Destination Management Plan    2014-2018

[Type the document subtitle]

1. Introduction
   1.1. What is Destination Management
   1.2. Why a Destination Management Plan
   1.3. A Partnership approach
   1.4. The vision of the Destination Management Plan

2. Context & background
   2.1. Policy context for Tourism & destination management
   2.2. The importance of Tourism
   2.3. Understanding the Visitor Economy
   2.4. Trends in Tourism Demand

3. Carmarthenshire – Visitor Experience Assessment
   3.1. The Tourism challenges for Carmarthenshire
   3.2. The Tourism opportunities for Carmarthenshire
   3.3. Improving the Visitor experience

4. The Wider Leisure Experience

5. Destination Framework
   5.1 Vision
   5.2 Ambitions
   5.3 Priorities

6. A Partnership for Growth
   6.1. Why Partnership
   6.2. A new Partnership for Carmarthenshire
   6.3. Managing Performance

7. Appendix
   7.1. Partnership Group Structure
   7.2. Regional Policy Context
   7.3. Local Policy Context
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 very relevant to such a large County as Carmarthenshire with so many different settlements and stakeholders (shops, pubs, restaurants, transport providers, religious buildings, public buildings, etc.) to work closely together. There needs to be alignment of activity behind a common purpose.

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 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;
- a 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 of 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 fulfill the vision and identifies the agreed roles of different stakeholders and the actions they will undertake. It will help in the setting of realistic targets for economic impact with prioritisation so that scarce resources can be used to best effect.

1.3 A Partnership Approach

Whilst Carmarthenshire County Council has taken the lead in the preparation of this DMP and has consulted widely with interested parties on its content, it acknowledges that there is a clear need for it to be delivered through close partnership working. 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. The 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.

1.4 The Vision of Destination Carmarthenshire DMP

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 DMP 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 town through innovative and cost-effective marketing;
- 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 interesting and vibrant locations to visit in Wales. It is recognised as a destination to visit for a number of reasons throughout a calendar year. Carmarthenshire is an eclectic mix of market towns and modern retail, of golden beaches and rolling countryside and one that is proud to be Welsh 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 AND 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 leading the preparation of local destination plans and the establishment of local destination partnerships.

At the regional level, South West Wales Tourism Partnership (SWWTP) has been responsible for delivering the national tourism strategy at the regional level and has worked with key stakeholders including local authorities and the tourism industry to drive sustainable growth in tourism. As part of its remit, SWWTP has commissioned a regional tourism strategy that is closely aligned with the priorities of the national tourism strategy. 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 6,250 full time equivalent jobs either directly or indirectly and generating £350m revenue to the County’s economy annually (c. 16% of the All Wales total). Over 5.5 million tourist days were spent in the County by 2.8 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.

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.

Table 1: Tourism in Carmarthenshire 2011

<table>
<thead>
<tr>
<th></th>
<th>Revenue (£m)</th>
<th>%</th>
<th>Trips (000's)</th>
<th>%</th>
<th>Days (000's)</th>
<th>%</th>
<th>Spend/Trip (£)</th>
<th>Spend/Day (£)</th>
<th>Average length of stay(Days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced</td>
<td>39.5</td>
<td>11</td>
<td>182</td>
<td>6</td>
<td>346</td>
<td>6</td>
<td>217</td>
<td>114</td>
<td>1.9</td>
</tr>
<tr>
<td>Non Serviced</td>
<td>223.4</td>
<td>63</td>
<td>493</td>
<td>16</td>
<td>3104</td>
<td>50</td>
<td>453</td>
<td>72</td>
<td>6.2</td>
</tr>
<tr>
<td>VFR</td>
<td>34.8</td>
<td>10</td>
<td>279</td>
<td>9</td>
<td>664</td>
<td>11</td>
<td>124</td>
<td>52</td>
<td>2.3</td>
</tr>
<tr>
<td>Day Visitors</td>
<td>57.3</td>
<td>16</td>
<td>2051</td>
<td>69</td>
<td>2051</td>
<td>33</td>
<td>28</td>
<td>28</td>
<td>1.0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>355.1</td>
<td>100</td>
<td>3005</td>
<td>100</td>
<td>6165</td>
<td>100</td>
<td>118</td>
<td>58</td>
<td>2.0</td>
</tr>
</tbody>
</table>

Source: Carmarthenshire County Council STEAM

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 worst 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 marketplace 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 travelers), 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 travelers 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.
3. CARMARTHENSHIRE – VISITOR EXPERIENCE ASSESSMENT

3.1 The 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 a reasonable range of wet weather and entertainment facilities;
- Lacks tourist attractions and compelling ‘reasons to visit’;
- Some town centre’s appearance is tired in some areas;
- 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 clear road sign strategy to persuade more car users to visit rather than bypass the County;

3.2 The 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. The preliminary analysis was also helpful in identifying a range of more positive aspects of the tourism offer that can provide opportunities for sustaining future tourism growth. Again, these are listed below in no particular order:

- Carmarthenshire has a good range of specialist and general retail facilities;
- Access to a large transit tourist market and a relatively large and stable holiday tourist market;
- Carmarthenshire has a warm and genuine welcome to visitors – customer care is a positive feature;
• Carmarthenshire has satisfactory car parking capacity although signposting could be improved;
• Good macro accessibility by road and rail;
• Carmarthenshire has a good and improving range of art / craft galleries and workshops;
• Relatively clean town centres that are acceptably free of litter;
• Carmarthenshire has a number of destination icons that have the potential for further exploitation
• There are exciting opportunities to tell “stories” to create a stronger and distinctive sense of place through a partnership approach to marketing, interpretation, information provision and visitor welcome;
• Carmarthenshire has a strategic location as the gateway to the West of Wales and it has potential as a tourism base for South West Wales;
• Carmarthenshire has the potential to build on its existing programme of events and festivals that showcase its distinctive character and personality.

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.
4. THE WIDER EXPERIENCE

4.1 Shopping

Carmarthenshire offers a good range of convenience and comparison goods in its towns and out of town\(^1\). Shoppers generally organise their trips according to what they want to buy or do, with convenience and comparison shopping being the two most widely accepted trip purposes. Shopping, however, can also be recreational. People often go shopping not to buy something specific but rather to relieve boredom, to see what’s new, as a social activity, for amusement, to pass time between other activities, to browse without a purpose and for many other non-buying reasons. All of these make shopping a leisure-time pursuit and it continues to be a major component of tourist spending.

According to the GB Tourist Survey, shopping-related activities and entertainment account for approximately 40% of domestic (UK) visitor spend to Wales\(^2\). Shopping is also a popular activity for overseas visitors to Wales. The International Passenger Survey 2013 indicated that 75% of all overseas visitors go shopping during their stay in Wales. Unusually, more reported shopping for souvenirs than for clothes/accessories with Wales seeing the highest propensity for souvenir shopping across Britain. This perhaps indicates that visitors to Wales are looking for more unique and authentic experiences rather than ‘High Street’ shopping.

Tourist spending on shopping can help to sustain a superior quantity and quality of shops which could not be supported by local custom alone. In the same way, a thriving shopping destination will, in turn, stimulate a more prosperous tourism industry. In well established town and city tourism destinations (e.g. Bath, Chester, York, Edinburgh, Oxford etc) it is the leisure derived spending which plays the role of the traditional anchor. All of these popular destinations have recognised the value of making their town centres pleasant places to walk and to shop. All of these well established tourist destinations realised that their pavements, streets and parking areas needed pedestrianisation, covering, cleaning, painting, landscaping, beautifying, attractive signage, furniture and animation to generate and retain tourism spending. There is a clear lesson here for Carmarthenshire’s town’s future.

4.2 Eating & Drinking (TBC)

---

\(^1\) Convenience goods are everyday essentials and needs, especially foodstuffs. Comparison goods, on the other hand, are for the most part durable or semi-durable goods that are selected on the basis of their price, quality, style, suitability, fit and colour.

\(^2\) GB Tourist survey 2011. Total UK tourism spend to Wales = £1,734m; spending on buying clothes (£78m), eating and drinking out (£333m), other shopping (£200m) and entertainment (£86m) = £697m (40%)
5. DESTINATION FRAMEWORK

5.1 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 while 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

5.2 Ambitions

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.
5.3 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:

Priority 1: Raising the profile of Carmarthenshire (PROMOTION)
- Having a distinctive positioning and brand identity
- Having a partnership approach to promotion to ensure key channels (websites, brochures, apps, advertisements) are ‘on brand’, timely, reinforcing and effective ensuring that Tourism businesses fully utilise the technology available
- Using destination positioning in all promotional and public realm activity to reinforce the message;
- Improving Carmarthenshire’s reputation as a warm, welcoming, stunningly beautiful and distinctively Welsh destination;

Priority 2: Improving the Public Realm and Tourism Infrastructure: (PLACE DEVELOPMENT)
- Ensure good mobile and broadband coverage across the County
- Improving the look and feel of Carmarthenshire and the creation of a safe and pleasant place to spend time.
- Creating distinctive and compelling gateway features (signage/sculpture/planting) that reflect the personality of different aspects of the County and to divert more visitors into Carmarthenshire;
- Providing attractive, informative and coherent (i.e. aligned with brand identity) signage to and within areas within Carmarthenshire to encourage easier and more enjoyable visitor flow;

Priority 3: Enhancing the Sense of Place: (PLACE PROMOTION)
- Distinguish (via branding, signage, interpretation, street artwork and furniture) different parts of the County according to their unique tourism offer and character;
- Designate and promote key focal points in each town/village as offering a special character
- Adding depth to the sense of place by improving supply chain links between producers of goods and services and the consumer. Finding ways to spread the benefits of tourism more widely in the local visitor economy;
- Revitalizing Carmarthenshire’s reputation as a rural destination of character through more regular farmer’s markets and evidence of local products for sale;

- Having ‘wide and deep’ interpretation of the Carmarthenshire ‘story’ (covering all facets) to make its history come alive;

**Priority 4: Enhancing the tourism product and experience: (PRODUCT DEVELOPMENT)**

- Improving the quality and range of accommodation provision to meet existing and create new demand – serviced, budget, self-catering, caravan and camping – to appeal to a wide mix of markets;

- Improving the quality and range of places to eat /drink using quality local produce;

- Providing a competitive and distinctive range of facilities that encourage visitors to extend their stays; Attract, influence or facilitate at least one major new iconic all weather family attraction or facility to Carmarthenshire

- Develop a programme to improve physical linked access to the coast, countryside and culture products.

- Encourage, support, promote and co-ordinate a calendar of Carmarthenshire events both major and community based

**Priority 5: Improving Leadership and Delivery: (PARTNERSHIP AND PERFORMANCE)**

- Establishing the right organisational structures to manage implementation of the destination action plan.

- Identifying and securing sources of funding to implement the strategy;

- Devising a clear communication strategy to explain progress and proposed changes to the action plan;

- Foster a culture of continuous improvement, value for money and best practice learning;

- Monitoring and evaluating the outcomes of the action plan developing a robust and ongoing sustainable data management system to report on Tourism statistics
6 A PARTNERSHIP FOR GROWTH

6.1 Why Partnership?

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.

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.

6.2 A new Partnership for Carmarthenshire

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 Destination Carmarthenshire Core 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 better communications, 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.

Carmarthenshire County Council will establish an Internal Action Group that would comprise senior representatives from key departments that have a role in supporting future sustainable growth in the visitor economy. This group would be chaired by the Head of Economic Development with secretariat from the Marketing & Tourism section. This group will be
responsible for raising awareness of the importance of the visitor economy within the County Council and in improving coordination between departments to deliver the priorities of the Destination Action Plan.

There should be four Delivery sub groups for Promoting the County, Product Development, Place Development and Place Promotion. These operationally focused groups will be responsible for implementing specific priorities in the Destination Action Plan and have representatives from relevant public and private sector stakeholders. It is proposed that the sub-groups for Product Development and Place Development would be chaired by the Council and those for Promoting Carmarthenshire and Place Promotion by representatives from the private sector.

There should be Local Town Destination Management groups of those involved in the visitor experience from traditional tourism industries as well as those in supporting roles. The visitor “agenda” could be added or bolted onto an existing suitable group meeting or set up as standalone depending on the local requirement.

6.3 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 auctioned to measure changes to visitor satisfaction, business performance and changes to reputation and awareness levels.
## Appendix 1: Partnership Group Outlines

<table>
<thead>
<tr>
<th>Sub - Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Group</td>
</tr>
<tr>
<td>Representation</td>
</tr>
<tr>
<td>Regularity</td>
</tr>
</tbody>
</table>
Appendix 2: 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 – 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
Aims:
• 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 off
Appendix 3: 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 enable 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.

- People in Carmarthenshire are healthier
- People in Carmarthenshire fulfill their learning potential
- People who live, work and visit Carmarthenshire are safe and feel safer
- Carmarthenshire’s communities and environment are sustainable
- 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. Town Regeneration Areas (TBC)