short breaks at good quality hotels with good restaurants at the coast. At a more niche level, activity holidays have also seen significant growth. The most likely outlook for the next five years is that domestic and overseas demand for tourism in Wales and the UK is likely to remain at around the same level. This means that destinations can't rely on a rising tide to grow tourism.

The changing external environment: Key issues

No-one can say with certainty what the cumulative impact of these changes will be for Mid Wales. Some of these drivers may cancel each other out. The message is that:

- Public sector funding, private sector investment and consumer spending is likely to be constrained in the short to medium term;
- Competition is increasing and the market is more sophisticated and less loyal; and
- Tourism growth will have to come from capturing market share from elsewhere.

Success will depend upon:

- Reminding, people of what the Region's destinations have to offer;
- Understanding the market and changing consumer requirements;
- Exploiting new media and making it easy to access information, and arrange last minute, flexible packages tailored to the individual;
- Offering a range of quality experiences to delight, excite and enthuse; and
- Creating places that are distinctive, authentic, and enriching places to visit.

6. Regional issues

The stakeholder survey

Rather than impose another full questionnaire on the trade, a link was provided to an on-line form that included information about the project and invited structured comments under four key questions. This can only be considered a 'straw poll' but the results are valuable and indicative of the messages coming back through consultation. The four questions and the summary of key points arising are shown below[37]:

Mid Wales Stakeholder Survey

Q1. Thinking of Mid Wales as a whole, what are the main issues facing the development of tourism in the Region?

- Transport (over a third of the respondents mentioned this as a key issue);
- The future for TICs;
- In marketing, the need to raise awareness although there was some confusion around promoting the Region as opposed to individual destinations; and
- In product terms, the concern was all about raising quality (facilities and service).

Q2. What are the main strategic issues facing your organisation that might be addressed at the regional level?

- Need for better destination marketing;
- Problems about finance (bank finance, access to grants, RDP monies);
- Research for business planning; and
- Training.

Q3. Do you think the tourism industry has the right structures in place? Is it sufficiently well organised and geared up to take things forward? Generally no but two key points arose:

- Lack of clarity on roles and responsibilities; and
- Not enough public sector champions or engagement at the right level i.e. need better advocacy.

Q4. And finally, what would you say is the single most important priority for tourism in the Region that the new strategy should address?

- Improving product quality (basic infrastructure and transport in particular);
- More/better marketing;
- Advocacy;
- Training; and
- Structures.

To develop the regional strategy, the next task is to identify, from the full range of broader issues and opportunities, those that impact on the development of tourism - at local destination and/or national level - that can best be resolved and/or managed at regional level. These are summarised below.

[37] Further detail is provided in Appendix IV.

Organisation of tourism (structures)

The definition of local destinations and related structures is a local responsibility. VW is clear that there is no prescribed formula and such decisions should be taken locally but TPMW is tasked with assisting in this respect and there would be value in sharing knowledge and experience. Also, given the size of the Region and the low density of business, it is essential that organisations come together at a realistic destination level to co-ordinate and undertake activity. TPMW could act an independent broker in defining appropriate destinations. In some cases, there may be overlaps in such organisational structures that would benefit from a regional input e.g. Meirionnydd, Cambrian Mountains and the rationalisation/organisation of aspiring sub-area destinations.

Organisation of tourism (marketing)

Marketing responsibility is split between VW and local destinations. There is no regional marketing role for Mid Wales as a destination. However, there is a regional role to support the marketing efforts at national and local level (and thereby a need to understand the key, locally-defined markets). This will involve co-ordination and collaboration on initiatives where appropriate e.g. digital marketing, data stewarding. There may also be justification for supporting the marketing of specific regional products.

Human resources for tourism

The RTPs have been tasked with developing skills in tourism. Given the natural catchment areas for the provision of training, skills development for tourism businesses and individuals can best be organised at a regional level. The RTPs have been doing this in different ways and by different means. This needs to continue as a high priority given the emphasis on raising standards and quality although priorities need to be reviewed.

Policy

Consultation has identified the need for stronger advocacy for tourism, co-ordination of the multitude of activities and agencies involved in the sector and a clear channel of communication. This can best be implemented at a regional level. There is the view that Mid Wales' tourism sector does not get its fair share of resources from the national cake, whether that be through resources for transport or rural regeneration or specifically for tourism.

Transport infrastructure

Transport to and around the Region is a key tourism priority that appears to be of ever greater concern to stakeholders; the relative importance of leisure travel is much greater in Mid Wales - where journeys are longer and modal options fewer - than in the other regions and most competing destinations. There is a concern to improve transport facilities, the travel experience and related information for both public and

private modes. This is a fairly obvious regional issue as the transport links cover and link together the whole Region and transport is largely organised at a regional level.

Broadband Infrastructure

There is a need to enhance access to broadband and 3G services for tourism businesses seeking to capitalise on the move to digital marketing and the use of mobile technology by visitors. This is a regional issue as coverage of broadband and 3G is worse in Mid Wales given its geography. In addition, the national digital marketing programme is being delivered at a regional level.

Information Infrastructure

There is a need to seek a new mix of cost-effective means of delivering tourism information to visitors (and residents). This may involve piloting new ideas and/or sharing services, both of which could/should be co-ordinated cost effectively at a regional level.

Tourism product (attractions)

In terms of attractions, there is a need for further development in the Region to address issues of quality and seasonality. Attraction development is largely a local issue but there are situations where the development of certain facilities will have a regional impact and would justify regional support e.g. region-wide trails or iconic attractions/events that will draw in visitors from outside the Region. A set of regional criteria for providing support will help TPMW and other agencies in prioritising funds.

Tourism product (accommodation)

Promoting quality (and environmental management) is particularly important for accommodation. This is best done by demonstrating the commercial benefits, a task which can be most effectively organised at a regional level. As with attractions, there is a need to prepare regional investment criteria that prioritise the enhancement/ development of quality accommodation.

Research and evaluation

More and better research is needed for effective planning and evaluation. Tourism research is co-ordinated at national level by VW but there is a need to identify local research needs, define the data needed for relevant performance indicators and review the most effective means of disseminating intelligence. This will be done best and most cost-effectively at regional level.

7. The strategy

The goal for the Regional Strategy

The approach suggests that the regional strategy's goal should be:

"to focus and coordinate the combined resources of stakeholders at a regional level, to support and help implement the aims of national and local tourism priorities, to increase the value of tourism and thereby contribute to the broader, sustainable regeneration of Mid Wales."

Underlying principles

TPMW and all the relevant agencies need to contribute to the above goal and subsequent objectives through *"co-ordination, communication and capacity building"*. There are however a number of principles that should underlie this collaborative effort to achieve the goal above and the following strategic objectives:

- **Driving the national and local priorities** inherent in the VW destination management and marketing strategy which provides the broader context for regional priorities, tailored as appropriate for individual destinations.

- **Delivering economic development** in Mid Wales. Tourism sits side by side with agriculture as the key economic driver in the region. The wider rural regeneration agenda requires and supports a healthy tourism sector. Tourism therefore needs to be in the driving seat or at least on the top table in developing and taking forward that rural agenda.

- **Pursuing sustainability and well-being**. Tourism as an economic driver in Mid Wales is equally bound up with the other pillars of sustainable development; the environment and the community[38]. It supports and is dependent on general health and well-being agenda, from quality of life in the spa/market towns to outdoor activity and a sustainable approach to development and land management. Tourism has a key role to play in supporting, and benefiting from, the cross-cutting objectives of 'One Wales' and the Spatial Plan. Sustainability should underlie all subsequent action points.

- **Encouraging collaborative working**. This is a strategy for all concerned in the Region, not just TPMW. It is not just for those with a regional remit, it is for all those involved in tourism at any level and in any sector who might gain from a regional perspective or initiative. In particular, the aim is to get local stakeholders to consider the opportunities to work collaboratively and in partnership across the Region and make the most efficient use of resources. The Strategy should bring people together at regional level to impact at a local level.

Unlike many tourism strategies that are destination or thematic based, this strategy is more of a 'process plan', identifying key actions that will help deliver the aims and goals of others working in the Region.

[38] One Wales: One Planet, a new Sustainable Development Scheme for Wales, 2009

Objectives

The goal will involve dealing with those issues and supporting those objectives of national and local tourism in the Region that can best be addressed at regional level. These can be identified as:

1. To organise tourism resources in the most effective manner across the Region;
    - Creating appropriate structures
    - Marketing support

2. 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;
    - Improving the infrastructure
    - Developing the product

3. To encourage more local people to follow and develop worthwhile careers in the tourism industry;
    - Promoting tourism careers
    - Improving human resources for tourism

4. To maximise opportunities for tourism development with and between different agencies.
    - Advocacy and brokerage
    - Research and evaluation

Taking the strategy forward

This strategy is therefore a flexible framework for action by – and a reference point for – all regional tourism stakeholders in the context of rapidly changing circumstances and on-going initiatives.

The overall strategy needs to be endorsed by each stakeholder in the Joint Tourism Advisory Group. This is an existing group of stakeholders that should be reviewed and re-structured to ensure it is fully representative and responsible for this task. The group should, as a basis, include representatives from each local authority and National Park with complementary private sector representation. Each member of JTAG will be expected to assess their own contribution against the recommended action plan.

The Group will need, as a first task, to define and agree its terms of reference with roles and responsibilities. Subject to this discussion, the ToR might include:

- To provide strategic management and a co-ordinated approach to the planning and implementation of the Goal, Strategic Objectives and Action Plan as set out in the new Mid Wales Tourism Strategy;
- To provide a regional reference group for Tourism Partnership Mid Wales;
- To monitor and advise upon the implementation of the regional strategy as a whole and each individual Action Point;
- To advise and make recommendations to the RTP/ WG VW and to the local and regional partner organisations on JTAG on tourism related matters in the region;
- To ensure tourism is co-coordinated and integrated into the wider policy agendas relating to the environment, sustainability and economic and community regeneration.

Responsibility for co-ordinating the strategy and promoting its implementation by stakeholders should rest with TPMW acting under the auspices of the Joint Tourism Advisory Group. It is likely that sub-groups may be formed to oversee different sets of initiatives.

TPMW should produce an annual review of progress against each of the numbered action areas. The strategy should be reviewed in 2015/6.

Evaluation

This is a facilitation strategy that is designed to assist those directly responsible for attracting visitors, VW and the local destinations. It will not impact directly on the usual tourism performance figures i.e. the volume and value of visitors' trips and so the common KPIs in tourism strategies are not relevant. Most of the Action Points are supportive actions and the means of evaluation need to reflect that role.

Each year, each Action Point should be considered in turn and success measured by:

1. Noting whether the task is complete or, if on-going, is on schedule.
2. Identifying (and quantifying where possible) related activity and any specific outputs or general outcomes.
3. Asking a selected group of stakeholders to score the relative success/progress of the Action Point. This should be a qualitative measure on a scale of 1 to 5.
4. Identifying any corrective action required.

Role of TPMW

Besides co-ordinating the strategy, TPMW has an important independent leadership role linking up to national agencies and down to local destinations (and cross-border). This role is crucial, acting as the 'glue' between national and local stakeholders and between different stakeholders at each level. As one stakeholder put it, TPMW should "push, provoke and lead but not necessarily do".

Although this strategy is not a strategy purely for TPMW, it will provide the context and priorities over the next five years for TPMW's annual business plan.

Action Plan

In the following pages, the specific actions required under each Strategic Objective are outlined in turn. The implications are summarised in tabular form at the end along with an approach to evaluating progress.

8. Objective 1: To organise tourism resources

Clear organisation of the industry is critical to effective destination management and marketing. There is now a much clearer framework for destination management, marketing and investment. In essence, the onus is being placed on local destinations to organise themselves; to prepare realistic destination plans and put in place effective structures that maximise the opportunities for better partnership working and communication within and between the public, private and community sectors. Destinations that can demonstrate such plans are in place will then be in a position to benefit from TISS support.

The overarching national strategy reflects this new delegation of responsibilities. Visit Wales' approach to marketing (upon which most destinations in Wales rely) is changing radically. VW is focusing on raising the profile of Wales and attracting new business. Local destinations are now responsible for promotion to existing, known markets. The onus is on them to provide information and stories to VW - and to develop their own resources to feed a new digital marketing era.

The economic climate now makes it even more important to find new (and hopefully more effective) ways to improve the way in which national, local and other agencies work together to support the tourism industry. Whatever the prognosis for the period of this strategy, it is clear that the recession will continue to have a major impact on tourism and how it is managed given the ongoing constraints on public sector funding, individual disposable income and access to credit for many businesses. The implication is that the private sector will need to do much more to fill the gap and that the public sector is going to have to look at prioritisation and/or different ways of delivering tourism related services, from marketing to tourist information, from events to public toilets. Creative partnership working between all parties will be crucial.

Creating appropriate structures

Helping to define destinations

VW does not wish to define or prescribe the geography of destinations; that is down to local determination of what will work and will be sustainable although it may be fair to say that "less may well be more" when weighing up resources and effectiveness in management terms. There is also some confusion over the definition of a destination as opposed to a sub-regional geographic product. The former involves the management (and marketing) of a clearly defined tourism area e.g. the Brecon Beacons while the latter involves the promotion of a sub-area e.g. the Dyfi Biosphere within the context of one (or more) destinations. Management and marketing areas can differ although it is easier if they are co-terminus.

Destinations are traditionally based on local authority or National Park boundaries because these represent clear management boundaries. In Mid Wales, these management destinations are therefore likely to be:

- Brecon Beacons[39];
- North Powys (a new brand name is to be explored);
- Ceredigion; and
- Meirionnydd (part of Gwynedd and the Snowdonia marketing area).

The regional priority is to help establish, sustain and develop destinations with effective management bodies, local commitment and realistic plans in the context of the VW destination management and marketing plan.

There is another tier of 'geographic products' below this; sub-area destinations such as the Cambrian Mountains, Dyfi Biosphere, Fforest Fawr Geopark and a large number of individual settlements that seek to promote themselves as destinations. The regional priority here is to advise and help rationalise these aspiring destinations rather than necessarily provide support. This is partly a matter of resources but also one of responsibility; these sub areas need to work within the context of the main destinations.

Action Point 1.1: Set out, and agree, a hierarchy of destinations within Mid Wales

Private sector engagement

There is a need for the private sector to engage with, and contribute to, destination management. This requires organisation of the private sector into some form of association or entity to ensure they have a clear, representative voice and that there is a formal channel for other stakeholders, notably the local authority, to communicate and engage with them.

Local private sector networks have a very important role to play not only in providing a formal voice (and ear) for the industry but also in encouraging businesses to network, to work together, raise quality, get involved in training etc. Some private sector organisations have been able to take on a wider range of roles e.g. research, niche marketing and events organisation. However, new organisations might be more sustainable if they start with the simple twin objectives of providing a channel of communication with other stakeholders and offering a networking opportunity for members. Other roles can emerge if appropriate. In Mid Wales, different forms of private sector entities are being formed in the different destinations to meet local needs and there are opportunities to share experience.

It is important that these associations are representative of the local industry i.e. that all sectors of the industry are represented (including the caravan sector) and other relevant sectors e.g. retail, catering.

Action Point 1.2: Establish an appropriate, representative private sector association in each of the main destinations

Public sector tourism

By the same token, there is sometimes a need for the local authority (or authorities) that are responsible for destination management to consider how their different departmental functions collaborate and whether there is a need for better

[39] Part of the Brecon Beacons destination falls outside Mid Wales but this does not diminish its position in the Region. Indeed, the Brecon Beacons can draw on and support the activities of three regions. The situation simply calls for effective cross-border collaboration.

communication between those departments that are involved in tourism in one way or another. An in-house tourism group could be established that would provide a forum for internal communication and a channel for external communication e.g. with the private sector. This group could be used to ensure that tourism appears on all relevant agenda within the local authority.

Action Point 1.3: Public authorities to review their internal communications and formalise tourism as a common agenda item

Partnership working

The fourth element is the partnership arrangement that needs to be established between these two latter groups and other stakeholders, including TPMW, the local community and related sectors e.g. retail, catering. Having a mechanism whereby all the key players are working together as a partnership to an agreed strategy is one of the three pillars of IQM[40]. A cohesive and clearly defined partnership approach is required for effective collaborative working within destinations.

Again, the form of structure(s) and any partnership arrangement is not prescribed as different destinations will have different requirements and constraints. In fact, there are very different models under consideration in the Region. The criteria are effectiveness and sustainability.

Action Point 1.4: Establish appropriate partnership arrangements involving the public and private sectors, TPMW and other relevant stakeholders in each of the main destinations

Further support

Although the priority remains with the main destinations, there is a need and potential to help other, sub-area destinations work to their optimum. Project funding is allowing a variety of geographic clusters to become established and although their long-term sustainability may be questioned, these are opportunities to try and establish better local collaboration in the sector.

Assistance should be in the form of providing templates and models for organising tourism resources and building local capacity in the context of their over-arching destination plan. This might take the form of local business or community tourism plans in appropriate communities (see Action Point 2.6 below).

Destination planning

Destination planning is a local role but there may be a need to support/encourage the main and other strategic sub-area destinations and/or the key settlement ‘tourist hubs’ to prepare destination plans.

The **Central Wales Inland Tourism Framework** suggested criteria for defining tourist hubs:

- Clear ‘sense of place’;
- Existing honey-pot for visitor activity;
- Tourism industry already of economic importance as a driver for local regeneration;

[40] Integrated Quality Management (IQM) is the process developed by the EU and adopted by VW and others for the sustainable management of rural tourism.

- Opportunities for enhanced sustainable tourism development;
- Local commitment – from both the business and local community – to enhance tourism;
- Existence of core elements of the tourism product including:
    - Stock of serviced and/or unserviced accommodation;
    - At least one major attractor / event; and
    - Accessibility by public transport.

In addition, the hub is likely to be identified as a priority area for regeneration and renewal linked to a key settlement within the Wales Spatial Plan.

There may also be a need to assist – perhaps through pilot projects and/or templates – the preparation of community tourism development plans in the key settlements and experience shared throughout the Region.

Pilot projects/templates and other destination plans should make use of the new Destination Management Toolkit (http://www.dmwales.com/) and other resources[41] and involve:

- Establishing appropriate sub-area partnership structures;
- Resource audits covering accommodation, sense of place, activities, attractions, infrastructure and information provision;
- Visitor feedback;
- Action plans; and
- Appropriate indicators.

This is particularly important given the recent and current work with sub-destination clusters, notably in the Brecon Beacons. The current TPMW work with the Meirionnydd clusters provides another example of such work.

Action Point 1.5: Support the development of destination plans as appropriate

Marketing

It is important to re-iterate that Mid Wales is not a destination or brand in itself. There is no desire or support for creating a further tier for marketing related specifically to Mid Wales. There are however various opportunities for assisting marketing effort at a regional level through collaborative support for the national marketing strategy, local marketing strategies and support for specific regional products.

Support for national marketing

The national marketing strategy requires the assistance of local destinations in the form of providing data, information/content and PR material (stories) for dissemination. This uplift could be co-ordinated at a regional level with potential economies of scale.

There is also a need to communicate national priorities through to local destinations e.g. the need to disseminate and reinforce VW brand values in local marketing and to promote the VW digital marketing programme (and broadband support scheme) and its importance to operators and/or clusters, across the whole region. (It is important that the non-convergence areas are not disadvantaged by not being covered by the VW programme.)

[41] E.g. Fáilte Ireland's 'Historic Towns in Ireland Guidelines', aims to help the towns of Ireland make the best use of their historic and cultural assets and maximize their tourism potential.

Action Point 1.6: Support the implementation of the national marketing strategy through a collaborative approach to destination marketing

Support for local marketing

Local marketing is the responsibility of local destinations. However, many of the destinations will be undertaking very similar tasks and there are clear opportunities for collaboration and resource saving. For example, sharing the effort of:

- Data collection;
- Database building;
- Local research;
- Website development with common platforms, products, linkages and services;
- Website co-ordination i.e. co-ordinate all the small websites;
- App development and/or any other new media innovation; and
- Newsletter dissemination/ PR communications.

Action Point 1.7: Review the potential for collaboration on local marketing initiatives

Support for specific 'regional' products

There are a range of 'regional' products that could warrant marketing support because of the common benefits they offer across the Region or because a broader approach is justified e.g:

- Cross-regional offers e.g. train journeys, regional trails, produce trails; and
- Packaging clusters of regional significance e.g. food, outdoor activities, wildlife. (This might involve acting as an intermediary with niche aggregators to promote dispersed activities/products e.g. golf, riding, bird watching holidays.)

Action Point 1.8: Identify 'regional' products and develop collaborative marketing initiatives

Information provision

Visitor information, particularly regarding attractions, events, travel options (see 2.7) and, to a lesser extent, accommodation is common to all parts of the Region. Budget constraints are creating problems for the provision of such independent visitor information and a number of TICs have closed.

There are now opportunities for more cost effective service provision (including the use of new media) through collaboration between destinations in the Region including:

- Overall review of provision;
- Shared handling of telephone and email information requests;
- Provision of common information and services on websites;
- Provision of modular information points; and
- The development of 'mobile' information.

Action Point 1.9: Review opportunities for co-ordinating and sharing of information services across the Region (on-line and off-line)

9. Objective 2: To develop product quality

Quality is the second pillar of IQM. There must be consistency in quality across all areas that visitors come into contact with, irrespective of who owns or manages them i.e. from pre-visit information to arrival, the experience itself and departure.

Quality needs to be addressed at all levels i.e. in terms of individual products, overall destinations and the supporting infrastructure and services. Tourists are looking for attractive and efficient places and facilities which will encourage them to visit and to spend within the Region. It is the better quality enterprises and destinations, often irrespective of price, that perform the best. At a regional level, this is crucial as tourism growth can only come from adding value which in turn must come from enhanced quality - at all levels.

Accommodation

Promoting quality is important across the board but particularly in terms of accommodation. This is best done by demonstrating the commercial benefits, a task which can be most effectively organised at a regional level through organisation of:

- Learning journeys to demonstration projects within and outside the Region[42];
- Peer group workshops in the Region, using inspirational, successful mentors;
- Tourism awards, by sector and destination, as part of a networking function; and
- Promotion of the national grading or other successor accreditation scheme.

NB: This activity will provide excellent PR material.

Action Point 2.1: Establish a 'quality learning' and award programme for operators in the Region

In support of the underlying principle of sustainability, there is a need for on-going promotion of sustainable development in the sector. In practical terms, this could be implemented through an extension to an existing scheme in the Region e.g. Green Snowdonia or one of the two schemes developed in Powys funded, and Local Food Talks.

Action Point 2.2: Promote and support more sustainable tourism facilities/activities

Given the number and range of demands made on public agencies in the Region, a set of regional investment priorities is needed to focus investment and other related decisions. These can be used when planning RDP bids, or reviewing TISS or any other funding application or requests for more general support. Regional priorities for accommodation development support should include:

[42] It can be difficult for an individual operator to approach another business on this subject; a formal approach by a group, endorsed by TPMW, would be easier and more acceptable.

- High quality serviced accommodation (boutique hotels, B&B), mainly through upgrading existing facilities in key settlements;
- Upgrading existing services and amenities, including the visual amenity of caravan sites;
- Small scale accommodation linked to activities;
- Accommodation that is available off-peak;
- Innovative or exemplar projects; and
- Plugging strategic holes e.g. touring caravan sites or camping barns as part of a network.

These priorities would be in addition to the criteria of TISS e.g:

- Achieve Croeso Cynnes Cymreig status within two years of project completion;
- Participation in the relevant VW quality grading or accreditation scheme; and
- Development of facilities, or procedures, which directly result in energy efficiency and environmental improvements.

Action Point 2.3: Agree and formalise the regional priorities for accommodation development support

Attractions and events

As with accommodation, regional investment priorities for funding the enhancement or development of quality attractions and events would be helpful for various agencies. Priorities should include:

- Regional and national trails like the Coast Path, Glyndwr's Way, Offa's Dyke, Severn Way, Beacons Way, long distance cycling circuits and bridleways[43];
- Regional collaborations e.g. a revived Festival of the Countryside;
- Facilities, events and improvements that add value to the indigenous outdoor activity, wildlife, local produce or cultural products e.g. bird watching in the Dyfi Biosphere, improving the retail and catering offer focusing on local food, drink, arts and crafts and providing for outdoor activities (adrenalin sports and family recreation) focusing on the creation of new centres e.g. riding in the Brecon Beacons, cycling round Rhayader, sailing at Bala;
- Iconic attractions or events i.e. product-related events that may bring in a significant number of visitors from outside the Region and/or raise the profile of the Region, working with WG's Major Events Unit where appropriate;
- Attractions or events - linked to the above - that attract visitors off-peak;
- Attractions or events that are accessible by public transport; and
- The TISS criteria e.g.:
  - Croeso Cynnes Cymreig status within two years of project completion;
  - Participation in the relevant VW quality grading/accreditation scheme; and
  - Development of facilities, or procedures, which directly result in energy efficiency and environmental improvements.

Action Point 2.4: Agree and formalise the regional priorities for attraction development support

[43] Funding for the maintenance and development of the rights-of-way network is currently under severe pressure and yet they are critical to tourism across the region.

With specific reference to events, there is a regional role in:

- Developing the events database, seeking collaboration between event organisers on scheduling and disseminating it further; and
- Providing common support for event organisers through initiatives such as the event toolkit, collating event databases etc.

Action Point 2.5: Develop the regional events database and provide support as appropriate to event organisers

Infrastructure

Transport

Transport has emerged as a key issue for tourism in the Region. There is concern about the level and quality of provision of public transport (the network, frequencies, Sunday services, fares, service facilities, interchanges, ticketing) as well as provision for motorists. There are various plans for transport in the Region but it is critical that planning fully integrates the tourist sector. The combined use by residents and tourists can help to justify more and better services for all. Good, reliable transport is important for those living in, and visiting, rural communities.

Improvements in access to, and travel about in, the Region are needed to ensure that tourists have a variety of travel options, in particular for those who do not have access to a car[44]. A report on sustainable transport and tourism[45] highlighted the barriers that prevent visitors from using public transport. These are largely to do with poor information and communication:

Barriers that prevent visitors from using public transport

- Availability of clear, consistent, information on services and tickets;
- Connectivity with attractions (not all attractions are accessible by public transport/rail);
- Perceptions that the product is unreliable/expensive;
- Lack of information on where to go/what to do via sustainable transport;
- Convenience factor/luggage;
- A belief that the car is the only means of transport to get to the destination; and
- A lack of knowledge about the sustainable transport options available.

Evidence of visitor transport use and the propensity of visitors to use different forms of transport need to be gathered to help analyse the depth of this issue and provide evidence for additional support.

Action Point 2.6: Initiate visitor research on visitor transport usage

The Sustainable Transport report includes a series of recommendations. Those most relevant to Mid Wales involve raising awareness of existing facilities e.g:

- Improve the promotion of, and information about, public transport for visitors as part of the National Transport Plan proposals to improve provision of travel

[44] Evidence from the National Trust suggested this could be about 25% of people.
[45] Sustainable Transport and Tourism Assessment; A report by the Sustainable Transport and Tourism Task and Finish Group, November 2009.

information (e.g. promoting Traveline Cymru, increasing use of personalised travel planning);
- Promote and provide information about alternative driving routes through the Region e.g. not just the Severn Valley route. Routes could be branded with better signposting and information provided on available roadside services etc; and
- Work with the trade to deliver appropriate messages about alternative means of access, alternative routes, information on congestion etc.

'More than A to B': 10 Tips for Providing Better Travel Information to Your Visitors
South West Tourism produced a simple guide to range of initiatives for advising visitors on the best routes, avoiding congestion, encouraging sustainable travel etc.

TraCC is currently developing a Mid Wales Regional Passenger Transport Strategy which needs to reflect the role of passenger transport in supporting the visitor economy[46].

Action Point 2.7: Prepare a visitor travel information strategy and action plan

Transport infrastructure improvements tend to be expensive and budget constraints will be difficult to overcome. The key ones are already identified in the National and Regional Transport Plans e.g.:

- Newtown bypass (which will benefit the whole region);
- Improvements to east-west corridor A483 around Welshpool;
- Improvements to links from south Ceredigion to the A40/M4 corridor;
- Capacity/services on the rail and TrawsCambria networks;
- Feeder services to good quality interchanges (pubs, toilets etc);
- More traffic free walking and cycling routes;
- National Station Improvement Programme;
- Invest in rolling stock and improve customer experience on public transport;
- Improve the provision for cycles on train services; and
- Build on the transport initiatives of the National Parks across Mid Wales.

These projects need to be supported by the regional tourism industry but the onus falls more on the advocacy role (AP 4.1 below) – which should include lobbying for adequate funding for an effective rural transport service.

Action Point 2.8: Coordinate evidence and support i.e. the tourism case for key infrastructure improvements

Broadband

In addition to the much needed improvements to the broadband network, it is also essential to make comparable improvements in the 3G network, as this is increasingly important to tourism businesses and tourists[47]. Clearly, the network is vital for the

[46] Intervention 5 in the Regional Transport Plan prepared by TraCC is to coordinate a Sustainable Visitor Transport Strategy.
[47] The economic renewal programme expects all businesses in Wales to have access to next-generation broadband by the middle of 2016.

successful development of the digital marketing initiatives. Much work is already ongoing through WG to be supplemented by the Digital Tourism Business Framework initiative.

Action Point 2.9: Identify regional 'not spots', define scale of problem, press for timely enhancements and promote the WG grant aid available

10. Objective 3: To develop tourism careers / skills

As and when the tourism sector develops across the region, there will be a need for new, fresh blood to manage and staff the sector along with equipping existing operators – at each stage of their development - to deliver a quality service.

The challenge is to identify and tailor appropriate support which meets market demands and the aspirations of enterprises working in the tourist sector in Mid Wales. However an even greater challenge is the stimulation of demand for the plethora of courses that are available or could be made available. The real worry is that demand for training from tourism sector employers is generally weak, apart from in areas where there are statutory requirements, such as food hygiene, and health and safety. A majority of employers do not see the need to access external training or business advice but rely on on-the-job-training. Experience shows that there is a direct benefit from training in terms of staff retention levels and indeed customer satisfaction leading to higher levels of repeat visits.

This objective therefore involves three initiatives.

Promote careers in tourism

The school system opens the door to tourism careers but this needs more positive reinforcement. A holistic approach is needed to promote the industry involving schools, educational institutions and the trade through the 14-19 Network.

It will be necessary to continue to build upon other activities that provide information on, and encourage enthusiasm for, tourism careers e.g. the work of Careers Wales West and the Dynamo Scheme[48]. Partnership activities with Springboard Wales could be extended, for example, by participation in the Springboard Ambassadors scheme and the Springboard Wales *FutureChef* competition.

There is an important role here for the private sector and training institutions; to promote career opportunities in schools by talking to students, focusing on the breadth of what they would learn and how they could apply it, and giving them the chance to get first-hand experience through work experience and placements. Many operators are prepared to help on such initiatives.

Action Point 3.1: Prepare a holistic tourism careers campaign targeted at the 14-19 age group

Improve access to training provision

The aim should be to have a menu of options (demand and needs based) that is clear and accessible. This might involve providing a single portal to existing training and business information e.g. via Whodoiask.com, a one stop shop for support and

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

communication that will include generic national and specific regional advice for each Region. This should include the various training initiatives being offered to the trade through the various RDP programmes, Medrwn and other training providers.

Where there are gaps (in subject or delivery format), the aim should be to look to adapt provision that already exists in the region. As a last resort, new training on specific subjects and/or through different mechanisms can be considered. This might involve looking at how and where services are provided, perhaps involving mobile, in-destination, short courses including fam trips for clusters of businesses and/or open/blended learning. The most important issue is to provide the right courses. Location and timing of courses are crucial in Mid Wales where travel can be an issue.

Recent research in North Wales '**Vision for Skills Standard'** has identified priority training in seven different categories and a Customer Satisfaction Index as an evaluation tool. This model for identifying training needs is to be initiated out in each region.

Existing skill shortages for chefs are predicted to worsen in future years. Rather than always trying to recruit trained chefs, employers may need to be more willing to train chefs, for example, through apprenticeship schemes for which WG funding is available[49]. Training providers would be keen to increase provision but need evidence of demand to do so. The trade associations need to work with providers to marshal support from the industry across the Region to address this very particular problem.

Action Point 3.2: Establish a comprehensive portal to existing training and business information

Action Point 3.3: Identify gaps in training provision for tourism and means to fill them with particular emphasis on chef apprenticeship schemes

Raise demand for training

This is the most important element. Demand for training is relatively weak from the majority of small and micro businesses in the Region. New ways should be found of generating interest in improving skills, helping enterprises identify their own needs and then facilitating the support they require. This should include:

- Pro-active campaigns working with/through Tourism Associations, as part of each destination management plan, using peer pressure to promote a learning environment and the idea that training is an investment rather than a cost, perhaps targeting different clusters over a period of time, assisting operators to undertake training needs analyses and ensuring that short course provision is tailored to specific industry needs and marketed effectively; and
- Getting the skills agenda embedded in all tourism media e.g. via the new DM website, industry newsletters and conferences, linking it to grant awards.

It might be argued that the priority should be to focus on promoting broad-based management training and IT (notably digital marketing) in a cross-sectoral approach, working with the Dept for Education and Skills and other partners such as the Confederation of Small Businesses) rather than more specialised niche tourism subjects. However, providing short, sharp bits of learning via Medrwn and others e.g. the Ambassador training in customer care, sense of place and product knowledge,

[49] Programmes leading to recognised qualifications would be eligible for public sector funding.

funded by COLLABOR8 in the Brecon Beacons offers the opportunity to cross-sell training more broadly.

Equally, customer service skills have been highlighted as a skills gap across the visitor economy. From experience elsewhere, a customer service/product knowledge programme tailored for Mid Wales operators would be likely to gain operator enthusiasm and could include specific regional product and destination knowledge.

Action Point 3.4: Undertake a promotional campaign, through the TAs, for tourism training, focusing on management and customer service options

12. Objective 4: To improve knowledge and communication

There is much evidence to suggest an over-riding need to improve communications within and between agencies; a need to raise the profile of tourism across all agenda and a need to work with those already involved to collaborate more effectively.

Advocacy

Notwithstanding the impact of Foot & Mouth and the evidence that reveals the importance of tourism to the economy and other facets of life – particularly rural life - there is still a need to reinforce the role of tourism at national, regional and local level. This is ever more important as budgets are threatened at local level where tourism is not a statutory function. Given the cross-cutting nature of tourism, involving and supporting as it does transport, food and agriculture, health, education, environment, heritage, sports, the arts etc, it is vital that tourism gets a permanent place on the agenda of all these fora. This is a key role for partners and stakeholders.

Advocacy includes **promoting tourism to the local population** - as an industry that helps sustain wider community benefits and as a worthwhile career.

The rural tourism in Wales report[50] stressed the importance of tourism in this context. Note the quote referred to in Chapter 2: *"Tourism is particularly important in rural Wales, not just because of the income it generates but also because of the wider role it can play. It helps keep communities together through job creation; it allows farm diversification; and the provision of services for tourists can also be used by local people."*

The importance given to rural tourism in this official report is a good example of the evidence available to support the critical advocacy role required by the industry. NB: The committee was aware of the plethora of policy but the difficulty of marshalling it all and making use of it. It recommended: Reviewing the effectiveness of all policy relating to rural tourism to inform the review of Achieving Our Potential.

Similarly, the Coastal Tourism Strategy promoted the concept of: *'An integrated year round coastal tourism industry, based on an outstanding natural environment and a quality tourism product that exceeds visitor expectations, whilst bringing* economic, social, cultural and environmental benefits to coastal communities'.

There is a significant number of other authoritative reports, not least the Tourism Satellite Accounts, that provide further ammunition for the tourism industry in Mid Wales. All evidence needs to be marshalled, supplemented where necessary and used strategically for the benefit of the industry in a coordinated manner i.e. delivering the same, consistent messages.

Action Point 4.1: Take every opportunity to advocate the importance of tourism to Mid Wales as an economic and social driver, backed by hard, informative evidence

[50] Rural Development Sub-Committee Inquiry, op cit

Collaboration

Whether or not there is an awareness of tourism, there is a great opportunity for better collaboration between agencies/stakeholders. The sub-committee report on rural tourism raises this point strongly:

"In addition to the vast number of policies, witnesses told us about the difficulties created by a lack of cohesion amongst the various organisations and departments involved in delivering rural tourism." As one contributor remarked: *"It seems to me that some of the departments work to their own specific agenda, and perhaps the move should be more towards cross-cutting themes, such as cultural tourism….. An example of that can be found on the rural affairs section, where there is very little mention on the website of tourism, and yet it is an integral part of rural affairs."*

The Committee was keen to see greater collaboration across Government departments to deliver on rural tourism. They wanted to see *"a lot more cross-departmental working between Assembly Government-sponsored bodies, such as Cadw, the CCW and the Royal Commission on the Ancient and Historical Monuments of Wales. They could each have a tourist champion to pick up and recognise the opportunities in different programmes."* …. *"Furthermore, in the current economic climate we believe more collaborative working with bodies in the third sector will be efficient in delivering the objectives of rural tourism. "*

The report continues*: "Whilst we are sure that there is lots of positive work going on within departments, we are concerned that the necessary connections are not being made. Tourism is a cross cutting policy, which is delivered by numerous departments within the Government. However, the internal division of responsibilities within government is not immediately apparent to external organisations, and steps must be taken to rectify this information gap."*

There is similar scope for collaboration at regional and local level where there is a vast amount of work being done to help support the local tourism industry, directly or indirectly. For example, much of this work is project based through the RDP or Interreg and much of it is repetitive which is not surprising given the ubiquitous rural nature of the Region.

By way of example, a recent meeting of programme managers in the Brecon Beacons highlighted the large number of **RDP** and Interreg projects covering the National Park. All of these had a tourism element and there was considerable repetition of themes e.g.:

- Formation of cluster groups (geographic or thematic);
- ICT and digital marketing initiatives;
- Business support and tourism training;
- Grant schemes for farm diversification;
- Food tourism;
- Visitor transport;
- Cultural heritage/interpretation/ sense of place;
- Walking, cycling and riding trails;
- Signage;
- Events; and
- Environmental management/business 'greening'.

In this example, there is an opportunity for a regional brokerage role to encourage more joined-up thinking across the Region:

- For bids to be tourism-proofed i.e. to ensure that tourism benefits/opportunities are maximised in all related bids and that the bids across the Region are co-ordinated to gain maximum benefit;
- To look at options for sharing experience and resources to maximise benefit and minimise wasted effort once bids are won; and
- To evaluate the programmes and their wider impacts for future benefit.

Given the cross-cutting nature of tourism referred to above, and the opportunity for tourism development to contribute to general well-being, there are a host of other opportunities for such collaboration both within the tourism sector and with other sectors.

To a large extent, such collaboration is about having the right networks in place and then using them effectively. These can be internal or external to the Region e.g:

- The Wales Rural Forum;
- A new cross border forum;
- Revive the regional forum of tourism officers;
- Etc.

There are also a number of specific lines of communication that are particularly important e.g. with the Planning Officers in the Region in order to contribute to planning policy development in the new LDPs and provide independent advice on specific development proposals.

Action Point 4.2: Co-ordinate tourism project development and implementation e.g. overlap of RDP and other externally funded projects along with exit strategies

Action Point 4.3: Seek formal collaboration with cross-cutting sectors e.g. food, agriculture, countryside/forestry, transport, health, education, environment, heritage, sports, the arts

Research, Monitoring and Evaluation

A commitment to monitoring and improvement as an ongoing cyclical process is another pillar of IQM. This is about checking on visitor satisfaction, impacts on businesses, the community and the environment, setting and assessing standards; working together to make improvements; and repeating the process on a regular basis.

The UKTS and IPS surveys generate reports at regional level in Wales within acceptable margins but are not ideal to report statistics or measure trends at destination level or by activity which is so important across Mid Wales. There is a need for better data on the volume and value of tourism at a destination level for planning, monitoring and advocacy reasons. There is a clear aspiration to move on to a more manageable impact model run, say, every three years.

There is also a need for:

- More profile information on current visitors and non-visitors to the Region's destinations
- More intelligence about trends in the market place relevant to the Region's destinations e.g. small coastal resorts, activity and nature-based holidays; and
- Better local evaluation techniques, measuring performance against local destination objectives, using realistic indicators and accessible data.

Any research initiative should be undertaken in collaboration with the Wales Tourism Research Partnership. Certainly any new impact model would best be addressed at national level but would benefit from inter-regional collaboration. Locally, resources to capture and analyse tourism data and trends are limited and when available the data is not always uniform and in most cases only have short term funding support. However, there is useful data collected in the Region by various stakeholders. Where possible, this should be collated and made available.

NB: Consideration might be given to establishing a regional 'tourism observatory', working with an HE institution, marshalling all regional data from VW and local sources, gathering information on tourism trends and best practice exemplars (and developer needs).

Action Point 4.4: Identify and initiate specific research needs for use across the Region, including a new impact model

Action Point 4.5: Collate and disseminate tourism intelligence relevant to the Region, local destinations and the Region's products

Action Point 4.6: Develop relevant KPIs and benchmarks based on realistic, measurable performance measures. Undertake (independent) evaluation of local destination performance

13. Summary of Action Points

The implications of the above Action Points are summarised in the table below. This table identifies a number of implications associated with each Action Point:

- **Priority**. All the action points are considered important in the context of the five year strategy. The few that are considered priority 2 allow some flexibility in phasing.
- **Phasing**. This reflects both priority and the time required to implement the Action. Some are on-going initiatives i.e. covering years 1-5.
- **Lead agency**. Although all Actions should be taken on as a Partnership, one party will, or should, be best placed to take a leading role. It is indicated who that party might be but there may be some flexibility.
- **Support agencies**. These include other partners who will potentially have a significant role in implementing the Action Point.
- **Resources/Budget**. In broad terms, there are no proposals for major new initiatives and therefore there are no major new resource implications. Most of the Action Points could be deemed to be within existing terms of reference and budgets. In some cases, there may be some set-up and/or support costs. Where this may be the case, detailed appraisals will be required.

Acronyms used in Action Plan

TPMW	Tourism Partnership Mid Wales
VW	Visit Wales
LAs/NPAs	Local Authorities and/or National Park Authorities as destination managers
PS	Private sector operating through a local Trade Association
WG	Communications, Regional Engagement, Spatial Plan, Major Events Unit
Other Agencies	Public sector organisations such as Cadw, National Trust, Countryside Council for Wales, Forestry Commission, Environment Agency, Mid Wales Agri-Food Partnership etc
Local community	Local community or regeneration partnerships, local Tourism Associations etc
Transport	WG, TraCC, TrawsCambria, Heart of Wales Line, Cambrian Railways
Arts	Local arts/cultural/sports fora, including major venues and cultural groups
Education	Education establishments, WG, VW National Tourism Skills Coordinator

	Action Point	Priority 1 or 2	Phasing (Years)	Lead agency (Indicative)	Support agencies	Resources/Budget
Objective 1: Organising tourism resources						
1.1	**Set out, and agree, a hierarchy of destinations within Mid Wales**	1	1	LAs/NPAs	VW, TPMW	Existing budgets
1.2	**Establish an appropriate, representative private sector association in each of the main destinations**	1	1-2	PS	LAs/NPAs, TPMW	Existing budgets Additional cost subject to format of TAs
1.3	**Public authorities to review their internal communications and formalise tourism as a common agenda item**	1	1-2	LAs/NPAs Other agencies	TPMW	Existing budgets
1.4	**Establish appropriate partnership arrangements involving the public and private sectors, TPMW and other relevant stakeholders in each of the main destinations**	1	1-2	PS, LAs/NPAs	TPMW, Other agencies, Local communities	Existing budgets
1.5	**Support the development of destination plans as appropriate**	1	1-5	LAs/NPAs,	TPMW, PS Other agencies	Existing budgets
1.6	**Support the implementation of the national marketing strategy through a collaborative approach to destination marketing**	1	1-2	LAs/NPAs	TPMW, PS	Existing budgets
1.7	**Review the potential for collaboration on local marketing initiatives**	1	1-2	LAs/NPAs	TPMW, PS	Existing budgets
1.8	**Identify 'regional' products and develop collaborative marketing initiatives**	2	1-5	TPMW	LAs/NPAs, PS Other agencies Transport agencies	Existing budgets Additional cost subject to range of activity
1.9	**Review opportunities for co-ordinating and sharing of information services across the Region (on-line and off-line)**	2	1-5	TPMW	LAs/NPAs Local communities	Additional cost subject to range of activity

	Action Point	Priority 1 or 2	Phasing (Years)	Lead agency (Indicative)	Support agencies	Resources/Budget
Objective 2: Helping to develop product quality						
2.1	**Establish a 'quality learning' and award programme for operators in the Region**	1	1-3	TPMW	VW, LAs/NPAs, PS WG	Existing budgets
2.2	**Promote and support more sustainable tourism facilities/activities**	1	1-3	TPMW	VW, LAs/NPAs, PS WG, Other agencies	Existing budgets Additional cost subject to range of activity
2.3	**Agree and formalise the regional priorities for accommodation development support**	1	1	TPMW	VW, LAs/NPAs, PS WG	Existing budgets
2.4	**Agree and formalise the regional priorities for attraction development support**	1	1	TPMW	VW, LAs/NPAs, PS WG, Arts	Existing budgets
2.5	**Develop the regional events database and provide support as appropriate to event organisers**	1	1-2	TPMW, Arts Other agencies	LAs/NPAs, PS, WG Local communities	Existing budgets Additional cost subject to range of activity
2.6	**Initiate visitor research on visitor transport usage**	1	1-2	WG/TraCC	TPMW, LAs/NPAs, VW, Transport	Additional cost
2.7	**Prepare a visitor travel information strategy and action plan**	1	1-2	WG/TraCC	TPMW, LAs/NPAs, VW, Transport	Additional cost
2.8	**Coordinate evidence and support i.e. the tourism case for key transport infrastructure improvements**	2	1-5	TPMW	LAs/NPAs, PS, VW Transport Other agencies Local communities	Existing budgets
2.9	**Identify regional 'not spots', define scale of problem, press for timely enhancements and promote the WG grant aid available**	2	1-2	WG	VW (DTBF), PS, LAs/NPAs, Local communities	Existing budgets

	Action Point	Priority 1 or 2	Phasing (Years)	Lead agency (Indicative)	Support agencies	Resources/Budget
Objective 3: Developing tourism skills/careers						
3.1	**Prepare a holistic tourism careers campaign targeted at the 14-19 age group**	2	1-2	TPMW	Education, PS, WG	Additional cost subject to format
3.2	**Establish a comprehensive portal to existing training and business information**	1	1	VW	TPMW	Existing budgets
3.3	**Identify gaps in training provision for tourism and means to fill them with particular emphasis on chef apprenticeship schemes**	2	1-5	Education	TPMW, PS WG	Existing budgets Additional cost subject to range of activity
3.4	**Undertake a promotional campaign, through the TAs, for tourism training, focusing on management and customer service options**	1	1-2	Education	PS, LAs/NPAs, TPMW, WG	Existing budgets
Objective 4: Improving communication						
4.1	**Take every opportunity to advocate the importance of tourism to Mid Wales, as an economic and social driver, backed by hard, informative evidence**	1	1-5	TPMW	PS and all other partners	Existing budgets
4.2	**Co-ordinate tourism project development and implementation e.g. overlap of RDP and other externally funded projects along with exit strategies**	2	1-5	LAs/NPAs TPMW	Other agencies Local communities	Existing budgets
4.3	**Seek formal collaboration with cross-cutting sectors e.g. food, agriculture, countryside/forestry, transport, health, education, environment, heritage, sports, the arts**	1	1-5	TPMW	All partners WG (all departments)	Existing budgets
4.4	**Identify and initiate specific research needs for use across the Region, including a new impact model.**	1	1-5	LAs/NPAs	VW Research Unit, TPMW, PS	Existing budgets Additional costs subject to range of activity
4.5	**Collate and disseminate tourism intelligence relevant to the Region and the region's products**	2	2-5	TPMW	Education, PS	Existing budgets Additional costs subject to range of activity
4.6	**Develop relevant KPIs and benchmarks based on realistic, measurable performance measures. Undertake (independent) evaluation of local destination performance**	2	2-3	LAs/NPAs	TPMW, VW. PS	Existing budgets