National Assembly for Wales

Inquiry into Tourism

Submission from

Capital Traffic Management Limited

May 2014

Inquiry into Tourism

Submission to the Consultation

1. Introduction

1.1   Capital Traffic Management Limited (CT) has substantial UK and international experience in all transportation modes and of the interfaces among them. While we do not claim to possess expertise in tourism *per se*, CT does have skillsets that assist in the delivery of tourism products to visitors, including information design, marketing and transportation spatial planning.

Consequently, we have confined our submission to responding to a few selected issues, primarily framed by the third of the Terms of Reference.

1.2   Mindful of the recent IPCC report, we emphasise the need to expedite the deployment of low-energy and sustainable transportation to accompany sustainable tourism. The energy cost and impact of any motorised travel is high, and must be decreased if we have any chance of restraining climate change.

Wales is at present not well-situated in respect of benign, renewable and sustainable energy sources, electrified transportation systems or, though less so and less critically, walking and cycling infrastructure.

1.3   The tourism offer in Wales is wide-ranging, with particular strengths in heritage and outdoor activities. Food is often of a high to very high standard, and the accommodation is generally conspicuously clean and friendly. However, the nightlife is largely under-developed and has been somewhat marred by the excessive consumption of alcohol in city centres.

1.4   CT notes the recent marketing success of the tourism sector in securing more visitors from England.

1.5   We apologise for any translation errors in the submission.

2. Our Previous Submission

2.1   The Welsh Assembly Government's report <u>Sustainable Transport and Tourism Assessment</u> was released at a conference in Cardiff in November 2009.

At the conference, Professor Stuart Cole reminded the audience that one issue had been discussed at a similar conference five years previously, but that nothing had been done about it subsequently. This was travel information for the tourism industry.

2.2   In response, Capital Traffic submitted a draft proposal intended to respond to the perceived inadequacies. Time passed, and nothing happened. In late-2010, we approached the Welsh Government to ask what had become of the proposal. Nothing was known, and the proposal was presumed lost.

We then updated our proposal, as at **Appendix 1**, and re-submitted it. Again, there was no apparent action for over a year. Upon enquiring, we were told that a joint tourism – transport team was going to study the issue, but had not met. Given the election and other internal changes with the Welsh Government around and since that time, the team may have never met.

2.3   However, the issue remains. Should your Committee determine that action should be taken, we would be pleased to revise our proposal and submit it again for consideration.

3. Our Submission

3.1 Our submission primarily focuses on the third of the Terms of Reference, *viz…*

> *To assess the suitability and effectiveness of the structures and support the Welsh Government has in place for the tourism industry in Wales, and its future plans for regional support.*

3.2 *The clarity and strength of Wales's tourism "brand"*

3.2.1 While the flag of Wales (*Y Ddraig Goch*) is one of the more iconic and memorable in the world, and www.Visit Wales.com is a mostly excellent website, we consider that there is a lack of incoherence in the offer.

This largely relates to transportation – how to get there, especially by other than car, and how attractions and activities are linked in the transportation networks.

3.2.2 There is a striking omission of Cymraeg from the English version of the site. We consider that many visitors, although comfortable in English and confident they will be understood in Wales, would also be interested in the language as part of the distinctive Welsh culture.

At least, we consider that there should be a page of Welsh words for common words (say, mother, days of the week, numbers), and another for common phrases (say, *Croeso i Gymru*, *diolch yn fawr*, *Dewi Sant*) with an easy pronunciation guide. We concede that some audiences may be less interested than others…

3.2.3 We identify the following primary audiences for the Welsh brand…

- the people of Wales

- the people in neighbouring English-speaking countries, notably those with a shared Celtic connection

- the people of Europe

- the people of the Welsh diaspora (residing in Australia, Patagonia etc)

- active recreationalists in the above countries and elsewhere.

Most in the audiences will have English as a primary or secondary language.

Access to translations of the website in other languages is not prominent currently.

Consideration ought to be given to adding Breton, Basque, Japanese and Chinese.

3.2.4   The Welsh brand is generally lost on the Visit Britain website. Apart from the logo of Visit Wales, Wales is not mentioned on the front page, while Scotland gains two mentions (downloaded 21 April 2014). Nothing obviously or distinctly Welsh is represented.

We consider that Visit Wales and its website should concentrate on its primary audiences, while Visit Britain continues to target the global audience.

3.2.5   Wales is absent from a large part of the internet where branding could occur for Wales and Welsh organisations.

For example, Wales does not have a country code (ISO ALPHA-2, ALPHA-3, UN M49) distinct from .uk. Note that the Isle of Man and Wallis & Futuna/Fortuna do.

Similarly, in drop-down lists of countries, Wales does not appear (though Wallis & Fortuna does!).

We recommend that the Welsh Government should apply for distinct recognition of Wales-based web and email addresses.

3.2.6   We have noted the powerful recognition factor of the Welsh flag. While images can become hackneyed with frequent exposure, *Y Ddraig Goch* is a strong one.

It could be adapted to appeal to a number of market segments, for example…

Dewch o hyd i'ch draig – Ymweld â Chymru! (voiceover by Bryn Terfel or Anthony Hopkins, say)

Find your dragon/find the dragon in you – Visit Wales!

This might as easily apply to passive recreation as adventure tourism.

3.3   *The extent to which the marketing and development of tourism in Wales makes the most of Wales's cultural, historical and natural assets*

3.3.1   Undoubtedly, Wales's greatest assets include its landscapes and seascapes at various times of the day. Sunsets from the west coast are often memorable, but there many other examples.

Yet much that could be accessible and/or visible is not.

3.3.2   Major roads and railway lines typically lie in the bottom of valleys. Nevertheless, many are scenic routes, and the railway often offers attractive panoramas not visible from the road.

However, there are many highway routes where potentially spectacular views are not exploited.

The A449 is a case in point. For much of its route in the south, it parallels the Wye River and the beautiful Wye Valley. But much of the river is not visible from the road, generally shrouded by trees. Not that we advocating widespread vegetation clearance…

We propose that amenity stops be created along such roads where there is an outlook over valleys, mountains, rivers and lakes. Ideally, at least some stops would provide toilets and running water.

3.3.3   While there are many walking and cycling routes that enable access for able-bodied people to high levels in the mountains and hills of Wales, we consider that there little offered to the less mobile and agile. The latter are usually more elderly and may be disabled.

Given the growing significance of this demographic among the local population and among tourists, we consider that more should be done to promote ready access to, and the accessibility of tracks closer to the upper levels.

With this in mind, we have previously proposed to the Welsh Government a new walking/cycling route from North to South Wales. In part designed as an employment project, *Lôn Rhiannon* is intended to complement the Wales Coastal Path, now an international attraction. **Appendix 2** refers.

A comprehensive strategy that extends and links such walk/cycleways with narrow-gauge railways and other public transport routes should be developed, with the requirements of less mobile people being catered for to an appropriate extent.

3.3.4   Finally, CT proposes an annual photographic competition for visitors, through the Visit Wales website. The winning images should assist in future marketing campaigns (if appropriately referenced).

4. Conclusions

4.1   Tourism Wales should be congratulated on the high profile it has created for the country within the UK market.

While continuing with that and other efforts, Tourism Wales should also develop a resilient and strategic view of the opportunities and threats ahead. There is a growing awareness that *business as usual* may not be sustainable, and alternative scenarios should be explored.

4.2   Reducing the reliance on private motor vehicles should be a primary policy objective in tourism, as in all other sectors.

4.3   There are unresolved issues about the Welsh identity and brand that may compromise tourism marketing objectives.

4.4   There are access and accessibility issues in relation to places of interest, first in terms of transportation links, and second in terms of their visibility and accessibility from transportation routes.

4.5   There is a need to improve travel and transport information for tourist destinations.

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The submission was prepared by…

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10 May 2014

Appendix 2   Information Design Proposal

Visit Wales/Transport Wales, Welsh Assembly Government

Research Proposal - Information Design

Project objective   **To respond appropriately to the information inadequacies identified in the Welsh Assembly Government's report** <u>Sustainable Transport and Tourism Assessment</u> (*November 2009*) **in respect of the design and provision of information for the tourism, travel and transport sectors**

WP0 - Prelude

0.1   To prepare a presentation outlining the method of approach (including project management), the scope and a project plan, with estimated costs for each Work Package

WP1 – Tourism Sector

1.1   To critically review travel and transport information provided by tourist destinations and accommodation places in Wales through all media

1.2   To consult and work with stakeholders in and information providers for the tourism industry to identify current inadequacies and develop future information provision

1.3   To identify examples of good practice

1.4   To investigate mapping options for the tourism industry in Wales

1.5   To design an information template maximising accessibility by low-carbon modes for use by the tourism industry in Wales, and to otherwise propose means by which travel planning for tourist destinations could be improved

1.6   To promulgate good practice in information provision in the travel and tourism and related industries

1.7   To design training packages for regional tourist consortia

1.8   To produce a summary report on findings and recommendations for the Client and other stakeholders

WP2 – Travel and Transport Sectors

2.1   To critically analyse the information provided by public transport operators and other information providers

2.2   To consult and work with stakeholders in the public transport and related industries in identifying current inadequacies and developing future information provision

2.3   To provide a detailed critique of current provision by the major information providers

2.4   To critically review fixed and Internet locational and directional information ordinarily provided by highway authorities, local councils and/or their agents, including signage

2.5   To identify examples of international best practice

2.6   To develop the framework for a comprehensive, flexible and user-friendly information service for the use of all travellers by all modes in Wales

2.7   To promulgate good practice in information provision in the public transport industry

2.8   To design training packages for information providers

2.9   To report findings and recommendations to the Welsh Assembly Government and other stakeholders

WP3 – Signage Provision

3.1   To critically review and identify gaps in current signage provision

3.2   To propose improvements to signage for all major traffic generators, modes, locations, destinations, events and emergencies, and changes to standards where merited

3.3   To provide assistance in developing good practice

WP4 – Review and Closure

4.1   To review progress with implementation in each sector (tourism, travel, transport)

4.2   To review the impact on any available indicators and report

4.3   To provide a project closure report with any further recommendations

05 February 2011

Appendix 2   Lôn Rhiannon/The Rhiannon Trail *

1.   Lôn Rhiannon is envisaged as a high-level (200m contour plus) quality-surfaced pathway, providing vistas over our beautiful lakes, valleys and coasts, and connecting North and South Wales.

It would be designed as wheelchair-accessible and step-free with user-friendly gradients to the extent possible throughout. It would be at least 90% off-road, and could occasionally be open to motorbikes and scooters.

2.   Given the unemployment besetting our young people, and remembering that Sustrans began its work by constructing cycleways utilising such resources, we propose the North - South cycle/walkway as a means to…

-    employ young people from local areas to design and construct it (surfacing may require commercial companies), probably over some years as financial resources permitted

-    interest those young people and their peers in getting up into the hills by bicycle

-    create a national legacy for Wales that would become a rite of passage for young people to cycle or walk and show them their country

-    create an active leisure and international tourist attraction matching the Wales Coastal Path (which should be made accessible to cycles in large sections)

-    provide an opportunity for landowners and businesses along and nearby to the route to develop services for walkers and cyclists (accommodation, food etc)

3.   The trail would intersect some major roads and rail routes. In such locations, interchange with trains, buses and cars should be facilitated, so the Trail could be traversed in sections, as endurance, weather and/or convenience permits.

Along the Trail, viewing and rest areas should be provided at key locations.

4.   The initial Trail would be a spine for a network linking to existing cycleways, and be extended east and west, preferably above 200m, wherever suitable terrain exists.

We do not have a specific route in mind. That would require a comprehensive survey and careful consideration of the alternatives.

*   *Reproduced from our **Active Travel (Wales) Bill - Submission to the Consultation** (August 2012)*