

SPARC/ PLANED

**TOURISM REVIEW
AND STRATEGY**

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1 INTRODUCTION

At the end of 2001, SPARC (South Pembrokeshire Partnership for Action with Local Communities) developed into a new community led organisation called PLANED (Pembrokeshire Local Action Network for Enterprise and Development). This new organisation now covers the whole of the county of Pembrokeshire and will build on SPARC's achievements in integrated community led development.

This evolution has promoted SPARC/ PLANED to take stock and review existing activities in order to identify the priorities for PLANED in the future. As part of this process, The Tourism Company was commissioned to undertake a review of SPARC's involvement in sustainable tourism, and based on this review to develop a strategic approach for PLANED's future activities in tourism.

The review has not entailed a systematic assessment of all the separate projects undertaken by SPARC but rather seeks to provide a comprehensive picture. However, it does draw on some previous assessments of individual projects and initiatives which have been carried out internally and externally. The document is also presented more as a review rather than as a critical evaluation.

The research undertaken has included:

- In depth discussions with the Co-ordinator and Tourism Officer at SPARC/ PLANED.
- A desk review of relevant documents relating to SPARC's tourism activities.
- Consultations with key partner organisations and a selection of private sector enterprises in South Pembrokeshire.
- Consideration of wider tourism policy within Wales, which forms the context of PLANED's future work.

The remainder of this report is in four sections. First, we look at SPARC/PLANED's overall strategy and approach and how tourism fits into this. Then we consider the various actions undertaken with communities to develop and promote tourism in the area to date. The next section draws some conclusions about SPARC's work and considers the implications of this for PLANED, while at the same time relating this to the existing tourism policy and activities in the area. Finally, we set out strategic directions and priorities for the work of PLANED in tourism.

2 SPARC/PLANED AND TOURISM

SPARC has been a community led integrated rural development initiative, operating in South Pembrokeshire. The programme was based on an existing project, the Taf and Cleddau Rural Initiative (TCRI), which was set up in 1987 and covered 18 communities in the Narbeth/ Whitland area. As a result of a successful LEADER proposal SPARC was established in 1991 to expand TCRI's method of working throughout rural South Pembrokeshire.

The programme covered approximately 400 km² of rural Pembrokeshire including an attractive coastline, with about 40% of the area lying within the Pembrokeshire Coast National Park. The area encompassed some 40 towns and villages with a total population of around 45,000. The area has had a very heavy reliance on agriculture and has suffered from a low level of socio-economic development. Although some centres are well established as tourism destinations, development has been heavily concentrated along the coastal belt and is dominated by the traditional seaside holiday markets.

SPARC's aims and approach

The focus of SPARC's work has been community led integrated rural development. Empowerment, sustainability, partnership and integration are key principles underpinning SPARC's approach. The overall aim has been:

'to give local people in South Pembrokeshire the chance of playing a significant role in assisting and developing their communities – socially, economically, environmentally and culturally'.

Other aims underpinning SPARC's approach to rural development have been to:

- *minimise leakage by keeping expenditure in the local community;*
- *reverse out migration of young people by providing jobs and social opportunities for them in their community;*
- *provide private employment opportunities in sectors other than agriculture;*
- *supplement farm incomes;*
- *establish training programmes in the community to improve existing businesses and to encourage new operators to set up within these communities;*
- *provide technical assistance for rural development to be undertaken and promoted by local communities;*
- *improve the local environment and countryside;*
- *promote local rural tourism;*
- *improve linkages and exchanges of information within the area;*
- *ensure integration and co-ordination of programmes and objectives.*

The involvement of local communities is fundamental to all stages of SPARC's approach to rural development. The starting point for all development is the community consultation and appraisal system, through which the communities themselves identify key needs and opportunities. Some 37 communities have been involved in this process, developing action plans and taking identified projects

forward. SPARC's role has been to match these community efforts and enthusiasm with expertise and funding available through partner organisations, and to integrate local action into area wide strategies. A number of priorities for development have emerged from this process, one of which is tourism. Other key activities include: farm support; advice, training and development for small businesses; restoration of heritage features; rural transport linked to countryside activities; supporting local products; encouraging women to add value; social development and village renewal.

Tourism has played a major role in SPARC's activities as an integral component of sustainable rural development. The importance of tourism became apparent from the start with tourism opportunities identified by many local communities during the community appraisal and planning process. Appropriate tourism development offers potential for supplementing farm incomes and for economic diversification. It can help justify improvements to the quality of the natural and cultural environment and to rural community services such as public transport.

SPARC's approach to tourism

Although community consultations identified tourism as a key economic opportunity, it was agreed by all that this should be a non-intrusive form of tourism based on the natural resources of the area. It was also felt that providing a good quality visitor experience should be paramount. The overall aim agreed by all partners from the start has therefore been:

'to encourage and promote environmentally sensitive rural tourism, giving a total quality experience and bringing maximum local benefit'.

Associated aims for tourism development and marketing have been to:

- *enhance the area's image by stressing its quality hospitality, quality environment and quality local produce, thus creating new opportunities for adding value locally;*
- *boost local industry;*
- *improve skills of the local people to take advantage of the opportunities and to create their own opportunities;*
- *promote the area as a destination in sympathy with the objectives of the project;*
- *provide a forum through a Tourism Association for those people directly interested in the continuity of the project to come together to ensure the strategy is maintained and developed.*

A number of key principles have underpinned SPARC's approach to the development and marketing of sustainable tourism:

- A focus on high quality niche markets. The aim has been to attract 'discerning' visitors, looking for a quality experience based on the quiet enjoyment of the countryside and on activities which are in sympathy with the local environment and communities.
- A focus on quality improvements. A decision was made from the start that no tourism promotion would be undertaken until a good quality visitor experience could be ensured. Early priorities were therefore placed on the improvement of

tourism facilities, infrastructure, interpretation and information, and on the quality of any new development.

- Maximising local benefits from tourism. The focus has been on tourism opportunities which have positive economic multiplier effects on other local sectors, but which also complement the environment and heritage of the area.
- An integrated approach. Tourism development has been treated as one component of integrated rural development and close links have been made with other areas of SPARC's work including agriculture, local produce and community regeneration.
- Reducing seasonality. The approach has been to develop year round sustainable tourism, encouraging visits outside the peak summer season.
- A partnership approach. SPARC has worked closely with local communities, tourism enterprises and public sector agencies on tourism development and marketing.
- An area based approach. The role of SPARC has been to work up local tourism developments into an area wide rural tourism offer. There has been a particular focus on the inland rural areas to complement and counterbalance the longer established and better known coastal tourism product and image of Pembrokeshire. It was decided early on that the destination needed an identity and the Landsker Borderlands brand was developed in response to this.
- Supporting the private sector. No activity is undertaken which could be successfully undertaken by the private sector on its own. Instead, the approach has been to provide support and advice for service providers and to undertake those activities which would be too costly or inefficient for individual operators to carry out themselves.
- An innovative and pioneering approach. The role of SPARC has been to conceive of, and undertake activity to meet local needs that breaks new ground and is forward looking.

3 A REVIEW OF SPARC'S ACTIVITIES IN TOURISM

Over the last 10 years, SPARC has undertaken a broad range of activities in the fields of tourism development, marketing, information provision and business support. Two officers have had a specific remit for tourism within SPARC, working in close co-operation with other members of the SPARC team, local communities, private sector enterprises and public sector partners. Key areas of tourism activity have included:

- Upgrading, enhancing and restoring tourism infrastructure.
- Business advice, training and support for new and existing small tourism enterprises.
- The provision of good quality and accessible visitor information.
- Good quality interpretation of the natural and cultural heritage.
- Networking within and between tourism and related sectors.
- Enhancing and developing appropriate tourism products and services.
- Niche marketing of countryside activities and packages through a holiday bureau.
- The development of a distinct and recognisable identity for the destination
- Improving the environmental management and accessibility of tourism sites, routes and businesses.

The identification and design of tourism programmes and activities has resulted from a number of factors:

- Needs and opportunities identified by local communities. This has formed the starting point for many tourism development projects. A number of communities have set up tourism subgroups and tourism is an important component of many community action plans.
- Further assessment of these identified projects. Assessment has been undertaken to see whether concepts would be feasible and meet the needs of target markets. For example, an opportunity identified by local communities to develop language school tourism led SPARC to commission a feasibility study for this proposal.
- Partnership working with other agencies in Wales or through transnational exchange. Makers of Wales, for example, was a national scheme set up by CADW. QUEST was a successful training scheme already operating in Ballyhoura, Ireland.
- Funding sources, influencing the nature and life span of individual tourism programmes. With no core funding to draw on SPARC has sought external financial assistance on a project by project basis. Tourism activities have therefore needed to meet criteria set out by the relevant funding body. The short term nature of funding has caused some problems in terms of securing the continuity of programmes and staffing.

The activities reviewed in this chapter have been ordered under functional headings rather than as separate funded projects. This is because a number of projects have combined various aspects of tourism activity.

Community engagement

The starting point for much of SPARC's tourism activity over the last 10 years has been the community consultation process. Community appraisals have been undertaken in 37 towns and villages resulting in the establishment of community associations and the development of local action plans. SPARC have supported local communities in working with relevant partners to implement projects identified within these action plans. In some cases these plans have since been updated through further community visioning exercises.

Many of these local initiatives have had a direct or indirect tourism component. Projects identified by communities have included: environmental enhancements; restoration of heritage sites; improvements to footpaths; preparation of visitor information and interpretation materials; and the development of community events. Although some of these projects may not have had tourism as their primary aim they have nevertheless made a valuable contribution to the quality of the local tourism offer. In Narbeth, for example, the economic and environmental regeneration of the town has been recognised as significantly increasing the town's visitor appeal.

In a number of communities tourism has played a particularly strong role within the local action plans and has been the focus of dedicated working groups, studies and initiatives. Some examples are provided below:

- In Tenby, a dedicated tourism and business working group was established as part of the community consultation process and tourism forms a central component of the resulting action plan. Projects completed so far include environmental enhancements, the introduction of historic plaques and the development of a website for the town. In 2000, a consultants study was commissioned which reviewed previous proposals for economic development in the town and set out future priorities for tourism development.
- In Pembroke a consultation exercise was undertaken in 1999 to stimulate community feedback on the opportunities for tourism within the town. This study has informed subsequent planning for regeneration and tourism development within the community. A tourism association for the town has also been established.
- Saundersfoot's action plan in 1992 led to the implementation of a number of improvements to tourism services and infrastructure within the village including visitor signage, enhancement schemes and the interpretation of historic buildings. In 2000, progress was reviewed and a Business and Tourism Group identified further priorities for developing and managing tourism within Saundersfoot. Tourism plays a leading role in the new community action plan.
- The small historic community of Carew have taken a very proactive approach to developing the appeal of the village for visitors. Projects have included the restoration of a Flemish chimney through the Makers of Wales programme; improved visitor information and interpretation, and an ongoing project to develop an abandoned World War Two air control tower into a visitor facility.

Countryside access and sustainable transport

Developing and promoting opportunities for sustainable countryside recreation has played an important role in SPARC's activities. Particular areas of priority have included the development of walking and cycling routes and packages; strengthening links between countryside recreation and public transport services; and improving access to the countryside for all. These priorities have arisen both from local community needs and from SPARC's strategic emphasis on a form of rural tourism which is sustainable and based on the natural and cultural heritage.

Many community action plans highlighted the poor condition of rights of way in the area and this has resulted in the improvement of a number of local routes. The Quality of Life project, for example, enabled local communities to make improvements to 10 footpaths and bridleways. Communities have also worked with SPARC to develop new routes within and between towns and villages in order to encourage visitors to explore the area on foot, and to stay longer and spend more.

The 'Greenways' Environmentally Friendly Transport Initiative was set up in 1994 by CCW and has been managed by SPARC as a demonstration project in South Pembrokeshire. This project has sought to develop opportunities for countryside recreation, (walking and cycling) making use of public transport services. It also aims to improve access to the countryside for people with disabilities.

Components of the Greenways project have included:

- The improvement and development of rights of way, linking into public transport. Two new long distance footpaths, the Landsker Borderlands Trail and South of the Landsker Trail, have been created. In 1997 it was estimated that these two routes earned £200 000 for the local economy. A range of shorter circular and linear walking and cycling routes have also been developed which link into public transport services. In total, over 350km of footpath and bridleways have been improved, waymarked and publicised as well as 135km of on road cycle routes and 80km of off road cycleways.
- Improvements to disabled access at countryside sites. Environmental improvements and disabled access schemes have been undertaken at 36 sites between 1994-2001. Sites with improved disabled access include Lydstep Head, Manorbier, Penally, Freshwater East, St Florence, Carew, Milton, Bosherton and Blackpool Mill. Work is also being undertaken to ensure that all upgraded footpaths comply with BT Countryside for All standards.
- Improvements to information provision on walking, cycling and public transport. Information panels have been, (or are being), erected in 10 train stations and 16 bus stops within the area with information on local walking and cycling routes. Free information leaflets produced include:
 - Walk and Ride in South Pembrokeshire leaflet. This includes six linear walks linked into public transport routes.
 - Pembrokeshire Coast Line Guide including information on communities along the line and a timetable insert.
 - A railway guided walks leaflet.
 - Railway posters
 - Themed walk leaflets including Miners Walk, Lampeter Vale Walks, Llawhaden Walks and Narberth Country Walks.

- Landsker Cycleways On Road and Off Road Cycleway Guides;
- A programme of guided walks from train stations. These walks are led by the Ramblers Association and funded by Wales and West Trains. Ten walks were held in 2000 and six walks in 2001, which attracted 157 and 58 participants respectively. Of those attending the walks in 2000, 63% arrived on foot or by public transport. Visitors from outside the county accounted for 65% of the total and 92% of those visitors came on foot or by public transport.
- The development of holiday packages linking accommodation into walking and cycling routes. These breaks include accommodation, maps and itineraries and transport to and from the trails. 'Optional extras' are also offered including luggage transfer, station pick ups and packed lunches. Holiday packages based on the two long distance trails have generated 1773 bednights over the past 4 years.
- Public transport initiatives. These have included a Greenway's Day Ranger ticket and a pilot scheme of a special 'walkers' bus service in 1993. A 'Greenways Explorer' holiday package has also been developed based on using public transport and this has generated 127 bednights over the last four years. Over 60% of overseas visitors booking through the Landsker Borderlands holiday bureau come to the area by train, which is a higher proportion than for visitors to the county as a whole.

Greening the Landsker Borderlands Trail was a Leader II project which aimed to develop this long distance route into a niche 'green trail'. A local company used locally sourced timber to upgrade styles, bridges and gates along the route. Tourism enterprises situated along the trail were also targeted for participation in green business training. The trail was marketed as a green tourism product for the first time in 2001.

The Greenways programme was featured as a best practice example in a 1998 Welsh Office White Paper – 'Transporting Wales into the Future' and has attracted interest and study visits from representatives of other rural programmes across Europe.

Enhancement of local heritage and environment

The quality of the natural and built environment makes an important contribution to visitors' enjoyment of the destination. Community consultations and action plans have resulted in a wide range of local enhancement schemes within the area. Many communities have undertaken environmental improvements to village centres, such as planting schemes, village green enhancements and improvements to car parks. A number of communities have also undertaken restoration programmes on local heritage features. Recent community heritage projects have included the renovation of Narbeth Castle, restoration work on Penally War Memorial, and refurbishment to a church in Lamphrey.

Makers of Wales was a Leader II project based on heritage restoration, training and thematic tourism which linked into a national campaign run by CADW to celebrate Welsh heritage. Local communities were encouraged to become involved through community road shows and offers of financial assistance. This community

involvement has enabled the restoration of sites which are highly valued locally but which are not necessarily covered by CADW designations. A list of 20 000 historical sites were identified by Dyfed Archaeological Trust and a number of these sites have subsequently been restored and promoted under the project. Two important historic sites were purchased for restoration – a castle and a medieval manor house. A carding mill and a dovecote have also been safeguarded and have undergone consolidation.

This initiative led to the identification of a skills gap and an opportunity in the field of heritage restoration, which was addressed through the establishment of a training programme by SPARC, taken up by twenty five local craftsmen. This is an example of the integrated nature of SPARC's work.

In order to develop the tourism potential of this heritage resource, seven themed routes have been developed which visitors can follow by car, foot and cycle using accompanying leaflets or audio cassette. Interpretation panels were also erected in a number of communities. In addition, two short breaks and four longer holidays have been developed based on heritage themes which are promoted through the holiday bureau. Targeted promotion of the scheme has been undertaken overseas, aimed at tour operators in the US and Canada, although there has been very little uptake.

Events

SPARC has recognised the valuable role that local events can play in terms of offering an authentic and innovative visitor experience, encouraging positive contact between visitors and local people, and generating visits outside the peak holiday season. Community planning exercises have given birth to a number of ideas for new local festivals and SPARC have provided ongoing assistance to communities in the planning and execution of these events.

The Business Festivals Initiative provides small grants to local communities planning their own festivals. In addition, SPARC offers training on how to run an event and assistance with promotion. Festivals supported have included: Narbeth Food Festival; Kilgetty Festival of Carparks; Tenby Cafe Culture; Saundersfoot Christmas market; Pembroke Dock Kite Festival; and Pembroke Christmas Market. An annual walking festival was also organised by SPARC over a five year period between 1993-1997.

Attendance figures at the events in 2001 showed considerable variation, with the most popular being Tenby Café Culture and the Saundersfoot Christmas Market (500 each) and the Narbeth Food Festival (between 12 and 15 hundred)

Information and interpretation

SPARC has placed a strong emphasis on improving visitor information and interpretation within the South Pembrokeshire area. Visitors staying within the area

require user friendly practical information in order to plan their stay. Interpretative materials which provide information on local topics of interest can also enhance the quality of the visitor experience. Information provision can be a tool for meeting strategic aims such as encouraging visitors to stay longer, spend more and behave responsibly.

Over the years SPARC has developed a family of free information leaflets based on different areas and aspects of the destination. Local communities have also been supported in developing information materials about their own villages and towns. All information materials are designed within a family brand with shared styles, colours and layout and using illustrations by a local artist. This family of information print includes:

- An annual visitor guide for South Pembrokeshire (see Marketing section below)
- Information guides for three smaller areas within South Pembrokeshire: The Secret Waterway; Hidden Heritage; Coastal Splendor. (Other information leaflets are colour coded according to which of these three areas they fall into).
- Leaflets on area based walking and cycling opportunities as well as specific trails (17).
- Leaflets for individual villages and towns. Support has been given to community associations such as local history groups to research and produce these guides.
- Dedicated print produced to meet the aims of the Greenways and Makers of Wales initiatives.

In line with SPARC's aim to increase 'access for all', a programme has recently been initiated to revise all literature to meet Fieldfare Trust recommendations. Selected information materials have also been produced in German and French for use by overseas visitors.

A comprehensive local distribution system for information materials has been developed by SPARC over the years. This has expanded from an initial 30 outlets to a network of over 500 information points, including shops, post offices and pubs. This system ensures access to free information for all visitors and provides an opportunity for these businesses to add value to their own services. Welcome packs, containing detailed information, maps and itineraries, are provided to all those visitors who book a break through the Holiday Bureau. These guests are given the option of having the information sent to them before their visit or to have it provided on arrival.

Business advice and support

The provision of business support for enterprises and local communities has played a central role in SPARC's approach to tourism development. SPARC has very successfully developed into a 'one stop shop' for tourism advice and training, especially for the many micro-businesses which dominate the rural tourism sector and who often 'slip through the net' of existing business support providers. SPARC has successfully engaged this sector through the provision of practical training courses which are designed to meet the needs of small businesses and are integrated into a wider support package of grant aid, consultancy advice and networking.

The Quality in Tourism initiative linked attendance at a pick and mix of short courses to a small grant for making quality improvements. Courses have covered a wide

range of topics including marketing, IT, Welcome Host, green business practices, food hygiene, financial management, and using local produce. Grants were offered for up to 50% of capital costs and participants could claim up to £500 by attending at least 5 courses. The provision of these 'micro grants' has encouraged investment by small enterprises who could not afford the minimum financial commitment required by other agencies.

In 2000, the total attendance at training courses was 253, spread across 34 different courses. The numbers attending each course were relative small, but this has allowed for personal supervision.

SPARC has worked closely with the Pembrokeshire Business Initiative (PBI) on cross referrals for business advice and support and a PBI officer has operated from the SPARC offices in Narbeth. Business support for tourism enterprises is also closely integrated into schemes provided for other sectors. For instance, any farmers involved in the Farm Support and Development Scheme who are considering diversifying can be quickly brought into the tourism support programmes including WTB consultancy advice, grant applications and training. Communities have also benefited from training and financial support packages designed to facilitate the implementation of local action plans.

In addition to the core programme of business training courses, a number of support packages have been developed which focus on addressing specific priorities for the tourism sector:

QUEST (Quality, Uniqueness, Enhancement, Strategic Planning, Training).

QUEST was a one year business support package run during 2000. The programme's aim was to develop professional business and management practice and in so doing to significantly enhance local tourism and increase revenue generated from the sector. The programme was modelled on an existing scheme which had been implemented very successfully in Ballyhoura, Ireland. In fact, representatives of CERT (Irish Tourism Training Board) assisted in the delivery of the programme. The scheme comprised of:

- A diagnostic review of businesses.
- An IT diagnostic review of businesses.
- Seminars on business planning, marketing, and sales and promotion.
- A certified Welcome Host Manager training course.
- A study visit to Ballyhoura, Ireland.
- Advisory visits from specialist consultants chosen by participants, followed by additional support in finalising business plans.
- Provision of a small capital grant (EU LEADER II) offered to all those who completed the programme. The grants were for 30% with a maximum sum of £1000.

A total of 13 businesses completed the programme contributing over 2000 hours of their time and 12 businesses applied for a total sum of £11,204 grant aid. Feedback from operators taking part in the programme was extremely positive with most eager to be included in any follow up programme and a belief that QUEST would also be of great benefit to their industry colleagues.

Greening Farm Based Tourism (Ob5B) and green accreditation

This project aimed to encourage tourism businesses to become more environmentally friendly and in so doing to attract visitors during the shoulder season and to increase tourism expenditure. Components of the programme included:

- A green audit of tourism enterprises.
- Supporting new and existing businesses through training and advice on green business practices.
- Providing grants and support for ongoing work on environmental management and practices.

A total of 28 business had completed the training up to 2000 and £13 000 of grants were awarded, resulting in an investment of up to three times that amount by participating businesses. A further programme allowed the training to be offered to all types of tourism enterprises which attracted a further 24 participants. Enterprises who have completed the project received a 'Working Towards a Greener Future' certificate and are included within a green network. SPARC/PLANED will be working with a number of these operators to achieve a formal environmental business accreditation. The scheme has been used as a best practice example in WTB's Greening Your Business Guide and has been drawn upon by WTB in designing the new national Sustainable Tourism Business scheme. The project was also awarded a Green Globe 21 Recognition of Achievement Award in 2000.

Inclusive tourism for all

This pilot training programme was developed as a result of a research study into the needs of the disabled market. Seven tourism businesses successfully completed the programme which included a number of training seminars and an associated grant aid programme. A further seventeen enterprises have since registered to undertake the training.

Tourism Networking

The tourism sector is highly fragmented in rural Pembrokeshire comprising of many small independent enterprises. At an early stage, SPARC recognised the importance of developing networking between local tourism operators in order to facilitate mutual support and communication and to encourage partnership work towards the benefit of the destination as a whole. SPARC has facilitated private sector networking in a number of ways:

- Developing a database of 400 local tourism service providers. This has enabled SPARC to communicate effectively with operators on relevant issues.
- The Landsker Borderlands Tourism Association. The establishment of a local tourism association was an early priority for SPARC. It is now fully independent and has 110 members. The association has secured the survival of Kilgetty TIC and manages the centre on a voluntary basis. It also acts as a support system for its members through referrals, access to training and securing bulk discounts.
- Developing support networks linked to training packages. These networks provide further communication and support for tourism service providers who

have successfully completed training courses. The first of these networks was a 'Welcome Host Association'. This group has recently been replaced by a new 'Quality Product Development Group' which aims to create a 'critical mass' of enterprises committed to working towards shared goals such as quality improvements and extending the season. A Green Network of enterprises has also been set up in order to work with tourism operators towards the implementation of environmental practices.

- Encouraging partnership working between sectors. Joint working between tourism enterprises and local producers has been encouraged through networking and training. The Pembrokeshire Fayre held in 1994 brought together 60 local producers and 200 tourism operators.

SPARC has also placed a strong value on international collaboration and exchange of good practice. It was involved with European projects from an early stage. This was further taken forward through the LEADER programme and the co-ordinator's involvement in the AEIDL European Observatory of Rural Development Expert Group. SPARC organised rural tourism conferences in 1992 and 1994 and have hosted study visits from tourism managers and operators from a number of other destinations in the UK and overseas.

Marketing

The focus for SPARC's marketing activities has been the promotion of niche opportunities for year round sustainable tourism. Core components of this marketing approach have included:

- The packaging of activity and heritage products together with local accommodation into saleable holidays and breaks.
- The establishment of a destination brand as a marketing umbrella for the individual product based packages.
- Promotion of these holiday packages to niche markets within the UK and overseas.
- The establishment of a holiday bureau to provide a centralised visitor enquiry and booking service.

An early priority for SPARC was to develop a local identity for the area. As a result, 'Landsker Borderlands' and 'South of the Landsker' were developed as destination brands, reflecting the unique linguistic and cultural heritage of the area. These brands have been used to unify SPARC's destination and product marketing activities throughout South Pembrokeshire.

In 1994, the Landsker Countryside Holiday Bureau was launched to promote holiday packages based on the area's countryside, heritage, culture and natural history. Individual packages offered include:

- short walking breaks on 10 trails;
- five longer walking breaks along the 3 long distance trails;
- short and longer cycling breaks along the Celtic Trail;
- one base cycling holidays;
- two short breaks and 4 longer breaks based on Makers of Wales themes;
- a 'Greenways' car free explorer break;

- tailor made itineraries, including opportunities for riding and fishing.

These holiday packages are self guided and aimed both at individuals and small groups (up to six people). The holiday bureau offers a central booking service with 10% of the reservation fee reinvested into SPARC projects.

Promotion of the holiday packages focuses on niche markets in the UK and abroad. Overseas tour operators have been a particularly important target with contacts generated through WTB and BTA channels. Other promotional activities have included advertisements (in specialist walking and cycling press, Pembrokeshire Guide, WTB publications); direct mail campaigns; and PR activities. Media coverage generated to date has included features in HTV Grassroots, Holiday Magazine, Good Housekeeping, Sunday Times, Western Mail, and a Canadian TV Travel Show.

The two primary pieces of promotional print are:

- The South Pembrokeshire Visitor Guide. This includes details of accommodation, attractions, activities and places to eat. With a print run of 70 000 the guide is distributed to outlets throughout the destination and along the M4 corridor. The cost of entry to this brochure is kept very low enabling the participation of small enterprises. Discounted rates are also offered to the Landsker Tourism Association and Pembrokeshire Tourism. The guide is sent to potential visitors as an information source, enabling them to book direct.
- Greenways Holiday News. This visitor newspaper is produced twice a year and is used for direct mail campaigns and to service enquiries. The guide includes details of holiday packages available through SPARC as well as information on local events and sources of additional information.

Information on the holiday packages is also now available on a dedicated website 'www.southpembrokeshire-holidays.co.uk'. About 50% of visitor enquiries to the bureau are now generated through the website and email.

Bookings made through the holiday bureau have generated over 2000 bednights over the last four years. Three quarters of these have been generated through overseas tour operators, and in particular the Dutch operator SNP. Evidence from postal enquiries suggests that the bureau is used as an information enquiry service by a much larger number of visitors who may then go on to book direct with providers.

Wales Countryside Holidays (Ob5b)

Wales Countryside Holidays was started in order to get other rural areas in Wales to take an area approach to rural tourism. This took time to establish. The programme has involved a co-operative of seven rural areas, managed by SPARC and with support from WTB. Each of the area groups includes members from the local Leader Group, local authority, accommodation providers and activity operators. A programme of rural holiday packages has been created between seven areas of Wales (managed by SPARC/PLANED) for promotion under the 'Wales Countryside Holidays' brand.

The project has been progressed through a three year development programme followed by a three year marketing phase. The tourism offer consists of 23 holiday

packages based on walking, cycling, heritage, fishing, outdoor activities and 'go as you please' breaks. Trails featured within these packages are supported by maps, leaflets and waymarking and in some cases are also led by experienced guides. Accommodation operators provide luggage transfer between overnight stops. Marketing has focused on overseas niche tour operators and the co-operative are now working with six such operators who feature 14 of the 23 holiday packages on offer. By the end of 2000, Wales Countryside holidays had attracted over 600 bednights which generated more than £23 000 for the rural economy. Visitor markets have included the UK, Netherlands, US and Belgium.

Market research / monitoring

Visitor research has been undertaken through a visitor survey which provides feedback on visitor profiles and satisfaction levels. A postal survey is also undertaken of enquirers to the Holiday Bureau. A number of research studies have also been undertaken on specific markets or project proposals including:

- Feasibility study of language school development
- Review of the needs of the disabled market,
- Study of the local market for locally produced foods, including the links with tourism.

4 CONCLUSIONS AND POLICY CONTEXT

This chapter draws some conclusions about the work of SPARC in tourism. It then looks at the current policy context of tourism in Wales and how the work of SPARC and, potentially, of PLANED relates to this. This is followed by a summary of PLANED's existing strategic development plan. Finally, the relationship of PLANED with its partner agencies is considered. All this provides a context for the strategy recommendations for PLANED in the final chapter.

The contribution of SPARC to sustainable tourism

The review presented in the previous chapter shows that SPARC has been engaged in a comprehensive programme of activity in sustainable rural tourism. An objective view of this programme, together with discussions with small selection of SPARC's partners and recipient enterprises, leads to the following conclusions about the impact of their work in tourism.

There has been considerable success in getting local communities interested and involved in tourism.

The expertise of SPARC in community engagement is widely recognised. A broad range of people have been involved at the community level, including those with tourism enterprises and those without. Groups have been established in communities to take ideas forward. Some of these groups have been stronger and more representative than others. The involvement of SPARC in helping groups to take forward the initiatives they have identified has been a strength. The set of events established in a number of communities is a good example, encouraging community organisations to work together and creating tangible tourism benefit.

The infrastructure and support services for sustainable access to the countryside has been created and promoted as a valuable tourism resource, but there are issues of use and maintenance.

The creation of a network of shorter and longer routes and trails has established an infrastructure for recreation and tourism in a rural part of the county where this did not exist previously. A strength has been the fact that SPARC has taken this forward into a resource that can be used and promoted, through a set of information material and holiday packages and a linked network of service enterprises. SPARC should also be commended in fully addressing the sustainability agenda through improving disabled access in a large number of locations, using 'green' materials, and in linking this resource with public transport, although the level of public transport service in the area does restrict what can be achieved. There has been some criticism that the issue of maintenance of the trails was not sufficiently addressed at the outset, at a time when the local authority had few resources for such work, but this seems to have improved. Knowledge of actual use of the trails is quite limited, and the bookings of inclusive holidays have been relatively

modest and dependent on one main overseas market and operator, though enterprises involved have reported that this has brought valuable additional income.

The area is a more attractive place to visit and establish enterprises, and local heritage is better preserved and presented.

Local initiatives carried out by and with local communities and others have led to a range of improvements in amenity and the appearance of the towns and villages, together with the restoration of heritage features. It is increasingly understood that it is the inherent appeal of rural areas, the attractiveness of villages etc. that creates one of the main resources for rural tourism. Environmental and amenity improvement work has created a better context for enterprises to become established and flourish. The general uplift in the appearance and trading in Narbeth is often quoted as an example of this.

A wealth of local information material has been produced and distributed, which appears to be well used in places.

A wide range of interpretative and information material has been researched and created on the local heritage, in the form of panels, thematic routes and leaflets. This is clearly a resource that can be used by local people themselves, by tourism enterprises who want to add value to their guests' stay to the local area, as well as by visitors. Through this many small sites and communities have been able to be included in the overall tourism resource of the area. It has added to civic pride. Again, it is commendable that SPARC has pursued actively the linking and promotion of the heritage theme, for example through Makers of Wales, to seek to make it a more potent tourism resource. There appears to be relatively little information on the level of use of this material, although some TICs have reported that the leaflets are very popular.

Tourism enterprises have been considerably helped to improve skills, quality and sustainability, with programmes well suited to their needs.

SPARC has been particularly active and successful in supporting small businesses. Many other agencies, and the businesses themselves, are very positive about the benefit this has brought. The training courses offered and the way they have been delivered appear to be well suited to the needs of small enterprises. The linkage between training and small packets of financial assistance, well targeted, is a considerable strength. The provision of on-going support after training has been an important feature, as has been the way in which SPARC has brought enterprises together and facilitated networking. The integrated nature of assistance provided, linking tourism to other activity such as agriculture and general business advice, has been valuable. Again, SPARC has also been pioneering in moving the sustainability agenda forward here through their greening programmes, as well as addressing issues of inclusiveness through work with enterprises on providing for disabled visitors.

A holiday bureau reservations service has been established and a marketing campaign undertaken, but levels of response have been modest

SPARC has been active in marketing and have set up the mechanisms for supporting this. It has also spearheaded a Wales-wide initiative in Wales Countryside Holidays. Up to now, the level of response has been relatively modest, although this was anticipated, the objective being to establish new mechanisms and to seek to generate new markets. Individually, there is probably little awareness of the Landsker and Greenways brands in the market place. South Pembrokeshire and Greenways have come together to form a Pembrokeshire product, although there has been little time to establish this.

In summary, the greatest strengths and achievements of SPARC have been their engagement of the local community, their holistic approach to amenity improvement and sustainable development, their support for local enterprises and their championing of the sustainability agenda in tourism. In comparison, breaking through to the market place has proved more difficult and monitoring of visitor response has been a relative weakness.

Current policy context of tourism in South West Wales

The documents presented below provide the main framework of tourism policy in west Wales.

WTB Strategy: Achieving Our Potential

The four overarching objectives of the strategy, from which priority areas of action flow, are:

1. To market Wales more effectively as an attractive all year round tourism destination.
2. To exceed the expectations of visitors to Wales by providing high standards and ensuring that investment in tourism is responsive to their changing needs.
3. To improve professionalism and innovation by raising the profile of the industry and by enhancing skills, training and motivation within the industry.
4. To embrace a sustainable approach to tourism development which benefits society, involves local communities and enhances Wales' unique environmental and cultural assets.

SPARC has been particularly active in meeting the fourth of these objectives. The need to protect the environment and obtain maximum benefit to communities and the local economy is the starting point for all SPARC's activities. Indeed SPARC has acted as a *de facto* pilot area for a number of activities embraced in this part of the strategy. This continues to provide an important context for PLANED's work in future.

SPARC's activities in providing skills training for enterprises and improving the amenity of the area is directly in line with the second and third objectives. Its development of niche market opportunities year round complies with objective 1, but the emphasis in this part of the WTB strategy on relating marketing to the Wales

brand, strengthening segmentation and developing a partnership approach to marketing could be reflected more fully in future by PLANED.

South West Wales Integrated Regional Tourism Strategy

This a 1998 strategy was set to cover 5-7 years and so is half way through its life. The strategy is underpinned by four guiding principles: quality, sustainability, partnerships and regional spread. Priorities for action are set out within three action plans focusing on product and infrastructure development; marketing; and developing people and profitable business. Many of these actions are focused on regional structures and activities. However some of these activities have relevance on a local level, with LEADER groups identified as partners in a number of cases. SPARC's own activities have contributed to a number of these priorities including:

- Promoting and supporting integrated enhancement schemes for historic resorts, towns and villages.
- Development of local walks and cycle routes
- Pursuing integrated public transport network improvements.
- Product marketing campaigns including riding, farm tourism, heritage attractions etc
- Providing training for identified local skills shortages.

Objective One West Wales and the Valleys Regional Action Plan for Tourism (2000)

This plan relates the strategic objectives in the national tourism strategy to priorities within the Single Programming Document and provides a framework for funding bids. There are a number of action points where SPARC's activities have made a contribution, including:

- Working to increase the Wales content within programmes offered by overseas tour operators.
- The development of products and marketing campaigns to increase business outside the third quarter peak.
- Developing integrated campaigns with industry partners in specific sectors, such as walking, cycling, arts and culture etc.
- Adopting an integrated approach to business support including training, grants, advice and the inclusion of environmental, equal opportunities and inclusivity aspects within this process.
- The adoption of the IQM approach to tourism management.
- Work on sustainable transport for tourism initiatives.
- The development of cultural tourism including training, product development, information provision and marketing.
- Progressing 'Tourism For All' objectives.
- Support for farm tourism and other rural tourism businesses.
- Improvements to countryside access.

Within the context of sustainable development, there is reference to the need to involve communities in tourism. SPARC/PLANED has offered a way for this to be put into practice.

Objective One in Pembrokeshire – The Local Strategy

This is the strategy of the Pembrokeshire Partnership Management Board, whose terms of reference are to implement the Pembrokeshire Economic Framework and the objectives and targets of the West Wales and the Valleys Objective 1 Single

Programme. It recognises the importance of tourism as Pembrokeshire's largest industry and employer, and that the strong image of Pembrokeshire is based on its natural and built environment. It recognises the importance of addressing seasonality through market segmentation and improving product quality. Among the various priorities and measures of the strategy, those which relate most directly to tourism are:

Priority 5, Measure 4: Adaptation and Development of Rural Areas. Objectives include: 'To provide openings for further economic development, including tourism and craft activities'; 'To improve the physical environment of villages and conserving the rural heritage and culture'; and 'To help engage rural communities in the management of countryside access opportunities'. Key activities include: Support for community led projects that encourage tourist and craft activities aimed at enhancing the contribution that these activities make to the rural economy. This will include activities to improve access to the countryside for sustainable tourism activities.

Priority 5, Measure 6: Local Economic Development. One of the objectives is 'To encourage further tourism to rural areas. Key activities include: Support for advisory services, local supply chains, networking, community enterprises, local festivals and cultural initiatives, improvements to the physical environment in local centres, marketing initiatives to promote local products and places.

The previous experience of SPARC in tourism has been directly in line with these objectives and activities, and they provide a context for PLANED, in partnership with others, to contribute to the Objective One Strategy.

Integrated Quality Management and Tourism Growth Areas

It is appropriate to refer to IQM within the context of tourism policy for the area, as this concept has been adopted by the WTB and recommended to destinations. Places designated by WTB as Tourism Growth Areas are required to follow an IQM approach; within Pembrokeshire this includes the Tenby area.

IQM has been defined as: "A process of progressively improving the quality of the visitor experience while securing economic, cultural and environmental benefits for the destination".

There are three main components of IQM:

- Creating the right structures to ensure that all stakeholders are working together to an agreed strategy.
- Addressing all aspects of the quality of the visitor experience, from pre-visit images and contact, to booking and information, initial welcome and orientation, quality of all facilities, services and infrastructure, farewell and after-visit contacts.
- Pursuing a cyclical quality management process involving identifying needs, setting standards, undertaking improvements, and monitoring impacts on visitors, local people, tourism enterprises and the environment.

SPARC has always sought to foster an integrated and sustainable approach to tourism in the area. It saw the connection between its approach and the IQM concept at the time of the European Commission study on this subject. It set up an IQM committee involving key players, including the County Council. It is important that the County Council is fully engaged in the IQM process.

PLANED's overall strategy and action areas

The future activity of PLANED in tourism should relate to the overall direction of PLANED's work which has been set out in its Strategic Development Plan 2001 – 2005.

PLANED's Overall Theme is: '*working with local people to encourage sustainable development by promoting a community culture of entrepreneurship*'. Underpinning this will be four sub themes:

- '*Developing Communities*'. Community-led activity remains at the heart of the sustainable development process and will be the bedrock on which all activities will be built. The strategy places an emphasis on generating an entrepreneurial outlook in the community.
- '*Plugging the Leaks*'. Strengthening local economies through understanding local economic processes better, increasing retained income and local employment. It is about sourcing more goods and services locally.
- '*Economic Gardening*'. Working to create and grow local jobs through entrepreneurial activity, examining local assets, helping people to gain self-reliance and new perspectives and to identify opportunities.
- '*Sustainable Living*'. Raising awareness of the role of environmental management in improving the quality of life and providing development opportunities. This also includes caring for heritage and biodiversity resources and the benefits that can come from this.

PLANED's work in tourism will relate to these themes. Tourism is identified in the Strategic Development Plan as a sector priority. PLANED will continue to commission research and provide information, training and networking to raise the awareness and expertise of tourism operators. The emphasis will be on developing niche tourism opportunities, improving commitment to environmental sustainability and inclusivity and extending the tourist season.

The strategy already identifies a number of areas for tourism work, some of which have been developed into funding bids at various stages of approval. These include:

Support and development of quality niche tourism. To continue to develop sustainable year round niche, green, heritage and inclusive tourism identified through the Community Action Plans. The programme will cover commissioning research, developing training, developing packaged products and test marketing these. Marketing will be predominantly focused on overseas markets. An example could include taking forward research on the language school market commissioned last year.

Environmental tourism for all. To extend greening farm based tourism programme to a wider network of tourism enterprises across Pembrokeshire. To engage a further 60 SMEs from throughout the tourism sector in the greening programme, as well as working with 15 service providers on achieving certification. The support package includes: a self audit; seminars on energy conservation; environmental good practice etc; market advice on drawing up an environmental management action plan; and a grant for implementation. It also aims to bring the network together to look at joint marketing.

Inclusive tourism for all. This follows research undertaken last year and a pilot programme. It entails working with 50 tourism SMEs. The project will include: inclusivity audits; seminars by local experts; advice and support for SMEs to develop action plans; and identification of further investment potential through a small grant scheme.

Greenways. PLANED plans to work with others on extending the initiative throughout the county. The majority of funding will go towards developing new walking, cycling and disabled access routes linked to public transport which will be simultaneously enhanced. Some funding will be spent on route guidance, interpretation panels at railway stations and bus stops, and interpretative leaflets; material will highlight opportunities for people with disabilities to access the countryside.

Integrated Total Quality Management (ITQM). This programme seeks to pursue the above mentioned IQM approach in Pembrokeshire and relate this also to Green Destination status. PLANED's emphasis has been on environmental management as an element of destination management, with employment of an environmental officer post for 15 months, identifying baseline environmental data, establishing an environmental destination management group, and applying the Green Globe 21 framework and working towards Green Globe 21 destination status

Wales Countryside Holidays. PLANED will work with WTB to further promote rural tourism development and marketing opportunities on a Wales wide basis. A business plan for WCH has been commissioned.

The above projects represent PLANED's current concept of a set of tourism activities which relate to its overall approach. The strategy set out in the next chapter takes note of this, but has been prepared to reflect strategic issues rather than be driven by current programmes.

Relationship with key partners in tourism in Pembrokeshire

In the past, SPARC has referred to the importance of working in partnership with others, recognising mutual objectives and combining resources where appropriate. This remains vitally important in the future and is a requirement of most funding agencies. PLANED has an organisational structure, set out in the Strategic Development Plan, that embraces consultation and partnership working.

The fact that PLANED, unlike SPARC, is a Pembrokeshire wide body brings considerable opportunities but also responsibilities in terms of working with others.

The European Commission study on IQM of rural tourist destinations has as one of its three pillars a requirement that the key organisations and stakeholders in a destination should work together to an agreed strategy. It suggests that both leadership and partnership is required. It emphasises the key role of the local authority and the bringing together of its various functions that have a bearing on tourism. It also refers to the important roles of protected area authorities, private sector network organisations and community/economic development agencies as partners.

In Pembrokeshire, there are three main bodies with which PLANED must coordinate in its tourism work.

Pembrokeshire County Council

The County Council takes a leading role in tourism marketing for Pembrokeshire as a destination. It also has responsibility for important related activity such as transport, planning, economic development and social and community services.

Consultation carried out for this report revealed a universal call amongst the private and public sector for there to be a close and constructive relationship between PLANED and the County Council in their tourism work. This is regarded as a significant weakness at present and a threat if unresolved. Efforts should be made to improve this situation.

The County Council does not have a separate tourism strategy for Pembrokeshire. However, it does play a leading role in the Objective One Local Strategy for Pembrokeshire which contains a number of agreed activities for tourism. This local strategy is the responsibility of The Partnership Management Board, upon which PLANED is represented.

The approach of local authorities to economic development, countryside management, sustainability and Agenda 21, and community planning and involvement has changed in recent years towards an agenda which is more environmentally conscious, inclusive and community focused. Pembrokeshire County Council, like others, has been in a position to respond to this. Theoretically, there is more common ground between it and SPARC/PLANED. This should make the opportunities for mutually supportive working even stronger, but obviously means that the potential for duplication is greater as well. There are many positive opportunities for constructive partnership.

Pembrokeshire Coast National Park

The PCNP has responsibilities for countryside management, public access, planning and visitor information over most of the coastal areas on the county. They are not actively involved in tourism marketing. As with the County Council, it is very important that PLANED should coordinate its activities closely with them. There are considerable opportunities for them to work together on environmental and amenity issues, as has happened in the past with SPARC.

Pembrokeshire Tourism

The advent of a single body which coordinates private sector tourism interests in Pembrokeshire also creates opportunities for strengthening communication and the take up of initiatives to improve the quality and marketing of tourism in the county. Pembrokeshire Tourism has over 200 members, with a reasonable cross section of types of enterprise. Other private sector groupings relate to it as well. This provides a useful constituency for communicating the aims and activities of PLANED amongst operators, and for PLANED to reflect wider enterprise views and needs to complement its work at a community level.

Pembrokeshire Tourism is seeking close cooperation with the new Regional Tourism Partnership, which will play an important role in taking forward initiatives and funding reflecting WTB priorities as well as the regional agenda.

5 A TOURISM STRATEGY FOR PLANED

This final section of the report provides a strategic framework for PLANED in tourism. It does not attempt to go into a lot of detail as this will need to be determined by PLANED and its partners as its work unfolds and will partly depend on the requirements of funding regimes. What is needed is a clear understanding of the purpose and role of PLANED, its overall strategy and priority areas of action. Of equal importance is an understanding of how this relates to the work of other bodies in tourism and that this understanding should be widely shared and accepted throughout Pembrokeshire, not just within PLANED itself.

Towards sustainable tourism in Pembrokeshire

At the moment there is no agreed tourism strategy for Pembrokeshire. This is a weakness that should be rectified. A tourism strategy for the county as a whole should be drawn up through consultation, steered by a partnership of the main players, including the County Council, Pembrokeshire Tourism, The National Park Authority and PLANED, who should have ownership of it. Without such a strategy in place it is more difficult to construct a tourism strategy for PLANED. However it is possible to propose and anticipate what such a strategy might address, reflecting the policy context outlined in the previous chapter.

Any sound tourism strategy should be based on an assessment of priority target markets and on product strengths and weaknesses. Furthermore, it is increasingly accepted that sustainability principles and sound destination management practice should be incorporated into tourism strategies.

Market assessment

It is not the role of this report to undertake or present a market assessment for Pembrokeshire, but the Objective 1 report and internal marketing strategy for the county would suggest that:

- Main holidays will remain a primary market, but with a need to address the quality and diversity of the offer and effective marketing in order to retain market share.
- Additional holidays and general short breaks (including weekend and extended) should be considered as primary target market segments, offering further opportunities to extend the season, and requiring improvements in quality, excellent information, ease of booking and relevant packaging.
- Activity and special interest segments, especially walking, cycling and other outdoor rural and coastal activities, and interests linked to natural and cultural heritage, offer opportunity for growth, linked to particular product strengths.

- Secondary domestic markets include day visitors, group visits, conference/training tourism and VFR, but may not be seen as main targets.
- Overseas visitors currently make up a very small element of visitors to Pembrokeshire, but provide some opportunity for growth relating to specific product offers (especially Northern European and Irish markets).

Product assessment

Again, it is not possible to present a considered, county-wide assessment, but the main considerations to be reflected in a strategy might include:

- Exceptionally high quality coastal environment, largely unspoiled.
- Attractive small resort towns and villages.
- Appealing inland rural areas, with a wide variety of scenery – rolling farmland, estuary, moorland etc. – but largely unknown.
- Historic and cultural diversity, with a wide scattering of historic sites, many of which are small and not well known.
- Presence of the National Park; a strength in terms of image as well as protection.
- Relatively strong image of Pembrokeshire as a destination within domestic markets, but room for further enhancement.
- Accommodation sector of varying quality and dominated by small and micro enterprises, some of which are life-style businesses.
- Strong seasonality of demand affecting business performance.
- A reasonable array of visitor attractions, but patchy.
- A good range of outdoor activity providers.
- Coastal path providing a strength; also a growing inland access resource.
- Relatively poor public transport.

Sustainability principles

It is important and necessary that any strategy for tourism in Pembrokeshire fully embraces sustainability principles. These should not be seen as an added dimension, with 'sustainable tourism' being seen as a separate agenda or even segment. Sustainable development is central to Objective 1 requirements and is addressed in the WTB strategy and other policies. It would be appropriate to align the tourism strategy with Local Agenda 21; whose relationship to tourism is being increasingly stressed within the European Commission and other forums, especially in the build up to the Johannesburg World Summit. Three pillars of sustainability and LA 21 to be addressed are:

Economic sustainability. Here the tourism strategy may be particularly concerned with issues of addressing seasonality and increasing profitability, strengthening job quality and opportunities for local people, and capacity building amongst small businesses through advice and training.

Social sustainability. Issues here include ensuring tourism adds to the quality of life rather than detracting from it. Action to involve local communities in tourism planning and to empower and encourage them to seek ways of benefiting from tourism should be addressed. A further component of social sustainability involves ethical issues and inclusiveness, such as provision of opportunities for local people, employees and visitors with disabilities.

Environmental sustainability. This is partly about minimising the negative impact of tourism on the local and global environment. It is also about using tourism as an effective tool to raise awareness of the environment, amongst visitors and local people, and generate income to support the conservation of natural and cultural heritage.

Integrated Quality Management of the destination

The IQM approach (which is synonymous with ITQM) is being encouraged by WTB. It should be reflected in Pembrokeshire as a whole, not just in the Tenby Tourism Growth Area. PLANED has tried to encourage this to happen. Essentially it is an inclusive approach, which requires leadership and partnership. As set out in the last chapter, it is about:

- Developing the right structures for working together
- Addressing all aspects of the visitor experience – image, marketing, travel to the area, welcome, orientation, all facilities and services including environment and infrastructure, farewell and after visit contact.
- A process of assessing expectations and needs, setting standards, training and product improvement, assessing all impacts and making adjustments.

Strategic implications

The above strategic context for sustainable tourism in Pembrokeshire, and the conclusions drawn in the previous chapter, have a number of strategic implications for PLANED, as follows:

Working within the ‘Pembrokeshire’ brand. Unlike South Pembrokeshire/Landsker, Pembrokeshire as a whole is an already well established market brand. The opportunities for promoting ‘green’ images and products which reflect sustainability principles and community aspirations within this brand are considerable.

Addressing primary target markets. In the past SPARC has tended to concentrate its own marketing activities on niche markets, especially from overseas. The principle behind this approach was that it sees its role as testing new markets rather than duplicating the work of others, including the private sector, in established markets. This approach remains valid, but there may be scope to apply it in domestic as well as overseas markets, taking account of target market segments.

Making more of rural, heritage and cultural themes. The quality of the coast will remain the primary draw for Pembrokeshire. However, there is potential to strengthen the rural and heritage product throughout the county, linking this to the coast, and relating it to short breaks and an extended season.

Championing sustainability. Although sustainability should underpin the whole tourism strategy, there is a need to raise the profile of sustainability issues amongst all the players concerned and to drive forward related action programmes.

Involving communities. Community engagement is increasingly important when pursuing a sustainability agenda, and the advantage of adopting such an approach

has already been demonstrated by SPARC with respect to tourism. This needs continuing and strengthening across the county.

Addressing the needs of micro enterprises. Support for small enterprises which provide the bedrock of the Pembrokeshire tourism industry will continue to be a priority, helping them to address the tourism strategy in all aspects – market relevance, marketing, business performance, quality and sustainability.

Embracing IQM. It is important that IQM is not seen as some kind of separate scheme or as something that belongs to just a part of the county or to just one organisation. If it is meaningful, it is an approach that has implications for all players.

The role of PLANED in sustainable tourism

In order to set out the role of PLANED in tourism, it is necessary to consider the respective roles of the other main organisations, and how PLANED relates to them. The following is a broad indication of the breakdown of responsibilities.

Pembrokeshire County Council

- Lead responsibility for tourism and IQM.
IQM is too broad a subject to be led by PLANED. The original EU IQM report recognised a central role for local authorities. SPARC has played an important role in stimulating interest in IQM and PLANED is now taking this further with an initial project looking at baseline environmental conditions. The County Council should provide leadership and coordination, relating IQM to marketing, information and product improvement etc., with other agencies, such as PLANED, working on specific aspects and evidence.
- Destination marketing and coordinated information.
The County Council should continue to promote the Pembrokeshire brand. However, it will need to take an inclusive approach to this, embracing the sustainability agenda and community-based initiatives emerging through the common strategy. It should reflect rural and heritage images as well as coastal ones (albeit leading on the latter) and strengthen the image of Pembrokeshire as a sustainable tourism destination. PLANED should relate marketing issues and action emerging from its work to the overall marketing campaign and brand for Pembrokeshire. Coordinated information services and the emerging Destination Management System should also provide an increasingly important outlet for community-based initiatives and local material.
- Tourism planning
The important role of the County in tourism planning, including the new approach to community planning, should be recognised. PLANED should be encouraged to play a full role in this. It should seek to coordinate its community development activities with those of the County, where appropriate.
- Infrastructure, transport and environmental improvement
The role of the County Council with respect to public transport provision, highways and rights of way is particularly important in meeting sustainable tourism and quality management objectives. Many local amenity and

environmental improvement schemes will also be implemented by the County Council.

- Encouraging investment and strategic development
In association with its planning and economic functions, the County Council has an important role to play, together with the WDA, in stimulating new tourism investment. Much of this may relate to the promotion of sites, significant private sector development opportunities and larger scale public-private projects, whereas PLANED's focus will be at the community level.

Pembrokeshire Tourism

- Private sector networking
A primary function of Pembrokeshire Tourism is to engage private sector enterprises in tourism, communicating with them, and representing their interests. It will form an important link to the work of the County Council, PLANED, the RTP, and other public sector agencies.
- Securing relevant enterprise support and training
One of the functions of Pembrokeshire Tourism will be to identify the business needs of members and secure relevant training and support programmes to meet these. It will be important for PLANED to relate closely with them with respect to future work on capacity building with communities, micro-businesses and sustainability issues.

Pembrokeshire Coast National Park

- Information provision in the Park
The National Park authority has a long-standing role in information delivery, both through the provision of material and of outlets. PLANED will need to continue to make sure information material emanating from its work coordinates with this.
- Planning and countryside management in the Park
This important function of the Park has a strong bearing on local communities and tourism enterprises. PLANED can continue to provide a useful bridge between them, assisting the Park in communication with, and involvement of stakeholders, and raising awareness of sustainability issues.
- Access and interpretation in the Park
It will be important for further work on countryside access and heritage interpretation within the Park area to be well coordinated between PLANED and the Park Authority.

PLANED

PLANED needs to consider its tourism function with respect to the strategic issues and priorities identified at the start of this chapter and the roles and functions of other organisations set out above.

In the light of this it is suggested that the PLANED should concentrate on the following 6 primary functions:

- **Community engagement in tourism**
This is an activity for which PLANED is uniquely well placed and experienced, which is central to its overall approach and philosophy and where it can build on the success it achieved as SPARC.
- **Research and investigative work on specific concepts and themes**
Part of PLANED's approach should be to research and test out tourism opportunities that may emerge, including product and market concepts and specific project feasibility studies, in partnership with others.
- **Support for community based initiatives**
This is about working with communities to address issues and take forward ideas emanating from the community consultation and engagement process. PLANED, as with SPARC, can support community-based events, small scale heritage and amenity projects, interpretation schemes and material, etc. The focus of PLANED on community entrepreneurship is relevant here.
- **Specific action to address sustainability**
Although sustainability should be a universal theme in the county tourism strategy, affecting all players, it does require a champion to push forward many aspects of it. PLANED is well placed to do this. It could take a lead across the county on aspects which it has already addressed, such as the greening of tourism enterprises.
- **The promotion of wider advice and training amongst rural micro-businesses**
A strength of SPARC was the ability to recognise the need for integrated advice and training by small rural businesses, especially farmers. It was able to set this up, for delivery by others such as PBI. Provision of targeted training, linked to small amounts of financial assistance, such as the Quest scheme, was well received. Future changes in agricultural support, with a greater emphasis on diversified businesses and environmental schemes, may lead to a higher demand for integrated support services. The role of PLANED here needs to be developed further in discussion with other support agencies.
- **Selected, thematic product development and marketing initiatives**
PLANED may continue to get involved with taking specific products to market, but it should avoid initiating underfunded marketing campaigns, and seek to work closely with others, relating marketing to the Pembrokeshire or Wales brands and to identified target markets. Examples may include:
 - Working with the County Council and others on continuing the Greenways initiative and associated tourism packages;
 - Developing Wales Countryside Holidays with the WTB and other destinations.

As with SPARC, PLANED should seek to pursue innovation and to pilot new initiatives. As an area development organisation, it should seek to work with local people. Its role is not to take action in areas which are already being pursued, but to identify and test out new opportunities.

Strategic objectives for PLANED in tourism

The above 6 functions can be linked to a set of strategic objectives for PLANED in tourism as follows:

1 To enable and encourage all communities in Pembrokeshire to identify opportunities for gaining more benefit from tourism, and to provide ongoing structures for local people to work together to address them.

2 To support or undertake product and market research studies to assess the potential and feasibility of new tourism projects identified by local communities.

3 To assist local communities in the implementation of projects which enhance the distinctiveness of their area and its appeal to visitors and residents.

4 To encourage and assist tourism enterprises and other stakeholders to improve the environmental, social and economic sustainability of their businesses and of tourism in Pembrokeshire.

5 To give coordinated advice and support on the development or improvement of small rural tourism enterprises.

6 To support the development and marketing of selected tourism products, based on the natural and cultural heritage of the area and which encourage more sustainable forms of tourism.

Areas for action

Rather than setting out specific action under each objective, this section identifies some main areas to address and issues associated with them which have arisen from the review and strategy.

1 Engaging communities

- **Undertaking a rolling programme of new community consultation.** This should be extended across Pembrokeshire. It may need to be a staged programme to avoid overstretching resources.
- **Establishing community groups to address tourism issues.** It is important that groups are representative and also can be ongoing and self-sustaining. Structures and relationships will need to be looked at carefully, establishing good contact with formal mechanisms such as community councils and the community planning system, while ensuring that the process is widely accessible to all interested people and stakeholders. SPARC/PLANED has had the experience of doing this for a number of years. Establishing new groups is in progress.
- **Refreshing community engagement processes in the SPARC area.** While new communities in north Pembrokeshire are engaged, the previous communities with which SPARC has worked should take the opportunity to review and revitalise their community consultation groups.

2 Researching concepts and ideas

- **Researching market response and potential.** An inherent problem with a community-based approach to tourism is that many interests and ideas emerging are often not commercially viable due to a lack of market response or a mechanism for reaching markets. Rather than focussing on specific niche and overseas markets, it will be important to assess potential across a full range of domestic and overseas segments, and particularly among existing visitors.
- **Undertaking feasibility studies for specific development projects.** The legacy from community-engagement in the longer term may be most apparent from particular sites or amenities which have been improved or developed for tourism, or from viable community-based enterprises. Continued emphasis should be placed on feasibility studies addressing development costs, funding, project management and business planning.

3 Supporting community initiatives

- **Fostering and promoting events.** Events provide a tangible way of involving communities in tourism and addressing seasonality. As well as continuing to assist communities to stage events, PLANED might work with the County Council and others to raise the profile of events across Pembrokeshire, perhaps as a branded festival.
- **Supporting amenity improvement and heritage restoration schemes.** The importance of amenity improvement to tourism has been referred to earlier in this report. PLANED should continue to support communities in this, including working with other agencies in addressing funding opportunities, practical issues of implementation and maintenance
- **Identifying and planning circular trails.** Short circular walking routes and, in some cases, cycling trails, have proved to be valuable assets in many rural areas, helping to retain visitor interest and time in the locality. They are particularly relevant to the target domestic short break and additional holiday markets. It is very important that PLANED should work closely with the County Council and the National Park Authority in the work, as they will have responsibility for implementation and maintenance. Emphasis should be placed on community involvement, active dissemination of information locally, especially through accommodation and tourism outlets, and promotion within a common identity.
- **Disseminating information and interpretative material.** This is very important in backing up community initiative and maximising its benefit for tourism. In the past SPARC has produced a wide range of information about local communities, heritage sites and themes, access opportunities etc.; yet it has been difficult to keep track of how this is used. Effective delivery of information to visitors already in the area, or planning a visit, is arguably the best form of promotion for these fine-grain products. With the advent of PLANED working across Pembrokeshire, a comprehensive review of the way such information is disseminated and

monitored is needed. This should involve other partners, including the County Council, National Park and private sector operators.

4 Addressing sustainability

- **Running 'green' training linked to accreditation.** In the last few years there has been greater recognition across the UK and the rest of Europe of the opportunities to promote environmental good practice amongst tourism enterprises, and to recognise this through an environmental label. SPARC undertook pioneering work in this area and the WTB is seeking to establish a national scheme. PLANED is well placed to take a lead in the application of 'green' training and accreditation in Pembrokeshire. If possible they should work with the agreed national scheme, which will require coordination and promotion at a local level if it is to be successful.
- **Addressing social inclusiveness.** Action amongst communities and enterprises to improve provision for disabled and disadvantaged people should be universal and not the province of one organisation. However, PLANED has the opportunity to build on experience gained through SPARC in this field, raising awareness of issues and supporting training and good practice amongst enterprises. SPARC has also demonstrated success in facilitating and promoting disabled access to the countryside and this should be continued.
- **Supporting the promotion of sustainable local produce.** The promotion of local produce (food, crafts etc.) to visitors, directly or through tourism enterprises, has received considerable attention in the UK and elsewhere in Europe in the last few years, as a way of adding value to the rural economy, benefiting local farmers and traditional landscapes, and enhancing local distinctiveness. Pembrokeshire County Council has been active in this area, with the production of a Food Guide and promotional events. As this is a topic which is likely to be of growing importance within rural communities, and is closely linked to sustainability issues, PLANED may wish to consider how it can work with the County Council to encourage more producers to benefit from networking and links to tourism outlets and to strengthen the relationship of food promotion to sustainable land management.
- **Rolling forward the Greenways concept.** Greenways is an ongoing programme, with PLANED an active partner amongst others. This has been extended across Pembrokeshire. Greenways has been the subject of a recent study by consultants and the recommendations made should be addressed.
- **Strengthening the sustainability dimension of IQM.** Although PLANED should not have overall responsibility for IQM, it is well placed to ensure that sustainability issues are taken fully into account in processes to improve destination management and the visitor experience.

5 Supporting rural micro-businesses

- **Providing integrated training courses and assistance to small enterprises.** A considerable challenge with training provision for small enterprises has been to encourage participation and to relate training to actual improvement and investment. The Quest model, centred on assisted business planning and small

grants as an incentive, proved very successful. PLANED should develop this approach further.

- **Providing integrated advice to land based enterprises.** The likely need for further integrated advice and support for the farming community has already been mentioned. PLANED is well placed to provide tourism advice which also takes account of other needs and opportunities on farms and landholdings. This should be coordinated with other support agencies.
- **Encouraging networking between enterprises.** SPARC established a number of local networks. It will be more difficult to do this across Pembrokeshire as a whole. Thematic networks, such as the group of business who have undertaken 'green' training, can be particularly useful. The establishment of such networks across the county should be pursued, in consultation with Pembrokeshire Tourism.

6 Marketing selected themes

- **Strengthening the marketing of rural experiences in Pembrokeshire.** SPARC has established a vehicle for the promotion of small rural accommodation and associated walking, cycling and heritage packages in South Pembrokeshire. Rather than simply extending this across the county, the whole approach needs reassessment, including the selection of target markets in the UK and overseas, and the enquiry handling and booking processes. As Pembrokeshire Greenways, there is potential to link this to the overall promotion of the Pembrokeshire brand. This needs to be discussed with the County Council, RTP and other partners. The Internet is likely to provide an increasingly important medium for promoting small scale accommodation and rural tourism packages linked on the one hand to special interests and on the other to destination brands.
- **Developing Wales Countryside Holidays.** WCH provides an opportunity to relate the marketing of the above product in Pembrokeshire to a national campaign linked to the Wales brand. These should not be seen as alternative or duplicative approaches. The relative strength of Pembrokeshire or Wales as a brand will depend on the market segments addressed. WCH is the subject of a separate study.

Monitoring outputs and impacts

Action taken in the above areas will need to be monitored, both in terms of actual outputs produced and the impact of the action. This will be required for management purposes by PLANED and to inform participants, partners and funders.

Three types of monitoring should be undertaken:

Systematic recording of outputs

There should be a regular recording of all actions taken including:

- Community consultation undertaken and structures supported.
- Training programmes and attendance.

- Advisory sessions held.
- Information material produced and its distribution.
- Enquiries and bookings handled.
- Events supported, with attendance.
- Membership of networks.

Visitor and stakeholder feedback

This should be obtained through:

- Annual reports from each community on activities undertaken, results etc.
- Systematically gathered feedback from training and advisory sessions.
- Regular visitors surveys (undertaken by communities where appropriate).
- A system for enterprises to obtain feedback from visitors and share results.
- Community/residents surveys.

Performance indicators

Further indication of results and impact should be obtained through:

- A requirement that enterprises assisted by PLANED should provide performance indicators over a specified period, especially where related to topics covered such as 'green' measures taken.
- Monitoring of usage, for example spot checks on trails etc.
- Monitoring of environmental indicators against baseline information.