

Background

In 2001 PLANED invited a group, which included representatives of all stakeholders in tourism in Pembrokeshire, to look at the issue of raising the quality of the tourism product in Pembrokeshire. The group identified the seasonality of tourism in Pembrokeshire (with 38% of staying tourist trips falling within the summer period) as the biggest single barrier to businesses being able to make sustained investment in quality improvement.

In 2002 PLANED commissioned Tourism Development International to undertake a study into the 'Seasonality of Tourism in Pembrokeshire'.

The main objective of the study was to define the needs of the out-of-season and shoulder season tourist, and to see how these could best be met in Pembrokeshire to the benefit of the local economy. Specifics of the brief were:

- to identify and consider general issues of shoulder season tourism in relation to Pembrokeshire
- to examine and establish the current perceptions of Pembrokeshire as a shoulder season destination
- to examine and establish the needs of the 'out of season tourist' and evaluate variants in demand
- to assess current resource provision regarding accommodation, recreation and visitor attractions available for the 'out-of-season' tourist in Pembrokeshire
- to identify potential markets for shoulder season tourism, by geography and activity
- to identify any potential linkages with existing or developing local and/or national strategies

A synopsis of the report findings (published Oct 2003) are detailed below:

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1). Market Analysis

2). Conclusions from Tourism Trade Questionnaire

- including comparison of activity participation by domestic holidaymakers (Wales) with tourism trade perceptions of tourist activity participation.

3). An Assessment of Out of Season Resource Provision Pembrokeshire

- and a comparison of this with similar in Cornwall and Cork

4). Identification & Prioritisation of Opportunities

Appendix 1 - Consultees

Appendix 2 – Attractions ' Open in Winter'

1). Market Analysis

Wales – domestic tourist spend £1,664m (2001)

Wales – overseas tourist spend £248m (2001)

Pembrokeshire – overseas tourist spend 9% of Wales total (£27.28m)

Pembrokeshire – domestic tourist spend 11% of Wales total (£183m)

When comparing the monthly spread of visits to Pembrokeshire, it is clear that overseas trips are much more evenly spread throughout the year compared with domestic trips taken in the county. For instance, while 17 % of all domestic trips in Pembrokeshire take place during August, the comparative figure for overseas trips during the same month is 11 %.

Info on Pembs is taken from the results of the Pembrokeshire Local Area Tourism Model 2001 (Geoff Broom Associates) with thanks to PCC.

2). Conclusions from Tourism Trade Questionnaire

There was general consensus amongst the members of the trade that responded to the questionnaire as to what visitors take into consideration when selecting off-season breaks. Such considerations include:

Value for money

All in packages

Quality standards

Ease/speed of access to the destination

A good range of things to see and do

Indoor entertainment and events

Something different to the usual main holiday experience

Good service/personal touch

Suggested improvements, from members of the travel trade that responded to the questionnaire, to make Pembrokeshire a more attractive off-season destination

More indoor attractions for visitors

The closure of attractions, accommodation etc over the winter period needs to be addressed

The need to highlight the range of specialist outdoor activities available to potential visitors

The need to make it easier for the potential visitor to purchase an off-season break in the county

Marketing monies for attracting off-season visitors

2a. Activity Participation (Wales) By Domestic Holidaymakers & Tourism Trade Perceptions of Tourist Activity Participation

	Activity Participation (Wales) By Domestic Holidaymakers	Tourism Trade Perception of Activity Participation
Natural features and environmental attractions	74% Walking 22% Nature/Birdwatching 11% Cycling 7% Fishing 7% Boating 4% Mountaineering, Rock Climbing 4% Golf	10/17 thought tourists were very/quite interested
Cultural and environmental attractions	33% castles, churches, monuments 19% museums, art galleries, heritage centres	9/17 thought tourists were very/quite interested in historic attractions
Theme or activity parks	10% theme or activity park	11/17 thought tourists were very/quite interested
Attractive and vibrant towns and villages	No hard data	Case studies illustrate importance
Craft & Retail	No hard data	7/17 thought tourists were not interested in specialist shopping/retail – however case studies illustrate importance
Swimming	28%	
Performing Arts	11%	

3). Out of Season Resource Provision in Pembrokeshire

- i) Natural Environment & Access – strong asset, open all year
- ii) Attractions – extent of closure in winter is less than might be expected (see Appendix 2)
- iii) Off-Seasons Festivals & Events – need for more indoor events/build links with suitable events venues
- iv) Inclusive Tourism – PLANED's study 'Meeting the Tourism Needs of People with Disabilities – A Market Overview' highlighted that people with disabilities are an extremely loyal market with a clear preference for travelling at off-season times
- v) Accommodation –
 - Caravan & Camping Sector* account for 72% of Pembrokeshire's 90,000 bedspaces and are rarely available in winter (planning policy requiring closure of caravan parks for up to 3mths a year)
 - Serviced Accommodation* – it is estimated that 70% of serviced accommodation is not available off-season, due to both weak demand and a desire by owner-run enterprises to have time-off
 - Self-Catering Accommodation* – it is estimated that the availability of self-catering accommodation in off-season times outstrips demand. Tourism Development International identified a growth in demand for self-catering breaks off-season in the UK. Given the dominance of this sector in Pembrokeshire in the off-season period, this places the county in a strong position to grow off-season tourism business.

Services & Facilities – year-round TICs at Tenby, Haverfordwest, Fishguard, Fishguard Harbour, St Davids and Saundersfoot now open winter weekends. PCC's Charter for public conveniences is encouraging in that it makes provision for year round opening and cleaning of the majority of its 100 public conveniences. Leisure Centres – open year round.

Transport – Coastal Buses now offering 3 day a week winter service

Comparison of Off-Season Resource Provision with Similar in Cornwall and Cork

Cornwall – although spread of visitors to Cornwall is similar to that of Pembrokeshire the market is approx 5 times the size, making off-season opening viable. In addition Cornwall has a much more even spread of accommodation stock - e.g 45% serviced accommodation compared to Pembs 11%. Greater proportion of accommodation is available year-round. As a result, Cornwall's accommodation base is better matched to the needs of the off-season visitor. Cornwall benefits from having a number of high profile attractions that are of national renown. Many of the County's attractions – including indoor attractions – are open to visitors on year round basis. Cornwall plays host to over 100 events and festivals annually, many of which are held in the off-season period. During these periods, indoor venues are used and the county also attracts major sporting events in the off-peak season.

Cork – again, because Cork has more visitors than Pembrokeshire the value of its off-season tourism is greater and so staying open in winter is a more viable proposition (tourism spend Oct-March is estimated to be £56m – more than Pembrokeshire's entire annual overseas tourist expenditure). In terms of accommodation supply there is a dramatic difference in the ration of serviced to unserviced accommodation. Approx 67% of accommodation in County Cork is in the serviced sector – 11% for Pembrokeshire. Cork has a relatively weak attractions base when compared to Pembrokeshire. Activity products are also not well developed in Cork. The area's great strength, tends to lie in the overall ambience of pretty towns and villages which are very visitor-friendly in terms of shops, restaurants and pubs. Ambience and comfortable accommodation combine to make an attractive off-season product offer and these are packaged with event rather than attractions.

4). Identification of Opportunities

A workshop, held in Narberth in 2003, provided opportunity to discuss the relative importance of initiatives proposed in the study process. Actions recommended, by the study, to develop the opportunity, which exists for Pembrokeshire to further enhance its off-season tourism performance:

Product Development

- continuing environmental improvements in towns and villages

- continuing expansion of the Greenways and other transportation initiatives into the off-season

- developing an events strategy to address the need for investment in indoor events/entertainment venues, off-season festivals and events, developing a St David's Day product (cultural tourism opportunity) and developing a themed events-led approach to filling dips in accommodation occupancy

- encouraging more attractions to develop all weather facilities and to open for longer periods

- encourage the upgrading of the serviced sector, through encouraging new operators or supporting innovative existing players

- an increased emphasis on training for excellence in service quality

Marketing & Developing Packages/All Inclusive Offers

- accommodation providers could adopt a policy of adding value to the price of an out-of-season overnight stay (rather than dropping prices to an uneconomic level). This could take the form of add-on products, for example price inclusive of entry to attractions or advance booking to a local events.

- developing a joint-marketing approach to off-season tourism

- the need to change the image of Pembrokeshire from a beach/summer destination to a varied and product-rich year-round destination

- the need to project a stronger quality image

- continuing public awareness campaigns as to the potential improvements to lifestyle quality which off-season tourism in particular can bring

Appendix 1: List of Consultees

Barley Villa Farm
Blue Creative Development
Bowett Farm Holidays
British Tourist Authority
Coastal Cottages of Pembrokeshire
Croft Holiday Park
FMB Holidays
Folly Farm
Greenways Initiative
Horgan Farm Fisheries
Irish Ferries
Lower Haythog Farm Guesthouse
Pembrokeshire Coast National Park Authority
Pembrokeshire County Council
Pembrokeshire Hotels & Restaurants Association
Pembrokeshire Tourism Ltd
Pendeilo Leisure Park
Pendragon Tours
Poyerston Farm B&B
PLANED
Rebleen Guesthouse
Stena Line
Tenby 2020
Twr y Felin
Valley Farm Guesthouse
Wales Tourist Board
Welsh Development Agency