Carmarthenshire Destination Management Plan

2015 - 2020

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Produced by Carmarthenshire Destination Partnership

Wales
Cymru

Contents

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① Introduction

1.1 What is Destination Management?

Tourism has been defined as the, 'temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater for their needs.' Tourism includes visitors that stay overnight as well as day visitors. Destination Management is a process that seeks to coordinate all aspects of a destination that contribute to a visitor's experience, taking account the needs of visitors, local businesses, residents and the environment. Destination Management, while seeking to ensure a high quality visitor experience, is also a tried and tested means to maximise the benefits of tourism to the destination.

This co-ordinated approach is particularly relevant to a County as large as Carmarthenshire with its wide range of settlements (from University towns and regional shopping hubs to smaller rural communities, popular coastal locations and a National Park) and its diversity of stakeholders (including accommodation providers, shops, pubs, restaurants, transport providers, religious buildings and visitor attractions). All will need to work together towards common goals and priorities to achieve measurable progress and sustainable growth in tourism.

1.2 Why a Destination Management Plan?

The purpose of the Destination Management Plan (DMP) for Carmarthenshire is to clarify what is important to get right for the future, to shape policy and priorities, to steer resources and to form the basis for people, businesses and organisations to work together to achieve common goals. The DMP is based on close consultation with key stakeholders and represents a consensus view of the most appropriate and effective way forward – in effect, a single point of reference for future action. The DMP sets out to ensure that there is a coordinated approach to steadily improving the quality of the visitor experience and to growing visitor numbers (both day visitors and overnight stays) and their spend in Carmarthenshire as part of a wider regeneration strategy for the County. It is also in-line with the ambitions and policies recently adopted by Welsh Government in its 2013-2020 tourism strategy, where place and people are highlighted as key factors in a destination's success.

The DMP includes a number of inter-related elements:

- A clear vision for the future that engages, energises and excites those who have an involvement in developing and growing tourism.
- A critical assessment of the total experience on offer to the visitor, most usually illustrated in the form of a strengths, weaknesses, opportunities and threats analysis.
- A focus on future ambitions and priorities in order to make the best use of available resources and to develop new markets, encourage repeat visitation through relevant product development.
- An associated Destination Action Plan that sets out a phased programme of projects and actions that are needed to overcome the weaknesses and threats while capitalising on the strengths and opportunities to achieve sustainable growth in tourism.
- Clear description of responsibilities and accountabilities for delivering key priorities and actions.
- An agreed delivery structure based on active partnership between the public, private and third sectors.

Destination management is a process that seeks to coordinate all aspects of a destination that contribute to a visitor's experience, taking account the needs of visitors, local residents, businesses and the environment. A destination management plan sets out to articulate what needs to happen over a particular period of time to fulfil the vision and identifies the agreed roles of different stakeholders and the actions they will undertake. It sets realistic targets for economic impact and seeks to prioritise resources so that they can be used to best effect.

1.3 A Partnership Approach

The tourism product is a hybrid of different visitor experiences comprising, 'places to stay', 'places to visit', 'things to do' and perhaps most importantly, 'people you meet'. No single organisation or business is in control of all aspects of the visitor experience in any particular destination. This DMP, therefore, sets out to describe what needs to happen over a specified timescale to achieve the vision and identifies the agreed roles of different tourism stakeholders, the actions they will be responsible for undertaking and sets out a preferred approach to future delivery arrangements.

The private sector has a fundamental role in delivering key elements of the visitor experience but the policies and functions of many public sector organisations exert a powerful influence over the way that tourism is developed, managed and promoted. Their management of the public realm (the landscape, footpaths, roads, buses, town centres, etc.) is critical to the visitor experience and needs to be thought of as having an economic function as well as being part of the service for residents. The other vital role of the public sector is to support tourism businesses and to provide an effective framework within which private enterprise can achieve sustainable growth and success. This DMP is a key document for bringing people, businesses and organisations together, for focusing on what is important to get right for the future, for building trust between willing partners and for securing commitment and responsibility.

The Vision of Carmarthenshire Destination Partnership

A clear vision is needed to excite, energise and engage the various stakeholders involved in developing and supporting tourism in Carmarthenshire. The vision helps to foster a unity of purpose and to promote a common understanding of the overall goal of the Plan. It acts as a single point of reference for future action. This Destination Management Plan seeks to ensure that Carmarthenshire continues to flourish as a successful visitor destination in future years and continues to derive maximum benefit from the visitor economy. The vision is:

> To develop a prosperous visitor economy in Carmarthenshire, based on its unique strengths and character, which generates higher spend and local income, enhances its image and reputation and improves the quality of life for local communities.

This vision is a high level statement of intent and its achievement will be dependent on a range of factors, including the following:

- Providing clear 'reasons to visit' and delivering compelling, unique, memorable and high quality visitor experiences.
- Creating a clear positioning for the County in the context of the country.
- Prioritising investment to deliver the promise and to improve the overall quality of the visitor experience.
- Harnessing the collective strengths of all businesses and organisations that have a role in supporting the visitor economy.
- Defining Carmarthenshire's unique tourism promise / offer and attracting new and existing visitors to the county through innovative and cost-effective marketing.
- Gaining maximum benefit from the National Park designation and its brand, whilst fostering mutually beneficial cooperation with the Brecon Beacons Sustainable Destination Partnership and its programme of work.
- Improving access to and within Carmarthenshire to encourage better visitor flow, longer stays and higher spend.

- Ensuring the highest standards of customer service.
- Maximising visitor spend and income retention to the local economy.
- Improving customer satisfaction to encourage longer and repeat visits, higher spend and levels of positive recommendation.
- Fostering a culture of continuous improvement, value for money, best practice learning and sustainability.
- Identifying measures of success and monitoring performance.

> **We will know when we have achieved the vision when:**
> Carmarthenshire is widely known as one of the most welcoming, engaging and memorable locations to visit in Wales. It is recognised as a destination providing a wealth of quality experiences to the visitor, ranging from world renowned gardens to family focused attractions and culturally diverse places of interest. People increasingly visit throughout the year to enjoy its rich calendar of events and festivals, warm and vibrant market towns, modern retail centres, clean beaches and its rolling and fertile countryside that attracts walkers and more active visitors to a variety of venues, including both the Coastal Path and the National Park. Carmarthenshire is proud to be a truly Welsh County and the language is much in evidence - an inspirational reminder to all of the values and traditions that the area stands for and continues to live by.

2 Context & Background

2.1 Policy context for Tourism and Destination Management

At the national level, tourism has been recognised by the Welsh Government as one of nine key sectors of the economy. Its strategy for tourism 2013 – 2020, *'Partnership for Growth'*, identifies Destination Management as fundamental in helping to improve the visitor appeal of tourism destinations throughout Wales. The principles set out in Visit Wales' *'Developing the Visitor Economy: A Charter for Wales 2009'*, provide clear terms of reference for Destination Management arrangements in Wales and identifies a key role for local authorities in contributing to the preparation of local destination plans and the establishment of local destination partnerships.

At the regional level, Visit Wales tasked the South West Wales Tourism Partnership (SWWTP) with responsibility for delivering the national tourism strategy at the regional level. SWWTP has worked with key stakeholders including local authorities and the tourism industry to drive sustainable growth in tourism and has commissioned a tourism strategy that is closely aligned with the priorities of the national tourism strategy. Although SWWTP was wound up in September 2014, Visit Wales continues to maintain its ongoing commitment to Destination Management through Regional Engagement Teams. The work of the Swansea Bay City Region (see appendix 1)

which promotes partnership in relation to economic development is also relevant and will have clear implications for the tourism industry in the wider region.

At the local level, the *'Integrated Community Strategy for Carmarthenshire (2011-2016)'* is a key policy document (see appendix 2) that sets a vision for the future and identify a series of high level priority outcomes for Carmarthenshire, including Economic Prosperity under which sit many of the actions that will be included in this Destination Management Plan.

2.2 The Importance of Tourism

Tourism is a key component of Carmarthenshire's economy and a major source of employment and revenue supporting over 5,547 full time equivalent jobs either directly or indirectly and generating £326m revenue to the County's economy annually (c. 16% of the All Wales total). Over 5.4 million tourist days were spent in the County by 2.9 million tourists staying in one of the 573 separate establishments that offer 19,396 bed spaces. 2013 research shows that 92% of day visitors said they would definitely by returning to the County and 75% of UK staying visitors said they would return for an overnight stay again.

Statistics derived from Carmarthenshire County Council STEAM Trend Report 2002 -2013

Tourism also:
- Supports cross-cutting services and infrastructure which benefit local people, e.g. transport links, the range of shops and services, sports and cultural facilities and essential amenity provision.
- Helps promote a positive image of the County to external audiences which can attract investment, new business development and a sense of confidence in the future.

Tourism, when planned and managed in a sustainable way, can stimulate wider benefits across the County. Visitor spending on accommodation, food and drink, leisure activities and shopping will support tourism and non-tourism businesses through local supply chains that are an intricate web of formal and informal networks that bring benefits to small, indigenous businesses that are the lifeblood of vibrant communities. Tourism touches businesses that other economic sectors cannot reach. A strong tourism industry and visitor economy will support a more prosperous economy overall and will help to sustain existing and create new jobs.

Source: Carmarthenshire County Council STEAM

		Paid Accommodation		SFR	All Staying Visitors	Day Visitors	All Visitor Types
		Serviced	Non-Serviced				
		2013	2013	2013	2013	2013	2013
Visitor Days	M	0.4237962	2.2397437	0.677714	3.3412539	2.0598932	5.4011471
Visitor Numbers	M	0.2246952	0.3578562	0.2846692	0.8672206	2.0598932	2.9271138
Direct Expenditure	£M						244.51
Economic Impact	£M	53.94	172.50	38.09	264.53	61.81	326.34
Direct Employment	FTEs	1,129	2,302	408	3,840	654	4,494
Total Employment	FTEs						5,547

2.3 Understanding the Visitor Economy

It has become more usual in destination management to refer to the visitor economy rather than to the tourism economy. The visitor economy takes into account broader economic activity and comprises the direct and indirect contributions to the economy resulting from the spending by overnight and day visitors. This wider focus brings with it a need to consider every element that contributes to a viable and sustainable destination experience including transport infrastructure, IT/broadband provision, place management, customer care, supply chain management, arts and culture, land use planning and retailing. This broad range of interests create challenges and opportunities that need to be carefully addressed by a coalition of stakeholders who understand the importance of the visitor economy and are committed to enhancing the competitive position and performance of the destination.

Tourism is an experience product – the product cannot be taken home with you but the experience will be and it will be the least successful element of that experience that will often determine whether the visit was judged a success or failure and whether people return or recommend the destination to others. The surly waiter, the rude car park attendant, the dirty bathroom, the cold meal – there are any number of ways that visitors can be disappointed at each and every stage of the visitor journey. **A tourism product is what you buy – a tourism experience is what you remember.**

A poor or mediocre experience in one aspect of the visit could have overspill implications for other businesses. So, there is an 'inter-dependence' in delivery of the visitor experience. Businesses do not only have to satisfy those who visit their product or service but are reliant on all other businesses to do likewise. One weak link could reduce the benefits of tourism for individual businesses and for the destination overall. Maximising the impact of the visitor economy to Carmarthenshire is an essential aim of this DMP and this requires all elements of the visitor experience to be delivered at the highest achievable quality, every time and at every place.

2.4 Trends in Tourism Demand

The tourism market place is subject to many political, economic, social and technological influences. In such a volatile and unpredictable environment, the future is far from certain but a number of longer term drivers of tourism demand are apparent which provide growth opportunities for Carmarthenshire:

- **Travel for experience:** people are seeking novel and new experiences, activities, well-being, self-improvement, themed products, unique accommodation, leisure add-ons, events and happenings.

- **Nature, Authenticity, Nostalgia:** people are seeking simple pleasures, natural playgrounds, camping/caravanning, nature and luxury (glamping), outdoor activities, learning/nature/wildlife experiences, rediscovering old haunts, sense of place, local events, food, shopping and local history.

- **Price and Value:** people are looking for offers and deals, searching for best price and incentive deals, all inclusive/fixed price and new intermediaries such as 'Groupon' offering discounted (affordable) deals.

- **Economic Bounce:** the 'staycation' market has seen a marked increase in recent years, in part driven by economic recessionary influences. Of the two groups of staycationers – 'Switchers' who switch an overseas holiday for one at home for financial reasons and 'Extras' who take additional UK breaks to experience somewhere new and are less sensitive to financial constraints – it seems likely that as the economy recovers, 'Switchers' will rediscover a desire to travel outside the UK and this may have a dampening impact on the staycation market.

- **Social and Personal Traveler:** people are wanting to share and recommend their holiday experiences with close social networks, seeking new mobile networks (fellow travellers), travelling with friends and family groups, reunions, places with personality, independents rather than branded accommodation, personal touches and getting an insider's view.

- **Mobile Traveler:** people are wanting to decide where to go and what to do while travelling and in the destination, less pre-planning, using internet for in-destination offers, information and suggestions.

- **Changing Travel Groups:** more older travellers in line with an aging UK population, extended family groups, children with grandparents, gay and lesbian, ethnic and cultural needs, travelling with pets.

- **Corporate Traveler:** tighter corporate budgets leading to downgrading, technology replacing travel but major events still important.

- **Short Breaks:** people are increasingly time-poor which has fuelled a move to more frequent short breaks. Those destinations that are within a two hour travel distance from large centres of population should benefit from this trend.

- **Independent Explorers :** are Visit Wales' target market segments. Independent explorers look for places that allow them to be themselves, that enrich them, that challenge them. They appreciate honesty and value authentic experiences and places. Independent Explorers shun the over commercialised tourist honey pots. They are free minded, they do not follow the herd and like to interact with a place, to meet its people and understand the local culture, to return refreshed and enriched. They get a real sense of achievement and satisfaction from planning and organising and like to visit places that are comparatively undiscovered by tourists. There are four sub-categories of independent explorers:

1. Older cultural explorer couples.
2. Scenic explorer couples.
3. Active family explorers.
4. Pre Family Explorers.

3 Challenges, Opportunities & Improvements

3.1 Tourism challenges for Carmarthenshire

Although tourism is growing at a national (UK) and global level, so is the competition and Carmarthenshire will need to improve its competitive position to stand out in a crowded market place and attract higher numbers of tourists. Integrating the marketing of Carmarthen to previous and new visitors with phased improvements to the overall quality and range of the town centre experience is a sensible and cost-effective approach. A preliminary analysis of the tourism offer available in Carmarthenshire (using SWOT analysis) would suggest that there are, like most destination areas, a number of challenges that need to be overcome to grow tourist numbers and spend. These are listed below in no particular order:

• Carmarthenshire lacks a clearly defined Brand identity and the tourism promise is hazy.
• Lack of a reasonable range of wet weather and entertainment facilities.
• Lack of tourist attractions and compelling 'reasons to visit'.
• Carmarthenshire lacks well established destination icons that have resonance beyond its borders.
• Carmarthenshire lacks a coordinated approach to interpretation of its heritage and cultural assets.
• Lacks a coordinated approach to the outdoor market.
• Lacks a clear road sign strategy to persuade more car users to visit rather than bypass the County.
• Increasing competition from other destinations.

3.2 Tourism Opportunities for Carmarthenshire

While the challenges are real, they can be overcome given sustained and integrated efforts by those who have an interest in tourism. More positive aspects of the tourism offer that can provide opportunities for sustaining future tourism growth are below in no particular order:

• Carmarthenshire is a strategic location as the gateway to the West of Wales and it has potential as a tourism base for South West Wales.
• A good range of quality accommodation providers.
• Access to a large transit tourist market and a relatively large, stable holiday tourist market.
• Carmarthenshire has a warm and genuine welcome to visitors – customer care is a positive feature.
• A good range of specialist and general retail facilities.
• Good macro accessibility by road and rail.
• Relatively clean town centres that are acceptably free of litter.
• A number of destination icons that have the potential for further exploitation.
• Strong heritage, culture and authentic experiences, including the Welsh language – bringing opportunities for innovative and creative promotion and interpretation of the area's local distinctiveness.
• The county has several distinct characteristics, including historic market towns, award winning coastal features and varied rural countryside with valleys, mountains and rivers.
• Carmarthenshire has the potential to build on its existing programme of events and festivals that showcase its distinctive character and personality.
• It has a positive relationship with the Brecon Beacons National Park as an iconic destination which the county can use to its advantage.

3.3 Improving the Visitor Experience

Any tourism visit is a collection of memories. Places you stayed, places you visited, things that you did, food that you ate, people that you met. It is this diversity of the visitor experience – a collection of many products and services – which is tourism's greatest strength but also, potentially, it's greatest weakness, because no one person or institution has control over each individual aspect of the tourism experience.

Exceeding the expectations of our visitors is a statement of intent that is widely used in tourism as a key aspiration or measure of success. But achieving such an aspiration is not simple, straightforward nor easy. It requires a shared commitment within the tourism community to deliver quality, value for money and to provide good memories for our visitors on a daily basis. Failure to do so could have serious implications and over time result in the destination losing competitive edge. The aim of this DMP is to ensure that the improvement of that experience is undertaken in a coordinated focused manner with all key players committed to a shared outcome.
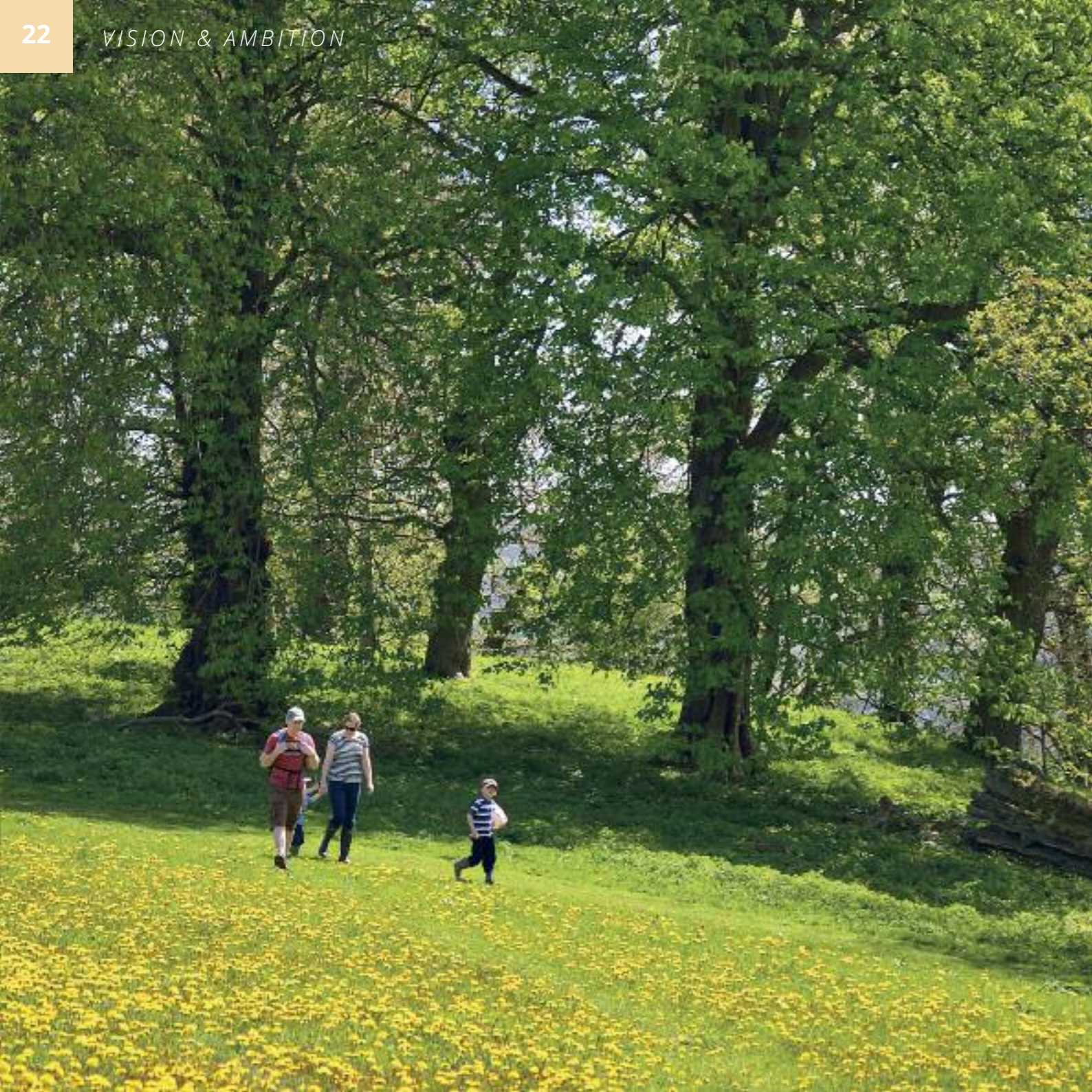
4 Vision & Ambition

Vision

Any plan that sets out to achieve future growth of tourism numbers and spend needs to overcome the challenges (Weaknesses and Threats) that face Carmarthenshire, whilst also capitalising on the opportunities (Strengths and Opportunities) that exist to improve the overall tourism experience. A top-line analysis comparing the challenges with the opportunities would indicate that the positives far outweigh the negatives; there are no challenges that are insurmountable and there are a competitive set of opportunities that provide excellent potential for further tourism growth. The tourism Vision for Carmarthenshire helps to define future ambitions and priorities that will greatly contribute to future tourism growth.

To develop a prosperous visitor economy in Carmarthenshire, based on its unique strengths and character, which generates higher spend and local income, enhances its image and reputation and improves the quality of life for local communities.

Ambition

Carmarthenshire's **ambitions** to complement the vision are to:-

• Be an important national destination in Wales providing a range of good quality accommodation, places to visit and things to do.
• Be an important hub and tourism base from which to explore the wider south west Wales environment.
• Be somewhere that has a distinctive image and identity which is meaningful to residents and visitors.
• Be a safe and secure destination that takes pride in its place in history and wants to tell its story to others.
• Be a place that warmly welcomes visitors and respects their individual needs.
• Be a place where people want to visit, live, work, do business and be educated.
• Be known for its strong emotional and functional ties with the rest of South West Wales with strong local supply chain links that support the retention of tourism revenue within the County.
• Be known as a place which is creative, contemporary and full of character.

5 Priorities

The identification of the priorities for Carmarthenshire enables key stakeholders to reach agreement on where to focus resources and responsibilities in the future to achieve growth in tourism. They are set out below and are aligned to the five key focus areas from *'The Welsh Government Strategy for Tourism 2013–2020, Partnership for Growth'*. The Objectives listed are those developed by members of the Partnership during 2014.

A number of cross-cutting elements / themes have been identified and which should underpin the delivery of all priorities.

- Innovative products & services.
- High quality visitor offers.
- Local distinctiveness and authentic experiences.
- Partnership and collaboration.
- Marketing and communication.
- Business and skills development.
- Addressing Seasonality.
- Sustainability / Environmental Sensitivity.
- Up to date and accurate Tourism data.

Priority 1: Promoting the Brand

- Develop and agree a distinctive positioning and brand identity for Carmarthenshire.
- Promote and market a clear message of Carmarthenshire's visitor offer, targeting existing and new markets with most growth prospects for the County's visitor economy.
- Have a partnership approach to promotion to ensure promotion of key channels (websites, brochures, apps, advertisements, etc.) are 'on brand', timely, effective, reinforcing the same messages and ensuring that Tourism businesses fully utilise the technology available.
- Plan the use of destination positioning in all promotional and public realm activity to reinforce the message.
- Market and visitor research; we need to know who our customers and target audience are and what they think, to keep pace with visitor expectation and to develop appropriate branding and marketing messages.

Priority 2: Product Development

- Improving the quality and range of accommodation provision in line with anticipated demand and responding to new opportunities to appeal to a wide mix of markets.
- Attract, influence and facilitate at least one new, major, iconic, of national importance, all weather family attraction or facility to the county.
- Support and encourage existing attractions and activities to invest, expand and make improvements to their visitor experiences and offers, to strengthen their profile and appeal, attracting additional staying visitors to Carmarthenshire throughout the year.
- Grow and maximise the County's reputation as a high quality food and drink destination – and encourage the use of locally sourced produce amongst hospitality businesses.
- Increase the number, range and quality of events which have the potential to attract visitors to Carmarthenshire. Facilitate collaboration, co-ordination and communication between county and regional event organisers – as well as with the wider industry - to maximise opportunities offered by events and festivals.
- Maximise the opportunities for Outdoor Activities throughout Carmarthenshire.
- Focussing on priority key themes, using existing research undertaken by partners and key stakeholders and where needed through additional investigation, agree the opportunities and strengths of Carmarthenshire's visitor offer.

Priority 3: People Development

- Foster and support innovation and entrepreneurship within the industry.
- Further develop and improve collaboration and communication with and amongst tourism businesses and other individuals, groups and businesses involved in the County's visitor economy.
- Working with partners, including the Regional Learning Partnership, identify areas of skills demand within the County and continue to develop and offer a programme of training and business development opportunities which meets the needs of the industry and helps effective trade involvement in the delivery of relevant plans and strategies.

Priority 4: Profitable Performance

- Agree and implement a systematic plan to accurately record and effectively utilise tourism intelligence for tourism development purposes. Focus on:
  - Visitor satisfaction, experiences and trends.
  - Business performance and confidence.
  - Impact on visitor economy.
- Develop realistic performance indicators to monitor sector progress.
- Encourage higher levels of external competitiveness and profitability amongst Carmarthenshire's tourism businesses.
- Encourage and facilitate improvements to mobile and broadband coverage across the County, and support efforts to take advantage of the opportunities offered by digital media by the industry.
- Ensure that public and private transport infrastructure is well designed with clear information available to visitors.
- Encourage and support the environmental sustainability of tourism businesses.

Priority 5: Place Building

- Focus on key geographical places, using existing research undertaken by partners and key stakeholders. Where needed through additional investigation, improve the quality, appearance and distinctive offer of those key communities / geographical areas within Carmarthenshire identified as having the greatest potential for development and appeal to visitors.
- Designate and promote key focal points as offering a special character, both county-wide and within towns and villages.
- Create distinctive and compelling signage, focussing on:
  - investment in the transport infrastructure especially to improve road signage to a destination,
  - gateway features and focal points to encourage more effective visitor flow, and to distinguish different parts of the County according to their unique tourism offer and character.
- Provide opportunities for local communities to be involved within - and to deliver - quality, authentic and memorable visitor experiences.
- Bring the 'story' of Carmarthenshire to life through encouraging and supporting a wide ranging, creative and innovative interpretation of its history, heritage and culture, demonstrate the strength of local culture.
- Add depth to the sense of place by improving supply chain links between producers of goods and services and the consumer.
- Find ways to spread the benefits of tourism more widely in the local visitor economy.
- Support and maximise the potential of those community-led events which can enhance the visitor experience and promote the sense of place of the area.

6 A Partnership for Growth

Effective partnership working is essential to manage and present the destination in an integrated way and to ensure that the visitor is considered and planned for at the earliest stages of any new development. This may mean changes to traditional ways of working to enhance transparency of decision making, silo-free thinking and active engagement between private, public and third sector partners. If this DMP is to be delivered effectively, there is a need to establish a coalition of stakeholders who are committed to improving the competitive position of Carmarthenshire. A unity of purpose through active partnership working is the key to ensure implementation of the DMP to time and budget. There is no single partnership model that is relevant to all destinations. Each destination will have a distinctive character, its own ways of working and a unique community of tourism interests. For a destination partnership to work, it must reflect the individual nature of the destination it represents. Simply put, it must be fit for purpose.

The Carmarthenshire Destination Partnership will work in partnership with the Swansea Bay City Region, recognising the 'pillars' of the City Region delivery plan and aligning actions and resources to prevent duplication and maximise outcomes.

The Carmarthenshire Destination Partnership Steering Group will become the leadership and management hub for a fresh approach to partnership working that will ensure closer links between Carmarthenshire County Council, the retail, hospitality and tourism sectors and key community interests. This Group will form the focus for clear communication, capacity building and coordination of planning and resources. It will be responsible for setting and reviewing priorities, target and activity planning, monitoring of performance and sourcing and allocation of funding to support effective delivery of the Destination Action Plan. The Partnership will arrange meetings to discuss matters relating to tourism and to disseminate information about the destination management process, achievements and aspirations.

The Partnership Steering Group currently consists of the following organisations:
- CDP Chair.
- Carmarthenshire County Council.
- Carmarthenshire Tourism Association.
- Brecon Beacons National Park Authority.
- Coleg Sir Gâr / University of Wales Trinity Saint David.
- Visit Wales Regional Representative.

The Carmarthenshire Destination Partnership as a whole consists of the following Organisations:

- **CDP Chair.**
- **Carmarthenshire County Council.**
- **Destination Tourism Associations:**
  - Brecon Beacons Tourism.
  - Carmarthenshire Tourism Association.
- **Brecon Beacons National Park Authority.**
- **Visit Wales / Welsh Government.**
- **Local Tourism Associations/Clusters:**
  - Ammanford Regeneration Forum.
  - Association of Bunkhouse Operators.
  - Brechfa Forest and Llanllwni Mountain Tourism Clusters Association (BALM).
  - Carmarthen Regeneration Forum.
  - Carmarthenshire Farm & Country Holiday Group.
  - Carmarthenshire Rural Tourism Regional Clusters.
  - Kidwelly Business & Tourism

  Forum.
  - Laugharne Chamber of Trade.
  - Llandeilo Business Forum.
  - Llandeilo Marketing Forum.
  - Llandovery Partnership & Chamber.
  - Llansteffan Tourism Association.
  - Newcastle Emlyn Fairtrade Group.
  - South Wales Outdoor Activity Providers Group.
  - Teifi Valley Tourism Association.
  - Visit Teifi Valley.
  - West Carmarthenshire Joint Working Group.
- **RDP Groups:**
  - Grwp Cefn Gwlad.
- **Key Stakeholders:**
  - BHS (British Horse Society) Cymru.
  - British Holiday & Home Parks Association (BH&HPA).
  - CADW.
  - Cambrian Mountains Initiative.
  - Coleg Sir Gâr.
  - Country Land & Business

  Association (CLBA).
  - Dŵr Cymru Welsh Water.
  - Dyfed Archaeological Trust.
  - Farmers' Union of Wales / National Farmers Union Cymru (NFU Cymru).
  - Heart of Wales Line Forum.
  - Llanelli, Carmarthen, Dinefwr Ramblers.
  - National Trust.
  - Natural Resources Wales.
  - One Voice Wales (representing Community Councils).
  - Sustrans Cymru.
  - Swansea Bay City Region Representative.
  - University of Wales Trinity Saint David.
  - Walkers are Welcome Llandysul, Llandeilo, Llandovery.
  - Welsh Association of Self Catering Operators.
  - Welsh Association of Visitor Attractions.
  - Youth Hostels Association.

We will communicate with and involve neighbouring Destinations to achieve cross-boundary working via the Tourism Associations, Local Authorities or representatives of :

- Brecon Beacons National Park
- Ceredigion
- Neath & Port Talbot
- Pembrokeshire
- Powys
- Swansea

The Brecon Beacons National Park is now a recognised destination within Wales and a significant part of it falls within Carmarthenshire. There is a separate Partnership structure (Brecon Beacons Sustainable Destination Partnership, BBSDP) for the Brecon Beacons on which both Carmarthenshire CC and CTA sit. Equally Brecon Beacons National Park Authority sits on

Carmarthenshire's DMP on behalf of BBSDP. All parties have agreed to work in partnership to deliver the best outcomes for both destinations. It will be particularly important that issues of brand, marketing and organisational communication are addressed to avoid both confusion amongst stakeholders and duplication of effort. However it is acknowledged that

product in both areas will have relevance to the other and that therefore cooperative working will bring benefits to all concerned. CTA and Brecon Beacons Tourism are working collaboratively and this should be encouraged and facilitated.

Similar relationships with other Destinations will be encouraged.

7 Managing Performance

It will be important to measure how well the delivery of the Destination Action Plan results in successful outcomes for Carmarthenshire. Success will be measured by the achievement of a suite of key performance indicators:

- Higher visitor spend and local income generation.
- More and better jobs.
- Improved business performance.

- More positive reputation and awareness of Carmarthenshire as an attractive visitor destination.
- Higher visitor satisfaction and recommendation of Carmarthenshire as a place to visit.
- Longer tourism season.

A research programme will be put in place to ensure that appropriate surveys are undertaken to measure trends performance. STEAM, the current economic impact model, will provide some core measurements but additional studies on residential (Over 50 panel, Citizens panel), visitor (face to face and on-line) and business sectors will be actioned to measure changes to visitor satisfaction, business performance and changes to reputation and awareness levels.

8 CDP Steering Group Contacts

The delivery of the aims contained within this plan will fall to the partners to deliver elements as appropriate within their remit. Their respective contacts on the CDP Steering Group are:

Brecon Beacons National Park Authority	**richard.tyler@beacons-npa.gov.uk**	**01874 620405**
Carmarthenshire County Council	**marketing@carmarthenshire.gov.uk**	**01554 744326**
Carmarthenshire Tourism Association	**info@visitcarmarthenshire.co.uk**	**01269 598140**
Coleg Sir Gar /		
University of Wales Trinity St David	**caroline.peek@colegsirgar.ac.uk**	**01554 748000**
Visit Wales	**philip.abraham@wales.gsi.gov.uk**	**0300 790 4528**

9 Appendices

Appendix 1: Regional Policy Context - Swansea Bay City Region Economic Strategy

A City Region is a core city, conurbation or network of urban communities, sharing resources such as a central business area, labour market and transport network. In other words a city region is one where most of its population conducts most of their lives Ð they work, trade, shop, live and spend leisure time there. The Swansea Bay City Region encompasses the Local Authority areas of Pembrokeshire, Carmarthenshire, City and County of Swansea and Neath Port Talbot. City Regions offer a new approach to economic regeneration:
• Larger and more efficient labour markets and therefore better prospects for job creation;
• Scope for better planning of housing, transport, support for business and other services beyond existing administrative boundaries;
• Better prospects for attracting investment, innovation and value added economic activity.

GVA growth (the primary indicator used to measure an economy´s overall performance) in South West Wales has been consistently below that of the UK and Wales over the past two decades - in 2010 it was 77% of the UK average equivalent to only 94% of the Welsh level.

Business Growth, Retention and Specialisation
Aims:
• Develop a more entrepreneurial culture across the region;
• Encourage a more dynamic and sustainable business start-up market;
• Provide tailored business advice and support for retention and growth;
• Better support large employers across the region in both the public and private sectors;
• Develop a first rate inward investment offer.

Skilled and ambitious for long-term success
Aims:
• Improve attainment and ambition in our lowest performing schools;
• Ensure that Further and Higher Education provision is aligned to the needs of growth sectors;
• Target individuals who are in work promoting awareness of up-skilling, progression and training opportunities;
• Change the culture and help people to be more ambitious for their future.

Maximising job creation for all
Aim:
• Support people to get back into work through a range of targeted support programmes;
• Increase the level of new business starts including social enterprises;
• Increase job opportunities by supporting employment growth in the region's businesses;
• Improve opportunities for our children and young people.

Knowledge Economy and Innovation
Aim:
• Develop a coherent long-term innovation strategy that is well aligned with EU thinking;

• Maximise the long-term potential of Swansea University's new Science & Innovation Campus;
• Adopt a strategic approach to nurturing new businesses through business incubation and
• innovation;
• Better integrate and co-ordinate our R&D assets across the region;
• Establish strong international connections and partnerships.

Distinctive Places and competitive Infrastructures
Aim:
• Establish a coherent investor and visitor proposition;
• Develop effective and strategic

long-term spatial planning for growth;
• Address strategic transport issues to unlock long-term growth;
• Develop competitive Next Generation Broadband and 4G.

Appendix 2: Local Policy Context

1 Integrated Community Strategy for Carmarthenshire 2011-2016
This provides a vision for how Carmarthenshire will look in the future and how that vision can be achieved. The vision is; *A Carmarthenshire that enables people to live healthy and fulfilled lived by working together to build strong, bilingual and sustainable communities.*

Progress is reviewed every six months and all partners will be accountable for their outcomes and goals. The strategy is accessible to all with a young people's version and children's version available. The new strategy, which runs from 2011 to 2016, has been developed through consultation with local communities, organisations and other groups. The Community Strategy contains a total of 5 priority outcomes.
1. People in Carmarthenshire are healthier.
2. People in Carmarthenshire fulfil their learning potential.

3. People who live, work and visit Carmarthenshire are safe and feel safer.
4. Carmarthenshire's communities and environment are sustainable.
5. Carmarthenshire has a stronger and more prosperous economy.

2 County Council Corporate Plan (2014-2017) & ARIP
The Corporate Plan details how the Council intends to help deliver its actions from the overarching Community Strategy (see above) and it is currently being developed (July 2014). Regeneration is one such priority outcome, with objectives relating to various projects that have a direct bearing on this Destination Action Plan.

3 Carmarthenshire Local Development Plan 2014-2029
The Carmarthenshire Unitary Development Plan adopted in 2006 is soon to be replaced by the emerging Carmarthenshire Local Development Plan (LDP)

which has undergone scrutiny at Public Enquiry with the appointed inspector due to issue recommendations in September 2014. After which, there is approximate timescale on acceptance and adoption.

The LDP will provide a framework for sustainable development within Carmarthenshire up to 2026. It is an extremely important policy document that will guide growth and identify infrastructure needs within the County over the next 15 years. The Plan contains policies for managing growth and development and contains specific land use allocations and spatial policies that relate. The Plan also contains criteria based policies that seek to provide for new or enhanced tourism and leisure facilities within Carmarthenshire.

4 Carmarthenshire Rural Development Plan
The current Rural Development Plan 2007-2013 has seen several

million pounds of investment in rural areas of Carmarthenshire including tourism assets and product. The Destination Management Plan will be an integral part of the local development strategy for the next round of RDP funding in Carmarthenshire with key priorities such as coast, camping, local food, outdoor activities and extending the traditional visitor season.

5 Brecon Beacons National Park Management Plan 2010-2015
This is a partnership plan between all stakeholders and lays out how the environmental, social and economic future of the Park should be managed. Tourism constitutes a significant part of the delivery of the Plan and is supportive of the designation.

6 Brecon Beacons National Park Sustainable Tourism Strategy 2012-2017
Overseen by the Brecon Beacons Sustainable Destination Partnership, this strategy guides

partners' tourism work within and around the National Park. It has 6 strategic objectives:

EFFECTIVE MARKETING
To raise awareness of the Brecon Beacons as a leading destination for quality rural experiences, generating overnight visits throughout the year.

COORDINATED INFORMATION AND INTERPRETATION
To ensure that all visitors have access to accurate information and interpretation that strengthens appreciation, enjoyment and understanding of the Brecon Beacons and stimulates curiosity and a desire to explore, stay longer and return.

ENVIRONMENTAL RESPONSIBILITY
To encourage and promote responsible use of the environment by visitors and tourism stakeholders and establish ways for them to support the management and conservation of the Brecon Beacons.

PRODUCT DIVERSITY
To provide a rich diversity of visitor experiences in line with potential market interests and opportunities and with Brecon Beacons brand values.

COMMUNITIES AND PLACE MAKING
To work with local communities to strengthen the individual distinctiveness of the towns, villages and rural areas in the Brecon Beacons and their appeal and amenities for visitors and local residents.

SUPPORTING BUSINESSES
To encourage and assist tourism-related enterprises to improve their quality and performance, undertake appropriate investments and work together to ensure the success of the Brecon Beacons as a sustainable tourism destination.