

## Report from the Director of Nature and Tourism

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**Subject: *To approve the refreshed Pembrokeshire Destination Management Plan (Tourism Strategy) 2024 - 2028.***

### Introduction

Visit Pembrokeshire was formed in November 2020 by bringing together resources formerly delivered by 4 different organisations: Pembrokeshire County Council, Pembrokeshire Coast National Park Authority, Pembrokeshire Tourism and PLANED. It is a not-for-profit company, created to provide leadership, advocacy, research and development, and primarily destination marketing activity for Pembrokeshire. One of its core functions is to lead and oversee the delivery of the Tourism Strategy which is referred to as the Destination Management Plan (DMP).

### Background and Context

A DMP is a strategic document, which provides a focus for activity and investment in Tourism within a particular area, in this case Pembrokeshire. While the production of the strategy, and aspects of its delivery, are led by Visit Pembrokeshire, it is a partnership strategy, which cannot be fully delivered without Pembrokeshire County Council (PCC), Pembrokeshire Coast National Park Authority (PCNPA) and other parties in the private and third sectors such as PLANED and the tourism business community.

The current strategy was launched in Feb 2020 just prior to the COVID pandemic. In the intervening years since then, a number of macro-economic impacts and other changes have occurred including the cost-of-living crisis, the increasing urgency around the climate and nature emergencies, and the impacts of a number of new policies from the Welsh Government that affect the tourism industry.

Given the above developments which have significant potential impacts on the operating environment of the visitor economy in Pembrokeshire, it was felt by the key tourism partners that a refresh, as opposed to a complete rewrite, of the Destination Management Plan was required now, rather than waiting until 2025, in order to reflect the contemporary challenges and opportunities facing tourism locally.

### Consultation

Visit Pembrokeshire, supported by PLANED, have led an extensive community engagement exercise to canvass views on the DMP priorities. In 2022, several community engagement events took place, both during the daytime and on an evening, with invitees including local community groups/organisations, Town and Community Councils, PCNPA Members and PCC Cllrs.

More recently, in November 2023, a new community panel was established as a pilot by Visit Pembrokeshire and PLANED and met for the first time to give feedback on the draft DMP. The longer-term intention is that this forum could act as a 'sounding board' for regular two-way dialogue between communities and DMP partners.

In addition, the draft DMP has been reviewed by the Visit Pembrokeshire Board at their meeting on the 9<sup>th</sup> April, which also includes PCC and PCNPA representatives who have commented and helped shape the refreshed strategy.

## **Main considerations**

A plain text version of the updated Destination Management Plan (Tourism Strategy) 2024 – 2028 is attached to this report. If approved, it will then be translated and professionally designed as a 'glossy' document for circulation with a possible launch at the forthcoming Pembrokeshire Tourism Summit on the 16<sup>th</sup> May.

Within the introduction it states that the plan... is not a new plan but a review, which sets out the vision with clear priorities to respond to the challenges and opportunities we now face in Pembrokeshire, which are wider reaching than simply developing a competitive advantage as a destination.

It includes the following guiding principles, stating that our visitor economy should:

- Benefit local communities generating sustainable livelihoods and income opportunities.
- Help to protect and celebrate unique cultural identities and traditions (supporting language, arts and heritage)
- Support the circular economy in Pembrokeshire helping businesses to develop and thrive.
- Conserve and respect our environment and help to restore ecosystems and natural resources.
- Be welcoming and inclusive to all.

The vision is ambitious and underlines the importance placed within the strategy on the long-term sustainability of the environment and our local communities:

### **Our Vision**

*To be a global leader in regenerative tourism.*

### **Strategic Priorities**

**Regenerative** – ensure our visitor economy takes account of its current, and future economic social and environmental impacts, whilst addressing the needs of all visitors, the environment, the industry, and local communities, delivering a net benefit

**Events and seasonality** – “Building our year-round offer to build additional demand in the spring and autumn.”

**Wellbeing and Active** – “Re-establish Pembrokeshire as a preferred destination for walking, adventure, and other activities and immersive learning breaks promoting our ecological, environmental and cultural worldwide significance.”

**Shared narrative and brand** – “Continue to build the new Pembrokeshire brand through trade engagement to sell Pembrokeshire’s year-round offer, communicated through marketing and PR.”

**Brilliant Basics** – “Deliver the foundations of destination stewardship - the underpinning level of the travel experience hierarchy and the visitor welcome.”

The rest of the DMP is focused on activity which will deliver the above strategic priorities, together with a recognition that the plan can only be delivered if adopted by the key partners involved. As a result, delivery will be overseen by a dedicated DMP Steering Group (reporting to the Visit Pembrokeshire Board) consisting of relevant staff from key partner agencies including PCNPA.

### **Financial, Risk & Compliance Considerations**

In establishing Visit Pembrokeshire, the Park Authority agreed a package of support, alongside Pembrokeshire County Council, equating to approximately £25K per year for 5 years (i.e. until Nov 25). Given the financial pressures on the Authority, delivering the ambitions contained in the refreshed DMP will be an important consideration in the context of the Authority’s medium-term financial planning.

In particular, a core philosophy behind the plan is that the public sector should primarily be responsible for directly delivering the ‘Brilliant Basics’, which refers to the basic infrastructure on which visitors rely upon. This includes, for example, coastal car parks, the public rights of way network, slipway and beach related services, coastal bus services etc.

However, due to the cumulative impact of the growing ‘squeeze’ on public finances, virtually all of the above services (and others) are under pressure and future investment cannot be guaranteed. As such, the approval of the refreshed tourism strategy (DMP) does not legally commit PCNPA and/or PCC to continue or enhance investment in the localised visitor infrastructure and in tourism more generally.

As a result, if Members are minded to approve the Destination Management Plan 2024 – 2028, they are effectively indicating that successful delivery of the plan is important to the Authority and, within the confines of reducing financial resources, PCNPA will work with partners, including the wider tourism trade, to find creative solutions to the delivery of the plan’s aspirations for the benefit of local communities, businesses and visitors alike.

### **Options**

*1. Approve the refreshed Destination Management Plan and commit officer time to a steering group to oversee its delivery.*

This will ensure that the county benefits from a refreshed DMP, bringing with it a fresh focus, particularly on well-being and sustainability.

*2. Do not approve the DMP and do not join the steering group.*

This will make some of the actions within the DMP undeliverable.

## **Conclusion**

The Destination Management Plan 2024 - 2028 is an important document for the visitor economy, which will focus the efforts of a range of organisations in the county on achieving the ambitious vision for Pembrokeshire to be a global leader in regenerative tourism.

## **Recommendation**

Members are asked to approve the Pembrokeshire Destination Management Plan (Tourism Strategy) 2024 – 2028.

## **2024-28 - Pembrokeshire Destination Management Plan**

### **Section 1 - Introduction**

Pembrokeshire's [2020-25 Destination Management Plan](#) was launched in February 2020 and set out a shared vision and plan around which the destination and partners could unite. Its focus then was to develop Pembrokeshire's unique proposition and to set it aside from its competitors.

Since then, we've experienced unprecedented change in the way in which we live our lives with the Covid-19 pandemic, the growing climate and biodiversity emergency, the cost of living crisis and world events including the war in Ukraine. Closer to home, within Pembrokeshire, some tensions exist regarding the benefits and challenges that come with being a popular visitor destination, and recent Welsh Government policy is also having an impact.

**This is not a new plan but a review which sets out a vision with clear priorities that respond to the challenges and opportunities we now face, and which are wider reaching than simply developing a competitive advantage as a destination.** It has been informed by stakeholder and community engagement events last year, and best practice elsewhere, with an overriding focus on sustainable and regenerative tourism.

As the official Destination Management Organisation (DMO) Visit Pembrokeshire leads on the coordination and delivery of Pembrokeshire's Destination Management Plan. However, this is a shared plan delivered in partnership with stakeholders across the public, private and third sectors and our local communities.

### **Section 2 - Guiding principles**

**In undertaking this review we have considered the following guiding principles:**

#### **Our visitor economy should:**

- Benefit local communities generating sustainable livelihoods and income opportunities.
- Help to protect and celebrate unique cultural identities and traditions (supporting language arts and heritage).
- Support the circular economy in Pembrokeshire helping businesses to develop and thrive.
- Conserve and respect our environment and help to restore ecosystems and natural resources.
- Be welcoming and inclusive to all.

We will measure and monitor the impact of tourism more broadly than just visitor numbers and economic value with a particular focus on measuring our success against the bullet points above.

### **Section 3 - Pembrokeshire in Numbers**

<b>Year</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>
<b>Visits</b>	<b>7 million</b>	<b>5.3 million</b>	<b>6.6 million</b>
<b>Economic value</b>	<b>590 million</b>	<b>420 million</b>	<b>594 million</b>
<b>Local employment</b>	<b>21%</b>	<b>17%</b>	<b>22.9%</b>

**NB: Taking inflation into account we haven't yet returned to pre Covid levels of economic value.**

### **Section 4 – How the landscape has changed since 2020:**

- Today's visitors value and are motivated to visit places where local people care passionately about where they live.
- We've seen an increase in social conscience and wanting to 'do the right thing'.
- Visitors have a greater connection with the natural environment and respecting and conserving this.
- Visitors are seeking places that promote and support wellbeing and authentic, immersive experiences that provide a real sense of place.
- There is a greater emphasis on work life balance with people working in different ways (hybrid).
- Economic uncertainty - businesses have experienced significant increase in costs alongside shorter lead times for bookings and reduced visitor spend.
- Significant and unprecedented pressure on public sector finances, which will impact on how we manage the destination in the future.
- Increase in second homes following Covid and an affordable housing crisis.
- There have been several developments in Welsh Government policy, which impacts on tourism.
- Post Covid, there is a skills shortage across multiple sectors, but particularly in hospitality and tourism, and businesses are struggling to recruit and retain staff.
- An ageing population which will require us to adapt how we welcome and support visitors accordingly.

## **Section 5 - 2020-25 Destination Management Plan - Original Vision and Strategic Priorities**

### **Ambition**

***“Grow Tourism for the good of Pembrokeshire”***

### **Vision**

***“One Pembrokeshire – a place of landscape, culture and adventure”***

### **Strategic priorities**

***Shared narrative and brand*** – “Create a shared narrative which sells Pembrokeshire’s year-round offer and is communicated through marketing and PR activities.”

***Events and seasonality*** – “Building our year-round offer to build additional demand in the spring and autumn.”

***Responsible and sustainable*** – “From actions already taken and planned, Pembrokeshire can legitimately claim “responsible” tourism and sustainability as a USP.

***Wellbeing and Active*** – “Re-establish Pembrokeshire as a preferred destination for activities”

***Brilliant Basics*** - “Deliver the foundations of destination stewardship - the underpinning level of the travel experience hierarchy and the visitor welcome.”

### **Revised Ambition and vision statement and Strategic Priorities**

#### **Our Vision**

***To be a global leader in regenerative tourism***

#### **Strategic Priorities**

***Regenerative*** – ensure our visitor economy takes account of its current, and future economic social and environmental impacts, whilst addressing the needs of ***all*** visitors, the environment, the industry, and local communities, delivering a net benefit

***Events and seasonality*** – “Building our year-round offer to build additional demand in the spring and autumn.”

***Wellbeing and Active*** – “Re-establish Pembrokeshire as a preferred destination for walking, adventure, and other activities and immersive learning breaks promoting our ecological, environmental and cultural worldwide significance.”

**Shared narrative and brand** – “Continue to build the new Pembrokeshire brand through trade engagement to sell Pembrokeshire’s year-round offer, communicated through marketing and PR.”

**Brilliant Basics** - “Deliver the foundations of destination stewardship - the underpinning level of the travel experience hierarchy and the visitor welcome.”

**Section 6 - Updated Action Plan – how this will adapt to respond to the changes since 2020**

**Regenerative**

Action	Delivery (who)	Timetable
<p><b>Develop a community led approach to tourism</b></p> <ul style="list-style-type: none"> <li>➤ Set up a DMP Community Panel who will meet biannually to help inform, shape and monitor progress of the DMP.</li> <li>➤ Build a shared recognition and understanding of the value and importance of tourism in Pembrokeshire and its contribution both to the local economy and quality of life.</li> <li>➤ Build relationships vertically and horizontally across local stakeholders/partners and with local communities.</li> <li>➤ Actively encouraging visitors who contribute positively to the local ecosystem.</li> <li>➤ Supporting a community led approach to “slow tourism.”</li> <li>➤ Deliver behaviour change campaigns to promote positive visitor behaviour: education e.g.: dogs, the potential dangers from water sports and swimming, and environmental impact on nature and wildlife, both land and sea based.</li> <li>➤ <b>Launch a Residents week</b> – off season to raise awareness with local people that they are also visitors and can contribute to the tourism ecosystem. This can include special offers to incentivise visits and develop local ambassadors.</li> </ul>	<p><b>Visit Pembrokeshire and PLANED</b></p>	<p><b>DMP Community panel launched in November 2023 and will meet biannually as a minimum</b></p> <p><b>Off season so February /November</b></p>
	<p><b>Visit Pembrokeshire</b></p>	<p><b>TBC?</b></p>



<p><b>Skills - Develop Pembrokeshire’s reputation as an exemplar for training in hospitality and tourism and an aspirational place to live and work.</b></p> <ul style="list-style-type: none"> <li>➤ Build skills within our local workforce - collaboration with schools, colleges, and communities.</li> <li>➤ Work with education and training providers to ensure that availability of training opportunities is linked to skills requirements within tourism and hospitality.</li> <li>➤ Develop and deliver a comms campaign aimed at key target groups (e.g., 16-24 and over 50’s?)</li> <li>➤ Croeso Awards – Further develop the Croeso Awards working with Pembrokeshire College and local business partners to inspire the next generation of tourism professionals.</li> </ul>	<p>with local education partners</p>	<p><b>Croeso Awards 2024</b></p>
<p><b>Accessible and inclusive</b> developing a world leading inclusive tourism offer as a USP for Pembrokeshire supported through the SPF Open to All project (OTA).</p> <ul style="list-style-type: none"> <li>➤ Project activities will include conferences, training, product development, promotion and marketing, provision of information, business audit and advice, and an advisory group to oversee delivery.</li> </ul>	<p><b>PCNPA and Visit Pembrokeshire</b></p>	<p><b>SPF project - January-December 2024</b></p>
<p><b>Wellbeing and Active</b></p> <ul style="list-style-type: none"> <li>➤ Continue working with existing endurance brands such as Ironman Wales and Long Course weekend to encourage increased dwell time and return visits.</li> <li>➤ Develop off season “learning” breaks which focus on, and encourage physical and mental wellbeing e.g. Yoga, Craft/Art retreats, Wild swimming, Foraging, cooking etc.</li> </ul>	<p><b>Visit Pembrokeshire, Ironman Wales, Activity Wales Events and PCC’s Events Board</b></p>	<p><b>Ongoing</b></p>
<p><b>Visitor levy</b></p>	<p><b>Visit Pembrokeshire and PCC</b></p>	<p><b>TBC but likely to be Autumn 2026 now following recent</b></p>

<ul style="list-style-type: none"> <li>➤ If Welsh Government formally approves the introduction of Visitor levy legislation, work with partners across the public, private and voluntary sectors to facilitate broad engagement and debate on the potential introduction of a visitor levy in Pembrokeshire.</li> <li>➤ This should be focussed on delivering the best outcome for Pembrokeshire and ensure that all stakeholders feel they have had a voice and an opportunity to shape any potential plans.</li> </ul>		<b>ministerial announcement</b>
<p><b>Develop and grow international visitors to Pembrokeshire</b></p> <ul style="list-style-type: none"> <li>➤ International visitors stay longer, spend more and are keen to immerse themselves in the locality (only 2% of the UK’s annual inbound visitors come to Wales).</li> <li>➤ Actively work with Visit Wales and local partners to attend appropriate Travel trade events to showcase Pembrokeshire to priority international markets.</li> <li>➤ Work with TfW to develop a ‘Visit Wales’ by public transport approach; ‘days out by rail’, ‘bus day trips within Pembrokeshire’, ‘where can I go by fflecsi?’ to encourage sustainable travel and tourism.</li> </ul>	<b>Visit Pembrokeshire Visit Wales and local partners</b>	<b>From 2024</b>
<p><b>Raising the profile of the Welsh language and culture</b></p> <ul style="list-style-type: none"> <li>➤ Build on current activity to integrate the Welsh language more widely across all digital channels e.g. Welsh Wednesdays and Dydd Gwyl Dewi.</li> <li>➤ Work with businesses to increase use of Welsh language within their businesses in a fun, engaging and accessible way for visitors. Great recent example from Coastal Cottages of Pembrokeshire for Dydd Gwyl Dewi 2024.</li> </ul>	<b>Visit Pembrokeshire</b>	<b>From 2024</b>

<ul style="list-style-type: none"> <li>➤ Increase bilingual content on <a href="http://www.visitpembrokeshire.com">www.visitpembrokeshire.com</a></li> </ul>		
<p><b>Meeting the UK’s 2035 Carbon Neutral commitment</b></p> <ul style="list-style-type: none"> <li>➤ As a global leader in regenerative tourism, we should aim to achieve this by 2030.</li> <li>➤ Inspire tourism businesses to “go green” and actively promote existing schemes that recognise green credentials e.g. Green Key and Green Tourism. Visit Pembrokeshire should lead the way in seeking accreditation as an organisation.</li> <li>➤ Explore opportunities from the Green Events Code of Practice (GECOP) Pilot Project.</li> </ul>	<p><b>All Partners</b></p> <p><b>Visit Pembrokeshire</b></p> <p><b>PCC/ Visit Pembrokeshire</b></p>	<p><b>From 2024/25</b></p>

### Events and Seasonality

Action	Delivery (who)	Timetable
<p><b>Continue to build a reputation as an all-year-round visitor destination</b> - building year-round tourism, and year-round sustainable jobs.</p> <ul style="list-style-type: none"> <li>➤ Continue with the current destination marketing strategy, which is focussed on building the Pembrokeshire brand, promoting our year-round offer, and highlighting the rich and diverse offer across the whole county.</li> <li>➤ Increase profile on wet weather provision through an off-season campaign highlighting the places to visit and things to do in poor weather.</li> </ul>	<p><b>Visit Pembrokeshire</b></p>	<p><b>Ongoing</b></p>
<p><b>Use Events as a catalyst to extend the season</b></p> <ul style="list-style-type: none"> <li>➤ Support delivery of PCC Events Strategy focussing on events out of season and scalable events.</li> <li>➤ Explore opportunities through the Arts Council Wales Green and Sustainable Events Code.</li> </ul>	<p><b>PCC/PCNPA and Visit Pembrokeshire with event partners</b></p>	

<p><b>Increased focus on our county towns and the county’s unique cultural experiences</b></p> <ul style="list-style-type: none"> <li>➤ Identify local Town champions to work with us to help tell the story of individual towns, e.g. What is its history, its stories what makes it special and unique and what can visitors see and do there?</li> <li>➤ Build this into ongoing destination marketing campaign across website, e-comms, and socials.</li> </ul>	<p><b>Visit Pembrokeshire/ PLANED and DMP Community Panel</b></p>	<p><b>From January 2024</b></p>
<p><b>Increased focus on Arts and Culture and food tourism</b></p> <ul style="list-style-type: none"> <li>➤ Continued and increased focus on highlighting the many artisan food and drink producers and developing “Food/Art tours” to help visitors explore these. Ditto with our diverse range of festivals all year round.</li> <li>➤ Raise awareness of: <a href="https://www.npopenstudios.co.uk/">https://www.npopenstudios.co.uk/</a> - and explore the appetite/opportunity to expand this across the county.</li> <li>➤ Build this into ongoing destination marketing across website, e-comms, and socials.</li> </ul>	<p><b>Visit Pembrokeshire/ PLANED and DMP Community Panel</b></p>	<p><b>From January 2024</b></p>
<p><b>Events calendar</b></p> <ul style="list-style-type: none"> <li>➤ Encourage and support closer collaboration amongst venues to bring together information about events across the county and create a single calendar to: <ul style="list-style-type: none"> <li>• Help event planners avoid clashes of dates</li> <li>• Support each other and share resources</li> <li>• Create a “What’s on” resource for both local and visitors</li> </ul> </li> <li>➤ Through the development of the new Visit Pembrokeshire website, seek to maximise</li> </ul>	<p><b>Visit Pembrokeshire/ PLANED and Pembrokeshire venues “Venue Buddies”</b></p>	<p><b>January 2024 onwards</b></p>

<p>any legacy from the “Pembrokeshire Inspired” website developed in 2021. The aim of this website was to create a “What’s on” resource to promote the breadth of the Arts and Cultural offer across Pembrokeshire to both locals and visitors.</p> <p>➤ Major product development supporting investment in new indoor/wet weather attractions with 9 months of the year opening a minimum requirement.</p>	<p><b>PCC / PCNPA/ Private Sector</b></p>	
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### Shared Narrative and Pembrokeshire brand

Action	Delivery ( who)	Timetable
<p>Continue to build the new <b>Pembrokeshire brand</b> and the proposition that Pembrokeshire is “Soul food” to attract visitors with shared values, who embrace what makes Pembrokeshire special, and who are committed to playing a part in conserving this.</p>	<p><b>Visit Pembrokeshire</b></p>	<p><b>Ongoing</b></p>
<p><b>Increase engagement and “buy in” with tourism businesses with the Pembrokeshire brand</b></p> <p>➤ Work with community champions and Community Councils to increase the profile of lesser-known areas and the county’s unique cultural experiences to help extend the season and disperse visitors away from busier coastal areas.</p> <p>We will do this through:</p> <ul style="list-style-type: none"> <li>• B2B Training events</li> <li>• Continued promotion of the Brand toolkit</li> <li>• Targeted “Out and About” events in areas where there is poor digital presence currently e.g. The Havens.</li> </ul>	<p><b>Visit Pembrokeshire/ PLANED</b></p>	<p><b>75% of tourism businesses engaged in the brand by 2025</b></p> <p><b>From January 2024</b></p>
<p><b>Coordinated Destination Marketing and PR to grow priority markets.</b></p> <p>➤ Focus on individual seasons and their distinctiveness in Pembrokeshire.</p>	<p><b>Visit Pembrokeshire</b></p>	<p><b>Ongoing</b></p>

<ul style="list-style-type: none"> <li>➤ Focus on coming to Pembrokeshire out of season.</li> <li>➤ Deliver ongoing Press and PR activity that is integrated with and amplifies the destination marketing activity.</li> </ul>		
<p><b>Curated approach to content creation</b></p> <ul style="list-style-type: none"> <li>➤ Continuing with thematic campaigns e.g., Wellness, Welsh Culture and Heritage, Taste of Pembrokeshire, Arts and Crafts, Adventure Tourism, Indoor Pembrokeshire, Pembrokeshire Night Skies, Valentine’s Day, St Davids Day, Halloween, and Christmas.</li> <li>➤ Continue to increase use of video content to engage the pre family 18-35 market.</li> </ul>	<p><b>Visit Pembrokeshire</b></p>	<p><b>Ongoing</b></p>
<p><b>New Visit Pembrokeshire website</b>  <b>Develop and launch a new <a href="http://www.visitpembrokeshire.com">www.visitpembrokeshire.com</a> website which will:</b></p> <ul style="list-style-type: none"> <li>➤ Showcase the destination and inspire people to visit.</li> <li>➤ Communicate the Pembrokeshire brand proposition clearly.</li> <li>➤ Provide a first-class user experience for both visitors and local businesses.</li> </ul>	<p><b>Visit Pembrokeshire</b></p>	<p><b>September 2024</b></p>

**Brilliant Basics**

Action	Delivery ( who)	Timetable
<p><b>Integrated sustainable public transport system</b> to provide reliable alternative to the car to support visitors, communities, and workforces.</p> <ul style="list-style-type: none"> <li>➤ VP seeking engagement in PCC’s new local transport plan and representation on the Combined Joint Committee (CJC), or at least a key stakeholder in the engagement on the plan, which will oversee delivery of the Regional Transport Plan (PCC, Carmarthenshire County Council, Neath Port</li> </ul>	<p><b>PCC and regional partners</b></p>	<p><b>TBC</b></p>

<p>Talbot County Borough Council and City and County of Swansea).</p> <ul style="list-style-type: none"> <li>➤ Improve the sustainability of travel to get to Pembrokeshire. <ul style="list-style-type: none"> <li>• Improve access and reliability of public transport options within the area to provide viable alternatives to private vehicle.</li> <li>• Of those arriving by private vehicle, increase the share using EV/hybrid.</li> <li>• VP seeking engagement in the Regional Transport Plan.</li> </ul> </li>   <li>➤ Improving the sustainability of travel in getting around Pembrokeshire. <ul style="list-style-type: none"> <li>• Encourage travel to and throughout Pembrokeshire via improved public transport (including Demand Responsive Buses) to reduce the amount of carbon emissions via a strong Comms Strategy.</li> <li>• Increase use of sustainable and active travel options.</li> <li>• Sustain and improve public transport infrastructure and services for visitors &amp; communities.</li> <li>• Developing a more integrated transport system for visitors, supporting modal shift.</li> <li>• Developing a suitable EV charging infrastructure for visitors.</li> <li>• Further expand and develop the network of cycling routes across the county.</li> <li>• Planning roadworks to minimise visitor disruption.</li> <li>• Develop and extend worker transport initiatives.</li> </ul> </li> </ul>		
<p><b>Digital connectivity</b> - Supporting infrastructure providers to build high quality fibre-based networks</p>	<p>PCC</p>	<p>Ongoing</p>

<p>across the County underpinned by commercial and public investment.</p> <ul style="list-style-type: none"> <li>➤ Local champion support for both businesses and residents.</li> <li>➤ Working with our partners through the Swansea Bay City Deal to drive investment and innovation in 4g/5g, fibre connectivity and internet of things.</li> </ul>		
<p><b>Visitor research</b></p> <ul style="list-style-type: none"> <li>➤ Maintain up to date quantitative visitor research (volume and value) – STEAM and the Cambridge Model.</li> <li>➤ Explore opportunities to build on this working with Visit Wales e.g. Resident survey and Digital Data project trial.</li> <li>➤ Deliver triannual quantitative research – to monitor both visitor sentiment and impact of tourism on local communities (budgets permitting).</li> </ul>	<p><b>Visit Pembrokeshire PCC, PCNPA</b></p> <p><b>Visit Pembrokeshire and Visit Wales</b></p>	<p><b>Annual Volume and Value and PCNPA STEAM research</b></p> <p><b>2024</b></p>
<p><b>Parking and Access plan</b></p> <ul style="list-style-type: none"> <li>➤ A proactive approach to parking provision, traffic management, supporting modal shift in key locations.</li> <li>➤ Encourage modal shift of visitors once here through provision of adequate car parking.</li> <li>➤ Car parking, toilets and public realm are important parts of the visitor experience that make up the entire destination: therefore, review toilet, waste, and parking provision</li> <li>➤ Consider means of integrated offer between car parks and attractions, transport, etc.</li> <li>➤ Ensure that payment options reflect visitor expectations, such as payment by card for parking as well as cash.</li> <li>➤ Consider coach parking arrangements including facilities for drivers and consistency to enable tour operators and group organisers to plan ahead.</li> </ul>	<p><b>PCC/PCNPA</b></p>	



## **Delivering the plan**

### **Key success factors in the delivery of this plan will be:**

- **That it is adopted by ALL partners involved in its delivery.**
- **That a new DMP Steering group is set up with representation from all key organisations whose role it will be to oversee delivery of the plan**
- **Developing a long-term sustainable model for Visit Pembrokeshire** as the strategic tourism body for the county beyond 2025.

Visit Pembrokeshire's current grant funding agreement with PCC will come to an end at the end of 2025. Whilst Visit Pembrokeshire has grown Membership and private sector investment over the past 3 years and this continues to be a business priority, it will require ongoing public funding if it is to continue to deliver on its current strategic purpose. During **2024 destination partners will need to consider** how this can be achieved considering current public sector challenges.