

tourism partnership north wales
annual review 2007-08
executive summary



what to do



www.breaksnorthwales.co.uk



www.adventure-northwales.com



www.golf-northwales.co.uk



www.walkingnorthwales.co.uk



www.moviemapnorthwales.co.uk



www.eventsnorthwales.co.uk



www.gardensnorthwales.co.uk



www.attractionsnorthwales.co.uk



www.walledtowns.co.uk

tourism partnership north wales

01745 589020

www.tpnw.org

front page picture: *giants north wales* owain glyndŵr



golf north wales, nefyn & district golf club

foreword

This has been a year of challenges and achievements for the visitor economy in North Wales.

I am glad to report that Tourism Partnership North Wales has risen to the challenges we have faced – and this is due in no small part to the effectiveness of our small team here in St Asaph.

Thanks to the dedication of our staff and the support of our Board, North Wales is continuing to punch above its weight in attracting visitors to the region.

As a result, during the year, we have achieved our target of generating an additional £16.5 million in tourism revenue.

We are working to the One Wales agenda which recognises that tourism is vital to economic prosperity and job creation and therefore needs to be developed on a regional basis in order to make the most of local resources and assets.

Our mission is to promote the strategic development of the tourism industry as the market moves increasingly towards shorter and activity-based breaks.

We will continue to promote the region by drawing on our distinctive culture, history and environment there by reinforcing our unique Sense of Place.

The current reality in the wider economy is a double-edged sword for the visitor economy in North Wales.

The logic of the downturn dictates that people have less disposable income to spend on foreign holidays. One consequence is that holidays closer to home are more affordable and therein lies an opportunity for us here in North Wales.

Even before the so-called credit crunch, the nature of tourism had changed and it continues to evolve – and this makes it essential to develop the out-of-season business.

We have to look at tourism in the round. It is not just a high days and holidays business. We need to develop the shoulder months so that we create a 12 month opportunity.

It is vital that the different marketing

areas of North Wales work in partnership and we all collaborate as a team.

It is also imperative that the trade and public bodies, including local authorities, are in complete concert to ensure mutual benefit.

If we are clever and use joined up thinking, our synergy will create a North Wales offer that is greater than the sum of its individual parts.

I think we are moving in the right direction but we must continue striving to improve the tourism product.

We want to move the tourism and visitor economy in North Wales forward and there are major challenges facing us.

We need to have a strategic approach so we can prioritise the right kind of investments because it's a very, very competitive world out there.

There are more than 2,000 tourism destinations in Europe alone and they are all competing for the same kind of income as we're hoping to get in North Wales.

We have some world class natural assets – sweeping mountains, breathtaking scenery and a fabulous coastline, not to mention our unique cultural heritage and language. We are duty bound to make the most of what we have.

We need to ensure that the visitor economy benefits the communities in which it is based. Therefore, we must concentrate our efforts on developing the industry in a balanced and sustainable way.

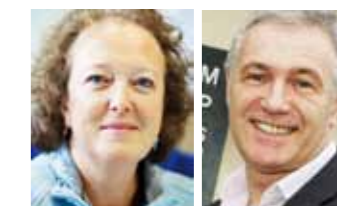
We are the custodians of North Wales. We do not have rights, we have responsibilities.

Alison Lea-Wilson

Chairperson

Dewi Davies

Regional Strategy Director



executive summary

The importance of tourism to the overall economic health and well-being of North Wales cannot be over-estimated.

It is a £1.8 billion industry that accounts for eight per cent of the region's gross domestic product and employs 39,000 people.

The role of Tourism Partnership North Wales is to manage and encourage the strategic development of the visitor economy.

Once again, this year we commissioned a series of effective campaigns to promote the region actively in external markets, drawing on our unique assets in culture, history and the environment.

The headline news from Tourism Partnership's perspective is that we achieved our target of generating £16.5 million in spending by visitors.

For every £1 we spent, our campaigns brought in another £17.80.

We are particularly proud of this record because we were not immune from the financial pressures affecting Visit Wales.

In common with other organisations, our budget was reduced from £1.444 million to £1.030 million – and we are expecting a further £50,000 reduction in our budget for 2008-09.

Tourism Partnership has therefore made it a priority to work with Visit Wales and partners across the region to explore other possible streams of European funding to replace the Objective One money that is drawing to an end.

This was also a fundamentally significant year in a number of other respects, not least because a review of the Regional Tourism Partnerships was undertaken by Cardiff Business School's Welsh Economic Research Unit and they reported their findings.

According to the review team, Tourism Partnership and the other RTPs are fit for purpose.

While the network of RTPs is to remain in place, the beginning of the year heralded more change for the Welsh Assembly Government's organisational structure for the tourism sector.

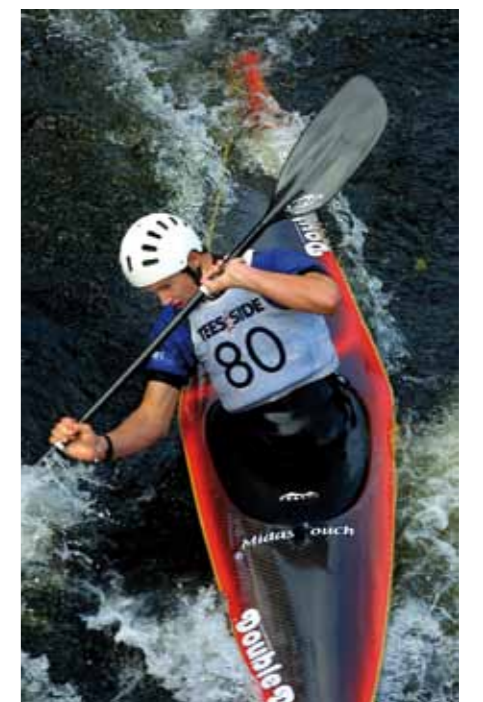
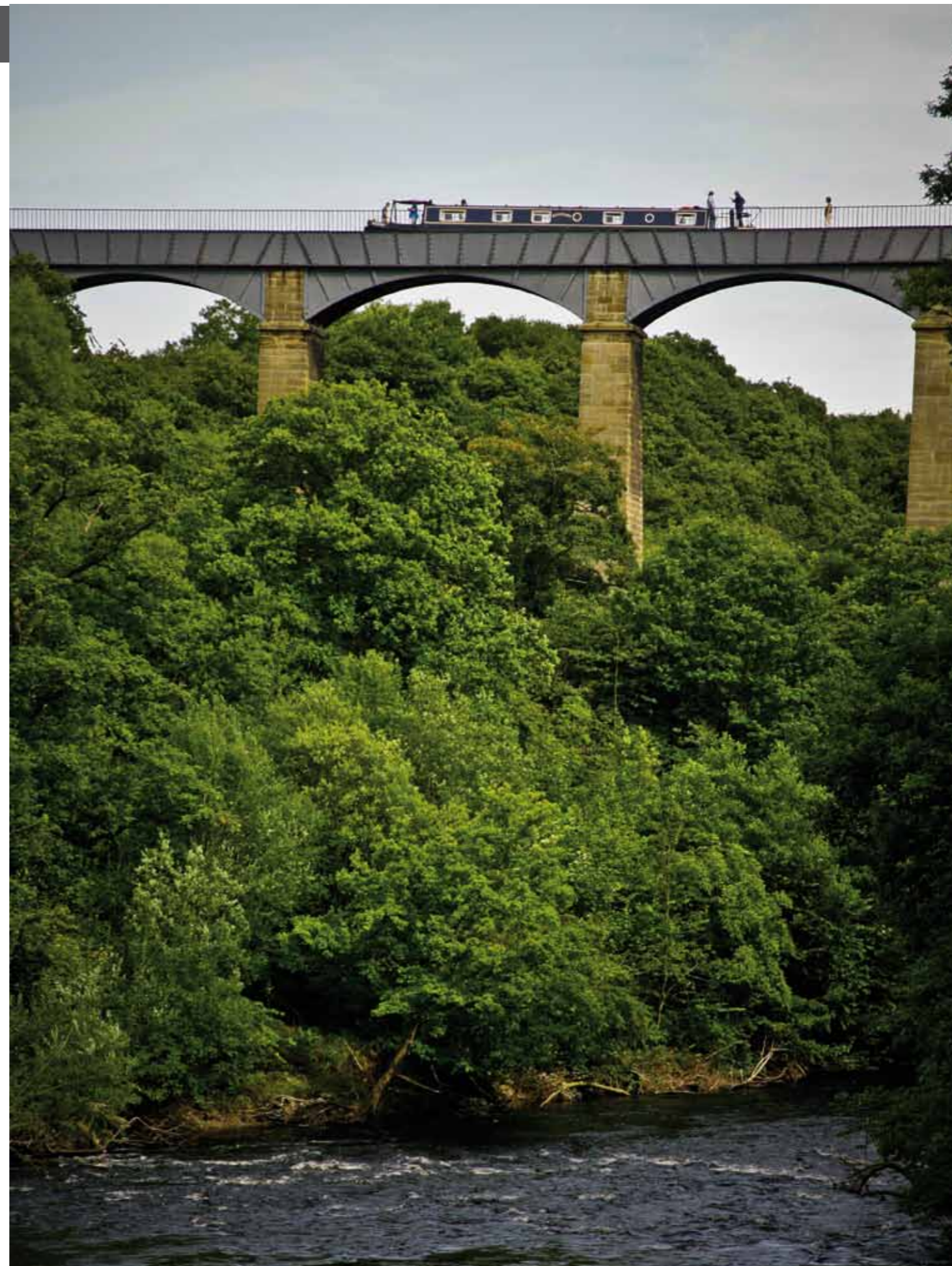
In 2006, the Wales Tourist Board had been merged into the Welsh Assembly Government and, by spring 2007, the activity of the successor department, Visit Wales, moved from the Department of Enterprise, Innovation and Networks to the Department of Heritage.

Rhodri Glyn Thomas AM was appointed Minister for Heritage following the Welsh Assembly Government elections in May 2007 and soon after his appointment, he spent a day in the North Wales Borderlands.

The visit included a canal cruise across the Pontcysyllte Aqueduct when he voiced his unequivocal support for the campaign to persuade UNESCO to confer World Heritage Status on Thomas Telford's engineering masterpiece.

A final decision is expected by UNESCO in 2009. Having another World Heritage site to join the castles in Gwynedd and the Isle of Anglesey, alongside the pyramids and the Taj Mahal, would be a fantastic boost to the visitor economy throughout North Wales.

Tourism Partnership North Wales has constructed its business plan to fall in line with the broad headings outlined in the National Tourism Strategy, Achieving our Potential 2006/13.



Images:

left

giants north wales telford pontcysyllte aqueduct

top to bottom

conferences north wales snowdon your next summit

events north wales mold food festival picture courtesy Graham Catherall

adventure north wales llangollen

business plan



distinctive branding

Looking to the future, we have been working closely with the tourism trade on an ambitious project to promote a distinctive brand for North Wales, highlighting our Unique Sense of Place.

We must present potential visitors with an attractive and consistent image of the region, one that sets us apart from other visitor destinations. Our brand proposition is based on the outdoor playground, The Great Outdoors.

Branding North Wales (Boosting Tourism in Our Region) was well received by Visit Wales and rolled out to 3,000 tourism businesses in the region.

There were presentations to a number of general meetings and specific training on "Tone of Voice" to partners and designers.

The work on branding has informed our campaigns, including Short Breaks North Wales which is aimed at Independent Explorers.

Short breaks are central to our whole strategy. This reflects the changing face of tourism in North Wales and the rest of the UK, a change originally brought about because of the availability of low-cost flights across Europe.

Now, the economic downturn, together with environmental concerns,

has led to a reduction in the number of people taking foreign holidays.

The main thrust of the campaign is web based with a facility to book accommodation online. A new Short Breaks brochure was produced, the website was significantly revamped and 100,000 unique visits were set as the target for the year.

Arguably the greatest Welsh hero of all time, the warrior prince Owain Glyndŵr, takes his rightful place as the figurehead on the front page of the Giants North Wales brochure.

But we also have giants of literature, song, visionary giants, castles, myths, slate and sacred giants.

All of them embellish our culture and our heritage. They provide different reasons for people to come to North Wales for short breaks instead of going to places like the Lake District, Scotland, Devon and Cornwall.

A Giants brochure was produced in English and Welsh and a 25,000-word website was created. Demand for the brochure through Visit Wales direct marketing campaign was excellent and generated a 15 per cent response rate.

The designation of Liverpool as the European Capital of Culture for 2008 presented another opportunity for the region.

The idea was to badge up a range of

activities under the banner of North Wales '08 and a leaflet featuring 30 cultural events was produced. A separate web page was also developed.

Gardening is a boom sector where Tourism Partnership is seeking growth and we have launched a major campaign to attract gardening enthusiasts to North Wales.

It is certainly worth the effort as the potential rewards are huge. There are an estimated 20 million gardeners in Britain and the market is worth £5 billion annually – and it's growing at the rate of 20 per cent every year.

The new Gardens North Wales brochure and web site were unveiled by one of our best known and most successful horticultural ambassadors, the multi-award winning Medwyn Williams, at The Gardening Show in Llangollen.

Business tourism is an increasingly lucrative market. A report commissioned by Tourism Partnership and funded by the North Wales Economic Forum revealed that business tourism generates £60 million in extra revenue in the region every year.

It now accounts for around six per cent of our visitor economy and that money is brought in predominantly by

130 locations across North Wales.

An action plan was drawn up to refocus our efforts to increase the value and volume of business tourism in region.

It included the setting up of Conferences North Wales and an associated marketing campaign costing £75,000.

Tourism Partnership also supported the campaign to develop the sea cruise market and promote Holyhead as a stop-off destination for cruise ships.

Financial assistance was given to help pay for overseas and domestic marketing together with the welcome of passengers to Holyhead for around eight vessels.

A study was undertaken to identify the full investment potential of developing new deep water mooring at Holyhead given the competition of a new terminal at Liverpool.

higher quality

Improving the quality of the tourism experience has been pinpointed as a priority for Tourism Partnership North Wales and we have commissioned a number of initiatives.

Among them was a campaign, Integrated Quality Management, to spruce up North Wales to make it an even more attractive visitor destination.

Special toolkits were available in all five of the region's designated Tourism Growth Areas. There was a particularly enthusiastic response in Wrexham, Conwy, Llandudno, Deganwy, and Betws-y-Coed.

A review of the Tourism Growth Areas has been commenced by the Tourism Company on behalf of Visit Wales.

Meanwhile, another priority has been to persuade more attractions to participate in the Visitor Attraction Quality Assurance Service scheme through the funding of advisory VAQAS visits.

With the Ryder Cup 2010 on the horizon, the drive to promote North Wales as an attractive destination for golfers continues to be important.

We commissioned a Golf North Wales brochure, a DVD, a website and an online booking service while our golf coordinator liaised with golf clubs

North Wales has undoubtedly already benefited from our involvement in

the Ryder Cup campaign and the striking aerial photograph of Nefyn & District Golf Club has had world wide distribution.

There has been extensive presence on exhibition stands worldwide and the One Stop Shop booking line generated over £100,000 during its initial year.

The campaign to attract walkers to North Wales is giving us another path to prosperity.

Walking North Wales features 14 great walks in our great outdoors. The web pages have been upgraded and made brand compliant while the direct mail campaign by Visit Wales generated demand for 12,000 brochures.

easier access

We are committed to improving the accessibility of North Wales as a visitor destination.

Ecommerce is playing an increasingly important role in enabling the tourism industry to communicate more effectively with customers.

Existing e-databases belonging to trade association and independent businesses were used to convey monthly newsletters, with details about forthcoming events and offers.

The number of businesses using the www.info4u.co.uk free-to-use template for an electronic newsletter increased to 373.

Meanwhile, Tourism Partnership also funded a regional central reservations facility. This traditional booking mechanism continues to be important although it generates less business than it used to.

Progress has been made in developing the Movie Map North Wales, designed to encourage people to visit locations used by the film and television industries in the region. The website now features 56 film and television locations.

It was also agreed to prioritise the development of Attractions North Wales website with the aim of attracting 100,000 visitors every year.

Similarly exacting targets were also set for both the Events North Wales and Adventure North Wales campaigns. Yet again the increasing importance of ecommerce was reflected in the way they were structured.



Images

left
walking north wales moel fammau
top to bottom
brand north wales the great outdoors
giants north wales david lloyd george
gardens north wales portmeirion
attractions north wales llynonn mill



walled towns conwy

better skills

Tourism Partnership recognised the importance of helping people involved in the industry to improve their skills.

In partnership with the Tourism Training Forum for Wales, we have commissioned a number of joint initiatives.

We have supported e-learning initiatives so that tourism businesses can embrace the Internet revolution to compete in the global marketplace.

In the last 10 years, there has been a 20-fold growth in the use of the internet with the total number of web users passing the billion mark in the last two years.

Europe is a particularly sophisticated marketplace, especially the UK and Germany where the percentage of tourism expenditure on-line is expected to pass 50 per cent in the next two years.

Funds were made available to help develop Web4-U as a learning tool and to secure greater participation by tourism businesses in web marketing.

stronger partnerships

Tourism Partnership undertook to build on existing partnerships to develop even more effective collaboration within the industry.

The network of Marketing Area Partnerships was identified as a key element in achieving this objective.

On the Isle of Anglesey, five projects were endorsed and the inaugural Isle of Anglesey Tourism Awards was particularly successful. Another positive development was the publication featuring Anglesey's heritage attractions.

Five projects were also supported in Snowdonia Mountains and Coast. Of particular note were the ongoing off-season marketing of Attractions of

Snowdonia, the strengthening of the Llŷn Tourism Partnership and the work done with Cwlwm Diwylliant, a new cultural tourism opportunity.

In the Coastal Resorts – West, activity continued to support the retail sector in Llandudno, Conwy and Colwyn Bay following the new retail development in Llandudno. In addition, there was a joint marketing campaign to promote Attractions Llandudno and five key events within the coast and county area.

Meanwhile, in Coastal Resorts – East there was continued support for the Fun Time campaign to promote Rhyl and Prestatyn as a destination for families.

Further east, in The North Wales Borderlands a new publication was developed to support the consortium of attractions in the area. The remaining funds were used to acquire additional advertisements within the main Visit Wales guides.

The Walled Towns Campaign, mounted by a consortium of local authorities, continued to be a successful vehicle to attract visitors to North Wales.

The towns of Beaumaris, Caernarfon, Conwy and Denbigh once again joined Chester to mount an international marketing campaign aimed mainly at the United States with a new web site providing an attractive online shop window.

Trade Directors

Alison Lea-Wilson
Barbara Griffiths
David Robertson
David Williams MBE
Bob Costain

Chairperson
Vice Chairperson
Marketing Area Isle of Anglesey
Marketing Area North Wales Coast Resorts
Marketing Area North Wales Borderlands

Trade Advisors to the Board

John Les Tomos
Darryl Shaw
James Hewett
Anwen Jones

Flintshire Tourism Association
Wrexham Tourism Forum
Marketing Area Snowdonia Mountains and Coast
Marketing Area Snowdonia Mountains and Coast

Local Authority Directors

Cllr R H Wyn Williams
Cllr Hefin Wyn Thomas
Cllr Tony Tobin
Cllr Sue Roberts
Dr Dawn Roberts
Cllr Derek Butler
Cllr Liz Roberts

Gwynedd Council Vice Chairperson
Isle of Anglesey County Council nominee
Conwy County Borough Council
Denbighshire County Council
Wrexham County Borough Council
Flintshire County Council
Snowdonia National Park Authority

The full version of the Annual Review 2007-08 is available at www.tpnw.org