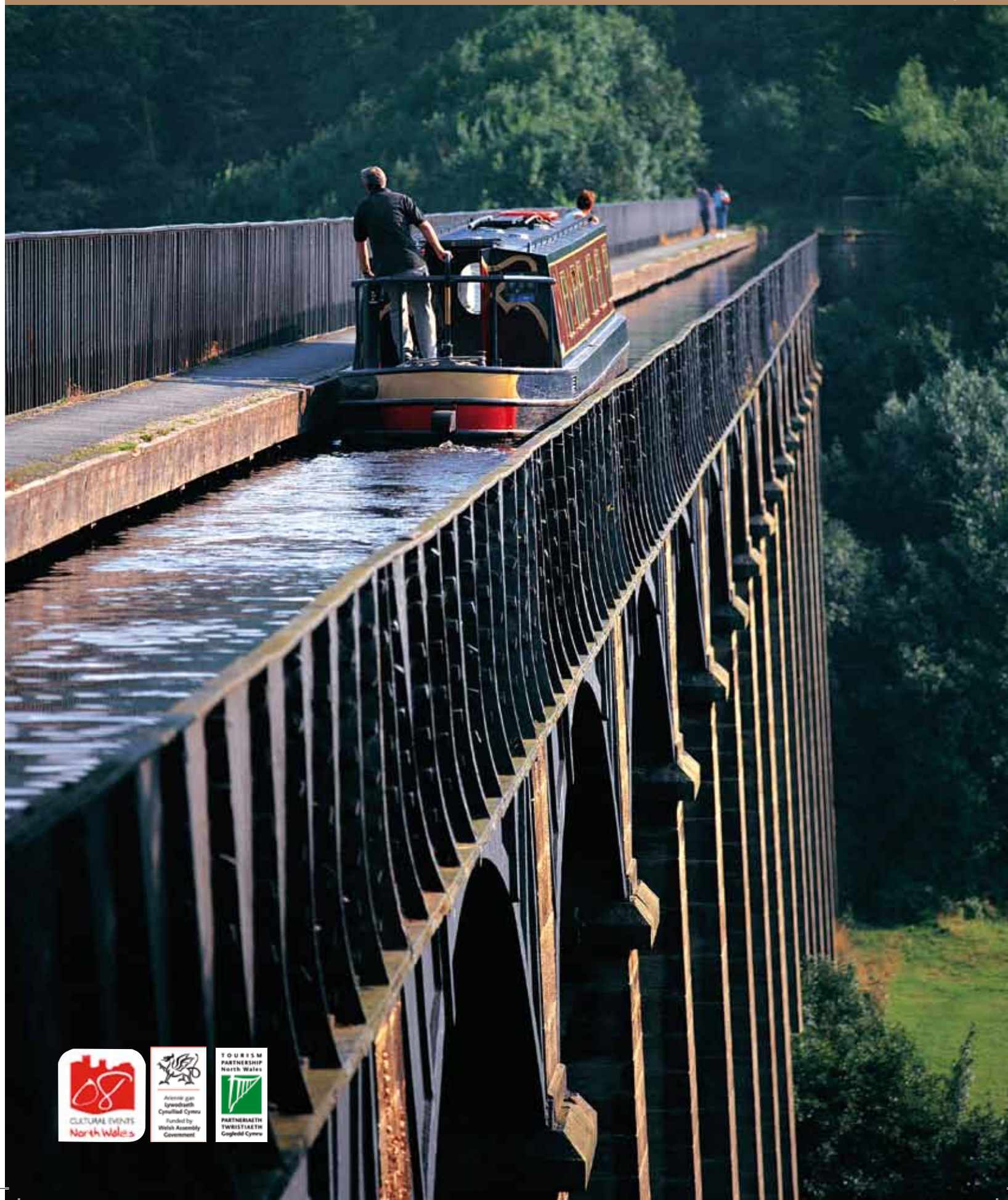


# tourism partnership north wales **annual review** 2008-09 executive summary



## what to do



[www.breaksnorthwales.co.uk](http://www.breaksnorthwales.co.uk)



[www.adventure-northwales.com](http://www.adventure-northwales.com)



[www.golf-northwales.co.uk](http://www.golf-northwales.co.uk)



[www.walkingnorthwales.co.uk](http://www.walkingnorthwales.co.uk)



[www.moviemapnorthwales.co.uk](http://www.moviemapnorthwales.co.uk)



[www.eventsnorthwales.co.uk](http://www.eventsnorthwales.co.uk)



[www.gardensnorthwales.co.uk](http://www.gardensnorthwales.co.uk)



[www.attractionsnorthwales.co.uk](http://www.attractionsnorthwales.co.uk)



[www.walledtowns.co.uk](http://www.walledtowns.co.uk)



[www.giantsnorthwales.co.uk](http://www.giantsnorthwales.co.uk)

tourism partnership north wales

01745 589020

[www.tpnw.org](http://www.tpnw.org)

front page picture: Pontcysyllte Aqueduct



top:  
*attractions north wales  
greenwood forest park*

above:  
*adventure north wales  
canolfan tryweryn*

left:  
*gardens north wales  
bodnant*

## foreword

It was a year when the global economy went haywire, financial markets went into meltdown and the UK was plunged deep into recession.

The outlook for the visitor economy in North Wales should have been gloomy but we have been able to ride the economic storm generated by the recession.

Every cloud has a silver lining and the elements that conspired to create an unprecedented credit crunch made the region an even more attractive proposition for visitors.

The weakness of the pound meant that fewer people were taking fewer foreign holidays. As a result, more and more visitors were rediscovering the delights of North Wales.

Tourism has always been a vital component of our overall economic wellbeing but the recession has underlined the sector's growing importance – and influence.

The visitor economy now brings in £1.8 billion every year and supports 37,000 jobs. It is responsible for eight per cent of our gross domestic product.

Nevertheless, the performance hasn't always been even across the sector. While the overall visitor economy, particularly the family market, has done well, business tourism has been dented.

We have a small team based at our office in St Asaph and I would like to pay tribute to their unstinting dedication and expertise in achieving a remarkable return on the investment we have made in our campaigns.

The figures tell an eloquent story. The campaigns commissioned by Tourism Partnership generated nearly £20 million against a target of £18 million – and a £50,000 reduction in our budget. For every £1 we spent, visitors spent £19 in North Wales.

North Wales is already among the UK's most popular destinations but we are determined not to rest on our laurels.

Our vision now is to become one of the top five destinations and we believe our ambition is eminently achievable.

Tourism Partnership has been delivering the goods for six years but we have reached a watershed, a defining moment in our history.

We have a largely new board with a renewed sense of direction and a shared purpose, working closely with our partners in the trade and the public sector to build on our successes.

What we have achieved so far is due in no small part to the newly-retired directors and we would like to take this opportunity to thank them for their important contribution.

The road map to future prosperity is outlined in our new strategy, Tourism Strategy 2009-14. It has been designed to make sure we become even more competitive and make the most of the magnificent raw material we have in North Wales.

Together, we need to take advantage of the law of supply and demand. We can supply incomparable scenic beauty, great attractions and a rich and diverse cultural heritage to meet the demands of the nearly 17 million people who live on our doorstep in places like Liverpool, Manchester and Birmingham.

To succeed, we must ensure that the quality of our attractions, accommodation and the service we provide match the magnificence of our natural assets and that the trade and public bodies work together as one.

The key will be to improve the tourism product and develop the visitor economy in a balanced and sustainable way so that tourism benefits and enhances the communities of North Wales.

**Neil Rowlands**  
Chairman

**Dewi Davies**  
Regional Strategy Director



# executive summary

This was a year when more and more of our marketing activities were conducted online.

While you can't export mountains and breath-taking scenery, we can take North Wales to the world via the Internet.

And against a gloomy economic backdrop, e-marketing was a particularly cost-effective way of selling the region as a visitor destination.

Despite the recession, we exceeded our target of £18 million and generated £19 million in additional spending by visitors which was equivalent to leverage of £1.5 million against a target of £1.14 million.

Our efforts were informed by the expert opinion and recommendations of Professor John Lennon, who runs the Moffat Centre for Travel and Business, in Glasgow.

In his report, The Wider Global Tourism Agenda, Professor Lennon, forecast an economic landscape featuring an increase in commodity prices from emerging economies, climate change and urbanisation – leading to an increase in demand for domestic holidays and a drop in demand for foreign holidays.

Professor Lennon rightly predicted that we were better placed than most areas to ride out the recession because of our location – with 15 million people living less than a three hour drive away. North Wales, therefore, had to get the basics in place – a great welcome, friendly people, passionate service and quality products set against an outstanding landscape.

As a result, one of our key objectives was to improve the management of the destinations of North Wales across the six local authority areas. The aim was to ensure that visitors carry home with them very positive messages about what a great place North Wales is.

Our contribution was effective in achieving the Welsh Assembly Government priority of putting Wales on the world stage and a number of our themed campaigns proved to be

a big hit.

Among them were campaigns highlighting the region's giants of culture and heritage, promoting North Wales as a destination for short breaks, adventure seekers and walkers.

We took advantage of the impending arrival of the Ryder Cup in 2010 – the third biggest event in the global sporting calendar - with a drive to promote the region as a top destination for golfers.

Along with Visit Wales and other partners, we have been active in looking at ways of accessing European development funding. As a result, there will be funding for a series of projects across the region. They include the World Heritage castles of Caernarfon and Conwy, Denbigh Castle, the Welsh language centre at Nant Gwrtheyrn and Holyhead Harbour.

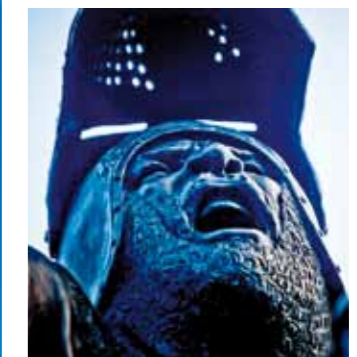
As part of our strategic role, we engaged at Ministerial and officer level to develop new spatial plans for North West and North East Wales.

A significant development during the year was the election of a new board. We were delighted to welcome new faces to give us a fresh impetus, with representation from across the region.

In addition to our partners from the public sector, we have an excellent cross-section of trade members - from holiday parks to self catering to farm accommodation to quality hotels. Each of them brought their own particular expertise to bear on how best to strategically develop the visitor economy in North Wales.

The year ended in eager anticipation of hugely important developments in relation to two of our icons, the building of the new summit building, Hafod Eryri, on Snowdon and the conferring of World Heritage Status on the magnificent Pontcysyllte Aqueduct and Canal.

A year that started with uncertainty ended with optimism for the future.



**left:**  
*giants north wales caernarfon castle*  
**above, from top:**  
*giants north wales national slate museum*  
*giants north wales statue of owain glyndwr, corwen*  
*giants north wales snowdon mountain railway*  
*giants north wales portmeirion*

# business plan

## distinctive branding

Brand North Wales was taken to another level during the course of the year and was effective in emphasising our Unique Sense of Place.

It is essential that we present potential visitors with an attractive and consistent image of the region, one that sets us apart from other visitor destinations. The brand proposition for North Wales is based on our outdoor playground, The Great Outdoors.

All our campaigns, both direct and indirect, were brand compliant with brochures, other publications and websites all bearing our distinctive branding.

Among them was the bi-lingual Giants North Wales campaign which featured a complementary brochure and website.

There are architectural giants like the network of castles along our coast – from Flint to Conwy, to Beaumaris and Caernarfon not to mention St Asaph Cathedral, the smallest ancient Cathedral in Britain, which is the final resting place of Bishop William Morgan, who translated the Bible into Welsh.

We also promoted giants of the industrial revolution represented by Telford's fantastic Pontcysyllte Aqueduct, which achieved World Heritage Status; his commanding Menai Suspension Bridge, along with the A5 road which revolutionised transport in the region.

Then, there are cultural treasures of huge renown, like the National Slate Museum at Llanberis and sacred places like St Winefride's Well in Holywell.

Snowdon also looms large in the campaign with special mentions for the world-famous mountain railway and the new summit building, Hafod Eryri.

There is a starring role, too, for the Italianate village of Portmeirion, the captivating architectural eccentricity given a world-wide profile by the television cult classic, The Prisoner.

Bodnant Garden, in the Conwy Valley, is another much-loved giant that is given pride of place in the campaign.

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.

The Short Breaks North Wales campaign continued to be an important element of our overall strategic approach. It was aimed at family and independent explorers and focused on heritage, culture and country pursuits. A new brochure was produced and the website was revamped.

The Gardens North Wales campaign flourished while our efforts to attract groups and coach tours were intensified.

The Spring of 2008 saw 50,000 leaflets distributed through outlets in Liverpool to coincide with its designation as the European Capital of Culture 2008, with the aim of attracting additional visits to North Wales by tapping into the proximity and synergy between us.

Another success story in terms of outcomes and branding was the Conferences North Wales campaign which has three cells within the region. The website includes a splash page linking enquiries to Visit Wales. In addition a publication, Conferences North Wales "Your Next Summit", was produced and distributed, appropriately depicting Snowdon on the eve of the Hafod Eryri opening.

We also provided funding to the Isle of Anglesey Council to manage and market Holyhead as a destination for cruise ships at a time when there was increasing competition from the new cruise ship terminal in Liverpool. Our support in 2008 will see the renaissance of passenger ship business, particularly with the creation of the deep water mooring in the harbor.

## higher quality

Improving the quality of the tourism product is central to our future success as a visitor destination and has therefore been central to all our activities.

We rolled out integrated quality management initiatives to ensure that visitors have a special experience, meeting or exceeding their expectations, while maximising the benefit to the destination. Funding was provided for activity in the Tourism

Growth Areas of Wrexham, Conwy, Llandudno, Deganwy, Caernarfon and Betws y Coed.

Funding was also provided for advisory visits by experts on Visitor Attraction Quality Assurance Service (VAQAS). The service has been developed to provide a number of tools for attraction operators that can be used to enhance quality and spread best practice within the sector. We also supported a review of the harmonized grading scheme by Visit Wales.

There was a major drive to strengthen the collaboration between our golf clubs and courses so that we can take full advantage of the spotlight being shone on Wales in the run up to the Ryder Cup in 2010, with the aid of a Golf Coordinator whose remit was to facilitate cooperation.

We organised a well-attended and well-received Golf North Wales Forum at Abergele Golf Club. We also played a part in securing the Ryder Cup Wales Seniors Open at Conwy and in attracting the Ryder Cup Wales Juniors at Bull Bay Golf Club.

Among the major developments on the golfing front was the creation of a new one-stop-shop booking facility in Colwyn Bay which generated more than £100,000 in its initial year. We also commissioned a brochure and an aerial photograph of Nefyn and District Golf Club had global exposure.

The website [www.golf-northwales.co.uk](http://www.golf-northwales.co.uk) was built and is operated by a Belfast company, BRS, the UK market leader in golf online systems. It enables golfers to book their tee times online and also see images of the different golf courses as well as details about special offers and nearby accommodation.

Our efforts secured an extension to the lifespan of the Events Commission and buy-in from our partners to the principle of a pan-regional 2008 events programme, including Bryn Terfel's Faenol Festival, Sioe Mon, Llangollen International Musical Eisteddfod and the Ruthin Craft Centre relaunch exhibition.

Another priority was building on the success of existing campaigns



to promote adventure and walking holidays in North Wales. Adventure North Wales, for example, generated £305,000 in extra income from visitors – from an investment of around £19,000.

Extensive coverage of our achievements has been secured in the region's newspapers and the ewelcome/egroeso newsletter was well received, particularly by the trade and politicians

Looking to the future, work started on a new Tourism Strategy North Wales for 2009-14 so that we can build on our successes and adapt to new market conditions. It includes an Action Plan for North West Wales and North East Wales and this will be revisited every year.

## easier access

Improving the accessibility of North Wales as a visitor destination is one of our major priorities and e-commerce is increasingly becoming the lifeblood of the tourism industry.

New media marketing became our main tool in reaching out to potential visitors as we strove to improve the region's competitiveness with our integrated family of themed campaigns.

The message about the need to embrace the Internet revolution came through loud and clear during a special forum organised by Tourism Partnership. The keynote speaker, Dr Roger Carter, a leading tourism consultant, emphasised that a web presence was now essential.

We worked closely with [www.visitwales.com](http://www.visitwales.com) to agree the most efficient and effective way of delivering destination management systems and websites.

Our investment in the [www.info4-u.com](http://www.info4-u.com) free-to-use template for electronic newsletters again paid dividends and enabled members of the trade to create their own bespoke new media marketing material.

We improved and updated our own website and piggy backed the databases of our partners to distribute the monthly newsletter, ewelcome, as a way of communicating with the trade and our stakeholders.

*golf north wales* ian woosnam at ryder cup seniors, conwy golf club

## better skills

Improving the skills of people involved in the tourism industry was again a strategic priority.

Our aim was to help the trade help themselves in honing their marketing prowess, particularly in using new media techniques.

We worked in partnership with the Tourism Training for Wales to regenerate the People Development Panel which provided an improved training and information programme.

Once again we supported e-learning initiatives so that tourism businesses could embrace the Internet revolution, enabling them to reach out to a global audience of potential visitors.

The last decade has seen a phenomenal 20-fold increase in the use of the Internet with more than 1.6 billion people now logging on world-wide.

Europe is a particularly sophisticated marketplace, especially the UK and Germany where the percentage of tourism expenditure online is expected to pass 50 per cent soon.

We continued to provide funding to develop Web4-U as a learning tool and as a result the number of participating businesses has risen to 1,200.

In addition, we supported the training to work on online booking facilities for golf clubs across North Wales through the Belfast-based company, BRS.

## stronger partnerships

We worked hard to build on existing partnerships to enhance the effectiveness of our collaborative efforts.

It is more important than ever that we work together in the face of increased competition for business and the hardening economy.

We worked with other partners at regional level, through the North Wales Economic Forum, North Wales Tourism, the five Marketing Area Partnerships, all seven Local Authorities including Snowdonia National Park Authority, tourist associations, consortia and sector groups

On the Isle of Anglesey, five projects proposed by the Anglesey Tourism Partnership were endorsed and one of the positive developments was the publication featuring Anglesey's heritage attractions as was the

continued support of the Isle of Anglesey Tourism Awards.

Five projects submitted by the Snowdonia Mountains and Coast Marketing Area Partnership were supported. Of particular note was the ongoing off-season marketing of Attractions of Snowdonia, the strengthening of the Llŷn Tourism Partnership.

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

Meanwhile, in the Coastal Resorts – East Marketing Area Partnership, the Fun Time campaign came to a successful conclusion with partner attractions and Denbighshire County Council taking their offers to major events across the region for the first time.

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

The Walled Towns Campaign continued to be a successful vehicle to attract visitors to North Wales and the website was upgraded.



*Isle of Anglesey Tourism Awards*

## Trade Directors

Neil Rowlands  
Darryl Shaw  
James P S Hewett  
Nia Rhys Jones  
Phil Nelson  
Anwen Jones  
Andrew Baker

Chairperson  
Vice Chairperson  
Snowdonia Mountains & Coast  
North Wales Coastal Region  
General  
General  
General

## Trade Advisors to the Board

John Les Thomas

Flintshire Tourism Association

## Local Authority Directors

Cllr R H Wyn Williams  
Cllr David Thomas  
Cllr Bryan Owen  
Cllr Goronwy Edwards  
Cllr Gail Hall  
Cllr Melvyn Higham  
Del Roberts-Jones

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

The full version of the Annual Review 2008-09 is available at [www.tpnw.org](http://www.tpnw.org)