

action plan
for the
Countryside
experience



Report of the Working Party on Countryside
Tourism to the Welsh Assembly Government



Llywodraeth Cynulliad Cymru
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Chairman's Introduction

May I firstly take this opportunity to express my sincere thanks to all those individuals and organisations that have given their time and shared their knowledge and experience with the working party in compiling this action plan and also to my fellow working party members who have given so generously of their time.

This document will not fully satisfy everyone's wishes but we have had to be realistic about what is achievable. However, we have endeavoured – and to a large extent succeeded – in fairly reflecting the thoughts and aspirations of the group as a whole. I hope – and believe – that it will act as a catalyst to inspire and enthuse those involved in Wales' countryside experience to work together to help fully achieve the country's potential in rural tourism.



Tourism plays a vital role in helping to sustain the rural economy and is often the major source of employment in rural areas. In Wales, we have a strong and long established countryside tourism product, with elements such as the farm tourism sector and many of our activity tourism products representing the best of their kind in the UK. Tourism is, however, a rapidly changing industry; with customer expectations rising continuously, we cannot afford to be complacent if we are to continue to compete globally.

Over recent years, much work has been undertaken to develop action plans for cycling, walking, horse riding, adventure, water sports and fishing. These plans have sought to analyse the existing product and identify the potential for growth, so as to grow the market through coordinated product development and marketing. We need to build on these successes and ensure that more of our countryside tourism products match or improve upon the best of their type.

We need to continually improve the quality of the visitor experience through not only offering improved physical products but also higher quality of service and by ensuring that the experience is delivered to the visitor in an integrated manner. This will require a well-motivated and skilled workforce, a willingness from tourism businesses to work together and a more integrated strategic approach by the public sector to supporting tourism. Adfywio and other initiatives that arose in response to recent problems that have beset the countryside show what can be achieved when public agencies work together, and should now be considered the norm.

The focus group research undertaken as part of this exercise highlighted the need to broaden the appeal of Wales as a countryside destination by emphasising that we have much more to offer than just mountains and outdoor activities. Wales' countryside experience must encapsulate tranquillity, changing seasons, local gastronomy and relaxing breaks, in order to truly sell itself.

A vital element of the Welsh countryside experience is the cultural heritage and in particular the Welsh language, which differentiates us from our near neighbours. We need therefore to ensure that our visitors are valued, able to access an authentic Welsh experience and that tourism supports rather than detracts from our rich heritage.

Tourism must have the support of local communities if it is to thrive. What is good for local residents, will also be good for visitors and vice versa. It is therefore essential that we increase the retention of visitor spend in the local economy, by encouraging tourism businesses to make use of and promote local suppliers.

Our challenge for the future is empowering both businesses and communities to work together to develop a thriving, sustainable and viable local tourism product, where the public sector can contribute to improving the local infrastructure and where communities themselves take ownership of the countryside experience.

Wales' countryside is undoubtedly one of its greatest assets, but with a more coordinated approach – from businesses, from communities, from the private and public sectors – we can even further strengthen Wales' rural tourism product and create a viable, sustainable and dynamic product that will offer visitors a five-star countryside experience that encapsulates the best of Wales' culture, heritage and natural beauty.

Christine Lewis

Chairman of the Review of Countryside Tourism Working Party & WTB Board Member.

1 The Future for the Countryside Experience

- 1.1 The Wales Tourist Board (WTB), together with the Welsh Assembly Government's Rural Policy Division, set up a working group of individuals with a wide range of experience and knowledge of public support of rural tourism to formulate a plan for the future of rural tourism. Membership was drawn from the private and public sectors and the members were guided by a steering group drawn from various public sector agencies. Initial discussion indicated that this plan needed to capture the range of activity relating to the countryside and set out action points, hence the title of this study.
- 1.2 This working group was formed in September 2003 on a task and finish basis and this report is based upon its work. The document has been primarily prepared for the Welsh Assembly Government, the Rural Partnership, WDA, local authorities in Wales and WTB. In addition, it is intended to inform those with a remit for, or interest in, the development and promotion of rural Wales. These are primarily Assembly Sponsored Public Bodies, together with private businesses and parts of the voluntary sector.
- 1.3 In the context of tighter budgets from the Assembly, the end of the Objective One programme and the maturity of the tourism industry, it will be necessary to ensure public funding is targeted where it will have the most sustainable impact, without further building a grant dependency culture. Business and community empowerment is, therefore, central to a successful future, with public support prioritised towards improving the business and social environment. Accordingly, the priority recommendations in this report are revenue neutral for the public sector. The report also contains a wider set of recommendations that could be undertaken should additional funds be made available.
- 1.4 The policy context is set by the following key strategic documents of the Welsh Assembly Government:
- *Wales: A Better Country* – The Strategic Agenda of the Welsh Assembly Government 2003
 - *Learning To Live Differently* – The Sustainable Development Scheme (currently being reviewed.)
 - *People, Places, Futures* – The Wales Spatial Plan
 - *A Winning Wales* – The National Economic Development Strategy
- 1.5 In addition the specific tourism policy context is set by the National Tourism Strategy for Wales *Achieving our Potential*, together with the four Regional Tourism Strategies.

Definition

- 1.6 The countryside experience was defined as being:

The role of inland and coastal rural Wales in offering rewarding experiences to visitors. The experiences include:

- enjoyment of the natural environment
- villages and market towns
- accommodation
- attractions, events and activities, especially outdoor activity
- restaurants, cafes, tea rooms and pubs
- shops and other retail outlets
- travel by public and private transport
- opportunities for walking, cycling and riding
- travel on or recreational enjoyment of the inland waterways of Wales
- distinctive Welsh culture and heritage.

Working Group Remit

- 1.7 The working group remit was agreed as being to:
- i) review the market for the countryside experience and assess the relevant trends affecting both the market and the product
 - ii) commission research into consumer expectations and attitudes relating to countryside holidays
 - iii) examine best practice elsewhere
 - iv) generate a vision for the rural tourism product to be presented to consumers
 - v) make recommendations on the required product development actions
 - vi) advise on effective mechanisms for the marketing and promotion of the rural tourism product.
- 1.8 This report includes only a framework against which sub-regional projects and initiatives (such as LEADER and TGA projects) might be assessed. The working group sought to provide direct input at a pan-Wales and Regional Tourism Partnership level only, rather than considering any smaller geographical areas.
- 1.9 WTB mandated the group to ensure that recommendations should be made with reference to:
- economic, social and environmental sustainability
 - other sectors such as agriculture, agri-food, crafts and non-visitor retail.
- 1.10 WTB also mandated the group to ensure that the recommendations should be public sector revenue neutral.

2 The Vision

2.1 The vision for the countryside experience in Wales is:

The destination of choice for visitors seeking a varied and quality countryside experience, whether this is as an activity enthusiast or the general visitor attracted by the quality environment, range of attractive accommodation, food and things to do.

The experience is delivered to visitors in an integrated manner by prosperous self-confident rural businesses and communities, who have taken responsibility for their own destiny. The experience is presented in a way that uses a distinctive Welsh sense of place that differentiates the experience from that offered by competitors, and provides economic benefits for the host communities whilst also supporting their local Welsh culture.

2.2 Through achieving this vision, the countryside experience will enable Wales to capitalise on the structural changes affecting tourism and better exploit the growing short break, additional holiday, cultural tourism and activity orientated markets. It will also help to provide prosperity to the countryside and maintain the core environmental asset that the experience is built upon.

2.3 The strategic priorities needed to realise this vision are:

- **meeting visitor needs** – through maintenance and development of the key elements making up the countryside experience
- **communication with markets** – to position the countryside in Wales as a modern destination and raise awareness, and encourage visits to Wales from a broad cross section of visitors
- **building self-sustaining businesses and communities** – prosperous and capable
- **integration** – of the way that visitor offer is developed through a holistic approach and the way the public sector agencies work together
- **contribution to the sustainable rural economy** – through supporting jobs and raising the value and wage levels of employment in the countryside.

2.4 While all the actions identified in the summary have a significant role to play in the countryside experience, the five key areas of work spanning public and private sector actions will be to:

- i) **improve access** to the countryside through rights of way, circular walks, trails etc. and through capitalising on the CROW Act provisions in 2005

- ii) **develop and market** the different parts of the countryside experience in Wales for a variety of types of visitor

- iii) develop **quality eating out** in Wales

- iv) **integrate regeneration** of rural Wales

- v) provide **local information** in a manner to suit the needs of visitors and residents.

2.5 Furthermore, there are four cross-cutting themes that need to be part of any countryside experience work. These are: ensuring rural regeneration and sustainable development benefits; building on the quality of existing provision rather than necessarily providing new facilities or activity; an integrated public sector approach; and the need to use local Welsh culture in its widest sense to build a sense of place.

2.6 The working group has established a set of principles against which any public support for countryside experience projects should be assessed. In essence, projects should have proven demand and a realistic likelihood of long-term viability and provide value for money and sustainable development outputs. Projects should also reduce seasonality, reinforce the sense of place and enjoy community support. Within these principles, projects that are genuinely innovative and take thinking forward should be considered, even if not all of the above criteria can be met.

3 Meeting Visitor Needs

3.1 The countryside in Wales is well placed to serve those visitors who are strongly motivated to pursue outdoor activities. However, there is a strong perception amongst many potential visitors that outdoor activities are the only product that the countryside in Wales has. Visitors have a diverse set of interests and there needs to be adequate provision in order to attract people. Of particular importance is a perceived lack of character accommodation, shopping and, particularly, good eating out. The main market opportunity for the countryside in Wales is to grow the volume of less active visitors through emphasising the diversity of things to see and do.

3.2 By comparison with a set of competitor destinations, Wales appears dated. The West Country is considered better for families while the Lake District in particular is very strong at presenting a mixed offer of good eating out, shopping and accommodation combined with a superb landscape.

3.3 To address these issues it is necessary to:

- Ensure a warm welcome.
- Develop and raise awareness of local circular and other walks suitable for a cross-section of abilities, linking places of interest, villages etc., and make maximum use of the new open access areas under the CROW Act. CCW has lead responsibility for publishing maps showing the areas to which the new rights of access apply.
- Continue the regeneration of market towns and villages in Wales in order to provide year-round visitor and resident opportunities to eat, drink and shop, as well as providing a sense of place to experience Welsh culture and heritage. Market towns and villages offer opportunities to build business clusters and create critical mass.
- Maintain and enhance the basic public services in the countryside such as toilets and car parks.
- Increase the quality of the visitor accommodation in Wales, with particular attention to rural character and sense of place. Only support the development of new and refurbishment of existing accommodation if there is an identified market need or niche.
- Increase the quality of countryside attractions through profitability and investment. Only support the development of new attractions with genuinely innovative ideas and commercial viability.
- Exploit Wales' competitive advantage in activity holiday markets and continue to develop new provision in line with market needs. Walking is the largest market but other activities and interests are also sought by visitors.
- Use events to attract new or repeat visitors to the countryside and to address seasonality issues.
- Improve the quality of eating out provision. This is vital to the visitor experience, particularly when centred on the use of local produce and menus. Places to eat and drink are key factors for visitors and an area in which Wales is perceived as weak. Although progress in developing the quality of Welsh food has been made over the last decade through public and private sector work including initiatives by the WDA Food Directorate, the market perception is that the food offer remains poor. Improved quality eating out provision is vital, particularly when centred on the use of local produce and menus. There is also opportunity to further develop the strong links between farm accommodation and food production in addition to schemes that facilitate the visitor purchase of food direct from the producer.

- Improve the retail offer in the countryside in Wales for visitors and residents. Visitors are particularly interested in local produce and craft. Use local retail specialism (such as Hay's literary associations and Betws-y-Coed's outdoor activity shops) to build differentiation and market advantage.
- Improve road and public transport access to the countryside in Wales and, in particular, through marketing and ensuring that operators meet the needs of visitors and thereby increase the tourism use of existing rural public transport services (e.g. the attractive rural rail lines) to enable the visitor to have an alternative to the car. Improving access by both car and public transport will be particularly important to serve the growing short break and additional holiday markets with their restricted drive/travel time criteria.
- Continue to improve the provision of visitor information to meet the changing needs of visitors.

Key recommendations to address meeting visitor needs are set out below, split into two sections, the first section being those actions which are considered to be broadly within existing public sector budgets (although this may, in some cases, be in the context of the scale of the action).

Some actions will require additional private sector investment and it is considered that this will happen in the light of the commercial benefits to be gained. The second shorter section identifies further actions that would make substantial progress towards realising the vision should additional public funding become available or if other existing activity by the lead or partner organisations is curtailed.

Commonly used abbreviations within the table include WDA (Welsh Development Agency), WTB (Wales Tourist Board), RTPs (Regional Tourism Partnerships), ELWa (Education and Learning Wales), CCW (Countryside Council for Wales), WAG (Welsh Assembly Government) NPAs (National Park Authorities) and TTFW (Tourism Training Forum for Wales). *Community* in this context refers to informal or formal community development groups, and the *private sector* primarily refers to the numerous individual businesses serving visitors to the Welsh countryside. While LEADER+ groups are referred to in the action table, primarily because of their role in rural development, some locations may have other community groups undertaking the same type of work.

Action	Priority	Lead responsibility	Partners	Timing
<p>Improve the rights of way network, with priority to the parts of most interest to countryside experience visitors (particularly circular routes that link tourism assets and village centres and provide links to the new access areas) through targeted investment.</p> <p>Use Local Authority Rights of Way Plans to plan strategically for coordinated upgrading of the footpath network.</p>	High	LAs	CCW, NPAs, National Trust, Forestry Commission, Private sector	Medium term
<p>Extend sustainable access to the countryside through consistent and accurate information provision, particularly in respect of the new open access areas.</p>	High	CCW	National Trust, Forestry Commission, LAs, NPAs	Medium term
<p>Promotion of the National Cycle Routes as a way of increasing access to the countryside.</p>	High	Sustrans	LAs, WTB	Next planning session
<p>Extend sustainable access to rivers in Wales for canoeing, angling and other recreational opportunities.</p> <p>Facilitate access agreements through use of model agreements.</p>	Medium	CCW, EA	Private sector, National Trust, LAs, NPAs	Next planning session
<p>Continued support for environmentally friendly farming and farm incomes to ensure a well-maintained countryside, through schemes such as Tir Gofal.</p>	High	WAG, CCW	Private sector, NPAs, NT	Next planning session
<p>Continue regeneration of market towns and villages by community, public and private sectors.</p>	High	LAs	WDA, Private sector, Community, NPAs	Next planning session
<p>Ensure 'sense of place' principles are used.</p>	High	LAs	WDA, Private sector, Community, NPAs, WTB	Next planning session
<p>Encourage the inclusion of built environment wet-weather recreation elements in regeneration programmes.</p>	High	LAs	WDA, Private sector, Community	Next planning session
<p>Only support the development of new accommodation; where there is an identified niche market need or gap in provision and ensure that any new accommodation provides appropriate quality and character.</p>	Medium	WTB	RTPs, Private sector	Next planning session

Action	Priority	Lead responsibility	Partners	Timing
Continue to capitalise on the positive relationship between the farm accommodation and the countryside (image and local food).	Medium	RTPs, WTB	Private sector	Next planning session
Continue to improve the quality of accommodation overall, particularly four star plus serviced accommodation.	High	Private sector	RTPs, WTB	Next planning session
Improve the landscaping and densities of caravan parks.	Medium	Private sector	RTPs, WTB	Medium term
Extend facilities to lengthen season.	High	Private sector	RTPs, WTB	Next planning session
Use accommodation to help build the sense of place.	Medium	Private sector	WTB	Next planning session
Development of accommodation consortia to accommodate group bookings.	Medium	Private sector	RTPs	Medium term
Only support the development of new attractions which are genuinely innovative and have a realistic prospect of attracting sufficient visitors to be financially viable, and do not cause significant displacement.	High	WTB	RTPs, LAs	Next planning session
Improve the quality of existing attractions and encourage constant reinvestment.	High	Private sector	WTB, RTPs	Next planning session
Link events with attractions (e.g. through holding events at attractions) to add value to both.	Medium	Private sector Attraction Operators, Community/ LEADER+	RTPs	Medium term
New WAG guidance for white on brown tourist signing to ensure consistency.	Low	WAG	LAs	Medium term
Attraction consortia and partnership development.	Medium	Attraction Operators	RTPs	Medium term
Build the linkages between accommodation and activity operators.	High	Private sector	RTPs	Next planning session
Use the WTB and other research and activity strategies to realise the potential of activities/interests in the countryside.	High	Private sector	WTB, RTPs	Long term
Develop a set of 'softer' and 'taster' activities and interests.	High	Private sector	Community, LEADER+	Medium term
Development and marketing of niche products responding to local opportunities.	Medium	Private sector	RTPs, Community/ LEADER+	Medium term
Use events to build a positive contemporary image of Wales.	Medium	WTB	RTPs, private sector	Medium term

Action	Priority	Lead responsibility	Partners	Timing
Use events to add value to other facilities or initiatives.	Medium	Private sector, Community	RTPs, LAs, LEADER+	Medium term
Use events to address seasonality and geographical spread issues.	Medium	Private sector, Community	RTPs, LAs, LEADER+	Long term
Upgrading of existing establishments and new development of places to eat and drink.	High	Private sector	WTB, RTPs	Next planning session
Exploit the pilot <i>Blas</i> work undertaken by the WDA as a model for development of Welsh cuisine.	Medium	Private sector	WDA	Next planning session
Build use of locally sourced produce and local specialities.	High	Private sector	WDA, WTB, RTPs	Next planning session
Stronger Welsh presence in publications such as the Good Food Guide and the Good Pub Guide.	High	Private sector	-	Medium term
Capitalise on the positive links between the clean Welsh environment and good places to grow food.	High	WTB, RTPs, WDA	Private sector	Next planning session
Use WTB Section 4 grants for quality restaurants which project a sense of place, offer value for money, have a customer focus and centre dishes around local produce.	High	WTB, RTPs	Private sector	Next planning session
Extend the role of TICs as one stop shops for a wider range of information about leisure, and the provision of non-tourism information to the wider community.	Medium	LAs	RTPs, WTB	Long term
Consider the reduction in the overall number of TICs, but increase the number of TIPs.	Medium	LAs	Private sector, community groups	Long term
Continue to encourage tourism businesses to become Green Dragon accredited.	High	WTB	RTPs, LAs/NPAs	Current
Making greater use of our rural railways by promoting them as visitor experiences rather than just transport. This should include the development of circular walks and cycle routes from rural railway stations.	Medium	Rail Operator (Arriva)	WTB, LAs, RTPs, Sustrans	Medium term onwards
Working with rural public transport operators to try and ensure that they meet the needs of visitors.	High	LAs	RTPs, WTB	ongoing

Aspirations

Action	Priority	Lead responsibility	Partners	Timing
Further improve the Rights of Way network.	High	LAs	CCW, National Trust, Forestry Commission, Private sector	Medium term
LEADER+ groups to work with local communities to identify community circular walk opportunities.	High	LEADER+	Private sector, Community, CCW, LAs	Medium term
Support for specialist rural retail, particularly craft and local produce.	High	WDA	WTB, RTPs, LEADER+	Medium term
Public-private partnerships with retailers to enhance the business environment.	Medium	Private sector, LAs	LEADER+	Medium term
Assembly to note the tourism need to prioritise the upgrading of the A470, A44 and the A487 in order to capitalise on the growing short break market with limited drive times.	High	WAG	LAs	Long term
Improved public transport links serving walking trails and places of interest.	High	LAs	Private sector	Medium term
Improved public transport links from the main airports serving Wales.	High	WAG, LAs	Private sector	Long term
Increase retailing by TICs, which may need initial local authority investment in suitable premises but lower future operating costs.	Medium	LAs	-	Long term
Support events which are high profile or which aid business profitability. Plus suggestion of encouraging a programme of events on a thematic basis throughout the year.	Medium	WTB	Private sector, Community	Medium term

This table for actions is repeated for each of the strategic priority themes (with the exception of the contribution to the rural economy which will result from all these actions.)

4 Communication with Markets

- 4.1 The public and private sectors each have a role in marketing the Wales countryside experience.
- 4.2 WTB has a clear role in presenting pan-Wales campaigns to the UK and overseas. An important task for WTB is to refine existing campaigns within the existing structure to change the image of the countryside in Wales to better reflect the diversity of places to stay and things to do, as well as re-positioning the countryside as a modern destination. It will also be important to maintain the competitive advantage enjoyed by Wales as an activity destination. This national work is best undertaken through existing campaigns such as Big Country rather than establishing new specific campaigns or organisations.
- 4.3 The Regional Tourism Partnerships' (RTPs) role is to use the themes jointly developed with WTB to facilitate regional and Marketing Area campaigns. These will present the distinctiveness of their respective areas to the appropriate markets, again working with existing marketing initiatives.
- 4.4 The cumulative marketing activity undertaken by the private sector dwarfs the work of the public sector, but it is fragmented. This needs to be addressed through partnerships or consortia to achieve economies of scale and increase opportunities for all the individual businesses. This should capitalise on the WTB and RTP investment in changing the image of the countryside in Wales through the use of consistent messages and there is some time-limited support for consortia from WTB. The private sector should also take forward the successful elements from previously public-funded projects such as Wales Countryside Holidays and Wales Farm Holidays.
- 4.5 In most cases local authorities should continue to work within the established Marketing Areas. It is clear that visitors need to relate to areas that have some cohesive identity.
- 4.6 The research has noted that visitors are most likely to originate from areas within relatively easy reach of Wales – the South East and North West of England and the Midlands. It is likely that these areas will remain the most important and, therefore, most activity should be directed towards these regions. This is of particular importance for short breaks, where a two to three hour travel time is likely to be the normal maximum. While overseas markets are forecast to grow it is considered that some overseas segments offer little short-term potential and care must be taken to use resources fruitfully.

Themes

- 4.7 The key marketing theme emerging from the study is the central role the countryside has in images of Wales. With the exception of the experiences offered by a few major locations (in particular the cities and the main coastal resorts) much of the rest of the driver for tourism in Wales is the high quality countryside and its role in Welsh heritage and culture. This central link needs to be recognised and capitalised upon, such as through the thematic programmes to improve visitor accessibility to Welsh culture and the cultural gateways identified in the WTB Cultural Tourism Strategy. It can also be addressed through creative themes used in advertising and other promotion of Wales to potential visitors.
- 4.8 Wales has a competitive advantage in outdoor activities and this should be maintained through continuing to promote Wales as a destination for activity tourism. However, Wales is perceived as relatively weak in having a high quality offer for the more general holiday or break taker, who is looking for a holiday or short break with good accommodation, interesting places to visit, shopping and eating out. Marketing needs to emphasise this theme, focused around those places in Wales where this more general experience can be delivered.
- 4.9 There are already a set of strong countryside destination brands in Wales, in particular, Snowdonia, Pembrokeshire and the Brecon Beacons. These brands need to be used for potential visitors unfamiliar with holidaying in Wales, for example with motivational campaigns. In the case of Snowdonia and the Brecon Beacons, care will be needed when using these rugged countryside areas to avoid the reinforcement of rigorous outdoor activity images for markets not seeking this experience. Other parts of the countryside in Wales might be best marketed to those people already familiar with Wales.

Action	Priority	Lead responsibility	Partners	Timing
Marketing to address the outdated image of rural Wales through careful adaptation of existing image-building campaigns by WTB. To include the use of strong brands to attract non-visitors.	High	WTB, RTPs	LAs	Next planning session
Capitalise on the national image building marketing work and capture the response generated.	High	Private sector, Marketing Areas	RTPs, TGAs, LEADER+	Next planning session
Raise awareness of the market towns and villages in the countryside and the range of shops, places to eat and things to see and do, in order to attract those who want a general holiday as well as those pursuing outdoor activities.	High	WTB, RTPs	Private sector, LAs	Medium term
Raise awareness of the high quality places to stay in Wales.	Medium	WTB, RTPs, Private sector	-	Next planning session
Capitalise on the high profile of activities in Wales.	High	WTB	RTPs, Private sector, LAs	Next planning session
Exploit best prospect overseas markets.	Low	WTB, Visit Britain	Private sector	Medium term
Further development of private sector marketing consortia to pool resources and increase the effectiveness of marketing.	Medium	Private sector	RTPs	Medium term
Use marketing to reduce the impact of seasonality.	High	WTB, RTPs, LA's, Private sector	-	Medium term

Aspirations

Action	Priority	Lead responsibility	Partners	Timing
Consortia heritage marketing of the countryside in Wales.	Medium	National Museums and Galleries of Wales, National Trust, Cadw	Private sector, WTB	Medium term

5 Building Self-sustaining Businesses and Communities

- 5.1 The tourism sector in Wales is a mature sector, with experience of satisfying visitors' requirements over many decades. However it is apparent that the structure of the core part of the industry in Wales is predominantly small or micro businesses and that these businesses face particular problems, particularly sector and organisational inefficiencies, a lack of shared good practice models and diseconomies of scale. There are key capacity gaps in business, people management and administration skills. Therefore, it is necessary to set in place measures that allow these entrepreneurs to realise the potential of their businesses.
- 5.2 Businesses in any given location do not operate in isolation from their host communities, particularly when the host communities may be customers, suppliers, staff, and complementary countryside experience businesses. Prosperous and capable communities will provide the best environment for thriving business and it will be important to empower communities to take a greater role in their own development through capacity building, rather than just through capital grant provision. This will need to include community engagement programmes to identify and realise local needs and aspirations, followed by the necessary regeneration work such as that undertaken through Rural Community Action. The WDA is currently supporting community regeneration through programmes such as the Community Regeneration Toolkit, Small Towns and Villages Enterprise Initiative and is facilitating delivery of programmes such as Rural Community Action. It is outside the scope of this report to fully address how we can build prosperous and capable communities, but it is recognised that countryside tourism has a role to play in helping to build such communities and that they are a requirement for developing a successful tourism destination. Integrated Quality Management (IQM) is an effective process for engaging communities in tourism. IQM also seeks to address the environmental, cultural and social impacts of tourism through the integrated management of the destination. From the countryside experience perspective, regeneration should be undertaken where tourism needs overlap with the broader economic and community priorities.
- 5.3 Building on the work to raise the capability of host communities, the necessary steps to self-sufficient countryside experience businesses will include:
- better coordinated and more accessible business advice
 - increased access to market intelligence
 - more priority to training for business management
 - continued operative training
 - more local delivery of training by peers/mentors
 - increased business networking, partnership working and consortia activity.
- 5.4 As unemployment in Wales has fallen, the job creation emphasis has changed to increasing the value of jobs rather than the number of jobs. Increasing the value of jobs requires more profitable businesses with better paid staff. This means more emphasis on increased earning levels, profitability and wages, achieved through increasing the turnover per member of staff through longer seasons and a higher quality higher value offer. This indicates a much stronger role for business management training and advice programmes, although there remains a need for operative training programmes. Better managed and operated businesses will also be in a position to deliver the quality experiences demanded by visitors.
- 5.5 It is also important to raise the profile of tourism to local residents. The tourism industry currently has a low status amongst some of the local population because of its reputation for low wages and seasonal employment and this has implications for recruitment and the wider visitor welcome. There needs to be more awareness of tourism career opportunities within educational establishments and also of the job possibilities which tourism offers to older people, together with measures to improve staff retention. Factors that need to be addressed include the migration of youngsters to cities, transport problems in rural areas, split shifts and seasonal employment. The lack of career progression in small tourism businesses also needs to be addressed, as well as the need to increase wage levels.

Action	Priority	Lead responsibility	Partners	Timing
Capacity development for countryside experience destinations, including entrepreneurship and engaging local skills, knowledge and enthusiasm.	High	WDA	Community, LAs, Rural Community Action, LEADER+	Medium term
Tourism briefings for business advisors.	Medium	WTB	WDA, RTPs	Medium term
Provision of market intelligence.	Medium	WTB	RTPs, WDA	Medium term
Favourable planning environment for rural retail to increase sales of local produce and crafts from specialist retailers.	High	WAG	LAs	Long term
Active participation in local networks and associations.	Medium	Private sector	Community, LEADER+	Next planning session
Increased retailer customer focus.	Medium	Private sector	-	Medium term
Continue the existing TGA programme refining it to take account of the recommendations from this report.	High	WTB	RTPs, WDA, LAs, Private sector	Medium term
Encourage private sector investment in areas with tourism potential.	High	WTB	Private sector, RTPs	Long term
Integrated delivery of training, including quality of advice.	High	TTFW	ELWa, RTPs, WDA, LANTRA	Next planning session
Sector Skills requirements of the tourism and hospitality sectors are investigated and addressed as part of the strategic review of provision for the sector.	High	TTFW	ELWa, RTPs, WDA, LANTRA	Next planning session
Use of networks to identify training needs and delivery.	Medium	Private sector	RTPs, TTFW	Medium term
Emphasis on business management training and advice to allow countryside experience businesses to realise their potential, as well as continue to raise skills of customer facing staff.	High	TTFW	ELWa, RTPs, WDA	Next planning session
Peer group training delivery and mentoring, subject to SSC endorsement.	Medium	TTFW	ELWa, RTPs, WDA	Medium term
Promote tourism to local communities and engage communities to add depth of experience to the cultural activities, events etc.	High	RTPs, LAs	Community, LEADER+	Medium term
Use events to engage local people in tourism development.	High	RTPs, LAs	Community, LEADER+	Next planning session

Action	Priority	Lead responsibility	Partners	Timing
Sector Skills requirements of the catering sector to be investigated and addressed as part of a strategic review of provision for the tourism and hospitality sector.	High	Sector Skills Councils	ELWa, TTFW, RTPs, WDA	Medium term
Encouraging tourism businesses to take up Green Dragon accreditation, to help develop a more sustainable tourism industry in rural Wales.	High	WTB	RTPs	Next planning session

Aspirations

Action	Priority	Lead responsibility	Partners	Timing
<p><i>Establish a coherent research base specific to the countryside experience:</i></p> <ul style="list-style-type: none"> • <i>volume and value</i> • <i>ongoing visitor attitude and satisfaction</i> • <i>rural tourism business activity</i> • <i>evaluation of new initiatives</i> • <i>research to explore the scale and quantity of retail in the countryside and progress against the retail recommendations in this document – series of local studies</i> • <i>research to explore the scale and quantity of catering in the countryside and progress against the catering recommendations in this document – series of local studies</i> • <i>tourism market intelligence services to businesses.</i> 	Medium	WTB, RTPs, WDA (retail)	LAs, Higher Education Institutions, Private sector	Medium term
<p><i>Identify a limited number of countryside locations with tourism potential, regeneration need and community support. When funds allow, concentrate area-focused public funds on these locations.</i></p>	High	RTPs, WTB, WDA, LAs	Private sector, Community, LEADER+	Long term

6 Integration

- 6.1 Integration within the countryside experience is necessary for the interaction with visitors and the way that organisations with a stake in tourism work together.

Visitors

- 6.2 Visitors to Wales experience the countryside through a mix of business, environmental and community contacts. In order to provide quality in this experience across the board it is necessary to ensure the whole experience is high quality.
- 6.3 Integrated Quality Management (IQM) is the preferred model in Wales for progressively improving the visitor experience while growing economic, environmental social and cultural benefits for host communities. IQM is based on an inclusive approach from the widest cross section of local people to local and national agencies. It requires a well-defined geographic or administrative area where it is natural for people to work together and a visitor-focused approach. This will consider the pre-, during- and post-visit relationship with visitors. The approach brings in the broader spectrum of visit elements (such as transport, local produce, culture etc.) and explicitly considers quality.

Organisations

- 6.4 It is evident that while there is already significant joint working between agencies, there is still further effort needed to provide a clear client-focused programme of assistance without duplication or gaps.

Actions to address this include:

National Agency Strategic Level Actions

- Develop further working relationships between different agencies and the acknowledgement of common rural development objectives. The proposed update by the Assembly of the Rural Statement originally produced by the Rural Partnership provides a vehicle for developing common rural development objectives.

- Establishment of common targets, executed through shared implementation plans with complementary funding arrangements.
- Cross-agency agreement of scheme priorities and targets.

Local Point of Delivery actions to improve client-focused service

- Awareness of other schemes and active signposting (e.g. to assistance schemes that better suit clients' needs etc.).
 - Establishment of more appropriate targets (and flexibility).
 - Cross-agency (and private sector) membership of steering/appraisal panels.
 - Pre-appraisal circulation of projects between network of agencies.
 - Secondments between agencies.
 - In the light of the evaluation of the Adfywio scheme, the Welsh Assembly Government and relevant ASPBs consider, subject to resources, the scope for similar initiatives in the future to facilitate further integration.
- 6.5 As well as visitor benefits, IQM also has a role in helping to integrate organizations and their actions at the local level. One likely impact of further integration is that within a given budget there will be fewer, but better executed, public sector projects.
- 6.6 The emerging Wales Spatial Plan provides a basis for coordinated action within geographical areas.

Action	Priority	Lead responsibility	Partners	Timing
Provide a comprehensive visitor experience using IQM principles.	High	LAs	Community, Rural Community Action, Private sector, LEADER+	Medium term
Improved strategic coordination of support by public agencies: <ul style="list-style-type: none"> • closer working relationships • common targets • complementary funding mechanisms. 	High	WAG	WDA, WTB, CCW	Medium term
Improved point of delivery support by public agencies: <ul style="list-style-type: none"> • signposting • flexible local targets • strong local agency links. 	High	WAG	WDA, WTB, CCW	Medium term

7 Contribution to the Sustainable Rural Economy

- 7.1 A sustainable future for rural areas in Wales will depend on a stronger economy, empowered and capable communities and conservation of the environmental assets that provide the agricultural, tourism and other industry wealth. Tourism has been identified as providing a catalyst for wider economic activity and, therefore, while a given countryside area may play a small role in delivering the overall countryside experience, the tourism contribution to individual countryside areas can be very significant.
- 7.2 Across the whole of Wales in 2001, employment in tourism-related sectors (hotels, restaurants, bars, museums/galleries etc) amounted to 89,400 plus an estimated 12,000 self-employed, giving a total of around 101,000 jobs. This represents around 8% of all Welsh jobs.
- 7.3 The nine counties considered to best represent rural Wales (Denbighshire, Conwy, Gwynedd, Ynys Môn, Powys, Ceredigion, Pembrokeshire, Carmarthenshire, and Monmouthshire) account for a substantial part of the overall tourism employment. Employment in tourism-related sectors in these nine counties accounts for 37,300 jobs plus an estimated 5,000-6,000 in self-employment, totalling 43,000 jobs. This represents 12% of all employment in rural Wales and 42% of all employment in tourism-related sectors within Wales.
- 7.4 The national tourism targets include an increase in the employment supported by tourism of 15% between 1998 and 2010, from 100,000 full time equivalents (FTEs) to 115,000 FTEs. As noted above, the countryside experience supports around 43,000 FTEs. In order that the countryside experience plays its part in achieving national tourism targets, the employment supported by the countryside experience will have to increase by around 6,000 - 6,500 FTEs by 2010. It is considered that the recommendations contained in this report will have a key role in ensuring that these targets are achieved.
- 7.5 Research undertaken for WTB estimates that walking tourism generates some £548 million per annum for the Welsh economy, and walking is judged to be the most important activity for 65% of visitors to Wales. The CROW Act 2000 is set to open up significant new areas of the Welsh countryside for public access in 2005, presenting new economic opportunities.

- 7.6 Importantly, the recommendations also have the potential to raise average earnings levels in the industry through building profitability, thereby increasing the value of the employment supported. This will be at least as crucial as increasing the level of employment supported. To achieve this vision will require action from the community and across both the public and private sectors. Implementing the recommended actions should also build sustainability through reducing the seasonality of visits to the countryside and through the use of local produce.

8 Monitoring

- 8.1 It is recognised that the organisations noted as responsible for the actions above will have the countryside experience as part of a portfolio of responsibilities, and their ability to deliver the actions will depend on the availability of budgets. It should be noted, however, that whilst the WLGA represented the local authority sector on the steering group, it cannot commit individual local authorities to actions identified in the action plan for which local authorities are identified as the lead body. Following their agreement to these responsibilities, it will be necessary to monitor progress against the actions. It is proposed that:
- The first stage will be a formal signing up to pursue these actions by the organisations concerned.
 - The organisations concerned will generate specific action plans to deliver their part of the necessary tasks.
 - Overall responsibility for monitoring progress should rest with the WTB, with an annual review of actions undertaken for the Rural Partnership.
 - A small working group from WTB, WDA and the Assembly should act as an executive to facilitate other organisations action plans where necessary, and ensure progress reporting is undertaken in a timely fashion. WTB to provide the secretariat for the group and be tasked to provide the annual review report for the Rural Partnership.

Appendix

Membership of the Working Party

Christine Lewis	Chair, WTB Board Member
Gwynn Angell Jones	Wales Environment Link, (National Trust Customer Services Manager)
Joan Asby	Wales Rural Forum
Sir Brooke Boothby	Wales Tourism Alliance (Caravan Sector)
Deilwen Breese	Farm Stay UK (Farm Accommodation Operator)
Julian Burrell	Wales Tourism Alliance (Self-Catering Sector)
Valerie Forsyth	Federation of Small Businesses (Criccieth Retailer)
Louise Owen	Young Farmers Clubs
Dennis T Sam Richards	Wales Tourism Alliance (Activity Sector)
Colin Rouse	Wales Tourism Alliance (B&B Sector)
Ian Rutherford	Wales Tourism Alliance (Attractions Sector)
Peter Smith	Wales Tourism Alliance (Service Sector)
Anne Wilson	Wales Environment Link (Ramblers Association & Operator of Walking Holidays)
Ray Youell	HE Sector (Head of Tourism Management at the University of Wales, Aberystwyth)

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Steering Group

Wales Tourist Board	Nigel Adams, Gill Berntsen, Linda Jones
Countryside Council for Wales	John Taylor
ELWa	Jo Banks
Forestry Commission	Sally Tansey
Tourism Partnership Mid Wales	Dee Reynolds
Welsh Assembly Government	Terri Thomas, Carol Thomas
Welsh Development Agency	Ann Watkin
WLGA	Kevin Bishop