BRIDGEND COUNTY TOURISM STRATEGY 2011 - 2016
















Cyngor Bwrdeistref Sirol
Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

BRIDGEND COUNTY TOURISM STRATEGY

CONTENTS

For further information contact:
Countryside and Tourism
Regeneration
Bridgend County Borough Council
Level 3, Civic Offices
Angel Street
Bridgend
CF31 4WB

Tel: 01656 815213 / Email: tourism@bridgend.gov.uk

Part 1

Tourism now

1. THE TOURISM PRODUCT

We begin by reviewing the current tourism offer in Bridgend County Borough (BCB) and the performance of existing tourism enterprises. It is based on an analysis of the accommodation database, a survey of the accommodation sector and discussions with tourism operators and Council officers.

1.1 Location and setting

BCB covers an area of 110sq miles located roughly equidistant between Cardiff and Swansea with a resident population of just under 130,000. It is a diverse area stretching from the upland, rugged former coal mining valleys in the North down to the more gentle countryside and attractive coast in the south.

This is an area of contrasts not a single coherent destination. It can be divided into the following three distinctive areas

- The 3 valleys (Llynfi, Garw and Ogmore) which meet at Sarn and stretch northwards for 7 miles or so. These are enclosed narrow river valleys and former mining communities with a proud heritage and a distinctive character. The scenery is attractive and now shows little evidence of its industrial past but the built environment in places is quite poor. The Celtic Trail broadly forms the southern boundary of this area.

- Bridgend and the M4 corridor. Bridgend is a small market town and commercial centre serving the surrounding area (resident population 39,500). This together with the M4 corridor from Pyle to Pencoed is highly accessible and is the most urban part of the County and contains a significant concentration of employment activity and a significant amount of budget hotel accommodation. With the exception of the Designer Outlet Centre (Junction 36) it is not a major draw for the leisure visitor.

- Porthcawl and the coastal strip. Porthcawl is a small traditional resort (resident population 19k) and former port for the iron and coal industries of the valleys. The town is quite tightly contained and has a pleasant feel to it although the main draw is the seven bays and beaches along the adjoining coast with extensive dune systems at Kenfig to the west and Merthyr Mawr to the east.

1.2 Access

Bridgend is very accessible. The M4 and A48 provide good east-west links and open up the area to a large catchment population. Cardiff and Swansea are 30 minutes drive and Bristol is just over an hour away. North South road links are more tortuous limited by the topography and the Garw Valley has no through route. We estimate that c1.9m people live within an hour's drive of Bridgend and 5.3m within 2 hours drive.

Rail access is also very good. Bridgend is on the main intercity route from South Wales to London. Fastest journey times from London are 2hrs 20m; Bristol Parkway is an hour away and Birmingham just under 21/2 hrs. In addition to the mainline, there are lines up the Lynfi Valley to Maesteg and along the coast towards Cardiff Airport. Cardiff Airport with scheduled flights to a range of destinations is just 40 minutes drive from Bridgend and 25 minutes by rail.

Most visitors to BCB arrive by car, (previous surveys suggest c 75%, whilst the figure for Wales is 80%). For those that don't, and for those who would prefer not to use the car after arriving, our research suggests that BCB is relatively well served with public transport with extensive bus coverage and railway stations at Pencoed, Pyle, Bridgend and stops up the Llynfi Valley to Maesteg. A private shuttle bus sometimes operates between the Designer Outlet and Trecco Bay. The main issues and deficiencies appear to be:

- The interchange between buses and rail in Bridgend
- The links between Porthcawl and Bridgend
- The promotion of public transport to visitors

A full review of the public transport coverage is given in an appendix to the outdoor pursuits report.

1.3 Things to see and do

There is a range of things to see and do in BCB but these largely relate to the inherent assets of countryside and coast rather than man-made attractions. With the exception of the Designer Outlet centre and Porthcawl funfair there are no large formal visitor attractions in the area. Minor attractions include the castles (open access so no visitor numbers), Lakeside Farm Park and Kenfig visitor centre.

Table 1.1 Visitor attractions in BCB

Attraction	Location	Attendance (000)
Designer outlet village	Bridgend	3.800
Adventures	Porthcawl	14
Bryngarw Country Park	Bridgend	51
Kenfig Visitor Centre	Kenfig	14
Bridgend TIC	Bridgend	108
Porthcawl TIC	Porthcawl	31

Source: The Tourism Company

The main elements of the product are summarised below:

The **coast and beaches** are the key strength for the area and has long been a magnet for visitors. There are large expanses of sandy beach, with a choice of beaches in a series of bays, largely non-commercialised, safe, clean, and with good facilities and parking. Three of the beaches are recommended in the Good Beach Guide (Rest Bay, Sandy Bay and Trecco Bay) and two have a Blue Flag and Seaside Awards. The extensive sand dunes of Kenfig Burrows and Merthyr Mawr add another dimension to the beach environment. Porthcawl is also part of the 14 mile Glamorgan Heritage Coast. The promenade through Porthcawl is an attractive seaside walk.

The **countryside** falls into two main areas. The area to the south of the M4 tends to be lower lying, is pleasant but not out of the ordinary. Kenfig NNR and Merthyr Mawr are the most attractive areas with considerable nature interest. To the north of the M4, the three Valleys provide some more dramatic and attractive upland scenery and great views. There are large tracts of forest and upland common, much of which is open access, plus a number of country parks and nature parks (some on reclaimed land) including Bryngarw, Bedford Park, and Parc Slip

The **built environment** is not a strong selling point for the area. There are a handful of characterful villages such as Coity, Newton, Llangynwyd and Merthyr Mawr. The main settlements of Bridgend, Maesteg and Porthcawl, are clean and reasonably well kept but they are not sufficiently characterful or distinctive to draw people in their own right. Maesteg and Porthcawl perhaps have more potential than Bridgend in this respect. The fabric of the built environment in the smaller linear settlements is somewhat challenging aesthetically but they do have a positive character of their own. These are the most visible legacy of the industrial past.

Heritage. The area has a long and interesting history of settlement but this is not very visible or tangible. There are four castles from the Middle Ages in the south of the area (Newcastle, Coity, Ogmore and Candleston) - mostly ruins with open access. Llangynwyd is an ancient hilltop village and Llangeinor has the Richard Price connection and there are other old buildings of interest. Potentially the strongest historical theme is industrial heritage, particularly coal and iron working, but almost all the physical evidence and structures have now been removed. Surviving examples include the iron works in Maesteg, and Tondu and the Cefn Cribwr Ironworks in Bedford Park. The Valleys to the east (most notably the Rhondda and Blaenavon) have capitalised on their industrial heritage. There are also more intangible aspects of cultural heritage celebrating the strong sense of community, legends and historical associations as well as contemporary activity such as the choirs. This is of interest to outsiders and more could be made of this if presented and packaged in the right way.

Outdoor recreation is potentially a strong theme for the area. The best developed is golf with 5 courses of which Royal Porthcawl is of championship standard and has an international reputation. Porthcawl is a major draw for surfers and is considered to be one of the best surfing beaches in the UK but has a much lower profile than Newquay, Cornwall and even the Gower. Other opportunities for outdoor pursuits include walking, cycling, water sports of all sorts, fishing (fly, coarse and sea fishing) , white water rafting, para gliding, riding and mountain biking. Whilst a range of outdoor activities are possible this is not as strongly developed as it is in other places. There are several independent activity operators working in the area covering surfing, water sports, walking, cycling, bird watching and adventure sports including bush craft. Nearby Afan Forest has developed as a major focus for mountain biking and this is easily accessible from Maesteg.

In terms of **recreational routes** the area is crossed by several long distance routes including the Celtic Trail, Wales Coastal Path, The Ogwr Ridgeway Walk, the Sky to Sea and the Coed Morganwyg Way (just outside the County) both running North -South. There are community routes running up the Ogmore and Garw Valleys with a new route under development in the Llynfi Valley. The Celtic Trail and the community routes are for cyclists, as well as walkers. BCB has also devised circular walks in several areas. The bridleway system is not as well developed but there are aspirations to develop circular routes in the Valleys and on the coast where beach riding is already popular.

The main **arts and entertainment** venues are the Grand Pavilion, Porthcawl and Maesteg Town Hall which host a varied programme of concerts, comedy and theatre. Other venues include Blaengarw Workman's Hall which has a performance space and the Berwyn Centre, primarily a community venue.

There is a programme of **events and festivals** throughout the year with a number of events and festivals ranging from sports events to music (22 are listed in BCB in the 2011 guide). Many of these are primarily of local significance. Events with a bigger and more interesting angle include the Porthcawl Interceltic Festival, Porthcawl Jazz festival, Verenti Dragon Ride, Bryngarw Arts Festival, Porthcawl Elvis Festival, Bridgend Food Feastival, Love2Walk Festival and the Bridgend County Show etc.

Shopping. The Bridgend Designer Outlet is a high profile and major draw attracting 3.8m visits a year. The majority of these visits are locally generated but 10% come from more than 90 minutes away and a similar proportion of visitors are on holiday. The centre brings in visitors, is a shop window for Bridgend and is also an added attraction for people already staying in the area. Bridgend and Maesteg are primarily local shopping centres and are not a particular draw for visitors. There are a handful of craft outlets including the Ewenny pottery which are of potential interest to visitors.

Food and eating out is not a particular strength. There is no local food group although there are moves to develop one in the Garw Valley. There is a farmers market in Porthcawl and occasional events at the Designer Outlet. There are no local restaurants featured in the Good Food Guide and the award winning Coast restaurant in Porthcawl has closed. Laleston has been identified as having potential to develop as a centre for food.

1.4 Competing destinations

Whilst BCB undoubtedly has some good tourism assets it is to some extent overshadowed by more prominent and well known places in the surrounding area - the cities of Cardiff and Swansea, the Gower coast an Area of Outstanding Natural Beauty to the west, Brecon Beacons National Park to the north and the higher profile valleys to the east such as the Rhondda.

Some key competing attractions include:

- Afan Forest/visitor centre. 3 miles to the west of BCB. 48sq miles of forest park and trails with a visitor centre and now one of the premier centres for mountain biking in Wales. The visitor centre had 113k visitors in 2008.

- Margam Park close to Afan Forest. A large country park and venue for major events with extensive facilities including gardens, mansion and the Go Ape activity attraction. It had 154k visitors in 2008.

- Rhondda Heritage Park. 5 miles to the east of BCB. Industrial heritage based on an old colliery with visitor centre, mine tours and other facilities. It received 45k visitors 2008.

Whilst the above facilities and places are competition for BCB they can also be seen as attractions which BCB can draw upon and market as part of the Bridgend offer.

1.5 Accommodation stock

An audit of the accommodation stock was carried out by the BCB Tourism Unit in 2008. This covered both assessed and non assessed accommodation and provides a snapshot of the current stock. A summary is shown in table 2.2 and we have adjusted these figures to allow for known closures since the date of survey and excluded accommodation outside BCB.

Table 1.2 Visitor accommodation in Bridgend CB 2010

	Estabs	Graded	Rooms	Bed spaces
Hotels	25	9	736	1723
Guest accommodation(1)	20	13	107	225
Total serviced	**45**	**22**	**843**	**1948**
	Estabs	Graded	Rooms	Bed spaces
Self catering - flats/cots	**12**	**8**	**35**	**94**
	Sites	Graded	Pitches/units	Bed spaces
Static caravans*	2	2	2040	
Touring caravans	2	2	85	
Tents	3	2	202	
Total caravan/camping (2)	**6**		**2372**	**9488**

Source: Bridgend CBC

(1) Includes pubs, Bed &Breakfasts, Guest houses. (2) Includes some self catering

The caravan sector dominates the accommodation stock (largely one site) and accounts for over 80% of available bed spaces.

There is little or no accommodation in the valleys. Most of the serviced accommodation is located in the M4 corridor and in Porthcawl and all the caravan sites are located in the south of the area.

There has been a significant contraction in serviced accommodation recently, especially in the guest accommodation sector. Since the 2008 bed stock survey was completed 2 hotels and 6 guesthouses have ceased trading.

A study of demand for serviced accommodation in SE Wales[1] was carried out in 2005 which included Bridgend and Porthcawl. This concluded that occupancies were low and that there was little scope for new hotel development up until 2010 despite projected growth in leisure and business tourism.

Serviced accommodation

There are 25 hotels in the County Borough providing 736 rooms of which just under a third are in graded accommodation. Average size is 29 rooms. These figures overstate the provision of hotel accommodation as two of the hotels specialise in respite care and some others are perhaps more properly classed as guest accommodation. The larger hotels are listed in table 2.3 below.

Table 1.3 Hotels with more than 10 rooms

Hotel	Location	Grade	Rooms	
Heronston	Bridgend	3 star	75	Best Western
Premier Inn	M4 jn36	Budget	69	Premier Inn
Seabank	Porthcawl	3 star	67	
Premier Inn	M4 jn35	Budget	60	Premier Inn
S Wales Conv. Home		Respite care	56	
Days Inn	M4	Budget	40	Days Inn
Travelodge	M4 jn35	Budget	40	Travelodge
Glamorgan Holiday Hot		Respite care	39	
Court Colman	Bridgend	3 star	29	
Coed y Mwster	Bridgend	(4star)	28	
Porthcawl	Porthcawl		26	
Wetherlodge	Bridgend		25	
Maerdy	M4 jn35	3 star	24	
Brentwood	Porthcawl		23	
Bryngarw	Bridgend	4 star CHH	19	
Fairways	Porthcawl	3 star	19	
Atlantic	Porthcawl	3 star	18	
Greenacres	M4 jn37		17	
Seaways	Porthcawl		16	
Great House	Bridgend	3 star	12	
TOTAL			702	

Source: The Tourism Company, BCB

[1] South East Wales Serviced Accommodation Study 2005. MPA

The largest hotel is the Heronston with 75 rooms. There are four modern budget hotels along the M4, a few country house style hotels such as Coed y Mwster and Court Colman and the rest are a mixture of older traditional 2 & 3 star properties. There are 20 guest houses and Bed & Breakfasts. These are generally small (average size 5 rooms).

The accommodation survey, carried out for this study provides some evidence of current performance and confidence. This is based on a response rate of 47%. A summary of the results are given in Appendix 1(Page 75)

- Occupancy rates vary enormously with the modern budget hotels achieving c80% whilst some hotels and guest accommodation are only managing 30-40%. The average is probably just under 60% with accommodation in the M4 area doing better than Porthcawl. For regional comparison see Table 2.4 below.

- Business mix also varies considerably. There is a strong reliance on business tourism, particularly contractors, on average accounting for 55% of room nights. Social visits and functions (20%) are almost as important as holidays (25%).

- More people report a decline in business (50%) over the past 5 years than an increase (30%). Note this excludes the people who have closed down. However there is more optimism than pessimism about the future, (44% v 25%.)

Table 1.4 Room occupancies 2008

	Wales	South Wales	Bridgend CB
Hotels	58%	62%	52%
Guest accommodation	37%	43%	46%

Source: VW

There has been relatively little pressure for new hotel development. We know of 3 approaches in past couple of years for hotels in the M4 corridor ranging from 60-150 rooms. Nothing has yet come of these.

Self catering

There are 12 self catering establishments, almost all single cottages/houses providing some 35 rooms in total. Some of these are quite attractive in character but there are significantly more of this type of property in the Vale of Glamorgan to the east. There is also an innovative establishment in the shape of the Ecodysgu bunkhouse facility.

Caravans and camping

There are 6 caravan and camp sites providing a total of nearly 10,000 bed spaces. Trecco Bay at Porthcawl, a 4 star site owned by Parkdene dwarfs the other sites with a total of 2000 caravan holiday homes and extensive park facilities. The other sites tend to be small family-run operations. There is one quite innovative site at Wild Spirit Bush craft Tipis. BCBC used to operate a large tourism site at Sandy Bay which closed a number of years ago.

Trecco Bay has seen significant investment in recent years and is performing very strongly. Three-quarters of the caravans at Trecco are privately owned although the owners can sub-let and the site manager reports a strong uplift in demand for hire vans this year. The other sites are much smaller. Around half the caravan pitches are privately owned static caravans and many of the touring pitches are used by people living in the valleys who park their caravans there for a season. Again demand seems quite buoyant.

Table 1.5 Major caravan parks (400 pitches+) and alternative accommodation

	location	Touring	Caravan holiday homes	Tents	Other b/s
Trecco Bay	Porthcawl		2000		
Brodawel Camping	Porthcawl	60		75	
Danygraig Holiday park	Porthcawl	44	40	30-40	
Happy Valley Caravan Park	Porthcawl			100	
Wild Spirit Bush Craft Tipi	Merthyr Mawr			2	
Ecodysgu Bunkhouse	Tondu				12

Source: Local authority database

1.6 Development proposals

There are a number of development proposals under consideration or in the pipeline which could impact on tourism. The main ones are noted below, although not all will come to fruition:

- Regeneration proposals for Porthcawl including a supermarket, leisure development, harbour facilities and public realm improvements,
- Improvements and extension to the network of footpaths and community routes.
- Proposal to restore the railway line in the Garw Valley as a heritage railway.
- Expansion of the Designer Outlet centre.
- Proposal for an adventure centre at Blaengarw.
- Improvement of facilities at Bryngarw as part of the Gardens centres of Excellence project.
- Some, small scale proposals for accommodation development and improvement, largely in the rural areas.

1.7 Key points

- The area is highly accessible with a large catchment population within 2 hours drive and good transport links.
- BCB is not a coherent destination but consists of three quite distinctive elements
- It is overshadowed by more prominent destinations and draws (rural and urban) in the adjoining areas.
- The primary and traditional attraction is the coastline and beaches.
- The urban areas have limited appeal and some areas are run down. They are not intrinsically attractive or of great heritage interest.
- The countryside in the upland areas is attractive and often dramatic
- Surfing is a major strength for Porthcawl but lacks supporting infrastructure. Golf

is also quite strong.

- The outdoor activity sector has potential but is relatively under developed. There is a growing network of routes.
- The heritage of this area is not very visible or dramatic
- The outlet centre is a major draw but shopping and eating out are not a major asset for the area
- The accommodation is virtually all in the southern part of the County in Bridgend and Porthcawl. There is very little in the valleys.
- Caravan accommodation dominates the bed stock. There is very little self catering, cottage type accommodation.
- Serviced accommodation ranges from modern budget chains thought to traditional seaside hotels. There are no large hotels and most are independent.
- Some hotels, the more up-market and those located in the M4 corridor, are doing OK but occupancies are low on average and many are struggling, especially in Porthcawl. There has been a significant and ongoing contraction in the guest accommodation sector.
- The caravan sector is dominated by the large Trecco Bay site which is thriving. In general the caravan and camping sector is quite buoyant.

2. VISITOR PROFILE

This section summarises the scale and nature of existing visitor activity in BCB. It draws on a range of existing research and surveys supplemented by discussions with operators. The term visitor includes staying and day visitors and people on holiday, business trips or visiting friends and relatives.

2.1 The scale and impact of visitor activity

In 2008, it is estimated that Bridgend hosted just over 0.5m staying visitors and 3.2m day visitors. The overnight visitors stayed an average of 3.8 nights and the bulk of these (64%) were spent in self catering accommodation, primarily caravans. Just over a third of all staying visitors are staying with friends and family.

Leisure day visitors far outnumber staying visitors with the beach and designer outlet centre as significant draws.

Table 2.1 Volume and value of regional tourism 2008

	Trips (000	Nights/days (000)	Spend £m
Staying visitors	566	2165	£87.4
Day visitors	3209	3209	£188.1
Total	3775	5375	£275.4

Source: STEAM 2008

Table 2.2 Staying tourism in Bridgend 2008

Accommodation used	Visitors (‘000)	Visitor days (‘000)	Spend £m
Serviced accommodation	153	277	26.3
Non serviced	206	1396	44.3
Staying with friends/relations	207	492	16.8
Total	566	2165	87.4

Source: STEAM 2008

2.2 Economic impact

Total spend by day and staying visitors was estimated at £275m in 2008.
Visitors spend impacts across a range of economic sectors. Accommodation only accounts for 10% of direct visitor spend whilst shopping, reflecting the importance of the designer outlet centre accounts for 49%. In addition there are indirect effects as businesses directly benefiting from visitor spending purchase goods and services from other businesses in the area. The total impact of visitor spending is estimated to support some 4736 jobs (FTE) in and around the Bridgend area. (Table 3.3)

Table 2.3 Impact of visitor spending in the BCB area

Sector	Spending £m	Direct Employment (FTE)
Accommodation	15.5	385
Food and drink	34.9	815
Recreation	10.8	307
Shopping	77.7	1635
Transport	19.6	204
Sub Total	**158.5**	**3364**
Indirect effects /other	116.8.	1372
Total	**275.4**	**4736**

Source: STEAM 2008. FTE = full time equivalent.

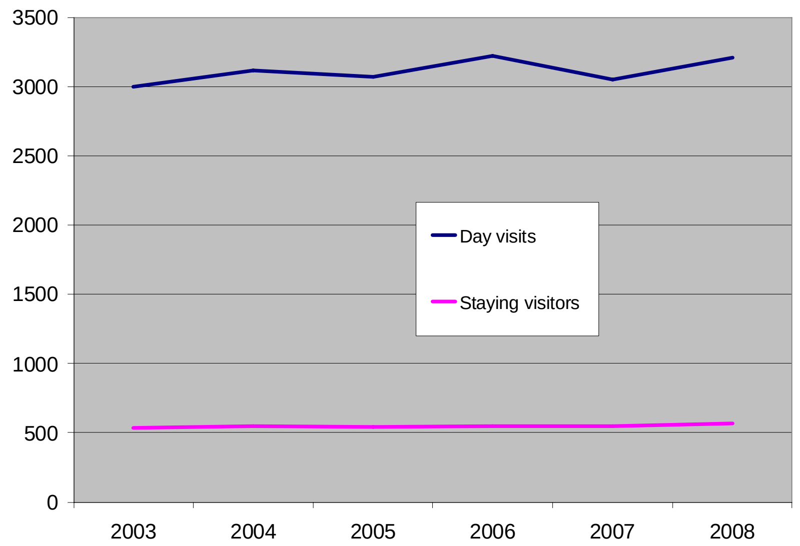
2.3 Visitor trends

STEAM data is available for period 2003-2008. These figures suggest:

- A modest increase over this period in both the number of day visits and staying visits (+7% overall)
- A similar increase in the number of staying nights
- Staying visitor spend has remained at around the same level in real terms
- Day visitor spend has shown more fluctuation but recent trend has been broadly static

One needs to be careful reading too much into these figures as there is some variation from year to year. It is probably more realistic to assume that the overall trend is broadly static.

Fig 2.1 Trends in visits to BCB



The number of visits to the TICs in Porthcawl and Bridgend has remained more or less static since 2004. Feedback from the accommodation survey (table 2.4) suggests that overall volumes of staying visitors in that sector are down slightly.

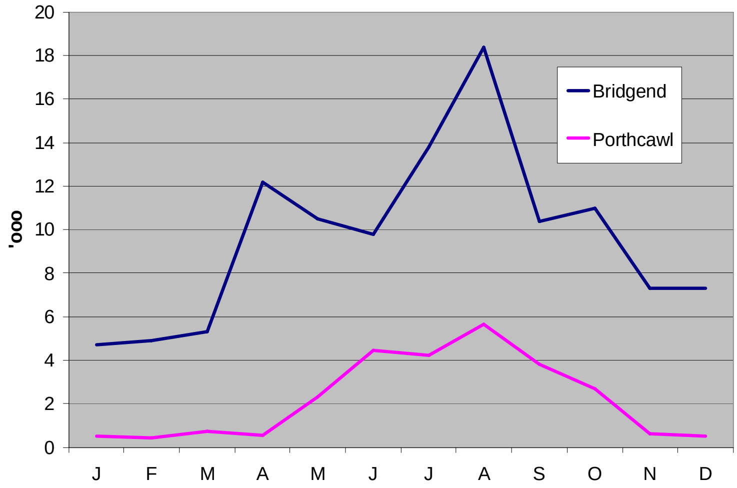
Table 2.4   In the last 5 years has the level of your business …

	Total (16)	Hotels (8)	GH/B&Bs (8)
Increased significantly	1 (6%)	1 (13%)	0
Increased a little	4 (25%)	1 (13%)	3 (37%)
Stayed same	3 (19%)	2 (25%)	1 (12%)
Declined a little	4 (25%)	2 (25%)	2 (24%)
Declined significantly	4 (25%)	2 (25%)	2 (24%)
	(100%)	(100%)	(100%)

Source: The accommodation survey

The pattern of visits at the TICs gives some indication of seasonality. The 6 months from April to September account for 80% of Porthcawl TIC visits and 65% of Bridgend visits.

Fig 2.2   Visits to TICs - seasonality



2.4 Visitor profile

There is little hard information about the characteristics of existing visitors to the County. BCBC carries out an annual self-completion survey of visitors to the TICs which is primarily concerned with probing visitor satisfaction with the TIC service and the destination as a whole. (See 2.5)

A regional visitor survey (South East Wales) was carried out in 2009 and before that in 2005. This samples visitors at key locations in the region but the sample size in the Bridgend area was too small in 2009 to draw any sensible conclusions. The regional level picture is not necessarily applicable to Bridgend because the dominance of Cardiff skews the figures.
Figures from the 2005 visitor survey, where the Bridgend sample was larger, showed:

- A preponderance of day visits (70%) in both Bridgend and Porthcawl and a majority of visitors resident in Wales reflecting the above.
- Most were repeat visitors, only 5% were on their first visit.

- The main reason for visiting Bridgend was shopping. Many of the visitors were staying with or visiting friends and relatives.
- Porthcawl attracted a higher preponderance of holidaymakers with about equal numbers staying in serviced and self catering accommodation.
- Visitors showed a similar social profile to the UK population as a whole. Bridgend visitors appear to be slightly younger than those in Porthcawl.

One needs to be cautious about placing too much reliance on the results of these surveys as they are based on small samples. There is a case for undertaking some more detailed research to explore the characteristics of the BCB visitor in more detail. Table 2.5 shows the business mix reported by serviced accommodation, where business related tourism accounts for over half of room nights and holidays and breaks for just over a quarter.

Table 2.5

	Total (16)	Hotels (8)	GH/B&Bs (8)
Short breaks	24%	21%	27%
Longer holidays	3%	3%	2%
VFR/weddings	19%	16%	23%
General business	32%	34%	30%
Contractors	22%	26%	18%

Source: Accommodation survey.

A commentary of the main market segments and their relevance to BCB is given below based on a general market analysis and feedback from operators.

Day visitors. A large market for BCB reflecting its good accessibility and reasonable sized catchment population. The bulk of day visits are probably generated from within an hours drive although specialist events can draw people from further afield. Day visits are quite weather dependent. In the case of BCB these comprise:

- People drawn in for special events such as the Elvis festival, Jazz festival etc
- Outdoor pursuits such as walking and surfing. The latter is a major draw for Porthcawl.
- Days out to the beach and seaside primarily focused on Porthcawl.
- Leisure shopping trips to the Designer Outlet.

Business tourism. This is driven by the businesses and organisations located in and around Bridgend, largely located along the M4 corridor. Much of this activity will be day trips given the relative ease of accessing Bridgend. Overnight business tourism accounts for 20% of tourism trips to South Wales and the figure may be similar in BCB. We estimate that overall business tourism accounts for just over half the room nights in serviced accommodation in the County with longer stay contractors forming an important element. The downturn in business activity due to the recession has had a significant impact on hotel occupancies.

Holiday tourism. This primarily now takes the form of short breaks of varying lengths, the average length of stay is under 5 days. These largely originate from within a 2 hour drive although some may come from further afield. We estimate that short breaks account for around 25% of room nights in serviced accommodation but a much higher proportion of nights in self catering and caravans. Longer holidays of a week or more, are fewer in number, highly seasonal and are concentrated in self catering and on the caravan parks.

Activity holidays. These are a subset of the above. Holidays where outdoor activity forms the main purpose are a relatively small market (accounting for 20% of all holidays in Wales). However, 78% of holidays involve some activity as part of the experience so activities are important. Walking is by far the most prevalent activity. The SE Wales visitor survey found that a quarter of visitors undertook walking on their holiday. Other specific activities such as cycling, water sports etc are much smaller in terms of participation but nevertheless can be important drivers of business for some areas; surfing and golf for example in the case of Porthcawl. Visit Wales has undertaken some interesting work in this area looking at segmentation, dividing people into samplers, dabblers, learners and enthusiasts. This is discussed in more detail in the Outdoor Pursuits study.

Visits to friends and relatives / social events. This involves people staying overnight to visit friends and relatives, and attend social functions such as weddings, funerals or parties. It is an important market for hotels and guesthouses and driven by the size and nature of the resident population. We estimate about a third of all staying visitors in BCB are visiting friends and relatives in the area.

In terms of other market segments:

- Overseas visits are very small in volume
- Group/coach visits are restricted by the size of the hotels.
- There is some transit traffic primarily using the budget hotels along the M4 corridor traffic

2.5 Visitor satisfaction

The evidence suggests visitors are generally quite positive about the destination. In a survey undertaken in the TICs (see table 2.6). 84% rated their overall experience as good or excellent and many elements scored good or better. Areas that scored worse, (although all were seen as better than average) were toilets, cleanliness of streets and car parking.

Table 2.6 Satisfaction with the Bridgend/ Porthcawl area

	Bridgend TIC	Porthcawl TIC	Combined
Range of places to visit/things to do	4.37	4.25	**4.32**
Overall quality of experience	4.17	4.19	**4.18**
Number and quality of places to eat and drink	4.02	4.32	**4.15**
Range, quality and choice of shops	4.18	3.84	**4.04**
Standard of visitor signposting	4.09	3.97	**4.04**
Feeling of security	3.84	4.15	**3.97**
General value for money	3.95	3.99	**3.97**
Standard and cleanliness of toilets	3.70	4.23	**3.91**
Cleanliness of streets	3.62	3.78	**3.69**
Car parks standard of service	3.62	3.77	**3.68**
Car parks, value for money	3.58	3.73	**3.64**

Source: BCBC. TIC survey 2008. Score 5 = excellent, 1= very poor.

These results are supported by figures from the 2005 visitor survey. This found that 96% of visitors interviewed in Porthcawl rated the quality of their visit as excellent or good, Bridgend scored less well with 77%. Similarly, 96% of Porthcawl visitors said they would recommend the place to others and 88% of Bridgend visitors.

These results suggest that BCB is doing something right although these figures are not atypical for destinations. People who are interviewed within a destination have usually chosen to come there and tend to be positive about the place. Some are frequent visitors and come back because they like it. Toilets, cleanliness and car parking almost always score less well than other elements in such surveys.

2.6 How people perceive Bridgend

The most recent work on perceptions of the area was carried out in 2003 as part of a wider study of SE Wales[2]. Of the people interviewed, 43% said they recognised the name Porthcawl and 37% said they recognised the name Glamorgan Heritage Coast. A much smaller number (10% & 12% respectively), said they were interested in visiting these places. Porthcawl and Glamorgan Heritage Coast came 11th and 12th in a list of 13 places to visit in SE Wales.

Whilst people had heard of Porthcawl and thought it was an attractive name, they didn't know where it was or indeed much about it. Less people had heard of Glamorgan Heritage Coast or knew where it was but the name also struck a positive chord with good associations.

The same research also explored the reaction to some marketing themes.

- Industrial heritage was a turn off for people and was seen as too 'educational'.
- The idea of Welsh culture, however, was seen as having some appeal.
- Activities had wide appeal although there is a danger of this being seen as just something for young people, not families or older age groups.
- The Valleys had a positive appeal and were strongly associated with beautiful scenery, distinctive culture and interest. Only older people associated this with negative industrial images.

The area's relatively low profile in tourism terms is borne out by its coverage in guidebooks. Published guidebooks provide a useful independent view of a destination and are an important source of information for visitors. There is no mention of anywhere in BCB in Footprint Wales or the Lonely Planet Guide to Wales (2007). In fact, the latter has a section on surfing which cites the Gower as the surfing capital of Wales. The Rough Guide (2006) does have a couple of pages on BCB (out of 82 devoted to SE Wales) and mentions the three valleys, Bridgend and Porthcawl. This coverage provides some positives as well as negatives (see box below).

Porthcawl – "chirpy little seaside resort".
"Moribund settlements of Nant-y-Moel and Ogmore Vale"
"Castle aside there's not much to occupy you in Bridgend although it's a useful transport interchange and has a good selection of shops"
Garw Valley - surprisingly pretty… ..very rewarding for good walks and congenial company in the pubs and shops"
Maesteg - "Downbeat town"
"With the usual selection of tatty bungalows and caravan parks, Porthcawl is one of Wales' most enduring family resorts"…" once you've exhausted the fun of the fair, though, there is little to do other than striking out on enervating walk along the coast or surfing

Source: Rough Guide 2006

2.6 Key points

[2] Market Research Report . CRT 2004

- BCB attracts c0.5m staying visitors and just over 3m day visits each year.
- Only 25% of staying visitors in serviced accommodation are discretionary tourists who have ‘selected’ the area to come on holiday (i.e. approximately 75,000 people per annum)
- Total spend in the area is estimated to be c£275m (Source Steam 2008) and supports 4736 jobs (FTE).
- The volume and value of tourism fluctuates but the long term trend has been broadly static over the past 5 years.
- There is little hard information on the visitor profile but the evidence suggests a fairly local catchment and a high level of repeat business.
- Key segments are short breaks, business tourism, day visits and VFR. The beach/coast and designer outlet centre are significant draws for day visits.
- Existing visitors show high levels of satisfaction with the destination although car parking, toilets and cleanliness of streets are less well thought of.
- The area has limited coverage in guidebooks and a relatively low profile.

3. TOURISM ORGANISATION AND MARKETING

There are a number of organisations involved in the marketing, development and management of tourism which impinge on the Bridgend area. The activities of these are summarised below.

3.1 Visit Wales and Welsh Assembly Government

Visit Wales (VW) part of the Welsh Assembly Government (WAG), has the overall responsibility for tourism in Wales. It undertakes various marketing campaigns, carries out research, co-ordinates some funding programmes, oversees the quality grading schemes, and has established brand guidelines. VW's website and domestic marketing campaigns drive enquirers to the marketing areas - Glamorgan Heritage Coast in this case. Bridgend currently doesn't buy into the VW marketing campaign because it doesn't see it as value for money.

3.2 Regional and sub-regional activity

There are a number of overlapping and complementary marketing initiatives, largely public sector driven, which can be confusing to the trade and consumers. The main ones are:

- **Glamorgan Heritage Coast** comprising BCB and the Vale of Glamorgan is one of 13 Marketing areas in Wales. This area provides the focus for much of the marketing activity undertaken by BCB largely focussing around the production and distribution of the main brochure. The current strap line is The most Southerly point in Wales.

- **South East Wales Consortium** is a grouping of the South Eeast Wales local authorities working with Capital Region Tourism (CRT) This group undertakes some regional tourism marketing aimed at the overseas market, travel trade and some exhibitions. The unit is based in BCB offices.

- **Valleys Partnership** is an initiative concerned with the regeneration of the Valleys covering an extensive area from Torfaen across to Carmarthenshire including the Bridgend Valleys. Tourism is one element within this and there is funding for various tourism initiatives and some dedicated tourism staff. This has been recognised as a separate marketing area by VW. A major initiative is a branding exercise and marketing campaign – 'Heart & Soul', which is aimed at improving perceptions of the area, boosting local confidence and pride in the area and generating new business.

- **Western Valleys Strategic Regeneration Area** covers the valleys area from Bridgend across to Kidwelly. This initiative draws on funding from WAG and is concerned with regeneration. Tourism is an element within this but the project will focus on supporting existing and proposed initiatives.

3.3 Local activity

BCBC is the main driver of local destination marketing activity operating through the Countryside and Tourism Unit. This falls within the Communities Directorate of the Council. The current net core budget for the tourism department, excluding staff costs, is £97,000. Staff costs amount to a further £232,000. These costs exclude the cost of running the two Tourist Information Centres (TIC). There are 8 staff working on tourism and current activities include:

- Production and distribution of main brochure
- Maintenance and development of a tourism website for BCB
- Maintenance of customer database
- Development of new destination management system (DMS) and acting as data stewards for VW and Visit Britain (VB) databases.
- Limited advertising / promotional initiatives including participation in the BRADA campaign.
- Contact with travel media.
- Other marketing initiatives in conjunction with Glamorgan Heritage Coast and SE Wales Consortium.
- Research, surveys and data collection including the STEAM model and TIC surveys.
- Managing two TICs
- Provision of development advice and managing tourism development grant schemes.
- Policy advice and input to strategic planning.
- Management of the Strategic Events Fund via the Events Panel.

Research is undertaken to measure the response to the brochure and also visitor satisfaction with the TICs.

Tourism Forum. The Tourism Forum is open to all local tourism enterprises and others with an interest in tourism and chaired by an independent person. It meets twice a year and is primarily a networking occasion and an opportunity to inform people about BCBs plans. It is generally built around a theme with some presentations e.g. local produce. Average attendance is c50.

Tourist Association. The Porthcawl and District Tourist Association was originally focused on Portcawl but is keen to expand its remit to cover the rest of the County Borough. There is a modest membership fee, a small largely inactive membership driven by proactive 2 individuals.

There are some local groups which bring together stakeholders on an area or sectored basis which have an impact on tourism. These include the Newton and Rest Bay Management groups and a Rural Tourism group to advise on tourism projects in the Rural Development Programme area for Bridgend.

3.5 Key points

- A range of overlapping marketing initiatives across SE Wales which potentially impact on Bridgend
- A new marketing area has been formed (The Valleys) which cuts across existing areas.
- BCBC has quite a well-staffed, experienced and active tourism department, although budgets are quite modest.
- There has been a long history of joint working with the Vale of Glamorgan.
- The private sector is represented through a local tourist association but this is

not particularly vigorous. There are moves to reshape it.

- There is some contact between the industry and BCBC but a feeling that relations could be improved.

4. STRATEGIC CONTEXT

We have examined and reviewed the large number of existing policy documents and strategies which have a bearing on the visitor economy. Rather than summarise each one in detail we flag up some of the salient points below. A full list of the documents we have consulted is given in an appendix.

4.1 National and regional level policies

At a national level key strategic documents include Achieving Our Potential (2000, updated in 2006) (the national tourism strategy), the Wales Cultural Tourism Strategy (2002), Sustainable Tourism Framework (2007), Coastal Tourism Strategy (2008) and Rural Development Plan for Wales. The Wales Spatial Plan is also a key document.

Key themes from these documents, relevant to BCB are:

- **Sustainability**
  There is an emphasis on looking to the long-term and ensuring that future developments are sustainable, not just in an environmental sense but also taking into account the needs of local communities and cultures. The focus should be on value rather than volume. As the national tourism strategy puts it 'tourism growth by any means is not a sustainable option'.

- **Economic development**
  Generating income for local economies also runs through all the plans. Tourism is seen as having a significant role in achieving this, and it is about ensuring visitors stay longer and spend more money in the area, and ensuring that this benefits local providers. Encouraging the use of local produce in tourism businesses, and improving access for visitors to local produce are commonly identified as key to this.

- **Sustainable transport options**
  A recurring theme throughout the plans is the need to provide and encourage sustainable transport options for both local people and visitors. This basically means better public transport to reduce congestion and the environmental impact of tourism.

- **Local communities at the centre of development**
  Local communities should be part of the decision making process and developments should be relevant to their needs. Local people should also be a key audience for new tourism facilities and improvements.

- **A business environment conducive to growth**
  An environment where local businesses can prosper should be created. This includes providing support, training and facilitation for new and existing businesses.

- **Raising the profile of Wales as a destination**
  A focus on promoting Wales and its vast array of visitor opportunities to new and existing markets. Wales has a rich culture, with high quality natural and built heritage, and these

should be widely promoted alongside activities which can help visitors better understand and explore them.

- **A quality product**
  Wales should strive to offer a quality product which is based on a good understanding of visitors needs.

The South East Wales Tourism Strategy (2008) was commissioned by Capital Region Tourism (CRT) and reflects the above priorities. It has relatively little to say about the coast but emphasises the importance of countryside breaks, outdoor activities, culture and heritage. Other important sub-regional strategies relate to the Valleys Regional Park and the Western Valleys SRA.

4.2 Local policies

There are numerous local strategies and policy statements which have been prepared for the BCB area. Those with particular relevance to the visitor economy include the Bridgend Tourism Strategy, Porthcawl Development Framework, Garw Valley Regeneration Strategy, Llynfi Valley Strategy, Bridgend UDP (currently being reviewed), Bridgend Community Strategy, Economic Development Plan, Countryside Strategy and Bridgend Rural Tourism Partnership Development Strategy (2007). There have also been a number of studies relating to specific activities and events.

Key themes and priorities running through the above and the other local strategies are:

- **A focus on increasing employment opportunities, skills and training**
  Making Bridgend and its constituent parts a 'better place to work' is a key priority. It is about developing people, encouraging entrepreneurship, offering training opportunities and encouraging business in the area to flourish so that local people can participate actively in the economic activity of the County Borough. It is also about supporting and connecting local businesses, and facilitating their access to new markets, including visitors.

- **Healthy living agenda**
  This is linked to the improving quality of life agenda and is important in tourism terms as it focuses on encouraging people to be more active, through walking, cycling and other activities. It is therefore important that activities are accessible to both local people and visitors.

- **Improving and protecting the environment**
  This is about conserving and enhancing local bio-diversity and landscapes and ensuring a high quality environment, both rural and urban. The role of the natural environment as a backdrop for visitor activity is acknowledged as are the opportunities for celebrating rural heritage through historic buildings.

- **Improving access to the environment and open spaces**
  Increasing the opportunities for sustainable access to rural areas, in particular through walking and cycle routes, but also through improved public transport, is central to several of the plans. It is about making people more aware of access opportunities, as well as ensuring that they are safe so that people feel comfortable walking or cycling.

- **Activity-based attractions**
  Central to developing the tourism products is a focus on developing activity based attractions linked to the walking and cycling opportunities in the area to open up the area to new markets.

- **The need for more accommodation in the area**

There is recognition that there is a lack of suitable accommodation in the area and improvements to the accommodation base are necessary for tourism to develop.

- **Partnership working**
  There is also recognition that there are a large number of organisations involved in the economic, rural, urban, tourism and social development of Bridgend County Borough, and co-ordination between them to avoid duplication of work, and ensure maximum benefits to local communities.

- **Developing outdoor activities / events**
  We have reviewed a number of recent studies of outdoor activities. These support improvements to routes and opportunities for walking, cycling and horse riding, and the development of events.

4.3 Potential funding streams for tourism projects

There are a number of funding streams which future tourism projects can draw on, summarised below.

Welsh Assembly Government. There are a range of relevant programmes under different WAG departments which touch on tourism including heritage, rural, transport and environmental projects. European funding is also distributed via WAG. Some of the more important ones are highlighted below.

Single Investment Fund. A flexible programme providing support for businesses for capital and other projects. This incorporates the old Section 4 funding for tourism projects but tourism projects now have to compete with other businesses for funding. The lower limit for capital projects is £5000.

EU convergence funding. The main opportunity for tourism lies with the Environment for Growth E4G) theme. Total budget for Wales is £60m. This consists of 5 projects Communities and Nature (CCW), Coastal access (CCW), Heritage Tourism (CADW), Sustainable Tourism (VW), Coastal Tourism (VW).

The Coastal and Sustainable tourism projects are led by Visit Wales (VW) and have been split into two areas. Green Sea (£2.9m) which covers small scale improvements to coastal access, facilities etc. and Centres of Excellence (£25.6m). Funding is up to 48% of project and has been supplemented by WAG funding. Bids for eligible projects have to be submitted by end of 2010. Bridgend is featured in two of these:

- <u>Swansea Bay and Porthcawl Water Sports Centre of Excellence</u> which includes development of new infrastructure for water based activities centred in Porthcawl Harbour..."
- <u>South West Wales Historic Gardens Trail</u>**.** A centre of excellence linking attractions in SW Wales to firm a Historic Gardens Trail running from Bryngarw Country Park to the east of the area through to Margam Country Park. Funding will support improvements to visitor facilities, interpretation, footpaths etc".

Rural Development Programme. This is EU funded and covers much of rural Bridgend including most of the valleys and down to the coast. The overall budget in the last round was c£750k approximately and included c£70k for the Rural Tourism Development Fund and a similar amount for the Rural Events Fund. A new bid is being made in 2010 which includes a major programme of tourism development and marketing.

Valleys Partnership. Covers the former old coalfield area across 11 local authorities including Bridgend. The partnership has received £24m from Convergence Fund to support various regeneration initiatives across the Valleys. Of this, £4m has been allocated to tourism related initiatives relating to the idea of the Heart and Soul branding.

Western Valleys SRA. Covers a wider geographical area than just BCB. It is concerned with economic and community regeneration as a whole but tourism is one of the strategic themes. Budget is £8m for 2009/10

Small grants schemes. There are a variety of small grant schemes for tourism related projects funded by the above programmes and BCB. These tend to be under £10k and require matched funding. These include:

- Rural Tourism Development Fund (RDP)
- Rural events fund (RDP)
- Tourism Development Grants (Convergence funding)
- Strategic Events Fund (BCB)

Local Investment Fund. Tourism businesses in BCB can tap into £1.2m of funding available from the convergence programme. 40% grants available up to a maximum of £5k for capital, marketing and IT costs. Administered by BCBC economic development unit.

5. FUTURE CHALLENGES AND TRENDS

Future patterns of tourism in BCB will be partly determined by what happens on the ground but also influenced by external factors outside local control such as economic and social change. We summarise some of the key influences below.

5.1 A difficult economic situation

Over the past two years the economic context has shifted from one of optimism, growth and wealth to recession. In the past year we have seen:

- Considerable reductions in consumer spending
- The highest unemployment rates for many years
- Lowest interest rates for over two decades
- Unprecedented government bail out of the banking sector
- Falling house prices
- The weakening of the sterling against the dollar and euro

Latest figures[3] from the Treasury indicate that GDP is expected to fall by 4.7% in 2009 with unemployment reaching 1.6 million by the end of the year. The UK, like many other countries around the world, has been in recession since 2008 with the first indications of a return to growth in the last quarter of 2009. Independent forecasts expect modest growth of just over 1% in 2010 and the pace of recovery is expected to be slow thereafter.

As a consequence of the government support for the banking sector there will be significant restraint on public sector spending over the next few years which will have a major impact on WAG and local authority budgets and the resources available for tourism marketing and infrastructure. High levels of unemployment and constraints on wages will also impact on consumer spending. This could constrain and slow the recovery.

5.2 Tourism prospects

Tourism is closely linked to the state of the UK and global economy. UNWTO forecast that that international tourism fell by 5% in 2009 and may only grow at 1-3% in 2010. Long term forecasts[4] by Tourism Economics suggest that global tourism will return to 2008 volumes in 2011 and continue to grow strongly after that.

Inbound tourism to the UK has followed this pattern. It fell by 5% in 2009 and is expected to grow by less than 1% in 2010. Volumes may not return to 2008 levels until 2012. Wales has a relatively limited share of UK inbound tourism and it has not shown much growth over the past decade.

Domestic tourism, however, has been given a bit of a boost by the current economic situation. Although business overnights are down as companies have cut back on travel in the recession, holiday tourism is up as people have opted to holiday at home. This has particularly benefitted the self catering sector and visitor attractions also report increased attendance. This represents a welcome change as over the past decade the evidence suggest domestic tourism in the UK and

[3] Forecasts for the UK economy; A comparison of independent forecasts, January 2010 (HM Treasury)
[4] Long term forecast Tourism Economics. Visit Britain Website.

Wales has been fairly static. It is difficult to know whether this is a temporary fillip which will disappear when the economic situation improves.

The most likely outlook for the next five years or so is that the domestic and overseas demand for tourism in Wales is likely to remain at around the same level. This means that destinations can't rely on a rising tide to grow tourism but will need to capture market share from elsewhere.

5.3 A changing population

The UK population is more or less stable in terms of numbers (0.7% annual growth in 2006-2016[5]) but in common with most of Western Europe it is ageing. Over the next ten years most age groups will show a modest increase, apart from children aged 0-14, which could hit the family market. The big change in this period and beyond will be a 20% increase in the over 65 age group. Traditionally this group has been more likely to take holidays and breaks at home and has been important for Wales, but patterns are changing and an age group that has grown up with holidays abroad is reluctant to kick the habit.

Other changes we can expect to see will be:

- A more ethnically diverse population.
- More single person households, fewer traditional family households.
- More of the population will be classified as ABC1 but increasing unemployment and reduced disposable income may constrain holiday choice for some.
- Better educated and more mobile households.
- The probability that many people will have to work longer to fund their retirement.

5.4 Changing lifestyles

Attitudes towards holiday taking and use of leisure time have changed considerably over recent years as consumers have become more sophisticated and experienced. Changes noted by commentators such as the Moffat Centre, Henley Centre and others include:

- A shift towards consumers who are 'cash rich, time poor' – leading to shorter more intensive holidays and added value.
- The search for authenticity and distinctiveness as everywhere begins to look the same. This has driven people further and further afield.
- The search for well-being and escape from a world where people are full-on, all the time. The spiritual quality of an experience is becoming more important.
- A fragmented market where people increasingly seek tailor-made experiences to satisfy their own particular needs and predilections – the 'me' generation.
- Discerning, sophisticated and 'streetwise' consumers, who are widely travelled, know what they want and pride themselves in getting value.
- Increasing importance of brands, customer reassurance and third party recommendation in an era of seemingly limitless choice, fuelled by the internet.

Irrespective of the recession we believe these trends will still continue to influence travel decisions, although there will be more emphasis on value for money.

5.5 Climate change in a turbulent world

The environment is now firmly on the political agenda and there is an increasing focus on climate change throughout government and business communities. Amongst consumers this is also reflected in a growing trend towards 'ethical living' and concepts such as 'slow tourism'. The ramifications of this on tourism are likely to be:

- Increasing real transport costs and growing awareness of the impact of travel on climate change might encourage people to stay closer to home.

[5] Population projection by Government Actuary / Office of National Statistics. 2006 based projection

- Sustainable transport options to and from destinations will become more important, which will mean a stronger role for public transport.
- There is a growing interest in green and ethical choices which is beginning to have an impact amongst a section of consumers. People want to feel good about their choices.
- It is possible that governments will enforce economic measures to mitigate climate change which will result in increased costs for businesses.
- The global impact of climate change could result in political unrest and environmental disasters which may deter people from travelling.
- Wales may see a warmer climate as a result of climate change, although more unpredictable weather is the likely scenario.

5.6 Technological advancements

Technology continues to move on apace and the internet has had an enormous impact on tourism. It is now the preferred route for booking and information for many people and has led to shorter booking times and a desire for tailor-made experiences. New ways of accessing and sharing information through social networking sites such as Facebook are by-passing traditional routes and information can now be accessed more readily on the move via mobile phones and 'sat nav'. Meanwhile the internet has made it easier for even the smallest enterprise to reach distant and niche markets but as a result the marketplace is increasingly crowded. It becomes more difficult to make yourself heard.

5.7 Increasing competition from destinations

Low cost airlines, the growth of the internet and a period of prosperity have meant that over the past decade the world has become more accessible to a larger number of people. The choice of places and experiences is becoming ever greater, both at home and abroad, and these are eating into traditional markets and setting new benchmarks. In this environment, simply keeping position and retaining market share becomes a challenge let alone breaking into new markets and developing new business.

5.8 Key points

No-one can say with certainty what the cumulative impact of these changes will be. Some of these drivers push in different directions and may cancel each other out.

The message is that:

- Tourism growth is not guaranteed and may have to come from capturing market share from elsewhere.
- Public sector funding and support is likely to be constrained in the short to medium term.
- Competition is increasing and the market is more sophisticated and less loyal

Success will depend upon:

- Understanding the market and changing consumer requirements, not selling to yesterday's consumer.
- Raising sights and looking outside the area to match and exceed what the competition is offering.
- Continuously investing in and upgrading the product and infrastructure.
- Not taking for granted that consumers know what BCB has to offer.
- Providing reasons to visit and triggers.
- Exploiting new media and making it easy to access information, and arrange last minute, flexible packages tailored to the individual.
- Offering a range of quality experiences to delight, excite and enthuse.
- Creating places that are distinctive, authentic, and enriching places to visit

Part 2

Moving forward

6. THE STRATEGY

Having reviewed the current situation this section of the report looks ahead to the future. It sets out where BCB should be heading in tourism terms and identifies priorities for the next 5 years and beyond.

6.1 Where are we now

Key points arising from our analysis of the current situation are summarised in the form of a SWOT analysis (Table 6.1).

In brief, the main strengths of BCB as a tourist destination are its good access to markets, a diversity of scenery in a small area, some excellent beaches and attractive upland countryside in the Valleys. There is a traditional, established resort in the shape of Porthcawl, and there has been investment in new budget accommodation, and the caravan sector, both of which are performing well. There is also the Designer Outlet centre, a growing network of recreational routes and the Council is supportive of tourism with an active and experienced tourism unit.

However, there are also some negatives and areas for concern. BCB does not hang together as a single coherent destination; it does not have a strong profile and is to large extent overshadowed by better known places. The rural areas are undeveloped in tourism terms with no real tangible product at present whilst Porthcawl is a mature and fading destination which has seen better days. The serviced accommodation stock is a mixed bag; it is contracting and in some case struggling to survive. The tourism sector lacks a shared vision and there is a lack of co-ordination between public and private sector.

Looking to the future, Bridgend faces a number of pressing challenges if it wants to retain and grow its visitor economy although it shares these with many other destinations:

The challenges are:

- Increasing competition from other destinations both at home and abroad which offer more exciting, novel and fresher experiences. This requires investment to improve the tourism experience.
- A sluggish domestic tourism market and poor success in Wales attracting overseas visitors. This means that market growth has to come from capturing business from other destinations.
- Adapting to the needs of changing market requirements and aspirations. Tourism is essentially market led; if we can't provide the sort of experiences that people want then they will go somewhere else.
- Constraints on public sector resources which currently underpin much of tourism marketing and tourism infrastructure.

6.2 Why tourism is important

Whilst tourism will never be the dominant activity in Bridgend it has an important part to play in contributing to local prosperity and quality of life. As previously noted the visitor economy already supports 4700 jobs and injects £275m into the Bridgend economy each year.

Tourism:

- Supports jobs and provide business opportunities and help diversify the economy. It provides another string to the bow.

- Helps promote a positive image of the area to the outside world which in turn can attract investment and make people feel better about the place they live.
- Supports services and infrastructure which benefit local people and can result in greater variety of cultural and leisure provision.

Table 6.1

STRENGTHS	**WEAKNESSES**
Easy access, large catchment Proximity to Wales' major cities and attractions Great beaches and coast Attractive, dramatic upland scenery/valleys Coast to mountains in small area Good golf Great surfing Designer outlet centre Trecco Bay caravan park Loyal, satisfied visitors, high level of repeat Country parks Growing network of routes/trails Engaged council/ active tourism unit Porthcawl, established resort Funding streams available Some good events – Elvis, Jazz	Not a coherent destination Low profile for tourism Overshadowed by other places Nothing exceptional, no hook Urban areas lack distinctiveness Valleys are run down and have poor image. Lack of visible heritage, nothing to see Poor quality, outdated accommodation Lack of investment in product Shrinking serviced accommodation sector No accommodation in the Valleys Gaps in infrastructure Food and shopping unexceptional Seasonal tourism, weather dependent High reliance on day visits Previous delays in Porthcawl regeneration Down market image Variable quality standards Lack of things to do in poor weather Limited communication between public and private sectors Lack of meaningful tourism research data related and used in destination management. Very modest marketing budget available for tourism locally

OPPORTUNITIES	**THREATS**
'Borrow' attractions in surrounding area Unexplored countryside in the Valleys Porthcawl - surfing centre of excellence Expand outdoor activity opportunities Higher profile events to drive tourism Celebrate industrial and cultural heritage Green and eco activities Revitalise Porthcawl as key focus Funding streams to stimulate change Wildlife interest Attract new investors/ entrepreneurs Improve accommodation offer Co-ordinated action from public and private sector Focus on distinctive, different and quirky Better links between accommodation and activity sectors	Cutbacks in local authority funding Competition form other destinations Reduced budget for marketing of Wales by WAG/VW Public/private sectors in conflict. Dissipation of effort Lack of co-ordination between agencies/ council depts. Effects of recession on Porthcawl regeneration Not adjusting to changing markets Lack of investment in product /infrastructure Continuing economic recession Looking inward not outward Lack of clear vision and direction

These benefits and the fact that BCB already has a long track record in tourism means it makes sense to ensure that the area continues to drive benefit from tourism and that this carries on into the future.

This won't just happen by itself and past success will not necessarily guarantee survival in the future. It will be essential to respond to changing market requirements, make people aware of what is on offer, give them a reason to visit and satisfy or exceed their expectations when they are here.

6.3 Feedback from consultations

In the course of our work a large number of people in the tourism industry and other organisations in BCB have been consulted. The accommodation survey and tourism workshop also provided some useful feedback. Some common threads arising from these discussions were:

- BCB has a diverse, interesting offer and a lot of potential in tourism terms but it is still struggling to unlock this. The offer is not quite there yet.

- Activities have potential for further development. Events are key to generating visits and awareness and more emphasis should be placed on this.

- Tourism enterprises within the County often have little knowledge of what the wider area has to offer and there is a lack of communication and joined up thinking between sectors of the industry and different parts of BCB.

- There is concern that a deepening recession will halt progress with regard to regeneration in Porthcawl.

- Dissatisfaction with current structures and working arrangements both within the tourism sector itself and its relationship with the public sector. There is little sense of people pulling in the same direction.

These points are echoed in the response to the accommodation survey (see below) Respondents are generally enthusiastic about the potential of the County and believe there is a future for tourism in BCB but clearly recognise the need to be more proactive in developing a distinctive tourism offer.

Table 6.2 Accommodation operator opinions

What extent do you agree/disagree with the following statements	Score*
There is potential to grow tourism in Porthcawl	4.7
More could be made of golf tourism in the area	4.4
We don't make enough of the area's culture and heritage	4.3
The potential of surfing is underdeveloped in Porthcawl	4.1
More emphasis needs to be placed on generating visits through events and festivals	4.1
The Valleys have untapped potential for outdoor activities	3.9
We should be selling more 'packaged' experiences	3.7
We need more provision for touring caravans and mobile homes	3.5
There is not enough for visitors to see and do in the area	3.3
There's no future for tourism in Bridgend CB	2.3

Source: Accommodation survey 2010. Based on 16 responses
* 5 = strongly agree, 1= strongly disagree

6.4 Guiding principles

Tourism doesn't exist in isolation and needs to complement and support existing policies and strategies if it is to contribute to wider objectives. Our review of these suggests the tourism strategy should embrace the following key principles and themes. These are cross-cutting principles and will underpin and flavour all the proposed actions

- **Sustainabilit**y. The need to ensure that tourism has a viable long term future and that the economic, environmental and social benefits outweigh the costs.

- **Quality**. Striving to do things well and improving the overall experience for the visitor as the route to success.

- **Local benefit**. Ensuring that local people and local businesses derive benefit from tourism and see it as a positive feature of life in Bridgend.

- **Partnership**. Working in collaboration to make the most efficient use of resources whether it is between authorities and agencies or public, private and voluntary sectors.

- **Distinctiveness**. Drawing on the natural and human resources of Bridgend to create something special which distinguishes Bridgend form other places and gives it an edge.

6.5 A road map for the future

Looking ahead, we recommend adopting the following approach to tourism in BCB.

The aim

The overall aim of the tourism strategy should be to:

> *Develop a thriving visitor economy in Bridgend which celebrates the unique strengths of the place, supports jobs, generates business opportunities and improves the range of amenities available for visitors and local people.*

This is about developing a viable and sustainable visitor economy which is in tune with the area and brings net benefits to the local population.

Our promise as a destination should be along the lines of:

> *We will constantly seek ways to improve the quality of the visitor experience along every stage of their interaction with our destination. This will include ensuring quality in our messages that are key in influencing the customer's decision to visit us, the quality of the visit itself, and any post visit communications.*

The tourism agenda

We have identified a number of key elements which will form the backbone of the strategy and which should drive activity and shape priorities over the next five years. Taken together these will put the visitor economy of Bridgend onto a sounder footing and lay the foundations for future success.

- Focus on revitalising Porthcawl and the coast as the flagship destination within BCB. The aim is to change its image from a faded resort to a desirable, lively, short break destination.

- Develop small scale infrastructure, product and distinctive experiences in the rural areas, particularly in the Valleys, based primarily around outdoor activities and linking into the culture and heritage of the Valley communities.

- Focus on the ease of access to a range of enjoyable activities as the key selling point. Not necessarily the biggest or the best but a convenient, safe and well managed place to come and do things, especially for families.

- Develop some hooks to attract attention, raise the profile of the place and stimulate visits. This should involve surfing, golf, building up events, and offering quirky and different experiences.

- Raise the quality, improve and diversity the accommodation base to meet changing market demand with a stronger relationship to the tourism offer.

- Improve linkages and make it easier to move between the coast and the Valleys and BCB and the surrounding attractions. This will help spread the benefits and strengthen the tourism offer.

- Improve the co-ordination, management and marketing of tourism and active engagement between the public and private sector. This requires rethinking current structures.

Targets

We recommend that BCB should aim for modest growth in both the volume and real value of tourism over the next decade. This is a challenge in the current situation but we think a realistic target to aim for is a 15% overall growth over the next decade.

More important than increasing volume or value, however, is the aim of creating a sector which is more vigorous, in better shape to compete and at ease with its surroundings and the local community.

6.6 Branding and market positioning

BCB does not have a strong identity in the market place compared to places such as Pembrokeshire, the Gower or Cardiff, and the County boundary doesn't define a coherent, self contained destination. The resources available for destination marketing are also limited.

In the light of this we don't think it makes sense to sell the County as a stand-alone destination or to lead with the name Bridgend. Instead the emphasis should be on selling places, experiences and themes within and adjoining the County, generally in co-operation with others.

We do not think it is sensible to try to create a separate Bridgend brand. The nature of the product and the scale of resources mean that this is unlikely to be effective and there are arguably already too many brands in Wales fighting for attention. Marketing activity should incorporate and project the themes and brand values already developed by VW and the Valley's Campaign.

Key messages to project about BCB, consistent with the above are:

- Easy to reach
- Beautiful coast and dramatic upland and valleys
- The range and quality of outdoor activities
- A real place with a vibrant culture and proud heritage
- Warm, friendly people with a sense of humour
- Quirky, different and often surprising

The main markets with potential for Bridgend are:

- Day visits, primarily from within an hours drive for countryside activity, visits to the coast and events.
- Families living with a 2 hour catchment looking for a value for money, main, additional or short holidays.
- Active adults of any age from within the same catchment looking for an active break. The focus should be on ‘dabblers’ and ‘samplers’
- The local population in and around BCB, especially those who are looking for places to entertain visiting friends and relatives
- The independent explorer?
- Special interest nice markets such as.......wildlife tourism, bird watching, botanical tourists (fen orchids etc), volunteering (dry stone walling, countryside management weekends etc)

Secondary markets are:

- Special interest and activity enthusiasts, e.g. golf, surfers, mountain bikers
- Business visitors looking for a convenient place for a meeting or training.
- Group travel?

6.7 Delivering the strategy

In order to take the strategy forward we have identified a range of activities and actions discussed in more in the next section. These fall into 9 programme areas which in turn relate to 3 strategic objectives which crystallise what need to be done to turn round tourism in BCB.

The 3 strategic objectives, which all have equal weight, are show below together with the programme areas which relate to them
(Alternative set of headings)

1. Raising profile and awareness
   - Higher profile events (Promoting events)
   - Strong hooks (Exploiting strengths)
   - Partnership marketing (Marketing in partnership)

2. Investing in product development and quality
   - Better accommodation (Improving accommodation)
   - Interesting experiences (Creating experiences)
   - Improved infrastructure (Investing in infrastructure)
   - Skilled workforce (supporting the industry)

3. More effective organisation and delivery
   - Destination management (Managing tourism)
   - New structures (Organising effectively)

The above relate to the County as a whole. To provide a framework for action at the sub-county level we have set out more a more detailed action plan for the two areas which we see as having the most potential for change and development in tourism terms and which have very different character.

- Porthcawl and the coast
- The valleys

The Rough Guide - 2020 the vision for tourism in BCB

A few years ago this bit of Wales between Cardiff and Swansea and was just another place to drive through on the way to somewhere more interesting. How that has changed.

Porthcawl has swapped its image of a faded seaside resort to become the surfing capital of South Wales and a cool place to go for that weekend away just to chill out and enjoy the atmosphere and delights of this busting little town or play a little golf on its first class courses. Do check out the arts centre on the revitalised harbour adjoining the new award winning boutique hotel and fish restaurant. Despite the new sophisticated glamour this is still a great place to bring the kids for a romp on the beach with plenty to keep them occupied. Whilst the International Elvis Festival in the autumn brings its own special magic.

Further inland the Valleys have shed their industrial past and have really come on in terms of their outdoor offer with plenty of scope for walking, mountain biking, white water rafting and hang gliding. There is some characterful accommodation ranging from quality bunkhouse style accommodation to some high quality cottages and B&Bs. And if you've had enough physical exercise you can always sign up for the Valley Life experience. A novel community-led programme of entertainment, walks and talks which give a new slant on local life and culture – a sort of Local Hero meets Under Milkwood. Details from the TIC or the local pub.

Bridgend town itself with its interesting history has in recent times gained a reputation for the quality and 'quirkiness' of its events that are quite distinctive and quite luring as a result. A great programme throughout the year ensures this is an entertaining and a very different place to visit just off the M4 in South Wales.

As a whole, the area is easy to reach and has become a destination that offers something very different to the rest of Wales, which makes it very appealing to those who don't look for the obvious. Certainly worth exploring further.

7 RAISING PROFILE AND AWARENESS

Raising profile and awareness is key to attracting people to visit and stay in the area. People need to be aware of what is on offer and provided with a reason to visit. We have identified three priorities for action;

- Compelling events
- Selling strengths
- Collaborative marketing

Programme 1 HIGHER PROFILE EVENTS

The aim

Create a stronger events programme to stimulate interest and drive visitor activity..

The Challenge

There is already an events programme promoted by BCBC and third parties and the Council has an events fund to support events. A few of these are high profile and create interest outside the area but most are aimed at a local audience.

Events are important. They provide a stimulus for visiting a destination and can be used to attract people who wouldn't otherwise come or to steer visits to particular times of the year or different places within the County. Quirky and unusual events and festivals attract media coverage and can help project a positive and lively image. We believe an events strategy is key to expanding tourism in BCB. The priority now is to build on this, and grow some events which will have a bigger impact in terms of attracting people from outside the area. We also need to ensure we get maximum benefit from the spill over from major events in Cardiff and Swansea.

What we want to see happen

More resources devoted to developing events

There needs to be a more proactive and vigorous approach to developing events. This means identifying events with growth potential, and working closely with the organisers to nurture and support them, providing both operational and marketing expertise. Events should be chosen which tap into strong themes for Bridgend (e.g. Surfing) or reflect a quirky and striking image (e.g. Elvis, Christmas Pudding Challenge). Possible contenders for development include the Porthcawl Jazz Festival, Surf Cult, Elvis festival, the Alternative Food Festival, A Comedy Festival, and various sporting events. Participatory events such as marathons and the Dragon Ride also bring in people and supporters.

The existing strategic events fund should be redeployed to support this and a suitably experienced person appointed to lead this in the tourism team. Other departments of the Council, particularly sports and arts, are also involved in generating events and there needs to be closer liaison between them to draw on expertise and avoid duplication. Ideally, a one-stop service should be offered to event organisers.

The development and delivery of high profiled quality events in BCB should become the strategic priority for tourism. To differentiate the destination from the rest, there needs to be close alignment with the Visit Wales branding proposition that encourages a more alternative, quirky approach to destination development and promotion, in order for us to stand out and attract people from further afield. Lesser visited areas in BCB for example have a great opportunity to share in the benefits that tourism brings should they adopt this approach to events, and this should be encouraged. It is far easier to create a tourism product and demand through events rather than spending millions on developing tangible permanent attractions.

Folkestone Triennial

The first Folkestone Triennial ran from July to September 2008. 22 internationally acclaimed artists were commissioned to create new works for the event which was supported by local businessman and former CEO of SAGA, Roger de Haan. A number of the pieces will be on display permanently in Folkestone. The Triennial is part of a major regeneration programme for the town which includes a master plan designed by Foster and Partners, a new city academy and university (to focus on the arts), a performing arts centre and creative arts quarter.

Capitalising on spin-off from major events elsewhere

Big sporting and music events in Cardiff and Swansea bring useful business for BCB accommodation. Bridgend and Porthcawl hotels need to ensure they are featured on Cardiff and Swansea accommodation listings to take advantage of this and operators need to maximise the use of these events in their own promotional activity.

Making local events more accessible to visitors

Local events will not generate visits in their own right but do provide interest, colour and entertainment for people staying in the destination. Some local events can also help create a sense of distinctiveness. There is a need to ensure that these events are accessible to visitors and that visitors are made aware of them. This is a key role for the TICs and for accommodation operators but may need some orchestration.

Animating the street scene

Consideration should be given to placing more emphasis on animation and building a lively atmosphere in key locations such as Porthcawl, Bridgend, Maesteg, country parks and the Designer Outlet Centre   This is about making places fun to be in and is of benefit to local people as well as visitors. It is about later opening of shops, pavement cafes, entertainers and street theatre, live music, flags and banners. This falls under the remit of the town centre manager but budgets are tight. The tourism industry should be playing a stronger role here and looking to how it can stimulate and support such activity through help in kind.

An outdoor event arena

Given the location benefits of BCB with its proximity to major urban populations through the M4, its aspirations as an event led destination and its failure to be able to accommodate large scale events to date, it is recommended that the potential of developing an outdoor events arena to accommodate both existing and new events is considered. The development of a purpose designated events space will not only attract new events to help sustain and grow the visitor economy throughout the year, and capitalise on the growth in this area of tourism, it will also compliment the BCB claim to being a true events led destination.

Action Points

- Review the strategic events fund and its allocation
- Establish a dedicated events team.
- Identify and prioritise some events for development and work with them .
- Seek ways to generate more benefit from Swansea/Cardiff events
- Improve information dissemination on local events.
- Identify proposals to improve animation in key locations at key periods
- Explore potential of designated outdoor events arena.

Programme 2 STRONG HOOKS

The aim

Capitalise on those areas where BCB has a competitive edge and use these to generate new business and interest.

The challenge

To stand out from the crowd it makes sense to focus on areas where BCB has particular strengths. Two areas where BCB offers something special and distinctive, which could potentially put it amongst the market leaders, are golf and surfing. These came out strongly in the consultation as being underplayed at present. In both cases the basic resource is there, and the area's accessibility gives it an edge, but the supporting infrastructure, co-ordination and promotion is undeveloped. There is potential for growth here but it will require some commitment and support from the tourism industry and other stakeholders.

Surfing: Porthcawl has good surfing with 3 beaches identified in Surfing UK and a number of surf schools. Facilities for surfers are very limited however, and there is very little accommodation geared to their needs. Porthcawl also has a surprisingly low profile on surfing websites and in guidebooks. The main area is Rest Bay and a key issue will be the extent to which the local community will support further development in this area. There is also good surfing along the Glamorgan Heritage Coast and also in the Gower which is arguably better known with a stronger accommodation base. The main economic and tourism benefit from surfing is likely to come from attracting more casual surfers (dabblers/novices) drawn by the lure of a place with a cool reputation. This has been the Newquay experience. There is also the potential to make more of the cross-over between surfing and other active sports and cross-sell other activities.

Golf: The area is well provided with golf courses with the famous Royal Porthcawl ranked first in Wales and 100th in the world. Most of the courses would like to generate more business from visitors and the response from hotels suggests that a number are already benefitting from this and see further potential. A locally based golf operator already promotes golf holidays in SE Wales on behalf of the regional tourism partnership but there is further scope. One problem is being able to offer hotel accommodation of the right quality and price.

What we want to see happen – surfing

Agreeing a surfing development plan

Exploiting surfing potential at Porthcawl is likely to be a contentious issue and will require some consensus building amongst the key players and the local community to define and agree a way forward and draw up a development plan. This is the first step.

Improving facilities for surfing and water sports

There is a need to provide some basic facilities for surfers and surf schools at Rest Bay. This should include toilets, showers, changing rooms and secure lockers. There is also scope alongside this for add-ons such as a shop, catering, storage and accommodation for surf schools/operators although development constraints at Rest Bay may limit the scale of building. Possible sites to examine include extending the existing Lifeguard building which is underused, adding on to the changing rooms on the sports pitches or an extension to the existing café building.

Expanding surfer-friendly accommodation

There is a lack of suitable overnight accommodation catering for this market which limits its economic impact. The issue of space for overnight stays in camper vans and motor homes needs to be resolved. Existing B&B and guesthouse owners should be encouraged to think about catering for this market and there is scope for attracting new forms of accommodation such as of surf pods, bunkhouse and beach huts. Potential redundant buildings in Porthcawl could well be a consideration for unusual and quirky surfing accommodation meeting the needs of this market perfectly.

Spreading the message

Alongside improving facilities there is a need to project a stronger image for Porthcawl as the surfing centre of South Wales, promoting the area as a great place to come surfing or just to hang out to soak up the atmosphere. Consideration should be given to working with surrounding areas from the Gower to the Vale which also have a strong surfing resource. This is an area where social networking sites will be key in spreading the word and hitting the right tone. Work also needs to be done on providing material for websites, guidebooks and general media coverage.

Events and competitions have an important part to play in raising profile. Porthcawl
Held the European Pro Event last year. The existing Surf Cult Festival should be built up into something bigger.

Managing the beaches

The management of the beaches will need to be carefully controlled to ensure that additional numbers can be accommodated. For example, a growth in surf tourism will place increasing demands on lifeguard resources for instance. There are already management structures in place to discuss and help steer this route such as the Rest Bay and Newton Groups.

Newquay – Surf capital

Surfing has changed the image of Newquay from a tired, old fashioned resort to a cool destination. Yet, before 2002 there were virtually no facilities for surfers. The Fistral Beach Surf Centre was developed in 2003 by the Council with European and private sector funding and is home to the British Surf Association, surf school, restaurant, shop and changing facilities. Other developments with a surfing theme followed in Watergate Bay with the Xtreme Academy and surfer friendly accommodation. A Surf Capital steering group was instrumental in developing a 20 year vision for the resort. Surfing is estimated to generate an additional £40-50m pa for the local economy.

What we want to see happen – golf

Establish a local golf cluster

Identify a small group of interested accommodation providers and golf clubs who are well matched and willing to work together in developing golf packages. The county boundary should be ignored for this purpose, as it is more important to get the right group of participants together. Support the group to explore opportunities for closer working and potential for creating special events and promotions.

Develop a promotional campaign

Consider establishing a golf holiday promotion using Wales Golf Holidays (a locally base specialist operator) along the lines of Golf on the Gower model. This could be called Porthcawl Golf to capitalise on the Royal Porthcawl name, or the Golf Coast emphasising the links courses.

Continue to promote golf as a strength for the area

Continue to highlight golf in all marketing material, encourage local clubs to feature in VW and regional marketing campaigns, to improve their facilities and accessibility to visiting golfers. Explore the idea of developing a local golf festival or celebrity event to raise interest.

Explore potential demand for activity 'hybrid' tourists

In the area with three of the highest quality activities on offer through mountain biking in Afan Forest, surfing and golf in Porthcawl, there may be a market opportunity to target the 'samplers' who exhibit tendencies to float from activity to activity. Some evidence in the destination points to how this activity floating is happening during their actual stays as opposed to changing habits over longer periods. For example, when surf conditions are not amiable, then there may be opportunities in certain markets for participation in other activities nearby. Generally and in the US for example, there is evidence that an element of the golf market has diversified into surfing and vice versa. Porthcawl is ideally placed to capitalise on any latent demand in this area and opportunities such as 'Surf & Turf' breaks should be explored further.

Action points

- Explore and develop a plan for surfing development in Porthcawl

- Prepare a guide for accommodation operators outlining needs of surf market
- Encourage new forms of surf friendly self-catering development
- Promote Porthcawl as the surfing centre of South Wales
- Develop the Surf Cult Festival
- Explore potential for attracting new surfing/golf competitions and events
- Review and strengthen beach management arrangements
- Establish golf cluster.
- Explore potential for a Porthcawl Golf / Golf Coast holidays promotion
- Raise awareness of golf tourism market needs amongst operators
- Explore potential demand for hybrid activity tourism.

Programme 3: PARTNERSHIP MARKETING

The aim

Work with others to project a positive and consistent image of BCB, promote specific opportunities, and stimulate people to visit and stay in the area.

The challenge

Destination marketing is largely the responsibility of the Council working with other local authority partners and attracting buy-in from tourism businesses where possible. Marketing BCB and making an impact in a crowded marketplace is not easy. Resources are limited and under pressure, the area does not have a strong identity and neither is it a single coherent destination. In some areas the product is either weak or under-developed.

In the light of this the emphasis should be on selling places, experiences and themes within BCB rather than trying to create awareness of a free standing Bridgend brand. The latter is neither feasible nor desirable. Partnership working is essential in order to make the best use of resources, provide a stronger product and create more impact. The scope and nature of marketing activity needs to be critically reviewed to ensure that it is achieving its aim and that it takes account of new ways of doing things such as social media and the internet.

What we want to see happen

Working with others on destination marketing

BCBC should continue to work on destination marketing with the Vale of Glamorgan under the Glamorgan Heritage Coast banner. There has been a lot of investment in establishing this brand and partnership over the years and it makes sense to pool resources and create a stronger tourism offer. Whilst it would be possible to form alliances with other neighbouring authorities there seems no obvious advantage in changing unless existing partnership arrangements change. There is, as highlighted in the Wales Spatial Plan and Convergence Water Sports Centre of Excellence project, some synergy between Porthcawl and the wider Swansea Bay concept that may be worth exploring in the future.

The Valleys campaign, under the banner Heart & Soul, is a new initiative covering a wide swathe of South Wales, crossing existing marketing areas. This is well-funded and could develop into a powerful vehicle for raising awareness and driving business to the Bridgend Valleys. Research suggest that Valleys is no longer a turn-off for people. BCB should actively support this campaign for which there is currently no cost.

Move away from print if resources shrink

The brochure and associated campaign should be continued as a vehicle for generating and servicing enquiries. The website, however, is weak and is in need of improvement. At some point, especially if resources are reduced further and advertising support weakens, it may be necessary to drop the printed brochure and focus instead on driving people to the website. This should be kept under review.

Reinforcing the brand

BCB marketing will have greater impact if it ensures that the messages it puts out are consistent with those already being projected by VW, CRT and the Valleys Partnership. These are based on market research. It would be counter-productive for BCB to try to establish an independent branding as it does not have the resources to do this effectively. It may be useful to produce some guidance for local enterprises and internal use about the key messages and tone, and how best to get this across to consumers. It is therefore recommended that a greater understanding of branding needs to permeate the tourist industry, internal Council departments and all other stakeholders involved in all aspects of destination management. It is important that the destination is aware that branding does not only affect marketing, but also all aspects of tourism development including signage, interpretation and destination management. All involved need to embrace any guidelines on what the destination is trying to communicate and project about itself.

Focus on the domestic market

BCB should focus its resources on domestic marketing. The level of resources available for overseas marketing is now so limited as to be virtually useless. There is some merit, however in turning some attention to a VFR campaign aimed at local residents to widen their awareness of places in which to entertain their visiting friend and relatives. This ties in with the proposed Valleys Homecoming campaign.

Support cluster-based marketing initiatives

The main thrust of other marketing activity should be to work with and support clusters of enterprises to help them extend their reach and create more impact. This involvement might be on an ongoing basis or a temporary capacity-building initiative. The aim is to empower people to do it better not do it for them. The involvement of the BCB tourism unit might consist of an injection of staff resource / expertise or some modest revenue support to move things up a gear. The type of activity supported will vary according to the needs of the particular cluster but could include the use of social media, market research, capacity building or help with attendance at exhibitions.

The number of campaigns that can be assisted will depend on the resources available but possible ideas include:

- A BCB golf holiday campaign involving selected local courses and accommodation and delivered through a commercial operator.

- A campaign to raise the profile of Porthcawl as a surfing destination working with existing activity operators, accommodation and other key stakeholders. This would probably focus on web-based promotion, events, social networking and guidebooks.

- Establishment and support for a business tourism group bringing together main hotels, Designer outlet centre, Odeon etc. and involving activity to promote awareness of meeting facilities /business services in hotels amongst local companies. This should be supported by business advice and encouragement to improve facilities.

- An activity operator group. Establish and support a networking group to encourage linkages with accommodation operators and help activity operators publicise their offer.

- Valleys' Life (Heart & Soul) packages. Working with tourism ambassadors, community groups, guides and accommodation operators to construct a small portfolio of quirky, eye catching loose packages base around experiences that can be sold to generate publicity and which may lead to some more permanent opportunities.

Develop enhance marketing skills of all involved

The marketing landscape is currently evolving at an unprecedented pace to such a degree that it is very difficult for local authority staff and others involved in destination marketing to keep abreast of developments and new emerging opportunities. This is proving to be a difficult challenge and needs to be addressed if BCB is to become a forward thinking market led destination. Furthermore, given the pressures on an already modest marketing budget for the destination, new skills to deliver more efficient marketing are becoming fundamental. BCBC are not alone in this and there may be a need to address this corporately with the Communications department or through WAG to ensure those people involved in public sector marketing access the right intelligence to develop the necessary skills. The future skill sets of tourism marketers are likely to be very different to how it was as little as 5 years ago.

Action points

- Continue to deliver destination marketing through GHC campaign
- Develop brand guidelines for the destination and roll out their application to all aspects of destination management.
- Improve and develop GHC website
- Review need for destination brochure
- Actively participate in Valleys Heart & Soul campaign
- Review participation in overseas marketing
- Produce some simple brand guidelines for BCB
- Consider VFR campaign aimed at local residents
- Identify and provide marketing support to marketing clusters
- Develop enhanced marketing skills of all involved

8. INVESTING IN PRODUCT DEVELOPMENT AND QUALITY

Whilst raising awareness of what the area has to offer is important, if the product is not up to scratch and doesn't meet expectations then visitors will be disappointed and unlikely to return. This section identifies the priorities for improving the tourism experience and infrastructure on the ground. The priorities are:

- Better accommodation
- Accessible experiences
- Supportive infrastructure
- Skilled people

Programme 4 BETTER ACCOMMODATION

The aim

Put in place the right mix and quality of visitor accommodation to satisfy changing market requirements and to compete with other destinations.

The challenge

BCB has a limited stock of accommodation, dominated by static caravans. Elements of the accommodation sector, hotels along the M4 and caravan sites, are doing well but others such as the smaller seaside hotels and guesthouses are struggling and need reinvestment and re-positioning if they are to survive. The stock of these is shrinking. There is relatively little accommodation in the Valleys which constrains the development of staying tourism.

Without the right sort of accommodation it will be impossible to increase staying visitors and reap the full economic benefits of tourism. Encouraging additional accommodation development can help attract new visitors and open up new markets but this needs to be done carefully, and as part of an overall strategy to expand tourism, if is not to further erode the existing stock.

What needs to happen

Attracting some new hotels

The scope for additional hotel accommodation is limited given existing occupancy levels. The main development interest is likely to be focused around Bridgend and in the M4 corridor and applications will be subject to the normal planning considerations and constraints.

In the medium term Porthcawl would benefit from a new, small boutique hotel, or possibly a good quality restaurant with rooms. Examples elsewhere suggest that the right sort of development can be made to work despite the current poor occupancies and can have a knock-on effect on other enterprises. This needs to be integrated with the regeneration plans. Possible options include a location on the harbour, a development adjoining Trecco Bay or the refurbishment of an existing property. Any new products attracted to the are need to be mindful of the destinations aspiration top develop into a quirky, creative high quality destination that's distinctive.

Midland Hotel Morecambe
This 1930s art deco hotel has recently been renovated and after re-opening in June 2008 now has 4 stars from Visit Britain and is in the Michelin guide. It has 44 modern boutique style rooms, a sea view restaurant and a bar, as well as a spa. It was purchased by developers Urban Splash in 2003 and renovation was thanks to £7.2million of funding from NWRDA and Heritage Lottery Fund. It was a signature project of the Morecambe Townscape Heritage Initiative.

Improving the existing stock

Guesthouses and hotels should be encouraged to upgrade their facilities. Further loss of guesthouses to other uses in Porthcawl and elsewhere should continue to be resisted unless the owners can demonstrate that the properties no longer have a viable commercial use as tourist accommodation. Many owners are now of retiring age. To encourage the influx of new blood and investment, a more rigorous and systematic approach should be adopted to applications for change of use requiring owners to advertise their property on the open market in accordance with Council guidelines.

Encouraging new small scale development in the rural areas

The development of small scale accommodation in the countryside should be encouraged subject to planning constraints. There is a need for rooms attached to pubs and restaurants, B&Bs in private homes, high quality bunkhouse type developments catering for groups and youth market, certificated caravan sites, and new forms of small scale self-catering development such as surf lodges and wigwams. The letting of second homes and redundant farm buildings for holiday cottages should also be encouraged.

Surf Pods Europa Park is a surfers campsite based in Woolacombe which targets groups of young people including stag and hen parties. Accommodation consists of surf motels, surf pods, surf lodges, surf cabins, static caravans and many camping and touring pitches. The site includes a swimming pool, sauna, large club house with a great view of Woolacombe beach and sea .The Surf Pods are a 2-berth accommodation, which have proven themselves to be very popular with our guests. They are made of wood and roughly the size of a two-man dome tent; they have a double bed, heater, beer fridge and kettle

Better provision for touring caravan and motor homes

There is a buoyant demand for touring caravans and motor caravans/camper vans. Consideration should be given to establishing a medium sized touring caravan park in Porthcawl possibly in the vicinity of the former Sandy Bay site as part of the redevelopment programme. In addition some smaller sites, with minimal facilities should be identified to facilitate overnight stays by Camper vans and motor homes. Possible locations include Porthcawl, the country parks, Kenfig and Maesteg.

Action points

- Ensure the Local Development Plan reflects the above priorities
- Seek the development of a new flagship boutique hotel in Porthcawl
- Actively encourage investment in existing hotels and guesthouses in BCB
- Provide business advice and support to small accommodation enterprises to help develop new capacity, upgrade facilities and performance.
- Explore potential for new touring caravan site.
- Seek suitable sites for overnight stops for motor homes.

Programme 5 ARRESTING EXPERIENCES

The aim

Bring out the hidden interest of the County and make it easier for visitors to access a range of distinctive and memorable experiences.

The challenge

BCB is an interesting place with a strong culture, rich heritage and a wide range of potential activities on offer. However, unless you are in the know it can be difficult to access these and, in many cases, impossible for the outsider. This is particularly true in terms of the heritage and history of the area which is no longer very visible and the cultural life of the Valleys which is community based. The outdoor recreational potential of the area is also largely untapped.

There is an opportunity here for BCB, to capitalise on this and develop a product which is a bit different to other places and gives it an edge. This means working with local communities, social enterprises and activity providers to identify and package up a set of intriguing experiences and find new ways to present these to the market. Such activity will also help project a different and more interesting image for the area.

What we want to see happen

Develop closer links between activity and accommodation providers

We want to encourage closer links and working between activity/experience providers and accommodation enterprises. Both have much to gain from promoting each other and there is a tendency to work in silos at the moment. Networking events are a useful tool as is a newsletter. Consideration should be given to producing and circulating a tourism handbook within the industry (possibly on-line) listing all tourism providers and what they can offer.

Research needs to be undertaken amongst activity providers regarding the accommodation needs of their customers. This should be distilled to provide advice to accommodation operators, to encourage a better fit between the accommodation supply and the demands of activity orientated visitors.

Create some eye-catching packages

As a pilot scheme, a small portfolio of tourism packages providing a mix of accommodation and experiences should be created. These should pick up on quirky, unusual or eye-catching themes which might relate to local culture, choirs, industrial heritage, food, customs, entertainment, music, crafts or learning a skill. They could include activity or taster weekends or some form of challenge event. These would provide a vehicle for publicity and stimulate thinking and networking. Whilst the Council should initiate this and provide some marketing support the aim is to get local enterprise or community based organisations to drive and deliver these experiences. This will provide authenticity and experiences with some bite.

Holiday packages in South East England finest landscapes
The 9 Areas of Outstanding Natural Beauty and National Parks in South East England are joining together to develop and promote a portfolio of 27 holiday packages which celebrate the special qualities of these places. These packages are being developed through clusters of enterprises working together and will embrace principles of sustainability. Current ideas include – Night Wight (exploring the Isle of Wight at Night), An orchard experience in the Kent Downs, dry stone walling in the Cotswolds, and survival skills in the High Weald

Recruit some tourism ambassadors

The Valleys Partnership is developing the idea of Community Ambassadors as part of the Heart & Soul campaign and proposing to train people to act as a local guides and lead activities and walks. Something similar has been developed by BCBC with Leisure Brokers. This idea is a good one and should be supported. The aim is to develop a pool of enthusiastic and knowledgeable local people who can spearhead the development and delivery of special and distinctive experiences which can be promoted to visitors.

Raise awareness of the BCB activity offer

The Get Active leaflet produced for the Glamorgan Heritage Coast is a useful guide to activities but it needs to be in every hotel bedroom and caravan. It is worth thinking about a simpler version of this which can be produced in greater quantities. Consideration could be given as to whether the TICs might offer an activity booking service.

More work needs to be done to persuade specialist and regional tour operators to feature BCB packages (walking, cycling, wildlife interest, golf etc) in their programmes. This is about getting others with specialist expertise to help take things forward.

The Designer Outlet Centre is a major visitor focus attracting some 3.8m visits a year. This has potential to act as a shop window for the County with a tailored programme of events and displays throughout the year to raise awareness and stimulate interest in what the surrounding area has to offer.

Action points

- Prepare tourism handbook
- Organise networking / information sharing meetings
- Explore the idea of developing some themed packages
- Research activity visitors' accommodation needs
- Identify and support a tourism ambassador scheme
- Produce and distribute an activity sheet
- Identify tour operators who might feature BCB
- Develop programme of events at Designer Outlet

Programme 6 IMPROVED INFRASTRUCTURE

The aim

Ensure the right facilities and supporting infrastructure are in place to cater for the needs of our visitors and maximise the tourism potential of the area.

The challenge

This is about strengthening the visitor experience on the ground and providing the right environment and mix of facilities to support a thriving tourism sector. Significant investment has taken place over the past decade in new attractions such as the Designer Outlet Centre, the development of country parks, walking and cycling routes and environmental improvements. Other developments such as the improvements to the harbour at Porthcawl are in the pipeline. The basic building blocks are there but their full potential in tourism terms has yet to be realised. The priority now is to complete the missing links in the network of routes, and focus on selected other developments which will capitalise on the investment that has taken place to create a step change in appeal.

What we want to see happen

Reviving Porthcawl

Porthcawl has enormous potential to be reborn as a desirable tourist destination drawing on its inherent character, harbour and natural resources. The long awaited regeneration of the waterfront area is important to move forward on and is a vital part of the tourism strategy. We are also suggesting a number of other development projects in Porthcawl which are key to expanding its appeal. These are discussed in more detail in the Tourism Development Area Plan (section 10) but include:

- A surf centre to establish Porthcawl as the surfing capital of Wales.
- A creative visual arts/craft centre as an expression of the beginnings of an emergent brand 'Creative Porthcawl'.
- A new waterfront destination hotel / iconic leisure development or both (as part of phase 2 of the Porthcawl Regeneration Programme).

Completing the network of recreational routes

The County boasts an excellent network of recreational routes, some of national significance. There are some missing links which need to be filled as and when resources permit. These include:

- The community route in the Llynfi Valley.
- The stretch of the Wales Coastal Path in Merthyr Mawr.
- National Cycle Route 4 Tondu, Blackmill.
- Cycle routes through to Afan Forest from Maesteg.
- Riding trails.

Improving visitor facilities in key hubs

The Outdoor Pursuits Strategy identifies a number of 'hubs' which act as gateways to clusters of recreational opportunities and facilities. Significant investment has already been put into these hubs, but some are punching below their weight and with further investment they could play a bigger role in developing as visitor assets. Some are the subject of more detailed studies. Opportunities which will be explored include

- Environmental improvements at Newton
- Upgrading the Kenfig visitor centre.
- Information and interpretation at Parc Slip
- Improvements to the visitor centre and facilities at Bryngarw Country Park.
- Facilities for mountain biking and riding.

Supporting the Garw Valley Heritage Railway

Re-opening the railway line in the Garw Valley as a heritage railway is an idea which has been around for along time. This has been given a recent boost with a influx of new members and expertise from Barry. This is a long term project and still uncertain. Nevertheless, we believe it could give a significant boost to bringing visitors into the Garw Valley, fit in well with walking and cycling routes and help put the Valleys on the visitor map. This aspiration should be supported.

Reviewing visitor information

Information delivery plays an important role in moving visitors around and is a vital part of tourism infrastructure. A lot of work has done in recent years in improving brown and white tourist signing in the County and the Council operates two TICs. There is a need to review the provision of tourist information and interpretation across the County to ensure that visitors can easily access information at key points during their stay. An integrated approach is needed which takes account of recent developments in electronic information distribution. Consideration also needs to be given as to appropriate interpretive material to bring out the hidden interest of the area.

.

Action points

- Implement the waterfront regeneration plans in Porthcawl
- Explore the opportunity for developing a surf centre in Porthcawl
- Explore the potential for developing a creative arts/crafts centre in Porthcawl
- Support projects to fill gaps in recreational routes
- Identify projects for improving visitor facilities at key hubs
- Review information and interpretive provision across the county and support a common approach

Programme 7 SKILLED WORKFORCE

The aim

Promote efficient business practices and ensure that all those working in the tourism sector in BCB are able to deliver the best quality service to our visitors.

The challenge

The very best accommodation and attractions count for nothing if they are poorly managed and are operated by people who offer indifferent service. If the experience
of visiting Bridgend is to stand out and compete with the best, then businesses have to continually improve their game and everyone involved needs to become more visitor focused. This requires a willingness to acquire new skills and become more professional in our approach. For a variety of

reasons the tourism sector has traditionally been slow to take up training opportunities and adopt new ways of doing things. It can also be difficult for businesses to find their way through the maze of different agencies and providers. The strategy should focus on raising awareness of this, encouraging take-up and signposting opportunities.

What we want to see happen

A commitment to customer care and product knowledge

There is a need to encourage more enterprises to improve customer care and welcome. The Croeso y Cynnes programme developed by VW is a useful introduction to this and enterprises should be encouraged to participate. The aim should be to get all front line staff involved, not just those in visitor accommodation. A key element is the need to raise awareness of what exists both within and outside the county so that everyone can act as an informed and enthusiastic ambassador for the area. The TIC staff could take an active lead in providing content. Ways of incentivising training commitment should be explored as part of this.

Take-up of business advice and support

Existing tourism enterprises can sometimes benefit from outside advice to help develop their businesses and become more competitive. Working with other agencies, BCBC should encourage businesses to identify training needs and skill gaps, and help them access the right expertise and support, provide advice about grant opportunities, and disseminate market intelligence to help them plan ahead. One area, ripe for development, is helping businesses understand how to exploit new media such as social networking.

To demonstrate the benefits of this, one possibility is to set up a skills night once a month for stakeholders for example or to work with a handful of businesses each year as part of a mentoring programme with a view to improving their business
efficiency and profitability. The results will be shared with the industry to encourage others to follow.

Encouraging new business start-ups in tourism

There are opportunities to encourage more people to become actively involved in tourism and this is one way of spreading the benefits of tourism more widely. For some this might be out of personal interest but for others it could be a business opportunity. This might include encouraging people to develop B&B in their houses or perhaps consider home stay, encouraging farm diversification into accommodation or activity tourism, and the idea of identifying tourism ambassadors and training green badge guides, possibly linked to the Heart & Soul Campaign. Support and advice will be provided to help people pursue these initiatives.

Brecon Beacons Ambassadors
"Brecon Beacons National Park Ambassadors are tourism businesses passionate about the National Park. They will help you to get to the Heart of the Park by helping you discover your own magical memory. Our Ambassadors attend a three day training programme which helps them to discover and understand what makes a visit to our National Park special. By meeting one of the Ambassadors you will catch their passion and your visit will be made extra special. These Ambassadors' have taken time out of their business to make sure they offer outstanding information and service"

Action points

- Promote and roll out a skills programme to help SME performance and make full use of the existing Croeso y Cynnes programme
- Use tourism handbook, newsletter and networking meetings to raise awareness of what BCBC has to offer
- Provide business support and advice service, signposting opportunities
- Develop a business mentoring scheme
- Identify and support tourism ambassador scheme

9. MORE EFFECTIVE ORGANISATION AND DELIVERY

This section of the report is concerned with establishing the right organisational structures and processes to deliver the strategy and manage tourism in BCB. This is about harnessing the energies of all the tourism sectors in the County and getting people to pull in the same direction. Without this in place, progress is likely to be fragmented and slow. The two key areas are:

- Destination management
- New structures

Programme 8 DESTINATION MANAGEMENT

The aim

Adopting an integrated and sustainable approach to managing and developing tourism to support a thriving tourism sector and generate wider benefits for the County.

The challenge

BCBC has a history of adopting a positive and supportive stance to tourism in the County but there is scope for further improvement in terms of engaging with other stakeholders and adopting a more integrated approach to tourism.

A successful tourism destination is one where a range of different stakeholders and businesses come together to deliver a consistently good experience for the visitor and where tourism is integrated into the overall life of the place and welcomed as an asset. This is the aspiration but it is hard to achieve. It is made more difficult because of the range, diversity and number of people that have an impact on the visitor experience.

To help achieve this, the aim is to put in place a more systematic approach to tourism referred to as destination management. (See briefing note Appendix 11 for further details)

What we want to see happen

Adopting destination management

Destination management is about adopting a systematic and holistic approach to making BCB work as a visitor destination. It embraces the idea of sustainability – i.e. tourism which brings economic benefit, is sensitive to the environment, is welcomed by the community and results in satisfied visitors. It also takes account of Integrated Quality Management (IQM), an idea introduced some years ago in Wales (and EU) which focuses on delivering a quality experience to the visitor.

This involves:

- Setting out a clear practical strategy and plan which attracts wide support from the relevant stakeholders. This is the first stage in that process.

- Communicating with and involving tourism enterprises and other organisations in planning and decision-making, and developing a closer partnership between public and private sector.

- Seeking to improve the quality of the overall experience and encouraging others to do so. Providing support through training.

- Communicating with visitors through marketing activity and provision of information.

- Monitoring tourism impacts and visitor needs and satisfaction. Evaluating success and adjusting the plan accordingly.

Forest of Bowland
The European Charter for Sustainable Tourism in Protected Areas has been awarded to over 70 national parks and other protected areas in Europe. The Charter requires the presence of a stakeholder forum of different interests to be responsible for tourism management, working to an agreed five year strategy and action plan. In the Forest of Bowland, Lancashire, the partnership involves the AONB, local authorities, area tourist board, local development agencies and representatives of tourism businesses. A sustainable tourism strategy was drawn up in 2004 which formed the basis for the partners' work together and has recently been renewed. A network of sustainable tourism businesses has been formed, who have quality and green business certification and are committed to work together on local initiatives to improve the local economy, conservation and environmental management, visitor information and marketing.

An evidence-based approach

An important part of destination management is ensuring that action is based on sound evidence. BCBC already has an existing programme of research which needs to be reviewed and supplemented where appropriate in the light of the strategy. It is felt that the current research programme, though comprehensive, is based on satisfying external benchmarking rather than a meaningful intrinsic need or thirst for market intelligence. Consequently a review of the research programme commencing with the identification of need for local data to feed the destination management and marketing processes a priority. Key areas for research include the following.

- A visitor survey to ascertain visitor characteristics and profile and also probe visitor satisfaction. (To take place at least every 3 years).
- Compiling and sharing of information on accommodation occupancy and attractions visits to monitor trends. Business trends survey. (annual)
- Monitoring bed stock capacity and changes (ongoing)
- Continuing to subscribe to the STEAM economic impact model or similar. (at least every two ears)
- Qualitative research to explore requirements of particular target segments (as and when required)
- Monitoring of impact of marketing initiatives (annual)
- Mystery shopper evaluation of TIC service. (annual)
- Monitoring of environmental and community concerns relating to tourism. (ongoing)

BCBC should also act as a clearing house for market intelligence, passing down information on tourism and market trends to the tourism industry

Monitoring key performance indicators

In order to measure progress on the strategy it is useful to select some indicators which can be compared over time. These don't tell the whole story but will provide some indication of whether the destination is moving in the right direction. The following key performance indicators (KPIs) are suggested:

KPI	Source
Staying visitor numbers	STEAM
Staying visitor nights	STEAM
Staying visitor spend	STEAM
Total visitor spend	STEAM
Visitor satisfaction level	Visitor survey
Serviced occupancy rate	Business returns
Caravan/self catering occupancy rate	Business returns
% bed spaces graded 4/5 star	Accommodation survey

However, we recommend that the BCBC develop their own indicators internally in order to accurately reflect the performance of their various tourism related services.

Action points

- Adopt the principles of destination management
- Review existing tourism research programme with emphasis on local need and to feed destination management processes.
- Undertake regular programme of research
- Develop meaningful performance indicators for BCBC tourism related services.
- Monitor and report on key performance indicators

Programme 9: NEW STRUCTURES

The aim

Establish the right organisational structures to deliver the tourism strategy, harnessing the energies and expertise of the public, private and voluntary sectors.

The challenge

BCBC has traditionally taken the lead on managing and marketing tourism in the County and there is a tourism unit in the Council. There has been a tourism association in Porthcawl which is in the process of extending its remit to cover the rest of the Borough. There are also twice yearly meetings of the Tourism Forum and private sector and community interests are represented on the Rest Bay and Newton Management Groups. A Rural Tourism Working Group has also been established to steer the Rural Tourism Programme.

There is a need to review these arrangements which have grown up over time, in the light of constraints in local government resources and the aspirations of the strategy. The aim is to encourage closer working and communication between the various and effective implementation of the strategy.

What we want to see happen

A designated lead body for tourism

Effective destination management needs a champion or a lead body. Traditionally, local authorities have taken on this role but in some parts of the UK independent bodies have been established to manage and market tourism. These are sometimes called Destination Management Organisations (DMOs), essentially mini tourist boards. They are often constituted as membership organisations, with an independent board, raise their own revenue but are generally also dependent on local authority or public sector support. Their primary focus tends to be marketing activity.

For a variety of reasons we do not think this approach is appropriate for BCB (see discussion paper) and recommend that the existing Tourism Unit continues to act as the DMO but guided and steered by a new Bridgend Tourism Partnership (see below). The internal structure and deployment of staff will need to be reviewed in the light of the priorities identified in the strategy.

If further reductions in resources take place then we recommend exploring the idea of setting up an arms length joint tourism unit with a neighbouring authority, or authorities, to deliver tourism services on behalf of the participating authorities.

A county-wide tourism association

To represent the interests of the tourism industry, and to promote better communication, a more vigorous County-wide tourism association should be established. This could evolve from the existing tourism association but it may be better to make a fresh start. This organisation should have some permanent administrative support to enable it function more effectively and should undertake various activities, possibly through a SLA with the Council. Some funding is available from CRT to support this. Its role would be foster networking amongst its members, act as a voice for the industry, co-ordinate private sector initiatives, and disseminate information. It would nominate some of its Board members to the Tourism Partnership.

BRECON BEACONS TOURISM
actively working together

BRECON BEACONS TOURISM
actively working together

Example of Best Practice

A Tourism Partnership to drive tourism

A Bridgend Tourism Partnership should be established. This body would consist of a small group of around10 individuals drawn from the new Tourist Association, BCBC and other relevant interests. It would be an advisory group but play a key role in planning activity, setting priorities, tackling issues and co-ordinating action. It would directly influence the work of the Tourism Unit. We envisage this group meeting 4 times a year.

The role of everyone involved in the partnership should be to deliver the strategy and not lose sight of our aim to constantly seek ways to improve on the visitor experience along every stage of their interaction with us. This includes ensuring quality even at the initial process that influences their decision to visit us, through to their visit, their return journey home and post visit communication.

A role for local groups

Local groups operating in specific areas of the County or with a specific remit (e.g. Newton and Rest Bay Management Groups) would be encouraged to take on responsibility for driving through certain initiatives within the strategy. The Tourism Development Area frameworks (see next section) would provide an agenda for these groups.

Action points

- Retain the BCBC tourism unit as the lead executive body for tourism
- Review the staffing and work priorities of the BCBC Tourism Unit in the light of the strategy priorities
- Establish a new county-wide tourist association
- Establish a Tourism Partnership group

10. TOURISM DEVELOPMENT AREA FRAMEWORKS

The policies and initiatives set out in the previous sections apply right across the County. This section, however, homes in and looks in more detail at what needs to happen in those areas of the County where there is most potential to grow and develop tourism in the future. We have called these places Tourism Development Areas (TDAs).

The Tourism Development Areas are:

- Porthcawl and the coast
- The Valleys

These areas are very different in character and start from different positions. They will have different priorities and will involve different sets of stakeholders. They have been selected because they have a strong inherent resource, a coherent identity and clear potential for change and growth. These will spearhead the development of tourism in BCB over the next five years.

This doesn't mean, however, that other parts of the County are excluded from tourism development or have no role to play in the visitor economy. Bridgend centre, for example, is not singled out as a Tourism Development Area because we do not see its strength in tourism terms or having potential for significant tourism growth. Nevertheless, this does not mean that visitors won't be encouraged to use the shops and leisure facilities there, attend events or stay in the hotels in the town centre or along the M4 corridor.

For each Tourism Development Area we have followed a broadly similar structure to the programme areas looking at the aim, challenge, vision for the area and what we want to see happen.

PORTHCAWL AND THE COAST

This TDA centres on the town of Porthcawl but also includes the coast on either side from Kenfig to Merthyr Mawr which is a natural extension of the Porthcawl product.

The aim

To realise the tourism potential of Porthcawl and the adjoining coastline and turn this into one of the best known, vibrant and desirable, all-year-round short break and day trip destinations in Wales.

The challenge

Porthcawl has a long track record in tourism stretching back over 150 years and although it is no longer the premier resort it once was it still attracts large number of visitors, contains the majority of the accommodation stock in BCB and has retained a certain character and charm. The beaches, seafront and harbour are a valuable resource which will continue to exert an enduring appeal for visitors. This is the primary tourism asset in the County and has the potential to grow and develop. That is why the area has been designated as a TDA.

Key to this rebirth is the plan for the regeneration of the Porthcawl harbour and waterfront. This includes a major new retail development on the site of the existing car park, the extension and refurbishment of the harbour, new leisure development, extensive improvements to the public realm and new residential development extending around Sandy Bay. The first stage of this plan, the retail development is likely to begin within the next year and funding has been awarded under the Centres of Excellence programme for improvements to the harbour. Other development projects are also being investigated at Newton and Kenfig but much of the coastline to the west and east, though highly attractive, is environmentally sensitive and subject to planning constraints and protection.

This plan sets out the priorities for the next 5 years to realise the tourism potential of the area. It is consistent with the overall tourism strategy and the wider regeneration strategy for Porthcawl.

The vision

A premier seaside resort and character waterside town with a bustling harbour, lively town centre, interesting shops, and good places to eat. A creative place with local artists and galleries and a strong design ethos. A Mecca for surfing enthusiasts and a great place to bring the family to enjoy the spectacular beaches. A good place to come and stay all year round with a choice of good quality hotels and bed & breakfasts, an award winning caravan park and cutting edge self catering. A base from which to explore the beautiful countryside and valleys on foot and by bike.

What we want to see happen in Porthcawl

We support the regeneration plans for Porthcawl which will develop some derelict sites and generate resources for environmental improvements along the seafront and around the harbour. Areas that need further consideration and refining from a tourism perspective are the impact and first impressions on arrival, the design and quality of the public areas and promenades, the scope for additional accommodation development and the type and mix of leisure uses to be attracted. These points are elaborated below.

Improve the quality and range of accommodation

The emphasis is on improving the range of and quality of accommodation on offer to take account of changing market needs and growth potential. The priorities are to:

- Explore the potential for developing a medium sized site (c100 pitches) for touring caravans, possibly in the vicinity of Trecco Bay either in conjunction with a commercial operator or the Caravan Club.

- Identify some smaller sites suitable for accommodating overnight stays by camper vans and motor homes at Kenfig, Rest Bay and Sandy Bay.

- Continue to resist the loss of hotels and guesthouses in Porthcawl unless it can be shown that these are no longer commercially viable. Explore ways to stimulate outside interest and attract new investment.

- Seek to attract a new modern boutique hotel or quality restaurant with rooms, to the waterfront site adjoining the harbour.

Investing in new facilities and reasons to visit

There is a need to invest in new facilities and attractions to raise the profile of the area, draw in visitors and encourage them to stay longer. Priorities are to:

- Exploit the potential of surfing. This is a key asset for Porthcawl, centred on Rest Bay but is also relevant to Sker Beach, Sandy Bay and Trecco Bay. This requires an integrated approach involving the development of new facilities, a management plan and promotional activity. The first step is to agree a way forward with the various interests and draw up a development plan.

- Develop the concept of 'Creative Porthcawl' to capitalise on the local enthusiasm for the arts. To act as a focus for this, the idea of developing an arts/craft centre in the Jennings buildings with studio space, café and gallery should be explored further.

- Continue to support a varied programme of arts, cultural and entertainment activity in the Grand Pavilion, an important focus of activity in the town

- Work with the events development team to support and grow a programme of events, some of which will be capable of developing into major draws in their own right. Local businesses should be encouraged to support these events through special promotions, themed decorations and late night opening.

- Support the concept of a Porthcawl Golf cluster and golf package

Improving the infrastructure and atmosphere

Improving the general environment and the look and feel of the town will make it a pleasant place in which to spend time and encourage repeat visits. Priorities are to:

- Undertake the proposed improvement works to the harbour and the associated environmental works to the surrounding area. This will be a major centre of visitor activity.

- Draw up a more detailed master plan to provide a unified concept for the promenade improvements. This should embrace the idea of creating focal points of activity and clustering commercial activity to add interest and variety and encourage movement along it.

- Extend the road train, cycle route and footpaths to encourage movement between Trecco Bay and Rest Bay.

- Improve the gateway to Porthcawl with a proposed retail development that will result in a very different first impression for the visitor as existing views of the sea will be replaced by buildings. Consideration needs to be given to the impact of this on the visitor and how the design can be used to make this a positive experience. The location of the TIC needs to take account of visitor desire lines.

- Review signage and information around the town centre to ensure that visitors can easily find their way around. Ideally it should reflect a new, fresh identity for Porthcawl and reflect the creative Porthcawl message and the overall branding guidelines for the area as a whole. It should also relate to the proposals for signage elsewhere in the County.

- Enhance the overall presentation of the town to project a livelier atmosphere at key periods with a regular programme of entertainment, street theatre, live music, open air seating etc.

East Beach Café
East Beach Café, Littlehampton, is an iconic piece of architecture representing a major capital investment. The café was designed by artist Thomas Heatherwick. It has won numerous awards for design and sustainability and received considerable press coverage, not only for its architecture and setting but also for its food.

Development opportunities elsewhere along the coast

The draw outside the built-up area primarily lies in the high quality, unspoiled natural landscape and coast. The priority is to maintain and enhance this and manage visitor activity so that it doesn't detract from the environment. The priorities are to:

- Develop the potential of the Kenfig Visitor Centre to act as a draw for visitors and provide better facilities. Areas to consider include accommodation aimed at youth groups and activity tourists, an overnight site for motor homes, café and shop, a wildlife interpretive centre.

- Persuade private landowner to properly landscape car park and access at Newton Bay. This is currently an eyesore and detracts from the attractive setting of the beach.

THE VALLEYS

This TDA comprises the three valleys to the north of Bridgend and the M4 (the Llynfi, Garw and Ogmore valleys). The potential that rural Bridgend has to offer has been highlighted as part of the LDS and RDP Business Plan (2007-2011.

The aim

To realise the tourism potential of the Valleys by strengthening and developing the rural recreational infrastructure as a basis for developing and expanding tourism, helping to generate economic benefit and business opportunities.

The challenge

The three Valleys have been transformed over the last 20 years with much of the legacy of the heavy industrial past being remedied. The valleys now reveal some beautiful scenery, large open access areas and some distinctive cultural heritage but the resource remains low key and unexploited. Those who know the valleys appreciate the major environmental improvements but the new visitor will form their impression from not only the restored natural environment but also the number of empty premises, tired public realm, lack of facilities and the dearth of obvious attractions.

In essence, this is an embryonic destination with potential based on the now very attractive countryside and good opportunities for access by walkers, cyclists and other active visitors. That is why the area has been designated as a tourism action area.

However, although the inherent resources are good, they are not exceptional in competitive terms. Supporting infrastructure in terms of accommodation, retail, catering and other services is very limited at present. To attract visitors from outside the area, there is a need and opportunity, to turn these 'good but not exceptional' resources into something special by creating exemplars. First class infrastructure with good amenities, presented well with added value and readily accessible will attract additional users. These attributes will be considered even more attractive than exceptional inherent resources by many.

This plan highlights priorities for the next 5 years. It is consistent with the overall tourism strategy and the strategy in the Outdoor pursuits Study (2010).

The vision

An exemplar area for outdoor pursuits with a range of easily accessible, sustainable, high quality activities provided and supported by local suppliers who can provide a personal and authentic introduction to the Valleys heritage and made available for all users.

What we want to see happen in the Valleys

The plan is to develop the accommodation offer and package up activities and experiences to make them more accessible to the casual visitor playing to the area's special qualities and strengths. Some further investment is required in facilities and infrastructure to strengthen the appeal and support visitor activity.

The Outdoor Pursuits Study identifies a range of potential projects under the headings of marketing initiatives, links, hubs and management. A slightly different grouping is adopted here but the projects are common.

Improving the accommodation offer

There is very little visitor accommodation at present in the Valleys which inhibits the development of staying tourism. The aim is to gradually expand this to cater for the target markets. Priorities are to:

- Encourage the development of small scale accommodation enterprises to include B&Bs, pubs with rooms, bunkhouse and hostel style accommodation, self catering cottages and certified '5 van' caravan sites. New forms of alternative self catering are essential in helping the destination meet its branding aspirations in offering a different experience, and doing things differently.
- Seek overnight, short stay accommodation for motor homes and camper vans. There may be potential at country parks and in Maesteg.
- Improving communication between activity providers and accommodation enterprises to help ensure that accommodation is geared to meeting the needs of the activity market.

Creating reasons to visit

The area currently has a low profile as a place to visit. The aim is to raise awareness of what is on offer and provide facilities and events which will draw new visitors. Priorities are to:

- Develop some simple interesting and unusual packages to enable visitors to get a taste of the real Valleys. These could be overnight packages or shorter tours based around a heritage theme, cultural event, learning a skill, entertainment or guided walk. These ideas should be generated by local people or community groups.

- Develop a programme of ‘taster’ sessions in various activities, capitalising upon the physical resource and associated opportunities; Nordic walking, cycling, riding, golf, fishing, nature/bird watching, water and other adventure sports. These could be promoted at places such as Designer Outlet Centre at Sarn and Bryngarw Country Park.

- Create some events which will bring people into the Valleys. These might be quirky (a cycle / kite festival) or perhaps based around sporting events and challenges which will attract participants and spectators

- Support the creation of tourism ambassadors - a pool of enthusiastic and knowledgeable local people who can spearhead the development and delivery of special and distinctive experiences which can be promoted to visitors.

- Support the long term development of the Garw Valley Railway

Improving infrastructure and support facilities

Further investment is needed to fill in the missing links in the good network of recreational routes and improve the range of facilities on the ground. Priorities are to:

- Complete the network of recreational routes and enhancing opportunities for walking, cycling and riding. Key missing links in the network include the community route in Llynfi Valley, the Wales Coastal Path in Merthyr Mawr, National Cycle Route 4 Tondu, Blackmill, cycle routes through to Afan Forest from Maesteg.

- Supplement facilities at key hubs which provide major gateways and access points to recreation facilities. Significant investment has already been put into these, but some are punching below their weight and with further investment they could play a bigger role in developing as visitor assets. Priorities include Parc Slip, Bryngarw, Blaengarw and Maesteg.
- Review the provision of visitor information, signage and interpretation.

Part 3

Action plan

TOURISM ACTION PLAN

Agencies: BCBC Council, Ti tourism industry, TCM town centre manager, Ao activity operators, NRB Newton/Rest Bay management groups, C community organisations/social enterprises, Do designer outlet, VP Valleys Partnership, VoG Vale of Glamorgan, CRT Capital Region Tourism, Wv Western Valleys SRA, Rd Rural Development Partnership (Reach), SW Southern Wales Tourism, WGH Wales Golf Holidays
Resources: 0 – no costs /met from existing resources, 1 – minor cost implications, 2 – significant cost implications

Action	Lead agency	Support agencies	Timing Year 1-5	Resource implications
1. Compelling events				
Review the strategic events fund and its allocation	BCBC	TCM	1	0
Establish a dedicated events team	BCBC		1	1
Identify and prioritise some events for development and work with them	BCBC	TCM/Ti	1-5	1
Seek ways to generate more benefit from Swansea/Cardiff events	Ti	BCBC	1-5	0
Improve information dissemination on local events	Ti	BCBC	1-5	1
Draw up proposals to improve animation in key locations at key periods	TCM	BCBC	2-3	1
2. Selling strengths				
Explore and develop surfing development plan for Porthcawl	NRB	BCBC,Ao, Ti	1	0
Implement improvements /development	BCBC		2-5	2 WAG funding
Prepare a guide for accommodation operators outlining needs of surf market	Ao	BCBC	1-2	0
Encourage new forms of surf friendly self-catering development	BCBC		2-5	0
Promote Porthcawl as the surfing centre of South Wales	BCBC			1
Develop the Surf Cult / Adrenaline Festival	BCBC	Ao, Ti,	1-5	1
Explore potential for attracting new competitions and events	Ao	NRB, BCBC	1-5	1
Review and strengthen beach management arrangements	NRB	BCBC	2	0
Establish golf cluster.	BCBC	Ti, Ao	1	0
Explore potential for a Porthcawl Golf / Golf Coast holidays promotion	Golf cluster	WGH	2	0
Raise awareness of golf tourism market amongst operators	BCBC	Ao/Ti	1-5	0

	Lead agency	Support agencies	Timing Year 1-5	Resource implications
3. Collaborative marketing				
Continue to deliver destination marketing through GHC campaign	BCBC/VoG	CRT	1-5	0
Improve GHC website	BCBC/VoG		2-3	1
Review need for destination brochure	BCBC/VoG		1-5	Possible saving
Actively participate in Valleys Heart & Soul campaign	BCBC	CRT, Ti	1-3	0
Review participation in overseas marketing	BCBC	CRT	1-5	Possible savings
Produce some simple brand guidelines for BCB	BCBC	Ti	1	0
Consider VFR campaign aimed at local residents	BCBC		1	1
Identify and provide marketing support to marketing clusters	BCBC	Ti	1-5	1
4. Better accommodation				
Ensure the Local Development Plan reflects the above needs.	BCBC		1-2	0
Seek the development of a new flagship boutique hotel in Porthcawl.	BCBC		2	0
Actively encourage investment in existing hotels and guesthouses in BCB	BCBC		1-5	0
Provide business advice and support to small accommodation enterprises.	BCBC		1-5	0
Explore potential for new touring caravan site.	BCBC		1-2	0
Seek suitable sites for overnight stops for motor homes	BCBC		1-5	0
5. Accessible experiences				
Prepare tourism handbook	BCBC	Ao	1	1
Organise networking / information sharing meetings	BCBC	Ti, Ao	1-3	0
Explore the idea of developing some themed packages	BCBC	Ti, C	2-3	1
Research activity visitors' accommodation needs	Ao,	Ti		1
Identify and support a tourism ambassador scheme	BCBC	C		1
Produce and distribute an activity sheet	BCBC			1
Identify tour operators who might feature BCB	BCBC	CRT,SW	2-3	0
Develop programme of events at Designer Outlet	Do	BCBC, Do. Ao	1-5	1

	Lead agency	**Support agencies**	**Timing Year 1-5**	**Resource implications**
6. Improved infrastructure				
Implement the waterfront regeneration plans in Porthcawl	BCBC	Ti	1-3	2 (WAG funding/ planning gain)
Explore the opportunity for developing a surf centre	BCBC	NRB, Ao	1-2	2 (WAG funding)
Explore the potential for developing a creative arts centre	BCBC	C, arts sector	1-3	2
Support projects to fill key gaps in recreational routes	BCBC		1-5	2
Identify projects for improving visitor facilities at key hubs	BCBC		1-5	(WAG funding)
Review information and interpretive provision across the county and support a common approach	BCBC		1-3	2
7. Skilled people				
Promote and roll out Croeso y Cynnes programme	CRT	BCBC	1-5	0
Use tourism handbook, newsletter and networking meetings to raise product awareness	BCBC		2	0
Provide business support and advice service, signposting opportunities	BCBC	CRT	1-5	0
Develop a business mentoring scheme	Ti	BCBC	2-3	1
Identify and support tourism ambassador scheme	BCBC	VP	1-5	0
8. Destination management				
Implement the principles of destination management	BCBC		1-5	1
Undertake regular programme of research	BCBC	Ti	1-5	1
Monitor and report on key performance indicators	BCBC		1-5	0
9. New structures				
Retain the BCBC tourism unit as the lead executive body for tourism	BCBC		1-5	0
Review the staffing and work priorities of the BCBC Tourism Unit	BCBC		1	1
Establish a new county-wide tourist association	Ti	CRT, BCBC	1	1
Establish a Tourism Partnership group	BCBC	Ti, CRT, C	1	0

	Lead agency	Support agencies	Timing Year 1-5	Resource implications
PORTHCAWL AND THE COAST				
Improve quality and range of accommodation				
Explore the feasibility of new touring caravan site	BCBC		1-2	0
Identify short stay sites for motor homes	BCBC		1-5	0
Review planning policy on loss of hotels in Porthcawl	BCBC		1-2	0
Stimulate outside interest in investment	BCBC	CRT	1-5	1
Attract new hotel/restaurant	BCBC	Ti	1-5	0
Investing in new facilities and reasons to visit				
Explore and develop surfing development plan for Porthcawl	NRB	BCBC, Ti ,Ao	1	0
Implement improvements /development	BCBC	BCBC	2-5	2 WAG Funding
Prepare a guide for accommodation operators outlining needs of surf market	Ao	Ti , BCBC	1-2	0
Encourage new forms of surf friendly self-catering development	BCBC	Ti ,Ap , TCM	2-5	0
Promote Porthcawl as the surfing centre of South Wales	BCBC	Vog,Ti,Ao,TCM	1-5	1
Develop the Surf Cult / Adrenaline Festival	BCBC	TCM,Ao,Ti	1-5	2
Explore potential for attracting new competitions and events	Ao	BCBC,Ti,TCM,NRB	1-5	1
Review and strengthen beach management arrangements	NRB	BCBC,Ti,TCM	2	0
Develop concept of Creative Porthcawl	BCBC	Ti,TCM,	2-3	0
Explore feasibility of arts/craft centre in Jennings building	BCBC	TCM	1	0
Support the golf cluster and golf packages	BCBC	TI/Ao	1	1
Work with events team to expand events programme	BCBC	TCM	1-5	1

	Lead agency	Support agencies	Timing Year 1-5	Resource implications
Improving infrastructure and atmosphere				
Implement the waterfront regeneration plans in Porthcawl	BCBC	Ti	1-3	2
Review the gateway proposals	BCBC		2-3	
Draw up design framework for promenade improvements	BCBC		2-3	1
Review signage and information provision. Link to Creative Porthcawl.	BCBC	TCM, Ti	1-2	2
Develop a programme of animation and entertainment to improve street scene	BCBC	TCM, Ti	1-5	2
Development opportunities along the coast				
Explore the potential for developing visitor facilities at Kenfig	BCBC		1-2	2
Improve access and parking arrangements at Newton Bay	Ti	BCBC, NRB	1-5	0
THE VALLEYS				
Improving the accommodation offer				
Encourage the development of small scale accommodation enterprises	BCBC	C, CRT, VP	1-5	0
Seek suitable sites for overnight stops for motor homes	BCBC		1-5	0
Organise networking / information sharing meetings	Ti	BCBC	1-5	0
Research activity visitors' accommodation needs	BCBC	Ti, TCM	1-5	1
Creating reasons to visit				
Explore the idea of developing some themed packages	BCBC		1-5	1
Develop and promote taster sessions	BCBC		1-5	2
Create and support some new events	BCBC	Do, C, VP, Wv	1-5	2
Identify and support a tourism ambassador scheme	VP	BCBC ,C	1-5	0
Produce and distribute an activity sheet	BCBC		1-2	1
Support development of Garw Valley Railway	C	BCBC, VP	1-5	0

Improving infrastructure and support facilities				
Complete network of recreational routes	BCBC		1-5	2
Improve facilities at key hubs	BCBC	Rd, Wv	1-5	2
Review visitor signage and interpretation	BCBC		1-5	2

Part 4

Supporting material and papers

APPENDIX 1
BRIDGEND ACCOMMODATION SURVEY

Survey sent to:
22 hotels
22 Guest House / B&Bs

Overall response rate:

Total	48%
Hotels	45%
Guest House / B&Bs	50%

Accommodation type	Count	%
Hotel	10	47%
Guesthouse	9	43%
B&B/Farm	1	5 %
Other*	1	5%

* Conference centre with accommodation

Location	Total	Hotels	GH/B&Bs
Bridgend	9 (43%)	7 (64%)	2 (20%)
Porthcawl	8 (37%)	2 (18%)	6 (60%)
Valleys	2 (10%)	0	2 (20%)
Other rural	2 (10%)	2 (18%)	0

No of beds	Total	Hotels	GH/B&Bs
Under 5	6 (29%)	0	6 (60%)
5-10	5 (24%)	1 (9%)	4 (40%)
11-30	7 (32%)	7 (64%)	0
31-50	1 (5%)	1 (9%)	0
Over 50	2 (10%)	2 (18%)	0

Grading	Total	Hotels	GH/B&Bs
Not Graded	5 (24%)	3 (27%)	2 (20%)
1 star	0	0	0
2 star	1 (5%)	0	1 (10%)
3 star	9 (43%)	6 (54%)	3 (30%)
4 star	5 (24%)	2 (18%)	3 (30%)
5 star	1 (5%)	0	1 (10%)

Occupancy	Total (14)	Hotels (9)	GH/B&Bs (5)
Average	60%	60%	60%
Range	30%-78%	30%-78%	40%-76%

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
W/d	1 5%	1 5%	1 5%	3 15%	3 15%	2 10%	3 15%	3 15%	4 20%	1 5%	1 5%	1 5%
W/e	1 5%	2 10%	2 10%	1 5%	2 10%	6 30%	5 25%	6 30%	4 20%	1 5%	3 15%	2 10%

⇨ Most businesses are not turning away business at all during the year, although some are operating at capacity during the summer, especially at weekends.

	Total (15)	Hotels (8)	GH/B&Bs (7)
Overseas	20%	17%	23%
Domestic	80%	83%	74%

⇨ Visitors are overwhelmingly domestic, although perhaps more overseas than might be expected?

	Total (16)	Hotels (8)	GH/B&Bs (8)
Short breaks	24%	21%	27%
Longer holidays	3%	3%	2%
VFR/weddings	19%	16%	23%
General business	32%	34%	30%
Contractors	22%	26%	18%

⇨ Important sectors in the leisure market are short breaks and VFR/weddings. Very low percentage of long holidays. The business sector, in particular long term contractors are very important generators of business for the accommodation sector.

	Total (16)	Hotels (8)	GH/B&Bs (8)
Individuals	55%	61%	48%
Couples	34%	29%	39%
Small groups friends	9%	8%	10%
Coach groups	2%	2%	3%

⇨ Mostly it's individuals and couples, reflecting the importance of short breaks and contractors. Very few coach groups.

In the last 5 years has the level of your business …

	Total (16)	Hotels (8)	GH/B&Bs (8)
Increased significantly	1 (6%)	1 (13%)	0
Increased a little	4 (25%)	1 (13%)	3 (37%)
Stayed same	3 (19%)	2 (25%)	1 (12%)
Declined a little	4 (25%)	2 (25%)	2 (24%)
Declined significantly	4 (25%)	2 (25%)	2 (24%)

⇨ about half of businesses thought business had declined in the past five years

Reasons for this …

Positive – more awareness, more business in Bridgend, good contacts with companies,

Negative – economic climate, more competition (cheap motorway hotels), they were going to close but now they're not, less contractors, little reason for visitors to come to Porthcawl

How optimistic are you about business prospects in the medium term?

	Total (16)	**Hotels (8)**	**GH/B&Bs (8)**
Very optimistic	0	0	0
Quite optimistic	7 (44%)	5 (63%)	2 (25%)
Neither	5 (31%)	2 (25%)	3 (38%)
Quite pessimistic	1 (6%)	0	1 (13%)
Very pessimistic	3 (19%)	1 (13%)	2 (25%)

⇨ People are cautiously optimistic?

Do you get any business generated by or associated with any of the following..

	No, none			Yes, small amt			Yes, important		
	T	H	G	T	H	G	T	H	G
Golf courses and events	4	2	2	8	3	**6**	3	3	0
Designer outlet centre	**8**	3	**5**	7	**5**	3	0	0	0
Surfers	**11**	**7**	**4**	4	1	4	0	0	0
Walkers/cyclists	2	2	0	**12**	**6**	**7**	1	0	1
Events and festivals	2	0	2	8	4	4	**5**	**4**	**2**

Allocating a score of No = 0, Small amt = 1 and important = 2, overall scores for the total sample are:

Golf courses / events	0.93
Designer outlet centre	0.47
Surfers	0.27
Walkers/cyclists	0.93
Events / festivals	1.20

⇨ Events and festivals, and walkers/cyclists are important sources of business for most respondents while the designer outlet centre and golf courses /events do generate some business. Surfers have yet to make an impact in terms of creating overnight stays in the area.

Any other important influences …

Local businesses / contractors / economic climate
5 star rating
Rugby in Cardiff / events at Margam Park
Web site
Only guesthouse in Maesteg
Good weather

How long have you been running the business …

Range from 4 months to over 20 years.

	Total (16)	**Hotels (8)**	**GH/B&Bs (8)**
Less than 1 year	1	1	0
1-5 years	3	0	3

6-10 years	5	1	4
Over 10 years	7	6	1

Are you planning to sell the business or retire in the next 5 years?

	Total (16)	Hotels (8)	GH/B&Bs (8)
Yes	3 (19%)	2 (25%)	1 (13%)
Possibly	3 (19%)	1 (13%)	2 (25%)
No	10 (62%)	5 (63%)	5 (63%)

Thinking about tourism prospects in Bridgend County Borough, to what extent do you agree or disagree with the following statements?

	Total (16)	Hotels (8)	GH/B&Bs (8)
There is potential to grow tourism in Porthcawl	4.7	4.8	4.5
The Valleys have untapped potential for outdoor activities	3.9	3.9	4.0
The potential of surfing is underdeveloped in Porthcawl	4.1	4.0	4.3
More emphasis needs to be placed on generating visits through events and festivals	4.1	4.1	4
More could be made of golf tourism in the area	4.4	4.3	4.6
We don’t make enough of the area’s culture and heritage	4.3	4.4	4.3
There’s no future for tourism in Bridgend CB	2.3	1.8	2.8
We need more provision for touring caravans and mobile homes	3.5	3.0	4.2
There is not enough for visitors to see and do in the area	3.3	2.6	4.0
We should be selling more ‘packaged’ experiences	3.7	3.6	3.7

- ⇨ very positive about Porthcawl and the Valleys
- ⇨ very positive about specific ideas such as surfing, golf and culture / heritage
- ⇨ general agreement that there isn’t enough for visitors to see and do in the area
- ⇨ quite positive about the need for more touring caravans / mobile homes and more packages
- ⇨ agree that there IS a future for tourism in Bridgend CB

APPENDIX II
DESTINATION MANAGEMENT – BRIEFING PAPER

This is a discussion paper which sets out the basis for our recommendations in the strategy and provides some addition background material

What is destination management?

This paper discusses some of the issues around destination management looking at organisation structures and processes. The paper draws on the work and thinking we undertook for the VW in 2009 and also on experience gained from working in many destinations both in the UK and abroad.

Destinations are defined as identifiable areas which comprise a mix of natural and man-made attractions, amenities and services which go together to create the visitor experience.

Destination management is about co-ordinating the delivery of these various elements to create a good experience for the visitor and enhance the reputation and appeal of the destination.

Successful destination management however is more than just about marketing an area and satisfying visitors. People have come to realise that developing sustainable destinations requires wider thinking –involving developing a competitive and successful tourism sector, taking account of the views and aspirations of the local community and seeking to safeguard the quality of the local environment and protecting natural resources. Without this broader approach there is a danger that tourism will simply burn itself out or become an unwelcome guest.

Managing a destination pose quite a challenge. There are lots of different players involved in determining the quality of the visitor experience, embracing the public, private and not-for-profit sectors. There is no one single organisation in sole charge. Ensuring that tourism is integrated into the wider picture makes it even more complicated. This means that destination management has to bring people together and be open to outside influence.

We can summarise the key elements of destination management as follows:

- Drawing up and getting broad agreement to an overall strategy and plan for the destination. Ensuring this fits into the wider picture.
- Providing a mechanism for engaging tourism enterprises and other stakeholders in the process
- Focusing on continuing to improving the overall quality of the visitor experience from arrival to departure and encouraging others to take supporting action.
- Ensuring the right product and infrastructure is in place to deliver the above.
- Marketing the destination to visitors and providing information to enable them to get the most from their visit.
- Monitoring visitor satisfaction and measuring impacts of tourism.
- Reviewing priorities and adjusting action in response to changing circumstances.

Whilst this is an inclusive process it works best when there is an identified organisation which can lead and co-ordinate the process. The term Destination Management Organisation (DMO) is generally used to denote such a body. DMO is often taken to imply a separately constituted public-private body, with strong private sector engagement (and often leadership). However it need not be so. In the past, in most destinations the 'DMO' was the local authority and in many parts of Wales and elsewhere it still is.

There are lots of variations. A DMO can be:
- A department of single public authority;
- A partnership of two or more public authorities, serviced by partners;
- A partnership of public authorities, serviced by a joint management unit;
- A public authority outsourcing delivery to private companies;
- A public-private partnership for certain functions – often in the form of a non-profit making company;
- An association or company funded purely by a private sector partnership and/or trading – again for certain functions.

The right solution depends on the scale and nature of the destination, the resources available and the degree of local enthusiasm and support.

Local authorities are often well placed to take on this role. They have traditionally been involved in destination marketing and have budgets to do so; they are responsible for planning and maintaining the public realm, are democratically accountable and provide long term continuity. Their limitation is that they talk a different language from the tourism industry; they can be slow in decision making and lack flexibility.

Free standing, independent bodies have a number of advantages. They can raise money from the private sector, provide a bridge between the public and private sectors, can act quickly and be innovative. The downside is that they are expensive to set up, highly dependent on public sector funding and financially precarious. If public sector support is withdrawn they can rarely survive by themselves.

Some examples from elsewhere.

Our work in Wales found only one example of a freestanding DMO, in Cardiff. Everywhere else, the tourism department of the local authority undertakes this function. One has to ask why this is the case.

The establishment of arms length DMOs is more common in England and Scotland although in most places; the local authority still performs this role and often what appears to be a free-standing tourism unit is in fact essentially a local government department with a different name.

Our conclusion was that independent DMOs are most likely to work in cities or resorts where there is a large concentration of tourism enterprises and a definite focus of activity. Whilst many of these organisations do raise funding from the private sector membership, this is often quite modest in scale, costly to collect and all are dependent for core funding on local authority or public sector support. Without this most would collapse overnight. This is not an argument against this model because it can be effective but it is by no means an easy option to establish and sustain.

Almost all of the freestanding DMOs focus on marketing activity although some operate events, Tics' and often a conference bureau. Other key aspects of destination management such as product development, infrastructure, signage, facility management, open spaces, maintenance of public realm etc still rest with the local authority.

Another factor is that these DMOs are usually membership organisations and take a hard-headed, commercial view about their role, often unwilling to promote or feature non members. This can be in conflict with an objective public service remit.

Some examples are given below.

Brighton & Hove
Tourism in Brighton is driven by the local authority through Visit Brighton, which is funded 80% by the City council for core activities such as the TIC, contact centre, conference desk, data collection and management, research and intelligence, managing the destination management system and PR activities; and 20% through private sector membership for specific marketing activities. A new tourism strategy has recently been launched which sets out how the council will take the lead in tourism but that input from wider public and private sectors is vital in terms of delivery. Visit Brighton has a team of 18.

Bath Tourism Plus
This is a free-standing DMO established in 2003 to market Bath and the surrounding area. It is a public/private partnership and constituted as a company limited by guarantee answerable to a Board of directors with representation from the City Council, local tourism sector and other stakeholders. It has 400 businesses in membership. Total turnover is in excess of £1m with the City Council contributing around 30% which is tied to a service level agreement. Other income comes from trading activities, marketing income and membership subscriptions. Activities include conference desk, leisure tourism marketing, events management and operation of TIC. BTP has a staff of 20

Leicester Shire Promotions
Formed in 2003, this is the DMO for Leicester, Leicestershire and Rutland and is a company limited by guarantee. It is a partnership between Leicester City Council, Leicestershire County Council, East Midlands Tourism, East Midlands Development Agency and Leicestershire Economic Partnership with an annual turnover of £2.4 million. The board consists of representatives from the City and County councils as well as the private sector. There are four advisory groups made up of public and private sector interests. These groups cover Invest Leicestershire review and development, city image and branding, sales and marketing, and business tourism. Activities include promoting the area through district partnerships, attracting inward investment through Invest Leicestershire and a wide range of marketing and promotional activities including the www.goleicestershire.com website. The district councils each have a tourism officer and, until recently were active in the district partnerships, through which all marketing activity was channelled. Several of the districts have withdrawn funding for the partnerships in recent months, however, but will retain a tourism role.

CVOne, Coventry
CVOne is a NFP arms length company which brings together city centre manager functions and Coventry/Warwickshire Promotions into one body. Four years old, it is funded by the local authority to undertake city centre management functions under a SLA but also draws on private sector membership for marketing of wider area.
Activities include marketing, management, street cleaning, security, lighting CCTV, , inward investment, business strategy, licensing, and research. It also manages the BID (800 members) and has an economic development role in terms of attracting new retail operators. It has core funding of £6.5m with other income of c£2m. Spending on marketing function is c£1.5-1.75m gross spend including staffing. There are 20 staff on the destination marketing side dealing with marketing, sales, pres/PR, IT, festivals/events, TIC. (NB: not dissimilar to BTP)
There is a high level board of 12 with 2 seats from City Council. Other parties are appointed e.g. cathedral, university, property development chairman. The Board meets monthly with sub groups involving different sectors. Tourism membership is c100.

Better Bank Side Business Improvement District (BID) London
Covering an area of approx 300 businesses, south of the river, from London Bridge to Blackfriars Bridge. This is a mixed use area of offices, restaurants and shops, industry plus some key visitor attractions along the river. Established in 2005, it levies a rate set at 2% of rateable value which amounts to £525k pa. This is collected on the BID's behalf by the local authority. The BID is established as an independent not for profit company with a business led board. Theme groups e.g. promotion, environment, cleaning etc help steer the programme of activity. Projects funded to date include events, hanging baskets, new litter bins, tree planting, open space enhancement and environmental improvements. .

The following figures have been obtained from selected DMOs and look at total turnover and the level of public sector support. Total turnover includes private sector buy-in to marketing activity.

DMO	**Total turnover £000**	**% public sector**
Bath Tourism Plus (07/08)	1425	29%
South Warwickshire (05/06)**	1226	38%
Cardiff& Co (1)	Not Available	36%
Tees Valley ATP	1177	87%*
Visit York	1760	33%*
Kent Tourism Alliance	1330	31%
Lincolnshire Tourism (2)	1524	68%*

Source: The Tourism Company * includes RDA funding. ** Since wound up

APPENDIX III
STAKEHOLDERS COMMUNICATIONS PLAN

The brief asks for some guidance on how to communicate the strategy to potential stakeholders and to engage them in the process.

Target audiences

Target audiences include:

- Council officers and members in relevant departments
- Other regional and local agencies with an interest in tourism
- The local tourism industry, accommodation, attractions and activity operators
- Community associations and groups

In our experience, most people find it hard to get excited about strategies per se and are much more interested in specific proposals that directly affect them. The main aim should be to show that some purposeful action is being taken.

In terms of engagement with the tourism sector we see the establishment of the new organisational structures we are proposing as providing the best vehicle for communication on an ongoing basis. Part of the communication plan will be to explain what is proposed and how it will work.

Communication tools

The main strategy document should be uploaded onto the Council website together with a summary version, for people to download.

You may want to consider producing a simple printed summary version of the document, attractively designed and laid out, to get over the main messages. This is probably sufficient for most audiences and is more likely to be read than the main document. It is worth spending some money on this.

It is worthwhile producing a simple PowerPoint presentation to be used at the strategy launch and on other occasions. This might be in an easily adapted, modular format to be used in different situations.

A press release and briefing will be needed to coincide with the launch of the strategy, picking out interesting stories for the local press.

The development of the council tourism website to act both as a consumer site but with an area of the site designated for the tourism industry, accessed by a password. This would be developed as the main means of communication with local tourism enterprises. If this is not possible then the site should be hosted by the newly formed tourism association but with a section allocated to the tourism unit

A regular email newsletter or update (6 monthly), from the Tourism Unit providing some tourism snippets and news to keep communication live.

The strategy launch

The strategy should have a formal launch to an invited audience comprising the tourism industry, council members, the local press and relevant agencies. This should be chaired by a senior Council member and also include some endorsements by leading private sector players and some people from outside the immediate area (Visit Wales). The aim is to make this an upbeat and lively event which leaves a positive impression. The summary will be distributed at the event.

Internal communication within the Council

Other Council departments are important because their activities often impinge directly on infrastructure or the overall appeal of the destination. We think the best way of communicating the new strategy and raising awareness of tourism, is to hold some informal seminars aimed at specific departments within the Council. These should take the form of a simple, short presentation about tourism, drawing attention to the new strategy and highlighting potential areas of overlap and interest. These events could be aimed at members and officers.

We have raised the issue as to whether a regular meeting of an internal cross-departmental tourism group (say 6 monthly) might be of use in improving understanding and highlighting opportunities. This is something to consider.

Regional agencies and external bodies

These should be sent a copy of the full strategy or link to the site together with the short summary version. Some should also be invited to the formal strategy launch.

Community associations and groups

These should be sent a copy of the summary document and a link to the website. The more important groups should be invited to the launch and an offer extended for someone from the Tourism department to address a future meeting of the group. These groups should receive the regular tourism newsletter.

The local tourism industry

This is a key audience for the strategy although it is action rather than policies which are likely to excite and interest people. There is also a level of cynicism to overcome.

The main method of communication should be via the newly formed tourism association and the dedicated tourism industry website. This would provide details of current marketing activity, statistics, and trends, market intelligence etc and updates on the strategy and action plan as required.

We would envisage regular email reports and updates from the Tourism Partnership meetings sent directly to tourism enterprises, plus the 6 monthly newsletters.

We also recommend that an annual tourism conference is held along the lines of the successful tourism forum to provide an opportunity for networking and face to face feedback. The tourism association may wish to hold open meetings on a more regular basis if demand justifies it.