



Pembrokeshire
SIR BENFRO

Pembrokeshire Destination
Management Plan

2024-28

CONTENTS

- Section 1 **Introduction**
- Section 2 **Guiding Principles**
- Section 3 **Pembrokeshire in numbers**
- Section 4 **How the landscape has changed since 2020**
- Section 5 **2020-25 Destination Management Plan
- Original Vision and Strategic Priorities**
- Section 6 **Updated Action Plan – How this will adapt to
respond to changes since 2020**
- Section 7 **Delivering the plan**

Thank you to all our Strategic and Ambassador Partners for their ongoing support



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Images courtesy of Nathan Lowe: Surfer (Cover), Country Lane Drive (P13), Skrinkle Night Sky (P16), Sunset (P21), Church Doors Cove (P22).

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 more wide 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.



2

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



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

4

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.

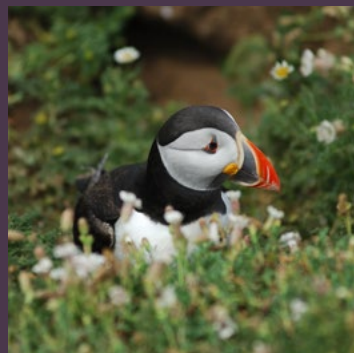
Significant and unprecedented pressure on public sector finances, which will impact on how we manage the destination in the future.

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.





5

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

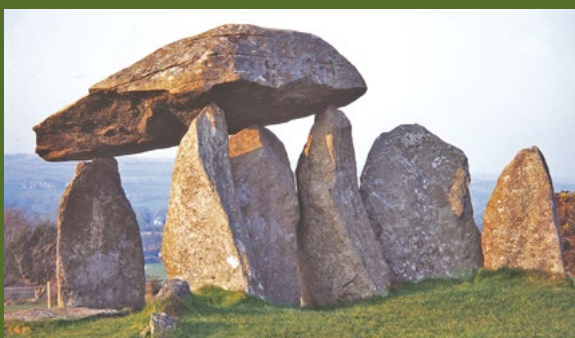
Shared narrative and brand – “Create a shared narrative which sells Pembrokeshire’s year-round offer and is communicated through marketing and PR activities.”

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.”



Updated Vision 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.”



6

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

Regenerative

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Develop a community led approach to tourism</i></p> <p>Set up a DMP Community Panel who will meet biannually to help inform, shape and monitor progress of the DMP.</p> <p>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.</p> <p>Build relationships vertically and horizontally across local stakeholders/ partners and with local communities.</p> <p>Actively encourage visitors who contribute positively to the local ecosystem.</p> <p>Supporting a community led approach to “slow tourism.”</p> <p>Deliver behaviour change campaigns to promote positive visitor behaviour: e.g. dogs, the potential dangers from water sports and swimming, and environmental impact on nature and wildlife, both land and sea based.</p> <p>Launch a Residents week – 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.</p>	<p>Visit Pembrokeshire and PLANED</p>	<p>DMP Community panel launched in November 2023 and will meet biannually as a minimum.</p> <p>Off season so February /November</p>

ACTION	DELIVERY (WHO)	TIMETABLE
<p>Skills - Develop Pembrokeshire's reputation as an exemplar for training in hospitality and tourism and an aspirational place to live and work.</p> <p>Build skills within our local workforce - collaboration with schools, colleges and communities.</p> <p>Work with education and training providers to ensure that availability of training opportunities is linked to skills requirements within tourism and hospitality.</p> <p>Develop and deliver a comms campaign aimed at key target groups (e.g., 16-24 and over 50's?)</p> <p>Croeso Awards – Further develop the Croeso Awards working with Pembrokeshire College and local business partners to inspire the next generation of tourism professionals.</p>	<p>Visit Pembrokeshire with local education partners</p>	<p>Ongoing</p> <p>Croeso Awards 2024</p>
<p>Accessible and inclusive</p> <p>Developing a world leading inclusive tourism offer as a USP for Pembrokeshire supported through the SPF Open to All project (OTA).</p> <p>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.</p>	<p>PCNPA and Visit Pembrokeshire</p>	<p>SPF project January-December 2024</p>
<p>Wellbeing and Active</p> <p>Continue working with existing endurance brands such as Ironman Wales and Long Course weekend to encourage increased dwell time and return visits.</p> <p>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.</p>	<p>Visit Pembrokeshire, Ironman Wales, Activity Wales Events and PCC's Events Board</p>	<p>Ongoing</p>
<p>Visitor levy</p> <p>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. 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.</p>	<p>Visit Pembrokeshire and PCC</p>	<p>TBC but likely to be Autumn 2026 now following recent ministerial announcement</p>

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Develop and grow international visitors to Pembrokeshire</i></p> <p>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).</p> <p>Actively work with Visit Wales and local partners to attend appropriate Travel trade events to showcase Pembrokeshire to priority international markets.</p> <p>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.</p>	<p>Visit Pembrokeshire Visit Wales and local partners</p>	<p>From 2024</p>
<p><i>Raising the profile of the Welsh language and culture</i></p> <p>Build on current activity to integrate the Welsh language more widely across all digital channels e.g. Welsh Wednesdays and Dydd Gwyl Dewi.</p> <p>Work with businesses to increase use of Welsh language within their businesses in a fun, engaging and accessible way for visitors.</p> <p>Increase bilingual content on www.visitpembrokeshire.com</p>	<p>Visit Pembrokeshire</p>	<p>From 2024</p>
<p><i>Meeting the UK's 2035 Carbon Neutral commitment</i></p> <p>As a global leader in regenerative tourism, we should aim to achieve this by 2030.</p> <p>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.</p> <p>Explore opportunities from the Green Events Code of Practice (GECOP) Pilot Project.</p>	<p>All Partners</p> <p>Visit Pembrokeshire</p> <p>PCC / Visit Pembrokeshire</p>	<p>From 2024/25</p>

Events and Seasonality

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Continue to build a reputation as an all-year-round visitor destination</i></p> <p>Building year-round tourism, and year-round sustainable jobs.</p> <p>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.</p> <p>Increase profile on wet weather provision through an off-season campaign highlighting the places to visit and things to do in poor weather.</p>	<p>Visit Pembrokeshire</p>	<p>Ongoing</p>
<p><i>Use Events as a catalyst to extend the season</i></p> <p>Support delivery of PCC Events Strategy focussing on events out of season and scalable events.</p> <p>Explore opportunities through the Arts Council Wales Green and Sustainable Events Code.</p>	<p>PCC / PCNPA and Visit Pembrokeshire with event partners</p>	<p>Ongoing</p>





ACTION	DELIVERY (WHO)	TIMETABLE
<p>Increased focus on our county towns and the county's unique cultural experiences</p> <p>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?</p> <p>Build this into ongoing destination marketing campaign across website, e-comms, and socials.</p>	<p>Visit Pembrokeshire / PLANED and DMP Community Panel</p>	<p>From January 2024</p>
<p>Increased focus on Arts and Culture and food tourism</p> <p>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.</p> <p>Raise awareness of: https://www.npopenstudios.co.uk/ - and explore the appetite/opportunity to expand this across the county.</p> <p>Build this into ongoing destination marketing across website, e-comms, and socials.</p>	<p>Visit Pembrokeshire / PLANED and DMP Community Panel</p>	<p>From January 2024</p>
<p>Events calendar</p> <p>Encourage and support closer collaboration amongst venues to bring together information about events across the county and create a single calendar to:</p> <ul style="list-style-type: none"> - Help event planners avoid clashes of dates - Support each other and share resources - Create a "What's on" resource for both locals and visitors <p>Through the development of the new Visit Pembrokeshire website, seek to maximise 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>All Partners</p> <p>Visit Pembrokeshire</p> <p>PCC / Visit Pembrokeshire</p>	<p>From 2024/25</p>

Shared Narrative

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Continue to build the new Pembrokeshire brand</i></p> <p>... 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><i>Increase engagement and “buy in” with tourism businesses with the Pembrokeshire brand</i></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><i>We will do this through:</i></p> <ul style="list-style-type: none">• B2B Training events• Continued promotion of the Brand Toolkit.• Targeted “Out and About” events in areas where there is poor digital presence currently.	<p>Visit Pembrokeshire</p> <p>Visit Pembrokeshire / PLANED</p>	<p>Ongoing</p> <p>75% of tourism businesses engaged in the brand by 2025</p> <p>From January 2024</p>



6

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Coordinated Destination Marketing and PR to grow priority markets.</i></p> <p>Focus on individual seasons and their distinctiveness in Pembrokeshire.</p> <p>Focus on coming to Pembrokeshire out of season.</p> <p>Deliver ongoing Press and PR activity that is integrated with and amplifies the destination marketing activity.</p>	<p>Visit Pembrokeshire</p>	<p>Ongoing</p>
<p><i>Curated approach to content creation</i></p> <p>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.</p> <p>Continue to increase use of video content to engage the pre family 18-35 market.</p>	<p>Visit Pembrokeshire</p>	<p>Ongoing</p>





ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>New Visit Pembrokeshire website. Develop and launch a new www.visitpembrokeshire.com website which will:</i></p> <p>Showcase the destination and inspire people to visit.</p> <p>Communicate the Pembrokeshire brand proposition clearly.</p> <p>Provide a first-class user experience for both visitors and local businesses.</p>	<p>Visit Pembrokeshire</p>	<p>September 2024</p>



Brilliant Basics

ACTION	DELIVERY (WHO)	TIMETABLE
<p><i>Integrated sustainable public transport system</i></p> <p>... to provide reliable alternative to the car to support visitors, communities, and workforces.</p> <p>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 of the plan, which will oversee delivery of the Regional Transport Plan (PCC, Carmarthenshire County Council, Neath Port Talbot County Borough Council and City and County of Swansea).</p> <p>Improve the sustainability of travel to get to Pembrokeshire.</p> <ul style="list-style-type: none"> • Improve access and reliability of public transport options within the area to provide viable alternatives to private vehicle. • Of those arriving by private vehicle, increase the share using EV/hybrid. • VP seeking engagement in the Regional Transport Plan. <p>Improving the sustainability of travel in getting around Pembrokeshire.</p> <ul style="list-style-type: none"> • 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. • Increase use of sustainable and active travel options. • Sustain and improve public transport infrastructure and services for visitors & communities. • Developing a more integrated transport system for visitors, supporting modal shift. • Developing a suitable EV charging infrastructure for visitors. • Further expand and develop the network of cycling routes across the county. • Planning roadworks to minimise visitor disruption. • Develop and extend worker transport initiatives. 	<p>PCC and regional partners</p>	<p>Ongoing</p>

**NIWGWL
NEWGALE**





ACTION	DELIVERY (WHO)	TIMETABLE
<p>Digital connectivity</p> <p>Supporting infrastructure providers to build high quality fibre-based networks across the County underpinned by commercial and public investment.</p> <p>Local champion support for both businesses and residents.</p> <p>Working with our partners through the Swansea Bay City Deal to drive investment and innovation in 4g/5g, fibre connectivity and internet of things.</p>	<p>PCC</p>	<p>Ongoing</p>
<p>Visitor research</p> <p>Maintain up to date quantitative visitor research (volume and value) – STEAM and the Cambridge Model.</p> <p>Explore opportunities to build on this working with Visit Wales e.g. Resident survey and Digital Data project trial.</p> <p>Deliver triannual quantitative research – to monitor both visitor sentiment and impact of tourism on local communities (budgets permitting).</p>	<p>Visit Pembrokeshire / PCC / PCNPA</p> <p>Visit Pembrokeshire and Visit Wales</p>	<p>Annual Volume and Value and PCNPA STEAM research</p> <p>2024</p>
<p>Parking and Access plan</p> <p>A proactive approach to parking provision, traffic management, supporting modal shift in key locations.</p> <p>Encourage modal shift of visitors once here through provision of adequate car parking.</p> <p>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.</p> <p>Consider means of integrated offer between car parks and attractions, transport, etc.</p> <p>Ensure that payment options reflect visitor expectations, such as payment by card for parking as well as cash.</p> <p>Consider coach parking arrangements including facilities for drivers and consistency to enable tour operators and group organisers to plan ahead.</p>	<p>PCC / PCNPA</p>	<p>Ongoing</p>

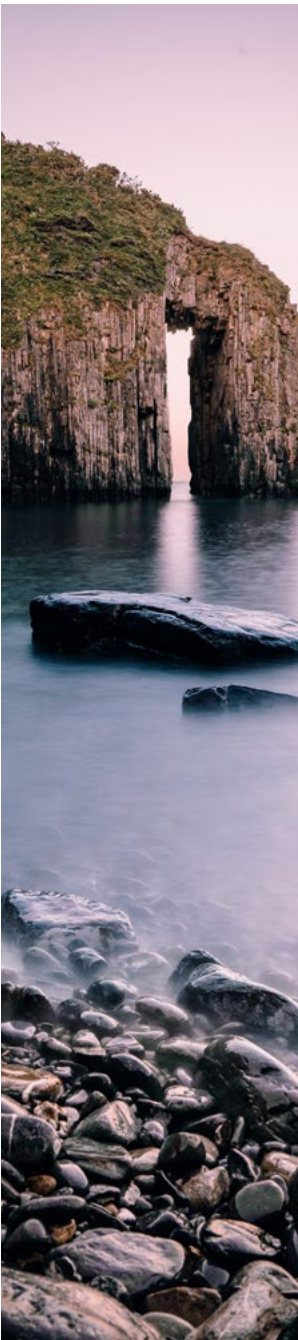


7

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.







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