

Rhondda Cynon Taf Tourism Strategy



Reaching Destination
Rhondda Cynon Taf 2007 - 2013



STRONG HERITAGE | STRONG FUTURE
RHONDDA CYNON TAF
TREFTAETH GADARN | DYFODOL SICR

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"...enjoy tea on the terrace!"

CYRCHFAN
DESTINATION
RHONDDA CYNON TAF *ref*

Executive Summary



Rhondda Cynon Taf was visited by 2,532,000 people in 2005, (STEAM - Scarborough Tourism Economic Activity Monitor research). According to the same research, tourism generated £113.5m for the local economy.

Rhondda Cynon Taf is not yet known as a “tourist destination” even though it has enormous untapped potential to develop short break and niche markets and generate corresponding economic and cultural benefits.

It is the vision and responsibility of this tourism strategy to improve the profile and “tourism offer” of Rhondda Cynon Taf so that prospective visitors believe the County Borough to be one of the UK’s short break destinations by 2013.

Local authorities have a key responsibility and have traditionally supported the tourism industry in many ways. The development, promotion and management of tourism are relevant to at least two of the key issues set out in ‘Leading reform in local services: Manifesto for Welsh Local Government 2006-2008’. Visit Wales realizes the efforts and involvement of local authorities in the tourism industry and this strategy has the full support of Rhondda Cynon Taf Council in delivering the actions required to realise the vision.

In order to achieve this vision the Tourism Unit, established early 2007, will develop, coordinate and manage the Council’s involvement in tourism.

Rhondda Cynon Taf has a number of tourism growth products or niche markets that can be maximised. These are:-

- Walking
- Cycling
- Adventure / Activity
- History / Heritage
- Culture / Events
- Genealogy
- Golf
- Equestrian

These will form the basis of the tourism offer to be developed and marketed. From extensive consultation with key tourism stakeholders there have emerged three broad aims and eleven underpinning challenges to provide the framework to deliver a three-stage action plan over the next 6 years. This timeline corresponds to the European Convergence funding period and the strategy is linked to all relevant Rhondda Cynon Taf improvement plans.

Aim 1:

To become a ‘Destination Brand’ and raise the profile of Rhondda Cynon Taf on the UK tourism map

Aim 2:

To develop and raise the quality of the Rhondda Cynon Taf Tourism Offer

Aim 3:

To develop effective partnership working within the tourism industry

Challenge 1:

Pre visit Image and Information

Improving the image of Rhondda Cynon Taf as a short-break destination by positive media management and awareness raising plus a robust and targeted marketing campaign.

Challenge 2:

Making Bookings

Attracting more visitors to stay longer by improving booking access via the web and providing short breaks and packages that can be booked.



Challenge 3:

Journey to Destination Rhondda Cynon Taf
Working with regional and national organisations to improve tourism signage and information provision at key influx points.

Challenge 4:

Initial Welcome

Capitalising on the warm and friendly disposition of the valleys people through training opportunities, community pride and ambassador programmes, tourism gateways and a clean and safe environment.

Challenge 5:

Information Provision in Destination

Information on what to see and do whilst in the area will be accessible through a tourism information points and new technologies like 'podcasting'.

Challenge 6:

Places to Stay

More graded accommodation and camping and caravanning provision.

Challenge 7:

Attractions and Activities

Supporting key attractions like the Rhondda Heritage Park with the marketing and development of the park as the hub for history, heritage and genealogy. Dare Valley Country Park as the hub for to outdoors and activities and in particular accessing Heads of the Valleys funding. And Ynysangharad War Memorial Park as the hub for events.

Challenge 8:

Places to Eat

Places to eat in Rhondda Cynon Taf will offer more locally procured menu's and will cross promote local attractions and accommodation providers to encourage local spending

Challenge 9:

Infrastructure and Environment

Improving signage within the County Borough as well as the appeal of tourism hot spots such as stop off points, railway and bus stations.

Challenges 10 & 11:

Farewell and Return Journey and After Visit Memory and Contact

Maintain contact with visitors to encourage return visits and customer feedback.



“...a great place to unwind”

CYRCHFAN
DESTINATION
RHONDDA CYNON TAF *ret*



1. Introduction

Until recently, tourism in Wales and in Rhondda Cynon Taf has been growing steadily year on year, (STEAM reports 1999 to 2006). However, the approach taken in managing the tourism offer or proposition has only recently been prioritised by the development of a Tourism Unit in 2007. As the Unit is responsible for increasing tourism in the County Borough, it is felt that this strategy should be clear from the beginning in its definition of what tourism is. Therefore, from the many tourism definitions available, the Tourism Society's version will be used:-

'The temporary short-term movement of people to destinations outside the places where they normally live and work and the activities during the stay at these destinations.'

Rhondda Cynon Taf is predominantly a day visit destination, with 45% of visits being in this category according to STEAM data (2006). This, coupled with the statistic that when visitors do stay, 36% stay with friends or relatives suggest that the Council has a considerable challenge to alter the tourism proposition to encourage longer visits and appeal to those visitors without friends and relatives residing in the County Borough.

Achieving this challenge will not be possible in isolation. Therefore, Rhondda Cynon Taf Tourism Unit will work in partnership with stakeholders in the tourism industry. The first step will involve engendering a more communicative and co-operative Council, so that all departments involved either directly or indirectly with tourism will work together to achieve the vision set for 2013. The vision being:-

To improve the profile and "tourism offer" of Rhondda Cynon Taf so that visitors and prospective tourists believe the County Borough to be one of the UK's short-break destinations by 2013.

In order to achieve the vision and provide an effective service within the tourism industry, the Tourism Unit on behalf of the Council has a number of roles and responsibilities:-

Developer/Sponsor

Product development is key in maintaining and improving the tourism offer to visitors. However, the Hyder Report ("Tourism Opportunities Study For the Heads of the Valleys area of Rhondda Cynon Taff - Final Draft Report" 2007), has highlighted that new attractions likely to receive less than 50,000 visitors, can dilute visitor numbers at existing attractions, thus reducing viability. It is therefore necessary to focus on developing the existing offer and assets that we have in the County Borough.

This offer encompasses developing and promoting the three key attractions identified in the Atkins Report of 2005, namely the Rhondda Heritage Park; Dare Valley Country Park and Ynysangharad War Memorial Park. Countryside and green space development for the provision of tourism growth markets such as walking will also be supported.

The Tourism Unit will work with key strategic bodies like Visit Wales and Capital Region Tourism, in enhancements and projects that improve the tourism offer from the community and private sector. The Unit will also play an important role in drawing down funds for tourism development.

1. Introduction



Co-ordinator

The Tourism Unit will act as a signpost for local trade in tourism related issues. It will improve internal communications within the Council, through the establishment of a tourism forum to share information, discuss joint initiatives and maximise on external opportunities such as major funding streams like the Heads of the Valleys Initiative and the new European Structural Funds Programme scheduled for 2007-2013. External communications will be improved via a more active role within the local Tourism Association, bringing together the tourism industry and creating 'reasons to visit' the County Borough.

Promoter

As a Local Authority, we have the opportunity to be privy to a number of tourism related networks acting to improve the tourism profile locally, regionally and nationally. Therefore, the Tourism Unit will represent the Local Authority at relevant meetings, and ensure that Rhondda Cynon Taf is fairly represented in all relevant marketing campaigns and funding allocations.

The consultation process

In order to develop a robust and inclusive tourism strategy, a number of consultation processes have been implemented. These include the liaison with key Council stakeholders to ensure that there is a unified Local Authority approach to tourism as well as consultation with Valleys Tourism Association.

Approach

The following sections provide a detailed account of the tourism product in Rhondda Cynon Taf, the target markets that we want to attract, as well as the methods used to communicate and entice visitors to the area.



"...the daily round up"

CYRCHFAN
DESTINATION *ref*
RHONDDA CYNON TAF

2. Setting the Scene



Rhondda Cynon Taf is located north of Cardiff, at the heart of South Wales and is the second largest Local Authority in Wales. To the north it includes part of the Brecon Beacons National Park and to the south neighbours Cardiff with the M4 running at its base and the A470 to the east. There are eight main towns, and the geography embraces an upland plateau and three valleys in the north, with rolling farmland and woods in the south.

2.1 Accommodation

There is a fairly good range of guest rooms in different types of accommodation in Rhondda Cynon Taf, which is concentrated around major settlements such as Pontypridd and Aberdare. There are 23 hotels, 6 graded, 12 bed and breakfast/guesthouses, 1 graded, 5 self catering/bunk houses, 4 graded and a 3 star caravan and camping site based in Dare Valley Country Park.

Table 2.1: Serviced and self-catering accommodation in Rhondda Cynon Taf

Type	No. in Rhondda Cynon Taf	No. of Bedrooms
Non graded hotels	17	227
Graded hotels	6	163
Non graded guesthouses	12	56
Graded guesthouses	1	4
Non graded self catering	1	3
Graded self catering	4	19
TOTAL	41	472

Type	No. in Rhondda Cynon Taf
Touring caravan pitches	25
Static caravans	0
Camping pitches	10
TOTAL	35



2. Setting the Scene

Tables 2.1 highlight a number of issues regarding the accommodation stock in Rhondda Cynon Taf.

- There is a favourable amount of bed stock in the County Borough, however there is a low number of graded accommodation stock, which makes it difficult to attribute any level or benchmark quality to the visitor, and prohibits the promotion of such providers by Visit Wales and other public bodies.
- There is only one camping and caravan park in the County Borough, with a limited and often saturated capacity.
- Only three out of the 41 accommodation providers are owned by a branded chain, which on a positive note provides a unique and personal feeling for the area, but conversely limits the visitor market gained through hotel brand loyalty.
- There is a recent growth in higher quality self-catering provision, an area that Visit Wales has targeted as a priority in their tourism strategy.
- A recent telephone survey with the accommodation providers, has highlighted that a number of providers are looking to sell up and retire in the next 18 months, and it is not known whether the guesthouses will be purchased as going concerns.

2.2 Attractions and Activities

The existing tourism product within Rhondda Cynon Taf is primarily focused around the area's rich heritage and natural environment. A number of attractions currently offer the visitor an insight into the area's heritage, with its strong links to the mining industry. Since the decline of that industry, many reclamation schemes within Rhondda Cynon Taf have vastly improved the landscape, which is today another focus for visitors. Not only does the area offer quality facilities such as the Dare Valley Country Park, but there are also a number of smaller county parks and an abundance of forest areas.

Rhondda Cynon Taf has 49 attractions spread geographically throughout the County Borough. Of these, many are local heritage attractions, and apart from the larger Rhondda Heritage Park, Pontypridd Museum and Cynon Valley Museum these comprise mainly of churches, castles, statues and Iron Age features. The natural environment features prominently, the area is rich in rights of way, strategic trails, waterfalls and waterfall walks. The area also acts as a hub for several major walking and cycling routes, including the Taff Trail, Sustrans Route 8 Lonlas Cymru Holyhead – Cardiff and Route 4 London-Fishguard as well as the Celtic Trail high level Mountain Bike route which runs from Pontypridd to Neath.

Table 2.2: Visits to Tourist Attractions

Attraction	Visitors 2004	Visitors 2005	Visitors 2006
Dare Valley Country Park	-	79,550	93445
Cynon Valley Museum and Gallery	43,845	44233	53910
Nantgarw China Works	552	2193	-
Rhondda Heritage Park	51,709	55,917	49830
Pontypridd Museum	27,737	26,725	26,050

Table 2.2 shows that Dare Valley Country Park and the Rhondda Heritage Park are the main tourism attractions within Rhondda Cynon Taf, both yielding visitors around the benchmark of 50,000 visitors per annum for a sustainable attraction. Hyder - "Tourism Opportunities Study For the Heads of the Valleys area of Rhondda Cynon Taff - Final Draft Report" (2007)

2. Setting the Scene



There are seven social or cultural attractions including the Muni Arts Centre, Coliseum and Parc & Dare Theatre and the Cynon Valley Museum and Gallery. There are six country parks and forestry areas including Dare Valley Country Park, Aberdare Park, and Garwnant Forest Visitor Centre. The Welsh Whisky Distillery at Penderyn has short-term plans to become a Visitor Centre. Attractions tend to be spatially concentrated at certain locations, local hubs with attractions such as at Llanwynno with many other assets focused in and around Pontypridd and along the Rhondda Fawr Valley.

Heritage and History

Perhaps better known for its industrial heritage, Rhondda Cynon Taf's heritage is much more diverse, going back through the Iron, Bronze and Stone Ages.

However, it is the history of the Industrial Revolution that provides a strong heritage brand for the South Wales Valleys, and this reflects the growing confidence in the cultural and economic potential of the areas' industrial legacy, and the successes of high profile initiatives developed by Herian.

The European Routes of Industrial Heritage initiative, also provides the opportunity to

promote Rhondda Cynon Taf's heritage on a European scale. Both the Cynon Valley Museum and Rhondda Heritage Park are identified sites along the South Wales Regional Route, and this establishes tourism links with more prominent regional attractions at Big Pit and Swansea's National Waterfront Museum.

Heritage is already a key asset of the area, and through initiatives such as the Interpretive Plan produced by Herian, it is envisaged that it will continue to grow. This growth is strongly associated with development of specific niche markets, such as genealogy. Developments on the Internet, and the launch of websites like Ancestry.com. Television programmes such as 'Who do you think you are?' are likely to further promote this market, allowing users to search family histories back to around 1790. As people establish family links to Wales, a visit to their birthplace or town is often associated, bringing a number of benefits to the local economy. The Rough Guide views genealogy as one of the fastest growing sectors in the travel industry, which has the potential to be extremely lucrative due to the numbers of Americans whose families originally came from Wales.

The growth in heritage tourism has been acknowledged by areas such as Torfaen, which

has done a considerable amount of work in developing the town of Blaenavon and the Big Pit Mining Museum as a World Heritage Site. Working with Big Pit and other high profile attractions will be vital in order to share in the visitors attracted and extending their visits to come to linked attractions just around the corner.

Rhondda Cynon Taf County Borough Council has recently reiterated its commitment to protecting the heritage assets of the area, and developing means of marketing and interpreting them with the commissioning of a Heritage Strategy that runs in parallel to this tourism strategy, and the appointment of a Heritage Officer to develop the work of the strategy. It is acknowledged that Rhondda Cynon Taf has a unique place in the history of South Wales and the UK, and as such this is an important differentiating factor when marketing the area for tourism.

Countryside and Parks

Countryside in Rhondda Cynon Taf is extensive, covering 80% of the County Borough. Green spaces cover 400 ha and include two premier parks (Ynysangharad War Memorial Park, Aberdare Park and Dare Valley Country Park, as well as key countryside sites and sports grounds. Garwnant Forest Visitor Centre lies just on the border between Rhondda Cynon Taf and



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Merthyr Tydfil and is managed by the Forestry Commission. These green spaces provide opportunities for both formal and informal recreation, everything from bowling greens and tennis courts to public rights of way and fishing waters. Rhondda Cynon Taf also benefits from many areas of open access land, especially in the north of the County Borough.

One of the County Borough's three key attractions, Ynysangharad War Memorial Park in Pontypridd, stages year-round events that attract visitors from outside the County Borough. The Park also has plans for restoration of some of its listed facilities, this will increase its appeal as a tourism destination and catalyse the regeneration of Pontypridd Town Centre.

Dare Valley Country Park in the north of Rhondda Cynon Taf has also been identified as one of three key attractions with realistic tourism potential (Atkins 2005), and is set in over 500 acres of reclaimed industrial land with woodlands, way marked trails, and lakes. It has a Visitor Centre with café facilities, 2 star accommodation and a 3 star camping and caravan park. The Park has huge potential for development, and makes an ideal candidate for Heads of the Valleys funding.

The Cynon Valley River Park Project aims to bring together all the relevant green-space projects in the valley floor, from Rhigos and Penderyn in the north, to Abercynon in the south, the project will look at all areas large and small, strategic and local, and pulling together into a coherent and up to date framework which can be used to guide action, and fund raising, over the next 10 years.

Walking and Cycling

Walking in Rhondda Cynon Taf has recently been recognised as a key activity for increasing visitor numbers and engaging our local communities. The County Borough has over 700 kilometres of trails and established walks, linking communities and villages with woodlands and mountains. Throughout the County Borough there are diverse access opportunities. The open moors can offer remote and challenging walking, thick forestry plantations contrast with the dappled sun-lit deciduous woodlands. You can choose a steep scramble by a mountain stream or a level, surfaced former railway track by the river. In the north of the County Borough open access land is extensive, in places adjoining the terraced streets. In the south, the footpath and bridleway network is denser, crossing a countryside of farms and small woods.

Way-marking and maintenance standards have improved due to an increase in staff and resources from 2002. However, consultation and 'easy to use' statistics indicate that further work is required, in particular with regard to the out of date Definitive Map.

Forestry Commission Wales in addition to the formal trail network allows open access for walkers throughout its extensive woodlands. There are walks for all abilities and local people have helped develop and promote walks around their communities.

Walking as a holiday and a day visitor activity is very popular in Wales, with over half of all day visits including walking activity (Visit Wales Walking Tourism Strategy). Spend by walking visitors is estimated to bring over £550 million into rural and coastal communities. Walking visits bring other benefits, alongside the economic ones, including reducing seasonality and contributing to the development of sustainable tourism.

The County Borough is well served by walking and cycling routes, providing links across the region with three key strategic footpaths. The Coed Morgannwg Way runs east to west taking in the Dare Valley Country Park and passing

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close to Aberdare town centre. The Taff Trail Strategic Cycleway is accessible for walkers and forms an integral element of Sustrans Route 8 on Lon Las Cymru within Rhondda Cynon Taff. The Trail offers access to Cardiff to the south and Merthyr and Brecon to the north. The Rhymney Valley Ridgeway walk runs north – south to the east of Rhondda Cynon Taf although does not directly enter the County Borough. The Cynon Trail is currently under development and will provide a walking / cycling route along the Cynon Valley. Further developments include linking the Taff Trail in Abercynon to Ynysybwl, a cycle link from Dare Valley Country Park to Aberdare Town Centre, and a link from Dare Valley Country Park to Cwmaman.

The Loops and Links network is a recent initiative to join together strategic routes with local level rights of way, country lanes, old drovers roads and forestry tracks. The initiative has so far established 18 trails within Rhondda Cynon Taf and links to Merthyr Tydfil. The trails are designed to be used by walkers, mountain bikers and wherever possible by horse riders and encourages users to explore the towns, villages and countryside of the Valleys. There are plans to develop Loops and Links in the south of the County Borough linking with Bridgend by 2010.

Established schemes promoting walking include the annual 'Wales Valleys Walking Festival' and the 'Walking Your Way to Health' initiative. Both have helped raise the profile of this key tourism growth area in Rhondda Cynon Taf. However, a lot more can be done to co-ordinate and market the vast amount of walks being developed and promoted by local communities, so that visitors to the area can easily see what is on offer.

Cycling

A number of cycle routes also provide recreational access within Rhondda Cynon Taf. The Celtic Trail (Route 47 of the National Cycle Network) runs northwards from Pontypridd before heading west above Maerdy. Route 4 of the Network runs from Pontypridd and heads westwards towards Bridgend. The Taff Trail (Route 8 of the National Cycle Network) follows the strategic footpath from Cardiff to Brecon, passing through Pontypridd and Merthyr Tydfil along the route.

The Visit Wales cycle tourism strategy, reports that cycle tourists, whether coming for cycling holidays, or participating in cycling as a holiday activity, represent a growing and valuable tourist market for Wales. Estimates suggest that the sector in Wales is currently worth over £34

million. The Strategy envisages mountain biking, Wales cycle breaks, family cycling and cycle touring in Wales as key growth market areas. The location of Rhondda Cynon Taf between two of South Wales' most popular cycling destinations (Afan Argoed and Cwm Carn) and the presence of the Celtic Trail within the Authority and Taff Trail along the eastern boundary, present excellent opportunities for the development of cycling within the area. The development of the Loops and Links network within the County Borough is a step forward in linking the established strategic trails to attractions and accommodation, drawing cycle tourists into the Authority. Cycle hire initiatives are emerging throughout the County Borough, which will serve to bolster the cycling product.

Arts and Entertainment

There are four multifunctional arts venues in Rhondda Cynon Taf, the Muni Arts Centre in Pontypridd, the Park & Dare Theatre, Treorchy, the Coliseum Theatre, Aberdare, and Cwmaman Institute. Between them, they present a diverse programme of film, music, drama, dance, literature, craft, digital media, visual arts and light entertainment. Visit Wales on reflecting the key potentials for tourism development in Wales, has produced a number of themed strategies which identifies culture, sports and



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adventure tourism as key opportunities. The Cultural Tourism Strategy, WTB (2003) refers to the need to change perceptions through raising the profile of Wales as a unique cultural tourism destination drawing on its language, history, and the arts.

The Valleys cultural identity is also closely aligned to the traditions of music, literature and sports, and the enhancement and promotion of modern cultural activities is important in terms of promoting an attractive vibrant image.

Events and festivals are critical in promoting local arts and culture, encouraging community participation. Although festivals and events vary considerably in size and level of attraction, they share the potential for encouraging local tourist expenditure and overnight stays, and to develop into regional or potentially national festivals and events.

Shopping and Eating Out

There are eight town centres identified for redevelopment in Rhondda Cynon Taf. Each offers traditional crafts and gifts as well as high street names. Each town centre has its own identity and 'offer' and this has been used in

promotional materials. Modern out of town shopping centres include Talbot Green Retail Park and Parc Nant Garw, which offers a range of leisure experiences including eating out, a cinema and bowling complex.

Crafts also play a role with the Model House, a thriving craft & design centre providing a gallery shop and studio space for up to 14 craft tenants who run their own businesses from attractive glass fronted studios.

Adventure Tourism and Sport

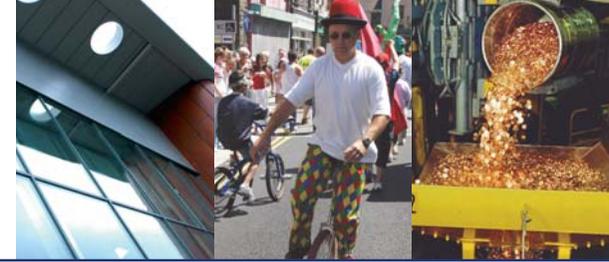
Adventure tourism includes climbing, caving and pot holing, non-motorised watersports, diving, motorised land sports, air sports, mountain biking, hill walking / trekking and other land based activities. Adventure tourism currently accounts for at least 1.25 million visits to Wales per year, and in the order of £180 million direct visitor spending. Anecdotal evidence suggests growth in this sector, particularly given facility development, improved access and better marketing and promotion. Rhondda Cynon Taf has 3 activity centres offering climbing, quad biking, shooting and other adventure activities.

Equestrian

Horse riding is an important tourist activity in Wales, with an estimated 800,000 riding occasions each year and a direct expenditure of approximately £18.55 million. Visit Wales estimates a 10% growth in riding holidays as achievable, giving product strengths and assuming further developments to facilities. Rhondda Cynon Taf is well placed to benefit from this anticipated growth, with a very high proportion of horse ownership in the area and an excellent outdoor environment. The Authority's proximity to the Brecon Beacons National Park also provides opportunities to link with established equestrian routes. However there are currently very few established facilities for equestrian tourism in Rhondda Cynon Taf, and this suggests an ongoing developmental need in this area.

It is recognised that there is a shortage of bridleways in the Rhondda, Cynon and Taf Valleys. In Taff Ely, the area north of Brynna and Llanharan has the most concentrated network of bridleways in the County Borough. Some limited provision for horse riders has been developed as part of the Loops and Links project in the north of the County Borough, and there is extensive access to Forestry Commission Wales owned land

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via the concordat with the British Horse Society. Rhondda Cynon Taf has three established horse riding centres, Green Meadow based in Dare Valley Country Park is in a prime location as well as Talygarn Equestrian Centre based near Llantrisant and Rockwood Riding Centre, Craig yr Allt, near Taffs Well. However, they are not directly set up for equestrian tourism at present.

Golf

There are six 18 hole golf clubs in the region, these are Aberdare Golf Club, Llantrisant and Pontyclun Golf Club, Mountain Ash Golf Club, Rhondda Golf Club, Pontypridd Golf Club and Whitehills Golf Club. There is also one pitch and putt course based in Ynysangharad War Memorial Park. With the presence of the Ryder Cup in the Region in 2010, golf tourism is increasingly popular and the interest in the regions golfing facilities is likely to continue. Reports from Ireland, host of the 2006 Ryder Cup, suggest that by 2005, 75% of hotel beds within a 50-mile radius of the K Club had been sold, and those looking for higher quality, 4 / 5 star accommodation would have needed to book by 2004. This is not surprising with an event expected to attract approximately 45,000 visitors per day. However, it is not just this short-term investment, which is expected, for instance 40% of US tour operators believe their

customers are more interested in visiting Ireland because of the Ryder Cup. Figures suggest that the early impacts of the Ryder Cup are being felt in Wales already, with a 10% increase in golf tourism in 2005, attracting nearly 155,000 visitors. Rhondda Cynon Taf has the potential to benefit from the 2010 Ryder Cup at the Celtic Manor given its close proximity (30 miles). If trends in accommodation bookings and interest in golfing breaks reflect those witnessed in Ireland, the event could bring a number of benefits to accommodation providers and golf courses in Rhondda Cynon Taf. It is likely to be the case that visitors will stay in the area and may wish to partake in golfing activity the vicinity of their accommodation, as well as the potential for friends and family visiting whom do not want to play golf.

Events

Events and festivals are an emergent giant in the competitive leisure & tourism arena. Increasingly public and voluntary organisations are teaming up with commercial operators, to deliver events for dual social & economic rewards.

In Rhondda Cynon Taf, there is a proven track record for staging successful events, with over 100 different events held annually, attracting in excess of 130, 000 visitors, a range of target markets are accommodated, with food and agricultural shows, music concerts, fetes, carnivals, community and educational events, as well as Christmas parades, sporting activities and civic functions.

The strategic development of events and festivals as social and economic generators, will greatly enhance the tourism product within Rhondda Cynon Taf, further establish the area's reputation for excellence in this field, and maximise the opportunities for sponsorship and commercial partnerships.

Conference and Business Facilities

Rhondda Cynon Taf offers a good standard of conference venues for international conferences, business meetings, incentives and training events. These are based in hotels, attractions and the University of Glamorgan. However, it is important to point out that Rhondda Cynon Taf is very close to the larger scale facilities in the nearby cities of Cardiff, Newport and Swansea.



2. Setting the Scene

2.3 Infrastructure

Rhondda Cynon Taf is primarily accessed by car, and the general quality of transport linkages throughout the County Borough is good and the railway line serves both the Rhondda Fawr and the Cynon Valleys. However there is no rail link to the Rhondda Fach, bus services are available throughout the County Borough.

Car parks within Rhondda Cynon Taf are predominately owned and run by the Local Authority. Attractions such as Rhondda Heritage Park, Dare Valley Country Park have ample free car parking spaces.

Rhondda Cynon Taf has a Tourism Information Centre, which is situated in Pontypridd Museum. There are a number of areas within Rhondda Cynon Taf Council offices, libraries and attractions which all offer tourist information.

The volume of overseas visitors to Wales remains low – attracting only 3% of all overseas visitors to the UK. On a Wales level, the planned introduction of a Welsh Route Development Fund will help to expand the range of scheduled air services from Cardiff International Airport in particular. And, as the growing European short break market is dominated by low-cost airlines, this will have a positive impact.

Access within Wales has also improved with the launch of intra-Wales air service in 2007. Ferry services between Ilfracombe in Devon and Swansea and Minehead and Penarth proposed for 2008 will increase access further.

Tourism signage in Rhondda Cynon Taf varies considerably including signage on main roads, signage to attractions and settlement signage. Only one attraction located within Rhondda Cynon Taf is signed off the M4 motorway, which is arguably the most important tourist route through South Wales. In the vicinity of Cardiff, the M4 frequently displays brown signs directing tourist towards Rhondda Heritage Park from the south and this continues via the A470 towards Merthyr Tydfil. Significantly, the A465 Heads of the Valleys Road does not display brown signs for the

Rhondda Heritage Park for tourist approaching the area from the north. The only brown signs displayed on the A465 for Rhondda Cynon Taf are located in the vicinity of Hirwaun, and direct visitors towards Dare Valley Country Park.

2.4 Marketing

This section is a summary of the main research findings from a data gathering exercise undertaken to ascertain the size, importance and nature of the tourism market in Britain, Wales and Rhondda Cynon Taf.

Measurement

Volume and value of tourism is notoriously difficult to measure. In the UK, data is gathered by several agencies for different countries, areas, regions and local authorities. Data sources include The Office of National Statistics, Department of Culture, Media and Sport, Visit Britain, WAG / Visit Wales, Capital Region Tourism, STEAM and Southern Wales. The different research methods, extrapolation methods and interpretation create a massive variance in figures and values, so therefore, none of the figures quoted should be considered as definitively accurate but they can be considered as indicators of trends.

2. Setting the Scene



Market Analysis - Background

Disposable time and income has increased in the Western world since the Second World War and the subsequent 'baby boom' in the 1950's, allowing for a well-documented rise in tourism from within the developed nations. These trends have increased steadily, with economic disasters or national tragedies causing only relatively minor blips in the upward movement of the trends. The rise of package holidays, cheap flights, and internet booking has made foreign holidays more accessible to more people. Destinations have realised that tourism has a contribution to make to their economies, and so have invested heavily in marketing. The development of niche marketing techniques and internet booking has ensured that a wide range of product on both a domestic and international basis, is available to anybody who has access to a computer and a debit or credit card. Consequently, tourism at all levels operates within an extremely competitive sector, competing on global and local scales in both niche and mass markets.

Key Tourism Facts

"Tourism is one of the biggest industries in the UK, accounting for 3.5% of the UK economy and worth approximately £85 billion in 2005" (Visit Britain)

Approximately 100,000 people in Wales are employed in tourism. This represents approximately 9% of the workforce. (Visit Wales)

In 2005, South East Wales received 2.8million UK overnight visitors, these visitors stayed 7.6million nights, sending £408million. (Visit Wales)

The Market

UK residents are taking more holidays than ever before. The number of people taking two or more holidays has increased from 15% to 25% between 1971 and 1998. This corresponds with the rise in accessibility in foreign holidays (the number of foreign trips outbound from the UK tripled between 1985 and 2005). This suggests that as the UK populace attempt to maximise the use of their free time there is a likelihood that additional holidays are likely to be

domestic.

Visitor numbers to the UK are increasing. In 2005 30 million overseas residents visited Britain spending £14.2 billion. However most visitors to Wales come from a domestic market – Wales and England in particular. Key English regions include the Midlands, the South West and London. Overseas visitors primarily come from Ireland, the US, Germany, Netherlands and France. This highlights the importance of communication links by Road and Rail (M4, A465, Cardiff – London Rail Links) and also good airport provision (Cardiff Wales, Bristol, London airports) and effective ferry provision. The recent loss of the Swansea – Cork ferry is likely to have a negative impact, whilst the possible introduction of ferry links from South Wales to Devon and Cornwall could have a positive impact.

By 2005 overseas and domestic tourism accounted for a spend in South East Wales of Target £591million and 3.2 million visits.



Target Markets

To make effective use of our limited resources, it's essential that we continue to target geographical markets and market segments which offer the best potential for Rhondda Cynon Taf.

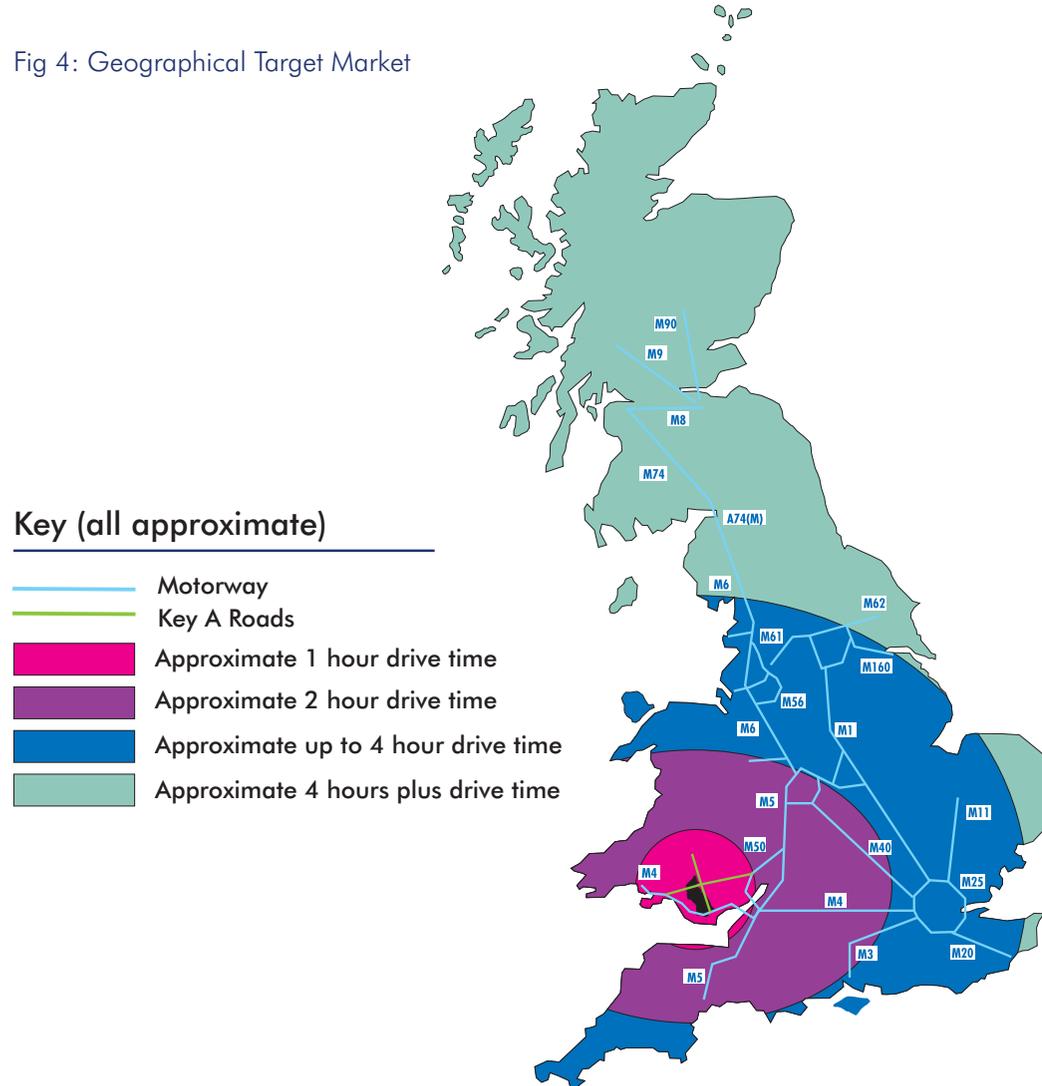
We are evolving our targeting approach to segment visitors by their attitudes and motivations, rather than by simply using demographic factors. The campaign will reach a broad range of potential visitors and will focus on 'the category used by Visit Wales, known as Independent Explorers'.

Who are Independent Explorers?

Independent explorers are in search of new experiences and places. They are slightly upmarket and tend to be adults aged 30 years and over. They shun the over commercialised tourist honey pots. They are free minded, they do not follow the herd. They are free spirited, they look for places that allow them to be themselves, that enrich them, that challenge them. They like to interact with the place to understand culture, to meet its people and to return refreshed and enriched.

Geographically we will target UK markets within a four-hour drive time, the M4 Corridor (including London), Midlands, North-West, Hampshire and the West of England.

Fig 4: Geographical Target Market





“...another busy day at the coal face”

CYRCHFAN
DESTINATION
RHONDDA CYNON TAF

ref



2. Setting the Scene

The tables below are taken from STEAM figures published by Global Tourism Solutions and supplied to each Local Authority. They are an amalgam of several different reports and highlight key tourism trends and economic impact of tourism in Rhondda Cynon Taf. Care should be taken when reviewing STEAM figures as they are based on trend data and are therefore indicative of trends rather than precise measurements. The effects of Foot and Mouth and the global downturn in tourism caused by the September 11th attacks can be seen in table 2.3, in particular for the years 2001-2002. It is generally perceived that the local industry was dynamic and robust enough to overcome these problems quickly. More recently, 2006 figures have shown a downturn in Rhondda Cynon Taf, this trend is reflected across many local authorities in Wales.

It remains to be seen how the recent agricultural scares and unusually poor weather have affected tourism in 2007.

The table above demonstrates how tourism has a direct economic impact beyond attractions and accommodation. Although the value of the accommodation income has increased over the previous seven years up until 2006, it actually accounts for only about 5% of the income to the

Table 2.3: Analysis by Sector of Expenditure (RCT)

(£'s millions)	2006	2005	2004	2003	2002	2001	2000	1999
Accommodation	5.4	6.0	5.5	6.2	4.9	5.4	5.6	4.3
Food & Drink	19.9	20.4	20.1	20.0	19.7	20.2	18.7	19.4
Recreation	9.0	9.1	9.0	9.0	8.9	9.1	8.5	8.7
Shopping	16.5	17.0	16.8	16.7	16.5	16.8	15.5	16.1
Transport	14.2	14.6	14.4	14.4	14.2	14.4	13.4	13.9
Indirect Expenditure	36.1	37.4	36.6	36.8	35.6	36.5	34.2	34.5
VAT	11.4	11.7	11.5	11.6	11.2	11.5	10.8	10.9
TOTAL	112.4	116.3	114.1	114.7	111.0	114.0	106.8	107.8

(Source: STEAM)

area from tourism activity. The value to the Food and Drink and Shopping Sectors in particular are relevant as is the indirect expenditure generated with businesses along the supply chain.

Tourism in Rhondda Cynon Taf directly supports as many as 1494 full time equivalent jobs with a further 602 safeguarded further down the supply chain. This figure has grown with few area specific initiatives in Rhondda Cynon Taf to support it, and no new tourism developments to catalyse any growth.

Even without specific sectorial support tourism could account for as much as 2.45% of the employment in Rhondda Cynon Taf (2,096 from 85,380 – Census 2001) with the correct marketing and product development, the potential exists for much more.

2. Setting the Scene



Table 2.4: Revenue by Type of Visit

(£'s millions)	2006	2005	2004	2003	2002	2001	2000	1999
Serviced Accommodation	16.6	17.5	15.7	15.5	12.3	14.6	15.5	11.1
Non-Serviced Accommodation	4.5	4.2	4.0	5.6	5.9	7.3	6.8	8.4
SFR ²	40.4	40.4	40.4	40.2	40.4	41.8	39.6	39.7
Day Visitors	50.9	54.2	54.0	53.3	52.3	50.3	44.9	48.6
TOTAL	112.4	116.3	114.1	114.7	111.0	114.0	106.8	107.8

(Source: STEAM)

In Table 2.4, it can be seen that day visitors account for around 45% of the visitors to Rhondda Cynon Taf.

Where serviced accommodation has seen a growth in recent years with a slight decrease in 2006. , non serviced areas such as self catering and caravanning has seen an increase for a third year running.

The value of a visitor staying in accommodation is higher than that of a day visitor. In order to capitalise on any potential growth in the market it is important to ensure that there are enough quality bed spaces available and they have the potential to be packaged effectively. This means ensuring cooperation between public and private sector facilities and development of the product offer including places to stay, eat and drink.



2. Setting the Scene

Table 2.5: Revenue by Area

	Rhondda Cynon Taf	Merthyr Tydfil	Caerphilly	Bridgend	Vale of Glamorgan	Swansea	Neath Port Talbot	Cardiff	Newport
Expenditure (£'s millions)	113.5	37.7	71.7	232.1	145.8	238	65.3	505	152.6
Tourist Days (1000's)	3123	1042	1956	5130	4860	6383	1742	13,072	2,760
Tourist Numbers (1000's)	2533	876	1507	3615	3554	3531	1338	11,550	2,124
Sectors in which Employment is Supported (Full Time Equivalent's)	2122	722	1431	4452	2345	4707	1365	8,987	2,502

(source: STEAM All Wales Executive Summaries 2005)

Rhondda Cynon Taf gains a reasonable proportion of visitor spend in Wales. Nearby local authorities such as Neath Port Talbot, Caerphilly and Merthyr Tydfil, receive less on a per local authority basis which can be viewed as competition as well as supporting the overall product offering of the area. More traditional tourism areas such as Swansea, Bridgend and Vale of Glamorgan unsurprisingly receive higher levels of visitor spend. Cardiff receives tourism expenditure over half a billion pound, and is looking to develop that further with recent efforts to market the city as a European City Break destination. The recent profile developed from the filming of Dr Who and Torchwood has added an extra couple of strings to its bow –

especially with regards to developing an inbound market from Canada and potentially North America. Domestic tourism generated as a result of these shows has pushed Cardiff into the top 10 short break UK destinations. (www.news.bbc.co.uk). Cardiff has also recently invested in the creation of a new marketing body for the capital, Cardiff & Co.

Tourist Profile

City Breaks seem to account for the highest proportion of the visits to the South East of Wales, with 43% of holiday trips and 51% of all tourism trips being spent in a Large City or large

town, within the region this would primarily mean Cardiff and Newport. Small town stays account for 23% of holiday trips (this is likely to mean established tourism based towns such as Abergavenny, Brecon and Monmouth (South East Wales Visitor Study – Heads of the Valleys) and Countryside or Village for 21% of visits. This suggests the market exists for promoting packages that capitalise on the Valleys unique mix of rural and urban landscape and culture. (Visit Wales - Tourism to South East Wales 2005)

According to South East Wales Visitor Study – Heads of the Valleys, nearly all visitors to the South Wales area and Rhondda Cynon Taf come by car. Just under half the visitors booked

2. Setting the Scene



their accommodation in advance and they did this by phone primarily and then internet. Over a third of people travelled with a spouse or partner and over 88% were in groups of 2-4.

Visitor Trends

The recent Hyder Report “Tourism Opportunities Study For the Heads of the Valleys area of Rhondda Cynon Taff - Final Draft Report” (2007) identifies market trends at a national level, as well as several potential growth sectors particularly relevant to Rhondda Cynon Taf.

- Wales is in competition with newly emerging tourism destinations such as locations in Eastern Europe, along with established destination areas in the UK. (ibid) This principle also then works at a Local Authority level where smaller regions (such as Rhondda Cynon Taf) work in competition with other emergent areas.
- Wales’ share of international tourism business to the UK is low, attracting 3% of all overseas visitors. This reflects the poorly developed international transport links (ibid). This also

offers opportunities as new links are created – in particular new air routes and developing England – Wales Ferry Routes. In recent years, the rail connections between the Valleys and Cardiff Wales Airport have improved, with a regular service from Aberdare / Pontypridd to the airport using the Bridgend line and a bus transfer from Rhoose village to the terminal. However, this service isn’t widely publicised to either outgoing or incoming passengers at this time.

- The short break market tends to be less seasonal and offers higher expenditure and is a growth area for tourism in Wales (ibid). This offers an opportunity for Rhondda Cynon Taf to develop products in this area. However, other areas have identified this market as a key target – especially Swansea and West Wales (ibid).
- Wales is under-represented in national / international branded hotels (ibid). This is echoed with by a 3% share of accommodation in the County Borough being part of a chain.

Growth Sectors

The Hyder “Tourism Opportunities Study For the Heads of the Valleys area of Rhondda Cynon Taff - Final Draft Report” (2007) identifies the following tourism growth sectors as opportunities for developing product in the Rhondda Cynon Taf area.

- Golf
 - Equestrian
 - Cycling
 - Walking
 - Adventure / Activity
 - Culture / Events
 - Heritage / Genealogy
- The golf product will receive a massive boost as a result of the Ryder Cup in 2010. The event will offer all of the benefits expected during the period of the event, but these will be relatively short lived as the event, itself is only a couple of days long. The key is to



2. Setting the Scene

capitalise on the associated publicity and profile that the South Wales area will receive, and find a way to achieve a recognisable 'share of voice' within the clamour for publicity. Valleys Tourism are working on a new Golfing Short Break to capitalise on this opportunity.

- Recognised opportunities to develop the bridleway and horse riding product in Rhondda Cynon Taf exist, however they may need to be linked to external offerings within the Beacons or Swansea Valley areas to be viable as a marketable product. It must be noted that developing this market requires a lot of effort and resources to be applied in developing the infrastructure.
- The cycling market is often treated as one market, but in fact it is an amalgam of very different activities. The market profile of a mountain biker is different from a touring cyclist, a family of 'dabblers' in the activity or families touring on the National Cycle Network. Rhondda Cynon Taf is not currently conducive to the mountain biking market, as there is only one real facility providing significant biking standards at Garwnant. Competition in this sector is fierce from areas like Afan Argoed in Neath Port Talbot. However, the Celtic Trail Mountain Bike Route

that links Pontypridd and Neath does provide an opportunity to enter this market.

- Walking is also a market that can be subdivided further. The proportion of people who visit an area purely for its walking opportunities are currently a minority in the South Wales area. This is changing as it is recognised as a growing activity for leisure and health reasons. It is still important to remember that walking is still very often a secondary consideration in choice of holidays, and needs to be supported with a reasonable things to see and do offer as well as quality eating and accommodation options.
- Adventure tourism has been developed as a major product in the Brecon Beacons, West Wales and Snowdonia. Anecdotal evidence suggests that there is demand for this form of provision in the South East Wales area, but there is currently little if any marketing support at a regional level. This document acknowledges that certain sports such as canoeing, climbing and pot holing have specific issues according to access, land ownership and liabilities, as well as potential environmental concerns.

- Heritage and genealogy are effectively two separate but complimentary markets. The heritage product in South East Wales is established, and in Rhondda Cynon Taf is well represented by Rhondda Heritage Park, Cynon Valley Museum & Gallery and Dare Valley Country Park. However, the product is in need of development in the face of increased competition from free-to-enter museum attractions, and new activities opening up in the area. The genealogy market is new and relatively untested in Rhondda Cynon Taf, but the Library and Heritage services within the Local Authority is developing key niche tourism products in this area.

2. Setting the Scene



Marketing Partnerships

Historically, Rhondda Cynon Taf has focused its marketing efforts regionally by working in partnership with other Local Authorities. On the plus side, this has meant that the County Borough enjoys greater economies of scale as a larger collective fund has stretched further and allowed a wider, more varied tourism offer to the visitor. Plus regional campaigns receive considerable funding from Capital Region Tourism, one of the four regional tourism partnerships in Wales. However, regional marketing does not increase the profile of each participant area, as the visitor becomes aware of the regional or sub-regional brand and not the individual destinations.

It is important to note that measuring the success of tourism is extremely difficult for a number of reasons:-

- Tourists to the area can only be tracked if tourists physically make a booking or notify you of their visit. Day visits and activities such as walking, cycling etc can take place without anyone knowing.
- The majority of tourism providers are reluctant to monitor visitor details, which would highlight the success or failure of marketing campaigns.

Ways around this are to develop a customer relationship marketing system, which builds information on visitors, and conduct regular research into any tourism activity. Website views can provide an indication of interest in the area but methods of measuring conversion should be added to this sort of data to ensure it can contribute to any return on investment analysis.

As mentioned Rhondda Cynon Taf has participated in regional and sub-regional, known as marketing area partnerships for a number of years. The following will provide an overview of what each partnership does and the perceived benefits.

Valleys Tourism Association

Valleys Tourism has provided a forum for the local trade in Rhondda Cynon Taf for many years. This forum has informed the trade on tourism issues and activities in the industry, and has been the link on many occasions between the Council, the tourism industry bodies such as Visit Wales and the hoteliers and attraction providers in the County Borough. Valleys Tourism has drawn down various funding streams for projects such as Fairways to Heaven, looking at developing and promoting the County Borough's golfing product. More recently the Association has held the walking gauntlet, and in recognition of the potential growth in the walking market has promoted its third annual walking festival.



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Valleys Tourism is growing its member base with the recruitment of a part-time marketing consultant and is running an annual program of presentations and familiarisation trips for members. In fact Valleys Tourism could be described as a useful extension of the Council's own tourism function, and there is no doubt that an association like Valleys Tourism is of significant benefit to the tourism industry as it provides a useful communication channel with the trade.

Wisdom and Walks (Valleys Area)

Wisdom & Walks is the official campaign promoting the Marketing Area Valleys of South Wales as a holiday destination. Marketing Areas are used by Visit Wales to carve up Wales and offer tourists a distinct offer in each area. Visit Wales promote each of these Marketing Areas without charge.

Wisdom and Walks' campaigns target ABC1s, couples aged over 45 years, and families with older children in the UK. Wisdom and Walks produces a guide including 7 themes, 'Outdoor and Active', 'Heroes of the Industrial Revolution', 'Folklore and Fairytales', 'Artists Impressions', 'Relax and Revive' 'Festival of Walks' and 'Genealogy'. Communication includes direct mail to the targeted markets, website and inclusion in the Visit Wales' walking campaign. Research from the last two years have show that Rhondda Cynon Taff has an estimated expenditure of £450,000 from a £13,000 campaign spend, a return on investment of 35:1. This success comes from the 10,000+ visitor database interested in the Valleys product. Some of the main benefits of working with this consortium are the pooling of funds to access wider markets working in partnership e.g. sharing ideas & knowledge, networking and accessing external funding.

Cordell Country

Alexander Cordell's novels provide an interesting mix of fact and fiction and are set throughout South Wales including Rhondda Cynon Taf. For some years a touring product has offered enthusiasts the opportunity to visit the places where the books are set. There is a guide for each tour, plus an accommodation guide and an audio tour taking excerpts narrated from the books and directions to key sites and landmarks. Past activity has not been monitored therefore the success of the campaign cannot be analysed. Through recent funding the campaign is now free, and the campaign is promoted at Tourist Information Centres and related tourist attractions in South Wales.



"...be part of the in crowd"

CYRCHFAN
DESTINATION
RHONDDA CYNON TAF

ret



2. Setting the Scene

Visit Wales

The role of Visit Wales is to generate enquiries and interest in Wales both in the UK and selected overseas markets. Considerable money is spent on raising the awareness of Wales as a tourist destination, and the majority of their marketing campaign work is centred on building up enquiries and growing their database. Following up with product information is fulfilled by the marketing areas such as 'Valleys Area – Wisdom & Walks' in Rhondda Cynon Taf's case. All their significant campaigns are chargeable and the marketing areas choose whether or not to participate.

If marketing areas do not participate, there is essentially a hole in the map and they are not included in Visit Wales' co-ordinated campaigns. To date, the Valleys Marketing Area has not been able to afford to participate, and involvement is neither affordable or permissible on a Local Authority area basis.

Visit Wales believes it must have the following at a local or regional level for marketing:-

- One destination layer below national that can be included in their marketing work.
- A complimentary approach to branding.
- A set of local or regional destination

brochures that cover the whole of Wales that are provided in sufficient numbers to service Visit Wales campaigns. These need to contain accommodation and a flavour of things to do in the area.

- A set of local or regional destination websites that cover the whole of Wales and provide detailed information about what the area has to offer. Strong and appropriate links to the VisitWales website.

Visit Wales International Marketing

Overseas markets are targeted offering the Wales product to markets in category A countries, USA, Germany, Netherlands and category B countries, Belgium, Japan, Australasia, Ireland, France. Campaign but in from regions or marketing areas is not permissible, and Visit Wales have carte blanche on choosing the images and offers, which is significantly devoid of anything valleys related. Campaigns include media work and advertising to raise the profile of Wales, as well as exhibitions.

Sustrans Marketing

Sustrans market the national cycle network across Britain. As such they promote routes 4, 47 and 8. Pontypridd can be considered a

potential hub destination for these routes. Sustrans sell maps of the routes, employ volunteer rangers, run work camps and develop new routes and promote art on routes.

2.5 Competitor Analysis

The decision to undertake a tourism activity is based on a number of factors such as:

- Needs and wants of the individuals or family
- Available time
- Available income
- Activities available at a destination
- Attractions available at a destination
- Accommodation available at a destination

Factors Affecting Future Tourism Trends

The Hyder document "Tourism Opportunities Study For the Heads of the Valleys area of Rhondda Cynon Taff - Final Draft Report" (2007) suggests the following factors may affect the future of tourism in Wales and Rhondda Cynon Taf in particular:

- An ageing population and improvements in health mean that there are increasing numbers of active and more affluent seniors who have more free time.
- Increasing affluence among the population is likely to shift demand to higher quality accommodation.

2. Setting the Scene



- Growing awareness of the range of choices available, means that tourism destinations must meet the individual needs of each market segment, and ensure that they offer value for money.
- As time becomes more limited and valuable and modern lifestyles more stressful, higher value is being placed on free time, which leads to enhanced expectations, an insistence for greater value for money, and an increased demand for short, additional holidays.
- There is a growing tourism market for groups such as single parent families, children travelling with grandparents, couples and extended singles travelling as groups of friends.
- Trends towards self-development, learning new skills and health and well-being may provide opportunities for activity and special interest products.
- The increase and affordability of European short haul travel has increased competition in the short breaks market. However, it also offers opportunities for Wales in new overseas markets.
- Concern for the environment is increasing. More people will want to visit destinations, which are perceived to be green and environmentally friendly.

- Climate change could lead to significant changes in seasonality and visitor patterns to Wales, an issue that the industry has been aware of for several years. Warmer weather is likely to reduce seasonality whilst colder weather will increase it.
- Fuel prices will begin to have an impact on local travel choices as well as longer distance travel.

Generic Factors

A consumer will have many demands on his or her available time and available money. Decisions such as whether to replace a car, buy a house, start a family can all affect the choices made as can factors such as work deadlines, shift patterns, career responsibilities etc. Any planned leisure activity is faced with competition from these sort of factors.

Once the decision has been made to take a holiday, a consumer must consider where they want to go and why? If they desire a beach holiday they will not consider visiting the South Wales Valleys. If they are interested in walking they could consider established walking destinations such as the Scottish Highlands, Peak District or the Brecon Beacons. If they are interested in Heritage and History they could consider locations such as Yorkshire and

Derbyshire who have a similar heritage product as Rhondda Cynon Taf, or various other towns and regions within the UK with a strong historical product.

Once a decision has been made to visit the South Wales area, what competition exists internally? There are world class quality heritage attractions (Big Pit, St Fagans), quality outdoor attractions (Brecon Beacons, Parc Bryn Bach), a major European city and two developing cities for City Break alternatives as well as distinct attractions such as Llancaiach Fawr, Dan Yr Ogof and Cardiff Bay.

This can be summarised as competition at three levels

- Competition for time and disposable income
- Competition with comparable regions
- Competition with comparable attractions and offers in the area

To attract visitors to Rhondda Cynon Taf it is necessary to provide a distinct offer that will distinguish the area as a viable destination against competition at each of the levels above. Fig 2 on page 33 provides a competitor analysis at each of these levels.



2. Setting the Scene

Themes

The Atkins Report identified three key attractions within Rhondda Cynon Taf for tourism, Rhondda Heritage Park, Dare Valley Country Park and Ynysangharad War Memorial Park.

- Rhondda Heritage Park was identified as a hub for history and heritage (which is also reflected in its Herian status);
- Dare Valley Country Park was highlighted as a local focus for outdoor and environmental activities, and,
- Ynysangharad War Memorial Park was identified for its potential as a cultural and events venue.

For the purposes of this Competitor analysis they will represent three key themes; History and Heritage, Outdoor and Activity, and, Culture and Events, which will encompass Rhondda Cynon Taf's offer. It is important to note that this offer is supported by the quality and range of accommodation and places to eat and drink available.

As identified earlier there are a number of tourism growth sectors, which will be used as a guide to developing tourism products in Rhondda Cynon Taf.

Target Markets by Niche Product/Interest

- **Walking:**
Independent Explorers with a keen interest in walking whilst on holiday
Advanced walkers who choose the destination based on walking opportunities
- **Heritage / History:**
Independent Explorers with a keen interest in the past, the industrial revolution and the culture and people of the South Wales Valleys
- **Cycling:**
Independent Explorers with a keen interest in cycling whilst on holiday or cycling holidays
- **Adventure / Activity:**
Independent Explorers who are actively seeking an adventure/activity short-break

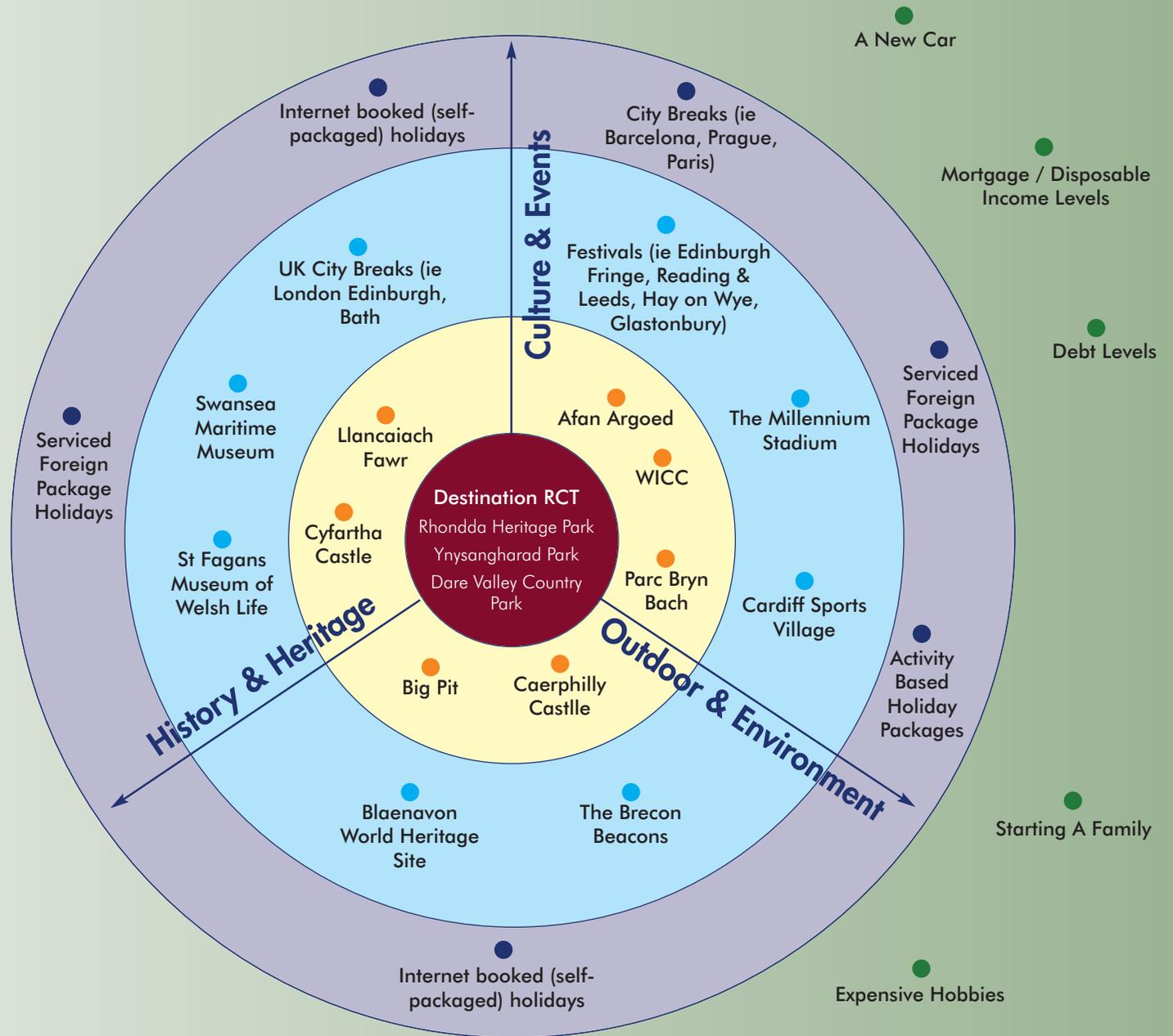
- **Culture / Events:**
Independent Explorers with a keen interest in experiencing our culture and events whilst on holiday
- **Genealogy:**
Independent Explorers who want to locate ancestors or visit ancestors birthplace
- **Golf:**
Independent Explorers who are actively seeking a golfing short-break
- **Equestrian:**
Independent Explorers with a keen interest in horse-riding whilst on holiday

Each of these will be addressed in detail in the Rhondda Cynon Taf Tourism Action Plan, identifying the communication routes that will be taken to reach their respective audiences.

Fig 2: Rhondda Cynon Taf Competitor Analysis Map

Key

- Local/Regional
- National (UK)
- International
- Other Competition





2. Setting the Scene

Table 2.6: Rhondda Cynon Taf SWOT Analysis

Strengths	Weaknesses
Heritage product	The Heritage product operates within a fierce competitive environment and is not unique within the area
Outdoor and Environment	Poor accessibility from the North (A465 down to Rhondda Valleys)
Culture and People eg music, history and traditions	Countryside product not fully developed for tourism
Cultural Events eg Full Ponty, venue programme, private sector/community events	Limited accommodation offer.
Accessibility from the South (M4, A470 and A4119)	Image of deprivation (i.e. 2007 Burberry closure)
Retail Offer in particular carft retail	Poor interpretation and signage
Towns with Character (in particular Pontypridd, Llantrisant and Aberdare)	Litter, dumping / fly tipping, anti social behaviour, vandalism, graffiti
Close to Brecon Beacons	
Close to Cardiff	Threats
Close to other supportive product (i.e. Caerphilly Castle, Llancaiach Fawr, Cyfartha Castle, Afan Argoed).	Town Centre / Retail Developments in other areas such as St David's II, Neath Town Centre and Trego Mills in Merthyr Tydfil
The 'Rhondda' brand	Developing environmental concerns about travel and carbon footprints (most of the visitors to Rhondda Cynon Taf come by car and our public transport links vary in effectiveness and access). However, in the future this could become an opportunity as overall access by train is good and public transport links could be improved.
Opportunities	Development of new or improved tourism product in other areas such as Brecon, Blaenavon, Cardiff and Swansea Bay (although this does support Wales' overall product offering) and closer working with those areas.
Integrated Quality Management approach to Destination Management	
Local brands e.g. Penderyn Whisky	
Marketing to Niche Markets (i.e. Genealogy) and developing markets such as Heritage, Cycling, Horse-Riding etc	
Growth of Creative Industries (ie Model House / Sonig) will enhance Rhondda Cynon Taf's tourism offer.	
Dragon International Studios	

2. Setting the Scene



Table 2.7: History and Heritage

Opportunities	Threats
Joint marketing with other attractions	Competition from Big Pit / Blaenavon World Heritage Site and other museum based offers
Expanding product offer and including a more diverse experience	Potential heritage products coming on line such as Elliot Colliery Winding House, Cefn Coed Colliery Museum, the Powerhouse in Llwynypia
Developing new or niche markets such as genealogy	Possibility of future revamped or improved offers in Bedwellty House, Tredegar and Cyfartha Castle, Merthyr Tydfil
Developing events based attractions around key heritage locations such as Rhondda Heritage Park, Cynon Valley Museum / Gadlys	Changing trends in visitor demands – are tourists still looking for a pure heritage experience?
Investigate offering an ‘experiential’ visitor package for Rhondda Heritage Park in partnership with Llancaiach Fawr.	Developing Outdoor and Activity based offers
The development of a Valleys ‘package’ – the region promoted as a destination alongside Cardiff and Brecon Beacons.	In the case of Rhondda Heritage Park, the fact that it charges for the tour whereas its direct competitor Big Pit doesn’t.



2. Setting the Scene

Table 2.8: Outdoor and Activity

Opportunities	Threats
Developing niche markets i.e. bird watching in Dare Valley Country Park	Regionally recognised 'outdoor' destinations such as the Brecon Beacons and Gower
Packaging products and experiences	Other countryside visitor centres and country parks
Developing niche events programme	Canals – holidays and day trips
Linking the facilities of Dare Valley Country Park more into the offer of Aberdare Town Centre	External Factors impacting on the quality of the environment and landscape and by implication the visitor experience. E.g. Windfarms and new roads.
Developing an accommodation and food and drink offer that supports the unique urban/countryside mix of the Valleys	Developing Outdoor and Activity based offers
Developing healthy lifestyle products based around walking, cycling etc	
The ongoing greening of the Valleys and the increased awareness of their potential as tourism destinations.	

2. Setting the Scene



Table 2.9: Culture and Events

Opportunities	Threats
Attracting new events and new promoters to venues / attractions	Other facilities with the potential to host events i.e. Cyfartha Castle Park, Margam Park
Co-marketing events internally within the Local Authority and also externally with other Local Authority run events	Existing concert and event facilities such as Millennium Stadium, Millennium Centre, Newport Centre, CIA
Packaging events and event experiences	New venues such as Liberty Stadium, Cardiff City Football Club Stadium, potentially Cardiff Sports Village
Piggy back marketing off other events	Competitive Events i.e. other areas
South Wales developments increasing demand for accommodation and packaged product	Price sensitivity of target markets
Devise Anti Clash Diary across arts, attractions, libraries and events.	Product trends
Funding: Heads of the Valleys; Convergence; Arts Council; Cymal	Proliferation of large scale festivals
State of venues and attractions – fit for purpose?	Marketing of neighbouring Local Authority events (also an opportunity as it increases the perceived product offer of the area)
	Heritage Park has to charge for events



2. Setting the Scene

2.6 Sustainability and Tourism

Sustainable tourism is an approach and not a type of tourism. It therefore must be built in rather than bolted on. Tourism will only be sustainable if all involved in it see sustainability as a collective responsibility that will benefit all sectors and the environment in the long term. Sustainable tourism can be defined as:-

'A level of tourism activity that can be maintained over the long term because it results in a net benefit for the social, economic, natural and cultural environments of the area in which it takes place'.
(ICOMOS, ICTC, 2002)

Tourism needs to be seen as one of our key growth business areas. Sustainability issues would include:

- Responding to the varied needs of the small and diverse businesses that will all have skill and business development needs.
- The fact that the tourism business is seasonal, does not often offer clear career development and can be characterised by low pay.
- The need to undertake visitor management in

any areas where their popularity and environmental sensitivity means that they need protection in balance with the needs of residents

- The reduction of the heavy dependence on car use by visitors.
- Encouraging the use of local produce wherever possible, and the local tourism industry to consider its carbon footprint
- Supporting and encouraging tourism providers to achieve green tourism accreditation.

Tourism businesses

- The profitability of tourism businesses is directly influenced by the quality of the environment and the warmth of the welcome visitors receive. Tourism businesses are sensitive to anything that affects visitor appeal, such as the quality of the local environment and the local cultural experience.
- Tourism businesses as all businesses have a direct impact on sustainability issues. The tourism industry should support local services and culture, act as a catalyst for improving the environment, and contribute to local economic growth and diversification. There is however also the potential to cause environmental damage through

inappropriate use of the natural environment, and the generation of waste and pollution. It is also possible that some tourism ventures could alienate local residents

- Tourism related businesses need to see sustainability as a key part of their business practice. There may not however be any advice available currently to help them to do this. In some areas incentive schemes have helped.

Destinations

- Achieving any Rhondda Cynon Taf aspiration for sustainable tourism, will mean that destinations are effectively managed. Destination management will only succeed if sustainability is built into the process. There is a strong link between destinations and the community side of sustainability. The VICE principle, V is visitor, I is industry, C is community and E is environment is about managing meeting the needs of the visitor, industry and the community within environmental limits.
- There is a key requirement that tourism providers and site managers are able to take part in discussions related to the quality of the natural and historic environment and transport. This, as these two things have a huge effect on tourism, on visitors, industry, communities and the environment. There are

2. Setting the Scene



numerous opportunities to link tourism with public transport such as the Beacons Bus designated bus services, advertisements on trains, cycle friendly buses and trains and stations.

- The Local Development Plan will be supportive of tourism, and ensure that planning policies that would support the growth of tourism are also sustainable.
- New tourism initiatives are supported to undergo a sustainability appraisal, that identifies the positive and negative aspects of the proposal.

Visitors

- There is a need to engage with visitors to discover how to maximise their positive impact on an area, and minimise any negative impacts. The majority of visitors consider that a well-managed environment is an important factor in choosing their destination. This is particularly important for Rhondda Cynon Taf, as the tourism strategy will focus on products like cycling, walking and horse-riding, all of which need an exemplary environment for usage.
- There is some evidence to suggest that more and more visitors consider it important that the local area benefits from their custom. There is also a widening group of people who would be willing to pay more to stay in accommodation, or have an experience that practices sustainability and demonstrates this.

- Tourism businesses, destinations and Tourist Information Centres need to provide information to visitors through leaflets or face-to-face that celebrates the sustainability angle in whatever experiences the visitors want to have. This will encourage visitors to behave in a way that will maximise their positive impact on the community and the area, and reduce any negative impacts.
- Culture and events have an important role in building a positive perception of the area and in developing a vibrant and relevant sense of place.



"...and no congestion charges!"

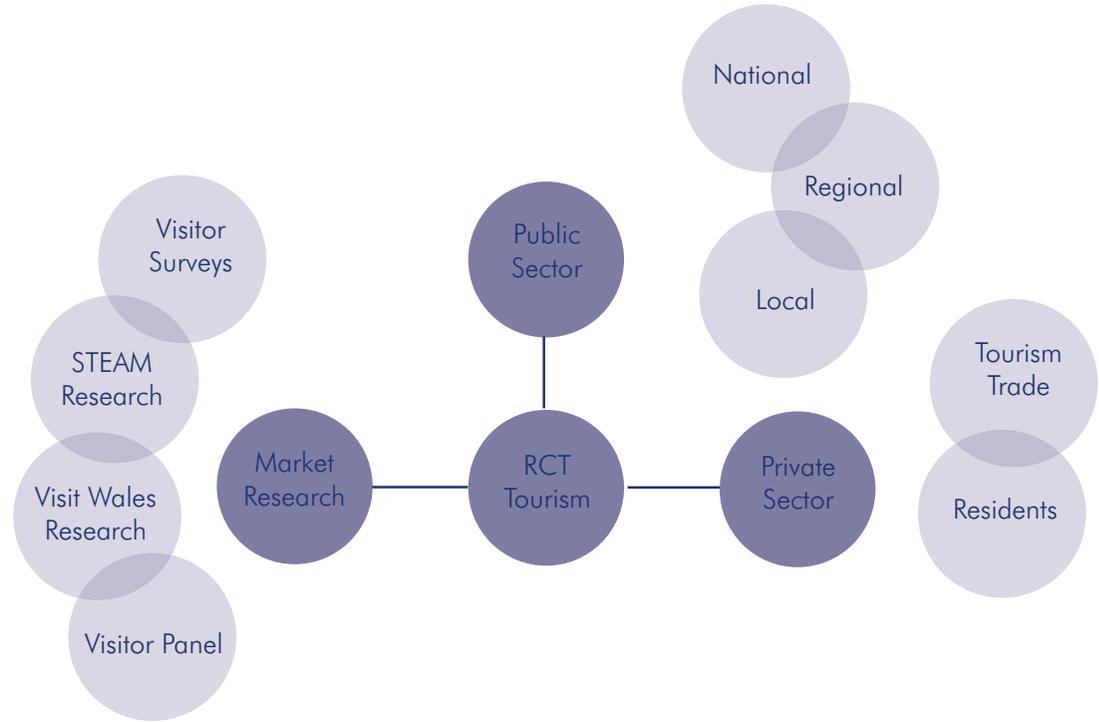
CYRCHFAN
DESTINATION
RHONDDA CYNON TAF *ret*

3. Policy Context



This strategy is synergistic and inclusive with the overall aims of the public bodies and organisations responsible for tourism in Wales. There are a number of strategic documents in circulation, which have contributed to the development of this strategy, and will be key in the successful delivery of its vision, aims and challenges. The spheres of influence diagram illustrates impacts upon Tourism in Rhondda Cynon Taf.

Fig 3: Spheres of influence





3. Policy Context

Public Sector

Policies and plans in the public sector at all levels will continue to shape how tourism is developed and delivered. Here are some of the many ways in which this strategy is influenced.

Local Influences

- Rhondda Cynon Taf Community Plan 2004-2014
- Environmental Improvement Strategy for Rhondda Cynon Taf
- Rhondda Cynon Taf Economy Regeneration Strategy
- Rhondda Cynon Taf Local Development Plan 2006-2010
- Rhondda Cynon Taf Leisure Parks and Countryside Business Plan 2007-2010
- Rhondda Cynon Taf Cultural Services Business Plan 2007-2010
- Cynon Valley River Park Strategy 2007
- Out and About: Rights of Way Improvement Plan (Draft 2007)
- Regional Transport Plan
- Regional Cycle Strategy

Regional Influences

- Capital Region Tourism Strategy
- Turning Heads - A Strategy for the Heads of the Valleys until 2020, WAG, (June 2006)

National Influences

- People, Places, Futures – The Wales Spatial Plan 2004
- Achieving our Potential 2006-2013, Visit Wales
- Wales – A Vibrant Economy – Welsh Assembly Government Economic Development Plan
- 'Best Foot Forward' - A walking tourism strategy for Wales
- 'Saddling up for Success' - A riding tourism strategy for Wales
- 'Moving up a Gear' - A cycle tourism strategy for Wales
- 'Time for Action' - An adventure strategy for Wales
- 'Angling for Growth' : A fishing tourism strategy for Wales
- Sustrans

Market Research

Scarborough Tourism Economic Model (STEAM) and Visit Wales

Rhondda Cynon Taf County Borough Council, along with 20 other unitary authorities in Wales subscribe to this trend research model. The model is designed to provide visitor numbers and economic benefit of tourism by Local Authority. Visitor numbers are given by those accommodation providers and attractions that are willing to track this data. These are used with other research carried out nationally, i.e. average spend whilst on holiday survey to give a fuller picture. As STEAM is a trend model, the numbers are used as a guide to gauge the impact of tourism, marketing and development. It is however noted, that there are many environmental forces that cannot be controlled and impact on tourist numbers and spend. Visit Wales has its own statistical directorate, which conducts ongoing research. This information is used to shape marketing decisions, and in particular in areas such as niche products, i.e. walking, cycling etc.

3. Policy Context



Visitor Surveys and Panel

In addition to quantitative data, qualitative information can help shape the tourism offer and provide an insight into what we are doing right and what can be improved upon. Visitor surveys within the County Borough are scarce and need to be increased to provide a more in-depth measurement tool. A panel will offer the opportunity to get even closer to the customer using focus group sessions.

Private Sector

Tourism Trade

Accommodation and attraction providers, cafés, restaurants and pubs, even public transport impact either directly or indirectly on the tourism offer. The key is to encourage ways of connecting with all of these providers to make the visitor experience as pleasant as possible.

Residents

We all have a duty to respect our environment and the communities in Rhondda Cynon Taf have already played an important role in shaping public policy. The people on the street are what makes us special. Research has shown that Wales is renowned for its friendly and helpful people. "Hwyl" the Welsh name for spirit is used to encapsulate this unique selling proposition in Visit Wales' campaigns. The various fora available at grass roots level are where communities are shaping their own areas and many have a tourism story to tell.

Encouraging residents to become ambassadors and to be signposts for tourists will help the overall process. A sense of citizenship and local pride is key to attracting sustainable tourism, and is both a key challenge to, and a key opportunity for developing tourism in Rhondda Cynon Taf.



4. Vision, Aims and Challenges

Reaching Destination Rhondda Cynon Taf sets out the following vision for tourism in Rhondda Cynon Taf.

To improve the profile and “tourism offer” of Rhondda Cynon Taf so that visitors and prospective tourists believe the County Borough to be one of the UK’s short-break destinations by 2013.

In order to achieve this vision, three broad aims have been identified and along with the vision will provide the ‘what’ we want to achieve. These aims link directly into the 11 challenges of the Tourism Value Chain (Fig 4, Page 46). The Tourism Value Chain is an important tool utilised within the Integrated Quality Management system of tourism development and sustainability advocated by the European Union and as such it delivers a cyclical quality interpretation tool that covers all aspects of a visitor experience.

Aim 1: To become a ‘Destination Brand’ and raise the profile of Rhondda Cynon Taf on the UK tourism map

Rhondda Cynon Taf was formed as a Unitary Authority in 1996, and has over the past ten years been promoted on a regional or marketing area basis. The name Rhondda is renowned and synonymous with its coal-mining heritage. However, the area of Rhondda Cynon Taf is not that well known as a destination brand. Therefore by 2013 it is planned that with the right marketing and tourism offers the County Borough will have an increased profile, and open up its appeal to a number of markets.

Aim 2: To develop and raise the quality of the Rhondda Cynon Taf Tourism Offer

This aim covers both the physical product as in accommodation, attractions and the outdoor or environmental assets available to us. It also includes the less tangibles such as activities and how all of these can be joined up to provide a managed tourism offer. The Tourism Unit will work with key stakeholders in the development of projects like the Penderyn Whisky Visitor Centre. The Tourism Unit will lead on strategic projects like Heads of the Valleys ‘Tourism Year’ working with other Council departments and public bodies, to ensure that funding is directed at areas with the most potential and maximised against other funding streams.

Quality is of major importance to any industry, and over the past 20 years disposable income has risen steadily, as we are on average 70% better off today than we were in 1979, Visit Wales, (2006). The result is a consumer that is more likely to seek fulfilment through spending on leisure experiences and lifestyle choices. There is a growth predicted in the socio-

4. Vision, Aims and Challenges

economic groups ABC1 and a decline in C2D groups in the UK. This increasing affluence is likely to increase demand towards higher quality accommodation, food and drink and holiday experiences. The outcome of this shift is that the consumer is more sophisticated and more demanding. Growing awareness of the value of products and the range of choices available mean that tourism destinations must meet the individual needs of each market segment and ensure they offer value for money. Coupled with this, time is becoming more limited and valuable with modern lifestyles being more stressful as a result. Therefore, higher value is being placed on free time, which leads to an increased demand for short, additional holidays. The Tourism Unit will strive to raise the quality of the tourism offer, by working with all industry stakeholders to seek training and funding for improvements.

Aim 3: To develop effective partnership working within the tourism industry

Tourism activity is prevalent at many levels within Rhondda Cynon Taf, and in order to provide a professional tourism experience, it is imperative that the industry is well informed about the support available to them. This partnership working must start within the Council, with all departments with a tourism interest working more closely. The Tourism Unit will provide a platform for co-working within the Local Authority, support existing tourism networks such as Valleys Tourism Association, and develop new fora where necessary.

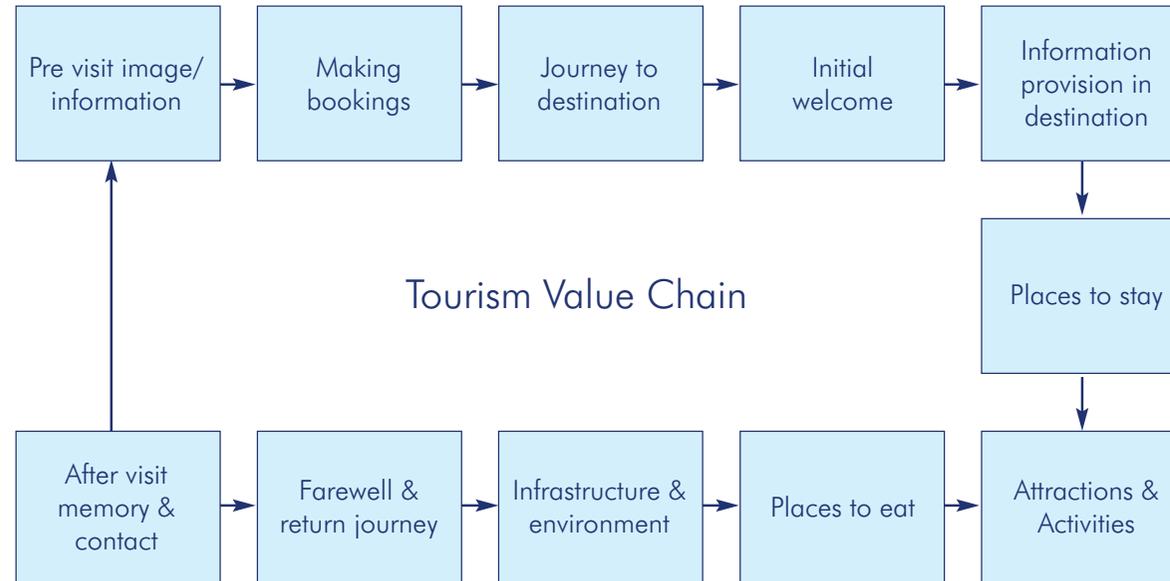




4. Vision, Aims and Challenges

Underpinning the broad aims and target markets are 11 strategic challenges, identified as 'how' we will achieve the aims and vision. These can be seen in Fig 4 to the right, which illustrates the tourism value chain or elements that influence visitors when deciding upon and visiting a destination.

Fig 4 Tourism Value Chain, IQM Visit Wales



4. Vision, Aims and Challenges



Challenge 1: Pre visit Image and Information

Just what prospective tourists read or hear about a destination will help form their opinion of it, and determine whether or not to visit. Press coverage and marketing form impressions of a destination, and negative press coverage or poor quality marketing can cause serious damage to the 'destination brand'. In effect this means that news stories about deprivation, factory closures and hill fires can effect the outside world's perception of areas such as Rhondda Cynon Taf (and the rest of South Wales). It is imperative to ensure that a steady stream of positive press stories, aimed at the relevant target markets are released and published in relevant print and electronic media like the article written by Andrew Marr written in the telegraph (June 2007) : "the Welsh examining valleys are slipping backwards, through the Industrial Revolution and out the other side, greening so fast George III will soon be on the throne". Good quality advertising, print and websites are essential to ensure that where a potential visitor is interested in visiting this area, the images and copy reflect and reinforce the positive ideas they have for the area.

The Tourism Unit will:-

- Develop a communication plan to promote Destination Rhondda Cynon Taf and its key tourism propositions to its target audience in a consistent manner to ensure brand identity is maintained by key partners.
- Work in partnership with valley's based Local Authorities to reach the UK and Southern Ireland generic markets, and maintain the ability to participate in high level Visit Wales campaigns.
- Create and promote short-breaks based around the identified growth products to add value to and lengthen visitor stay.
- Buy into appropriate marketing campaigns where return on investment can be proven.
- Develop a meaningful relationship with prospective and actual visitors to Rhondda Cynon Taf, via established marketing methods and ICT.
- Work with key media influencers and opinion leaders to improve the image of Rhondda Cynon Taf as a tourist destination.
- Utilise the network of Tourism Information and Visitor Centres within key tourism traffic areas.

Aspiration

Rhondda Cynon Taf aims to be within the UK visitors top 10 Wales' short-break destinations by 2013. Rhondda Cynon Taf will receive regular positive press coverage on a national and targeted level. Visitors will easily access information on the County Borough's key tourism propositions via print, press, website and other media and the Tourism Unit will build a meaningful relationship with prospective and actual visitors.

Challenge 2: Making Bookings

The internet has revolutionised booking in tourism. It is now possible to book a whole overseas holiday online from several different suppliers or packagers without leaving the house, or without talking to a travel agent. Customers holidaying in Britain expect the same ease of booking coupled with the personal touch. Internet booking in Britain is increasing as a direct result of Destination Management System/website developments, co-ordinated industry approach and better Industry Interaction.



4. Vision, Aims and Challenges

The Tourism Unit will:-

- Investigate working with partners to develop a dedicated tourism website and destination management system, (in partnership with CRT) that promotes the region and tourism products, and provides the opportunity to book short-breaks, accommodation, attraction/activity tickets.
- Address the lack of visitor centre presence in the County Borough, by assessing a cost and location effective solution.
- Work with the existing Tourism Information Centre in Pontypridd, to ensure that current promotion is up to date and visitors have all the relevant details to make bookings.
- Work with tour operators, short-break packagers and local tourism providers to increase bookable short-breaks for Rhondda Cynon Taf.
- Establish new Tourism Information Points, working with tourism related providers throughout the County Borough to house useful tourism information displays with booking information.
- Developing Customer Care training for providers to help make the visitors' stay enjoyable, and cross promote attractions and activities and book these where possible.

Aspiration

Rhondda Cynon Taf's tourism products will aim to be accessible via the internet with a robust and interactive website and destination management system that allows potential visitors to not only find out about the area but build their own short break packages, and book online services.

Challenge 3: Journey to Destination Rhondda Cynon Taf

Physical means of reaching the County Borough by car are easily accessible via the M4 as well as a number of A Roads. New developments like the duelling of the A465 at the Heads of the Valleys are adding to the accessibility. On a Wales level, the planned introduction of a Welsh Route Development Fund will help to expand the range of scheduled air services from Cardiff International Airport in particular. And as the growing European short break market is dominated by low-cost airlines, this will have a positive impact on the market in Rhondda Cynon Taf, and also a corresponding environmental and sustainability impact.

Access within Wales is improving, with the recent launch of the new North to South Wales air service as well as ferry services between

Ilfracombe in Devon to Swansea and Minehead to Penarth proposed for 2008. However, the loss in 2007 of the Swansea to Cork ferry may have a negative effect on visitor numbers and sustainability.

The Tourism Unit will:-

- Provide information at Tourism Information Centres along key routes, e.g. Major Services on the M4, Cardiff Wales Airport Rail Link.
- Work with partners to improve tourism signage outside of the County Borough to enhance visitor perception of Rhondda Cynon Taf as a tourist destination.
- Work with key influx points such as Cardiff Wales Airport and up and coming services to firmly place the County Borough and its tourism products on the map.

Aspiration

It is intended that linkages from all key influx points such as Cardiff Wales Airport, the ports and major highways will support Rhondda Cynon Taf as a short-break destination, by displaying tourism information on the region and tourism products. Public transport will add to the tourism experience, with clear information points at bus and train stops and in taxis.

4. Vision, Aims and Challenges



Challenge 4: Initial Welcome

Visitor perception of a destination starts the second of arrival, which is why Rhondda Cynon Taf needs to be welcoming as a tourist destination. Currently the County Borough has insufficient physical welcome resources such as tourism signage, areas to take a break, enjoy a view or find out where to go and what to see. The existing Tourist Information Centre is in Pontypridd, and a visitor would need to know about it to find it. The Centre is useful in terms of information provision once in the town, but there is a need for provision at gateway points into the County Borough and whilst travelling throughout the various regions. The environment must also provide a welcome, where litter free, well maintained buildings and facilities all make people feel comfortable and want to stay longer. Excellent customer service from the tourism providers is important to make visitors feel welcome, and grading standards and training opportunities both help deliver this.

The Tourism Unit will:-

- Work with Council departments responsible for environmental improvements and maintenance to understand problem hot spots and areas undergoing development, in order to direct/divert visitor attention.
- Work with partners to improve tourism signage inside the County Borough, to enhance visitor perception that Rhondda Cynon Taf is a tourist destination.
- Assess the opportunities for gateways and visitor centre style provision.
- Work with Council departments and external bodies to realise the potential of a northern gateway from the Heads of the Valleys into Rhondda Cynon Taf, focusing on Dare Valley Country Park as this conduit.
- Work with key partners to provide customer service related training to the tourism trade.
- Encourage residents to become tourism ambassadors and provide signposting services.

Aspiration

Rhondda Cynon Taf will aim to offer all the qualities of a welcoming tourism destination. There will be tourism gateways with information on where to stay, what to do and see and places to stop off and have a break whilst reading up on the areas cultural, environmental and heritage assets. Communities will play an even greater role in shaping their own distinct tourism offer, and provide information and guidance to travellers on their doorsteps.



4. Vision, Aims and Challenges

Challenge 5: Information Provision in Destination

Visitors are likely to seek information about things to do and see whilst at their destination. Therefore visitors should not have to search long for these opportunities. The Tourism Unit will:-

- Address the lack of a major visitor centre presence in the County Borough by assessing a cost and location effective solution, potentially utilising existing facilities.
- Establish new Tourism Information Points, working with tourism related providers throughout the County Borough to house useful tourism information displays with booking information.
- Help initiatives like HERIAN to populate and keep information fresh on their websites and kiosks at attractions in Rhondda Cynon Taf.
- Provide, where affordable clear printed promotional materials on the tourism offer in Rhondda Cynon Taf.
- Assess the merits of electronic promotion such as “podcasting”, where information such as talking tours can be downloaded.

Aspiration

It is intended that the tourism message in Rhondda Cynon Taf will be loud and clear with information on what to do and see available at all the obvious places where visitors frequent. Visitors will benefit from audio information through the latest technology and will download tours onto the mp3 players or mobile phones whilst travelling around the County Borough.

Challenge 6: Places to Stay

There are two main issues surrounding accommodation in Rhondda Cynon Taf. The first being quantity and the second quality.

The amount of bedstock has been an issue for many years, and in particular in the Rhondda Fawr and Fach areas. Many providers have closed, leaving a significant gap in the market. Growth markets such as luxury accommodation with spa facilities should also be considered. Attracting new business start-ups, encouraging expansion or related diversification, i.e. a pub or restaurant providing accommodation and attracting inward investment, are all necessary to improve this situation.

In Rhondda Cynon Taf the level of quality in the accommodation and attractions sectors remains variable. The pan UK grading harmonisation for accommodation, will facilitate better consumer understanding and allow meaningful comparisons to be made between accommodation products in different parts of the UK. It may, however, require additional investment by some operators, in order to maintain their current grading. One of the action points of Visit Wales’ tourism strategy, was to introduce a statutory registration scheme for accommodation to ensure quality standards.

Following a full consultation exercise and support from the National Assembly for Wales, good progress is being made in terms of securing the necessary legislative changes, which will give the National Assembly the powers to introduce a scheme in Wales. A statutory registration scheme for Wales is still seen as a priority measure, to improve the quality standards in the accommodation sector.

Quality, however does not necessarily mean that all accommodation should be five star graded. The aim should be to ensure that the product meets or exceeds the customer expectations, and represents value for money. The quality of service provided and the welcome received by

4. Vision, Aims and Challenges



the visitor, is at least as important as the quality of the physical fabric. Working with the relevant training providers will help support this.

The Tourism Unit will:-

- Work with Council departments and external bodies to assess accommodation creation opportunities, including the luxury and spa growth markets and deliver suitable solutions.
- Work with Visit Wales to support and encourage the tourism industry to make the necessary grading legislative changes.
- Work with Council departments and external bodies to develop the County Borough's camping and caravanning opportunities.

Aspiration

It is intended that staying in Rhondda Cynon Taf will be easy, with a well-utilised range of graded bed stock to suit all target markets. More visitors depending on their preference will be able to choose from bunk style accommodation to luxury facilities or bring their own caravan or tent.

Challenge 7: Attractions and Activities

Visit Wales research has shown that it is what you do or see whilst on holiday that is of more significance in short-break choices than the destination itself. Recent reports have highlighted tourism growth products, as well as attractions in the County Borough with the most potential, and these will be centred upon in tourism marketing and development terms.

The Tourism Unit will:-

- Support Rhondda Heritage Park with the marketing and development of the park as the hub for history, heritage and genealogy.
- Support Dare Valley Country Park with the marketing and development of the park as the hub for to outdoors and activities, and in particular accessing Heads of the Valleys funding.
- Support Ynysangharad War Memorial Park with the marketing and development of the park as the hub for events.
- Develop training on packaging events, activities, attractions, accommodation; deliverable across public, private and voluntary sectors

- Support Leisure, Parks and Countryside and partnerships like the Rights of Way Improvement Plan, in promoting existing and new rights of way for the walking, cycling and equestrian markets.
- Involve all suitable providers in development and marketing opportunities as they arrive.
- Work with Council departments and external bodies in supporting key community tourism projects, where they fit with strategic priorities, e.g. The Powerhouse in Llywnypia, Llantrisant Castle and Yr Eithin, Penderyn.

Aspiration

Rhondda Cynon Taf will aim to offer a distinctive visitor experience throughout the year, offering tourists a number of short-break opportunities that are tailored to each of the target market segments. The Tourism Unit will work with Local Authority Departments, accommodation & attraction providers and all tourism stakeholders, to ensure that Rhondda Cynon Taf is able to offer a high quality experience that exceeds expectations to all visitors.



4. Vision, Aims and Challenges

Challenge 8: Places to Eat

Whilst on holiday, many visitors want to try something different. In Rhondda Cynon Taf, there are many places to eat and drink. However, the quality and consistence is variable with a proliferation of takeaways and establishments which do not offer anything different from the rest of the UK. On the plus side, establishments like the Ty Newydd Country Hotel in Hirwaun and the Bunch of Grapes in Pontypridd offer locally procured menu's.

The Tourism Unit will:-

- Work with Council departments and external bodies to encourage local produce procurement.
- Encourage providers to include cross-selling opportunities to extend visitor stay and spend in the County Borough.
- Encourage established and industry leaders to mentor or guide those businesses that want to follow suite.
- Work with Council departments and private sector to encourage development of new restaurants/places to eat.

Aspiration

It is intended that visitors will get out and about in out towns and villages and sample real Welsh produce and enjoy traditional Welsh menus. Providers will work collectively to make the visitor experience pleasant and longer.

Challenge 9: Infrastructure and Environment

Rhondda Cynon Taf is primarily accessed by car, and the general quality of transport linkages throughout the County Borough is good.

In relation to strategic routes, the general quality is again good. However, the quality of certain stop off points along trails throughout Rhondda Cynon Taf is in need of improvement.

Tourism signage in Rhondda Cynon Taf varies considerably, including signage on main roads, signage to attractions and settlement signage. Only one attraction located within Rhondda Cynon Taf is signed off the M4 motorway, which is arguably the most important tourist route through South Wales. In the vicinity of Cardiff, the M4 frequently displays brown signs directing tourist towards Rhondda Heritage Park from the south, and this continues via the A470 towards Merthyr

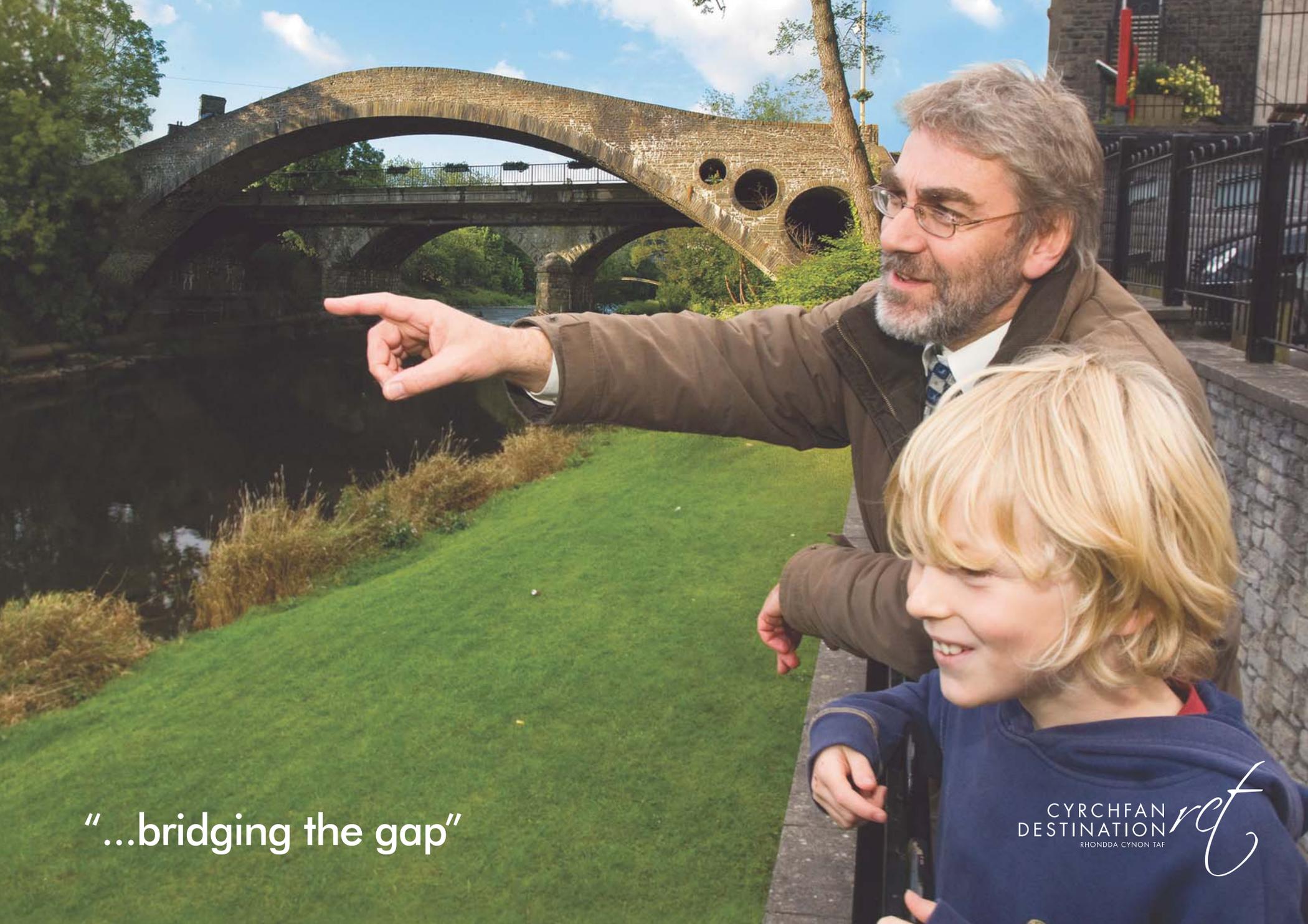
Tydfil. Significantly, the A465 Heads of the Valleys Road does not display brown signs for the Rhondda Heritage Park for tourist approaching the area from the north. The only brown signs displayed on the A465 for Rhondda Cynon Taf are located in the vicinity of Hirwaun and direct visitors towards Dare Valley Country Park.

The Tourism Unit will:-

- Work with partners to improve tourism signage inside the County Borough to enhance visitor perception that Rhondda Cynon Taf is a tourist destination.
- Assess the opportunities to work with public transport companies to improve the tourism message.
- Work to support policies on environmental improvements, anti-social behaviour and generating community involvement and community pride.

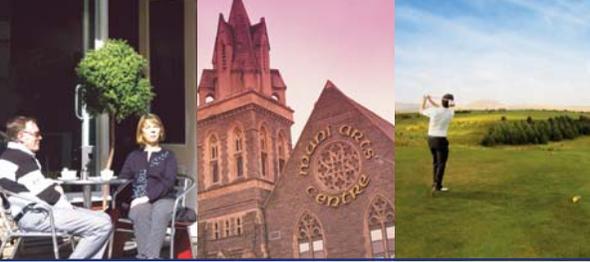
Aspiration

It is intended that attractions and activities as well as key tourist hot spots will be sign posted with clean, safe and welcoming stop off points providing information about local towns and villages and further points of interest. Getting around Rhondda Cynon Taf by own transport, public or private will be a pleasant tourist centred experience.



“...bridging the gap”

CYRCHFAN
DESTINATION
RHONDDA CYNON TAF *ret*



4. Vision, Aims and Challenges

Challenges 10 & 11: Farewell and Return Journey After Visit Memory and Contact

The tourism journey is not one way. Once a tourist's time at a destination comes to an end they have to leave. This is one of the last opportunities to make a good impression on the tourist, and it is also very easy at this point to sour their overall experience by an inconsiderate or ill-conceived 'farewell' experience. Hurried check outs, poor payment procedures and unhappy staff can all lead to a very poor end impression of a visiting experience, and this must be considered in all approaches to customer care.

It is also important to consider the 'farewell' message at a brand level and on physical signage.

Once visitors start their homeward trip, they will begin evaluating their holiday and whether they would like to return. Their perception and evaluation will more than likely be shared with family and friends, and this will have a domino effect building up or reinforcing an image of the destination. Subsequent contact with visitors will maintain the relationship established, and help understand what was good and bad about the holiday.

The Tourism Unit will:-

- Encourage all attractions; eateries and accommodation providers to consider their overall customer care approach from welcome to farewell to ensure that high standards are experienced by the visitor throughout their experience.
- Follow up known visits with invitations / reasons to return to encourage loyalty.
- Develop a Customer Relationship Marketing approach and research strengths and weaknesses regarding the visit.
- Encourage visitors' family and friends to visit via promotions.

Aspiration

It is intended that visitors will return home having enjoyed their short break in Rhondda Cynon Taf. They will tell family and friends about the area, and recommend that they take a break there too. They will plan to return and will be prompted to act from regular contact from the Tourism Unit and key partners.

Conclusion

The Tourism Unit believes that an integrated quality management approach that addresses issues across the whole visitor experience from 'pre-planning' to 'at destination' to 'farewell, reflection and return' will enable them to

- deliver marketing and promotions that are well targeted and deliver on consumers expectations
- stimulate and encourage the private, voluntary and public sectors to consider tourism issues in their development and planning
- help to stimulate a sustainable increase in provision and quality,
- and, ensure that visitors perceptions of quality are met to the point where they recommend Rhondda Cynon Taf as a short break destination to their friends and families.