

Enterprise and Business Committee

Inquiry into Tourism

Engagement event with stakeholders

Oriel y Parc, St Davids, Pembrokeshire, Thursday 26 June 2014

Purpose

The aim of this event was for Members of the Enterprise and Business Committee to hear the views and experiences of local tourism businesses.

The following people took part in the event:

Joyce Watson AM (Chair)

Julie James AM

Suzy Davies AM (substitute for Byron Davies)

James Parkin, Pembrokeshire Coast National Park

Dr Beth Swan, Venture Jet

Andrew Tuddenham, National Trust

Simon Morris, Bluestone Wales

Ellen Llewellyn, Aberglasney

Dilys Burrell, Anna's Welsh Zoo

The Very Reverend Jonathan Lean, Dean of St Davids Cathedral

Summary of the main points made

1. Barriers to growth

- The weather!
- The rationalisation of school holidays has had a huge impact on the summer season, effectively reducing it to five weeks.
- Unreliable broadband and mobile phone connections
- Locating tourist information centres in libraries has limited access to the services they can provide, due to libraries' limited opening hours.

2. Marketing Strategy

- Some small businesses don't feel they benefit directly from Pembrokeshire County Council's marketing strategy, although it is generally felt that the Council do a good job of promoting Pembrokeshire as a high quality destination.
- More dialogue with Pembrokeshire Council over their marketing strategy would be helpful.
- Events like Ironman Wales bring significant numbers of visitors to Pembrokeshire outside of peak season and should be encouraged as the economic impacts are significant.
- The market is very reliant on repeat visitors and has a very loyal customer base. Once people have holidayed in Pembrokeshire, they tend to return year after year, but the difficulty is in attracting them initially.
- Greater emphasis on Pembrokeshire's unique selling points is needed.
- Consideration should be given to creating tourism packages for special interest groups (eg birdwatching, walking and photography).
- It was felt that a co-ordinated approach amongst local businesses in relation to flexible opening times was an important factor in providing a quality product to the consumer. It was suggested that Visit Wales could act as a conduit in implementing a through ticketing strategy.

Support from Visit Wales

- There is a lack of clarity around what Visit Wales does and how it spends its money.

- Businesses are not clear about how the data collected by Visit Wales helps drive up their business.
- The Visit Wales website is hard to navigate and doesn't work effectively as a portal. Some of the businesses reported difficulties in getting up-to-date information about their business on to the Visit Wales website.
- If a business doesn't have a presence on the Visit Wales website it also doesn't appear on the Visit Britain website.
- It was felt that a single point of contact at Visit Wales would be beneficial.
- There was a general feeling that Visit Wales could improve their overall communication with businesses.
- Provision of timely, current data was seen as beneficial to businesses in forward planning and predicting future trends. It was felt that the data produced by Visit Wales was made available too late for meaningful use by businesses. Earlier access to data would be welcomed by businesses even if it were still in draft form and had not been officially ratified.
- Visit Wales needs a presence on Trip Advisor.
- The 'Have you packed for Wales' campaign is generally well regarded, although there is some concern that the adventure holiday aspect is predominantly aimed at young people.
- Faith tourism is an increasing market but it wasn't felt that there was enough support for this sector to help it grow.

Support from Welsh Government Major Events Team

- Generally, experience of working with the Major Events Team has been positive.

Regional Tourism Partnerships

- There was a view that the proposed changes to the regional tourism partnerships have not been well managed and that Pembrokeshire will lose out as a result.

Enterprise and Business Committee

Inquiry into Tourism

Engagement event with stakeholders

National Museum, Cardiff – Thursday 26 June 2014

Session 1, 10:30–11:30

Purpose

The aim of this event was for Members of the Enterprise and Business Committee to hear the views and experiences of local tourism businesses.

The following people took part in the event:

William Graham AM (Chair)

Neil Anderson, Associate Director, Capital Traffic

Kevin Burt, Manager, Cardiff Castle

Keith Davies AM

Eluned Parrott AM

Steve Salamon, Owner, Wally's Delicatessen

Natalie Taylor, Community Liaison Manager, Flat Holm Island/Cardiff Harbour Authority

Summary of the main points made

Redevelopment of Cardiff city centre

- The St David's 2 development had been a boost to retail, though the effect was waning. The rise of online shopping and out-of-town retail parks meant that shopping was less important for drawing people into the city centre.
- The cost of car parking was an issue for city-centre tourism.
- Where shops were lying empty in Cardiff's arcades, this was often because they were owned by London-based landlords who were prepared to wait for someone to pay the price they wanted.

Tourism in Cardiff

- More could be made of Cardiff's Victorian shopping heritage and independent retailers. A comparison was made with the marketing of Brighton's Lanes district.
- Cardiff's attempts to create a 'Brewery Quarter' and 'Castle Quarter' had not worked because they were too small, but an 'Arcade Quarter' could be viable. Exeter had successfully used colour coding to define different areas of its city centre.
- The castle is the biggest visitor attraction in central Cardiff. Along with Flat Holm Island Tours, it was using social media as a free alternative to traditional marketing methods. The castle had no capacity for outreach activities, but 56,000 people who live or work in the city had signed up to a 'Castle Key' scheme whereby they have free access to the site for three years.
- Among the castle's most popular events are the banquet nights, but although it holds more than 200 a year, the margins are low, with most of the profits going to tour operators.
- It was difficult to get Visit Wales to promote Flat Holm. The island was involved in collaborative marketing as part of the South Wales Attractions Partnership, and the best way of marketing the island was off the back of other attractions people visit.
- An online presence was now more important than hard-copy marketing. The Castle had reduced its spend on marketing by 30% over the last 10 years.
- Cardiff needed more distinctive branding.
- Culinary tourism was a growing market and Cardiff would benefit from a Michelin-starred restaurant.

Tourism in Cardiff Bay

- Cardiff Bay might not have the right mix of visitor attractions, with too much emphasis on the night-time economy of bars and restaurants and too few retail opportunities. It was felt that Roald Dahl Plass was a wasted space, and that a market or event should be held there every weekend. It was suggested that Riverside Market might benefit from relocating to Roald Dahl Plass and attracting tourists as well as local customers.

- Attractions in the Bay could strengthen their collaborative work as the 'arc of entertainment', which runs from the Doctor Who Experience to Cardiff International White Water.
- The Extreme Sailing Series, which has been supported by the Welsh Government Major Events Unit, had been very successful.
- The Bay is quiet in the winter, but the Cardiff Harbour Authority (Cardiff Council) in partnership with the Waterfront Partners is looking at a six-week winter festival.
- Melbourne's reclaimed Bay area is a good example of how to do more to attract tourists.

Transport links

- The lack of a good link between the city centre and the Bay was a problem. An extension to the water-bus service was suggested. Cardiff Harbour Authority had gone out to tender for a passenger waterbus transportation service, to act as a commuter and leisure/tourism service, a number of years ago, but the costs and subsidy that was expected from the public sector, and the risk for the private sector, were too high.
- A tram or trolley-bus link was also suggested.
- The fact that the Bay's rail link runs to Queen St rather than Central station is also a problem. Although there is a bus service from Central station to the Bay, and through-ticketing via PlusBus, this is not widely known outside Cardiff itself.
- A Wales tourism card was suggested, allowing visitors to use public transport more effectively.

Tourist information

- This was seen as a major weakness in Cardiff.
- Tourism bodies should work with hoteliers to improve the information available to visitors in the places where they stay.
- More could be done with maps to help tourists. The information design used by the tourism industry in Wales is not especially clear. Many free maps, including online maps, are of poor quality, and Ordnance Survey maps are expensive. Capital Traffic's written submission to the inquiry proposes investigating mapping options for the tourism industry in Wales.

- However, Cardiff Bay provides tourist maps from the Cardiff Bay Visitor Centre and the Waterfront partners have developed a leaflet and map highlighting attractions, points of interest, etc. in the Bay.
- It was difficult to find information about Cardiff Castle, for example, on the Visit Wales website. VisitBritain was better, but still not particularly effective.

Changing models of governance for public sector tourism

- Cardiff Castle was considering whether to adopt trust status. In recent years it had received £8 million of lottery funding and £10 million of capital funding from Cardiff Council. It had traded at a surplus for the last four years.
- Flat Holm Island has been run by Cardiff Council since 1996, initially in conjunction with Vale of Glamorgan Council. Money had been tight since the economic downturn and the council had recommended community asset transfer, with the RSPB and National Trust in talks.

Enterprise and Business Committee

Inquiry into Tourism

Engagement event with stakeholders

National Museum, Cardiff – Thursday 26 June 2014

Session 2, 11:45 to 12:45

Purpose

The aim of this event was for Members of the Enterprise and Business Committee to hear the views and experiences of local tourism businesses.

The following people took part in the event:

William Graham AM (Chair)

Keith Davies AM

Stephen Davies, Managing Director, Penderyn Distillery

Chris Hadfield, Manager, Cardiff International White Water

Eluned Parrott AM

David Pearce, Strategic Director (Business Performance), Wales
Millennium Centre

Peter Trevitt, CEO, Techniquest

Summary of the main points made

Branding of Wales and Cardiff

- Wales needs a clear and distinctive brand. This should be based on new research and aligned with a tourism strategy.
- Cardiff seemed unsure whether to prioritise the Bay or the city centre, with the focus switching from one to the other. It needed to find a way to market both.
- More could be done to market the Bay, in particular, to families.
- Tourist destinations within Wales could be 'twinned', to encourage visitors to move from one to another.

Welsh Government Tourism Support

- The VisitWales website was not helpful in terms of directing tourists to the Penderyn distillery. Even when you search for 'Penderyn' you are not directed to the relevant page.
- Support for tourism in Wales is too fragmented.
- Wales had had a more coherent approach to promoting tourism under the old tourist board.

Transport links

- The lack of an effective rail link between the Bay and city centre was a big issue. The original plans for redevelopment of the Bay had featured a monorail, but this was never built.
- Similarly, the A4232 link road was planned to connect with the M4 to the east of Cardiff, but was never completed; as a result, satnavs send tourists to the Bay through the industrial area around Rover Way, which is hardly the scenic route.
- Wales's proximity to London and Heathrow should be a strength, and something that differentiates us from Scotland, but our internal transport infrastructure lets us down.
- The recent improvements to Cardiff Airport were welcome.
- Wales needs a tourism presence at Paddington station.

Development of the Bay

- It was difficult to move around the Bay. The Bay does not need more big buildings, but work on the spaces in between, including connections.
- Pont y Werin had increased footfall to the White Water Centre.
- A capital city like Cardiff should have an exhibition centre, ideally with two large halls and an auditorium capacity of over 2,000. If this were located between the Bay and city centre it might act as a link between the two.
- Bay attractions – including Techniquist, the WMC and Cardiff International White Water work to market themselves collaboratively, but the panel still felt the Bay was yet to reach its full tourism potential. It was felt that businesses could do more to encourage tourists to visit several attractions in one trip to the Bay.

Road signage

- It is difficult for attractions to persuade the relevant agencies to put up brown road signs for tourists.
- The amount they charge for putting up brown road signs was prohibitive: figures were quoted of £18,000 for a trunk road and £250,000 for the M4.
- Tourist destinations north of the M4 were poorly served by signage on the motorway.
- Government could do much more to provide a streamlined, joined-up service to tourism businesses as far as road signage was concerned.
- Retailers like McDonald's were getting signage when local tourism businesses were being turned down.
- The Committee might look at the French model of a 'tourism corridor' in road signage, perhaps using new digital signs.

Distinctive Welsh products

- Wales lacks strong food and drink brands. Penderyn has been a pioneer in this regard.
- Scottish tourism was partly based around distinctive products, such as whisky. Wales could make a different offer, based around experiences. It was suggested that though the Scottish tourism brand was perhaps better known than an equivalent Welsh brand, the tourism product in Wales was in many respects better.
- Much of the best Welsh produce is perishable, and so not easily adaptable to the tourism market.