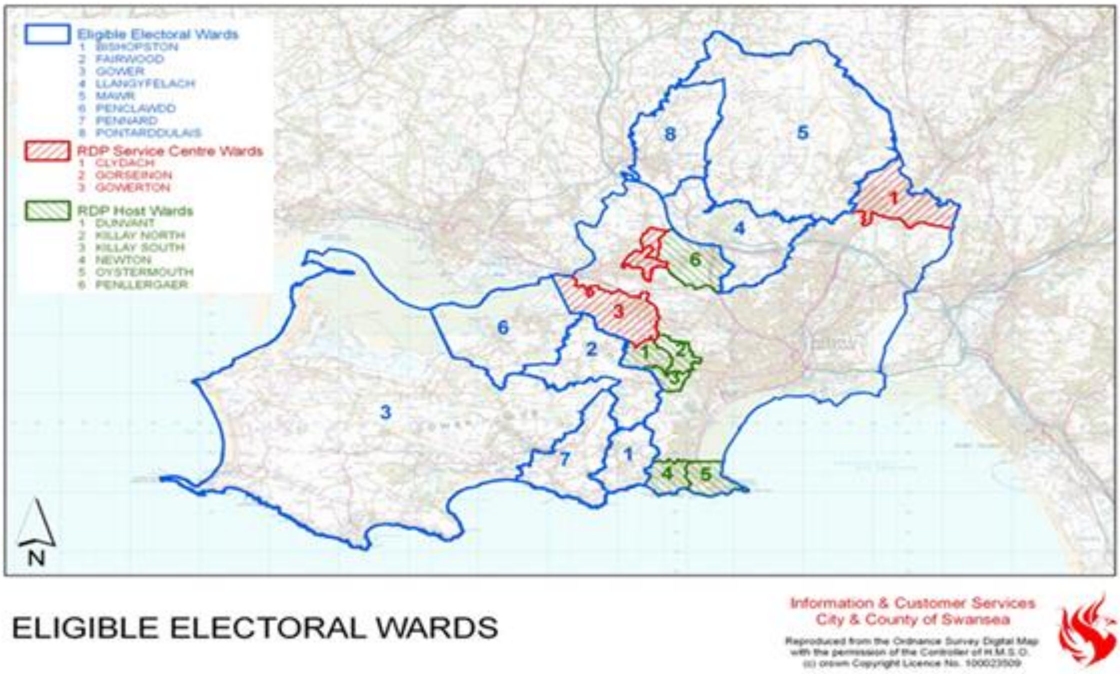
Rural Swansea Resource / Visitor Centre Feasibility Study

Final Report



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September 2017

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1. Introduction

In March 2017, Planning Solutions Consulting Limited was appointed by the City and County of Swansea, on behalf of the Swansea Rural Development Programme's (RDP) Local Action Group (LAG), to carry out independent research and assessment into the need, demand and opportunities to establish a dedicated facility (rural hub) to support the rural economy.

The Phase 1 work has focused on a needs analysis and consultation to identify the needs of businesses, stakeholders and visitors to rural Swansea. The output of this phase of work will inform the LAG on future investment decisions to support the rural economy. Phase 2 (which is outside the terms of reference for this commission) if required, will be an 'Options and Feasibility Study' informed by the outcome of this study.

Swansea Bay continues to develop as a major visitor destination with its strong rural, coastal and city centre product. The area attracts over 4.6m visitors a year, supports over 5,674 jobs and contributes over £400m to the regional economy[1]. The area's outstanding natural environment and exceptional quality of the Gower landscape is one of the key strengths identified by visitors. Enhancing the visitor offer and growing rural the local economy depends not only on what the area has to offer but the services and infrastructure available to contribute to the overall visitor experience. The lack of a dedicated visitor centre 'hub' in rural Swansea for visitors is perceived as being detrimental in growing the destination and retaining its competitive edge.

At an early stage. the initial focus was on the development of a dedicated 'visitor centre' serving the RDP-eligible wards. However, although the Phase 1 study has a particular emphasis on the tourism sector, the remit of the study has been extended to consider the feasibility of establishing a multi-functional centre to support rural economic development.

We designed an approach to meet the requirements of the brief and provide a firm foundation and evidence base for the Swansea LAG and partners to decide the way forward.

[1] Scarborough Tourism Economic Activity Monitor (STEAM) 2016

The Phase 1 work has included a comprehensive research programme to achieve constructive input from a range of stakeholders, businesses and visitors to rural Swansea to build the evidence for the project. The consultation plan is included as Appendix 1.

Our report is structured as follows:

- Section 2 outlines the strategic policy context;
- Section 3 summarises the current visitor experience in rural Swansea;
- Section 4 provides a market assessment, including demographic information;
- Section 5 outlines the main outcomes of the comprehensive research programme;
- Section 6 summarises the needs assessment and key strands identified by investigating good practice, and
- Section 7 provides recommendations and next steps for taking the project forward.

2. Strategic Context

Clearly it is important that the proposed rural 'hub' aligns with regional and local policy priorities.

Rural Local Development Strategy – Leader Programme 2014-2020

Rural Swansea is identified as 8 rural wards[2] with a total population of 29,354 (2011 census), which represents 12% of the population of the county of Swansea. The local strategic aims and objectives are set out within the Rural Local Development Strategy (2014-2020). The vision includes the aspiration that by 2020 the rural wards of Swansea will be a vibrant community in their own right and have a strong economy that takes advantage of local distinctiveness and all opportunities. The table below illustrates the Swansea RDP strategic aims and objectives and the Welsh Government Leader themes they link to, along with cross-cutting themes.

RURAL STRATEGIC AIMS AND OBJECTIVES	LEADER THEMES	CCT
Strategic Aim 1: Develop rural transport and infrastructure		Conserving our natural environment, cultural and built heritage serving our
Objective 1: Support an integrated and diverse transport network	Themes 1, 3	
Objective 2: Support and develop accessible, fit for purpose services	Themes 2, 3, 4, 5	
Strategic Aim 2: Enhance tourism offer		
Objective 3: Enhance quality of local offer and improve marketing	Themes 1, 2, 5	
Objective 4: Encourage development of year- round sustainable tourism offer across the rural area (especially food, crafts and recreation)	Themes 1, 2, 3, 5	
Strategic Aim 3: Deliver a strong economy and vibrant communities		
Objective 5: Support development of a self-sufficient rural economy	Themes 2, 3, 4, 5	
Objective 6: Support and develop cohesive, resilient and engaged communities	Themes 2, 3, 4	
Objective 7: Enable digital connectivity	Theme 5	

[2] Bishopston, Fairwood, Gower, Llangyfelach, Mawr, Penclawydd, Pennard, Pontarddulais

A core objective of Leader funding is to support a strong rural economy, which takes advantage of local distinctiveness. The development and operation of multi-functional hub is identified as a potential project to support and sustain local economic growth and development.

The LAG area has a varied professional services base, with over 700 people employed in financial and business services within the LAG area. Within the rural Swansea, micro-businesses are dominant, with the vast majority number of enterprises employing fewer than 10 people. Self-employment and home-based working (19%) are also important features of the economy. All wards except Pontardulais have a higher than Swansea average of people working from home, although this varies between wards, e.g. 2.9% in Pontardulais to 15% in Gower[3].

A number of rural areas throughout the UK have developed rural enterprise centres to support start-ups and provide a local infrastructure for indigenous business growth. For example, the East Devon Business Centre near Honiton provides competitive office lets, conference and meeting rooms and business advice through the Business Boost programme. Other success ventures include Denne Hill Business Centre http://www.dennehillbusinesscentre.co.uk/ and the rural business award winning Park View Business Centre http://www.parkviewbusinesscentre.co.uk/.

Agriculture is the main primary industry in the Gower AONB. Good quality soils (a significant amount of enclosed farmland is Grade 1 or 2) and a relatively mild climate (for Wales) make Gower one of the more agriculturally versatile and productive parts of the country.

Past Leader initiatives (e.g. Rural Swansea Action) supported the diversification of the rural economy, enhancing prosperity at a local level and developing Rural Swansea's identity for producing high quality Food, Arts, Crafts and Natural Products able to supply local markets.

Local and Regional Context

At local level, the Swansea Local Service Board has set out a clear vision in the Single Integrated Plan, which indicates the importance of a competitive and prosperous economy that acts as a focal point for the wider Swansea Bay City Region.

[3] Socio-Economic statistics: Rural Local Development Strategy Leader Programme 2014-2020

Tourism has a key role to play particularly in supporting the rural economy. The strategic policy context seeks to increase tourism revenues and extend the tourism season to create a year-round destination. In terms of economic profile, one quarter of employment in rural Swansea (1,500 jobs[4]) is based within tourism. Indeed, in the Gower ward, tourism accounts for 54%[5] of employment, highlighting the importance of the sector to the rural economy. The Swansea Bay Destination Management Plan outlines the importance of the visitor economy and the need to invest in new quality visitor products and upgrades to facilities to drive quality and tackle seasonality. Produced in consultation with major tourism stakeholders, it is regarded as a shared statement of intent between the public, private and third sectors on how to manage, develop and promote Swansea Bay. Future priority actions identified in the DMP include:

- Protect and enhance natural environment
- Develop tourism product
- Improve visitor experience
- Continue to deliver strong marketing for the area
- Improve infrastructure and facilities
- Develop strong partnerships between public, private and third sector
- Monitor destination performance
- Identify relevant funding

Any proposed development must be appropriate to its location and surrounding environment and not have a negative landscape or environmental impact. Whatever development is taken forward needs to conserve and enhance the special quality of the area, for example as set out in the Gower Area of Natural Beauty Management Plan.

At a regional level, the Swansea Bay City Region Economic Regeneration Strategy sets out the framework to achieve a step-change in the performance of the economy of South West Wales. The high-level imperatives to increase jobs, increase the number of higher value-added jobs and businesses have to be addressed at all levels, including local. The £1.3bn City Deal is based around 4 strands:

- Economic acceleration
- Energy
- Life sciences and well-being
- Smart manufacturing.

[4] Rural Local Development Strategy Leader Programme 2014-2020
[5] Rural Local Development Strategy Leader Programme 2014-2020

A regional digital infrastructure will be implemented to support each of the themes and priorities. The vision is to create a digital infrastructure, including gigabit fibre and next generation wireless networks that will enable innovation and entrepreneurship within the region. The City Deal has a strong focus on the economic regeneration of the city but it is also important that rural Swansea benefits from the programme to encourage rural economies to diversify and inclusively grow their local economies.

A multi-functional hub has the potential (subject to detailed feasibility) to perform a central role in demonstrating new technologies and showing the area to be technologically advanced.

3. The Visitor Experience

National Strategy

The context for tourism in Wales is set by the national strategy 'Partnership for Growth' (P4G) which sets a growth target of **10%** in real terms from 2013 to 2020. A review of progress was carried out in 2016 which identified that growth was moving well ahead of target and refocused Visit Wales' own investment priorities. In support of the 'This is Wales/ Gwlad Gwlad' brand, the development of route-based experiences, (including the A470 in the first phase), and the 'Years of…' approach to marketing product development and communications highlights the following categories:

- Flagship attractions
- Quality accommodation
- Business and Events
- Cruise
- Development of Heritage and Cultural experiences
- Food and Drink
- Utilisation by business of emerging technology

In implementing the new 'This is Wales…' brand VW is applying the 5 brand values as tests for project support:

- ✓ Surprise and Inspire
- ✓ Change Perceptions
- ✓ Elevate Our Status
- ✓ Do Good Things
- ✓ Be Unmistakably Wales

Visit Wales has also indicated it is keen to bring forward more 'routine' support investment in the region (e.g. accommodation capacity and quality upgrade, public realm and infrastructure etc.) through the mainstream TISS/ TAIS[6] processes and cooperative revenue projects through RTEF/ TPIF[7].

Tourism Product

As already stated, tourism and recreation have become increasingly important sectors of the local economy of rural Swansea. The wider Swansea Bay area

[6] Tourism Investment Support Scheme/ Tourism Amenity Investment Scheme
[7] Regional Tourism Engagement Fund/ Tourism Product Innovation Fund

welcomes more than four million visitors every year, most of who would have visited the AONB. In 2016, visitors spent over £400m, supported 5,674 jobs. Around 4.6m visitors came to the area of which 1.5m were staying visitors[8].

A recent survey found that the factors which most influenced visitors to choose the area were the coast (44%), scenery/landscape (44%), beaches (35%), The most popular activity undertaken by visitors was low level walking (2-8 miles) (45%), which has been the most popular activity undertaken by visitors every year since 2005 (52% of visitors in 2012). Natural beauty and tranquillity were identified as the main reasons for visits. Interpretation off and on site can add to visitors' enjoyment, understanding and appreciation[9].

The beaches of Gower are seen by visitors, tourism businesses and managers as one of the most important tourism assets not only for Gower itself but also for rural Swansea and the City and County of Swansea and Swansea Bay as a whole. Maintaining a beach environment of the highest quality is essential in order to retain the loyalty of past visitors and to attract and retain new visitors. The four current Blue Flag beaches on Gower are all managed by the City and County of Swansea. They are:

- Port Eynon and Horton
- Caswell Bay
- Langland Bay
- Bracelet Bay

All four Blue Flag beaches lie within the Gower Area of Outstanding Natural Beauty, and each comes with its own unique characteristics and qualities. 'Stunning beaches' are identified as the number one strength for tourism in rural Swansea, while weaknesses include 'Litter on some beaches and public areas'.

Total bed stock figures for Gower, where the majority of visitor accommodation is located, are estimated at 21,500, with the majority (87%) accounted for by camping and caravan parks. There is a significant number (c.250) of self-catering properties. Bed and Breakfasts have been declining in number and there are very few hotels in the rural area[10].

[8] Scarborough Tourism Economic Activity Monitor (STEAM) 2016
[9] Information from City and County of Swansea Beaches Management Plan, the Tourism Company, March 2015
[10] Gower AONB Management Plan 2016

The area includes a number of popular attractions, many of which continue to invest and develop their product offer in line with future trends and visitor aspirations. The main attractions include:

- Gower Heritage Centre
- Perriswood Archery and Falconry Centre
- A range of castles, e.g. Oxwich, Weobley, Pennard and Oystermouth
- National Trust Visitor Centre, Rhossili
- Penllergare Valley Woods

A wide range of recreational activities take place on Gower, many of which are associated with its special qualities, and especially associated with the sea. Water based recreation activities include surfing, diving, fishing, boating and canoeing. A number of small enterprises have been established to promote and run a number of activities, for example the Welsh Surfing Federation Surf School at Llangennith, Gower Surfing, Oxwich Watersports etc.

Land based activities include walking, cycling, horse riding, climbing, caving, golf (including Pennard Golf Club, which is listed in the top 100 golf courses in the UK & Ireland), archery, and less active ones such as bird watching, archaeology, and visiting historic sites.

The area includes a number of walks highlighting interesting locations and features along the way. Swansea Council has recently launched four new walking guides as part of a Gower Coast Walks series. A key emphasis is the All Wales Coast Path initiative, which includes the 55-mile-long coast path, which stretches around the entire length of the Swansea and Gower coastline. There are also a selection of walking trails to explore rural Swansea, including the Mawr and Pontarddulais Heritage trails, which tell the story of the area's past.

The area hosts a number of events, many of which add to the visitor product. These include:

- Gower Food Festival
- Wales National Air Show (Swansea)
- Gower Cycling Festival
- Gower Festival (classical music)
- BHF Gower Bike Ride
- Gower Triathlon
- Medieval Fun Week

- Gower Show
- October Cider Festival.

The area has a developing food and drink offer, offering a wide variety of places to eat and drink, many of which serve locally sourced produce. The area has also developed a number of food tours and food foraging trails to explore through initiatives like the Swansea Bay Good Food Circle.

The Leader programme has made investment to grow and develop the tourism product, including the RDP Rural Accommodation Growth Scheme, which secured investment to improve accommodation provision in rural Swansea.

Visitor information

Although information is available at a number of visitor attractions and accommodation providers, there is currently no dedicated visitor centre serving rural Swansea. Indeed, a key driver of the project has been the aspiration to develop a local information centre to serve visitors to rural wards.

Over the last few years, a number of Tourist Information Centres (TICs) in Wales have closed, including Swansea TIC. The Council has recently established a Visitor Information Points scheme (VIPs). The VIPs provide a range of visitor services including:

- Promoting things to do
- Accommodation
- Travel information.

The VIP is a recent partnership initiative between the private and public sector to improve visitor information services, which to date has secured a high take-up of business involvement. The area includes a number of VIPs, all of which were contacted through our research programme (see section 5).

Swansea Council also produces a range of printed materials to support the information journey. The official tourism website, www.visitswanseabay.com, if also a key source of information and advice for visitors, i.e. pre, during and post visit.

The RDP is also currently funding a Gower Community Tourism Ambassador Pilot and feasibility study. The objective is to train a pool of community ambassadors to provide an enhanced visitor experience through offering a range of resources and services. A clear focus of the pilot scheme is to provide visitor information on the heritage and landscape of Gower. If successful, the pilot will be rolled-out across

Gower and other areas of rural Swansea and will provide a further information resource for visitors to the area.

4. Market Assessment

An important component of the feasibility study has been a detailed market assessment of the overall project concept in order to assess its market prospects. Key to this feasibility study is an assessment of demand. Demand for the tourism product and local amenities comes from the following key segments, and these are considered below in relation to the hub development:

- Local residents: demographic profile and catchment
- Tourists

The visitor flows from the tourism market are subject to seasonal variations and the local market, particularly within the 0 to 30-minute drivetime contour, is likely to be the key driver of users particularly during the shoulder periods.

Three points within the study area have been chosen from which to produce the drivetime maps – Mumbles in the east, Rhossili Bay in the west and Gowerton to the north of Swansea City centre[11].

Headline population

The table below sets out the headline population figures, which indicate marked differences in the headline figures. For Rhossili Bay, the residential population is just 15,000 people within the overall 30-minute drivetime contour, which increases to half a million for the 0 to 60-minute contour and 2.4 million for the two-hour drivetime contour. The respective figures for Mumbles are 372,000, 1.17 million and 3.3 million and for Gowerton the figures are similar (423,000, 1.14 million and 3.3 million).

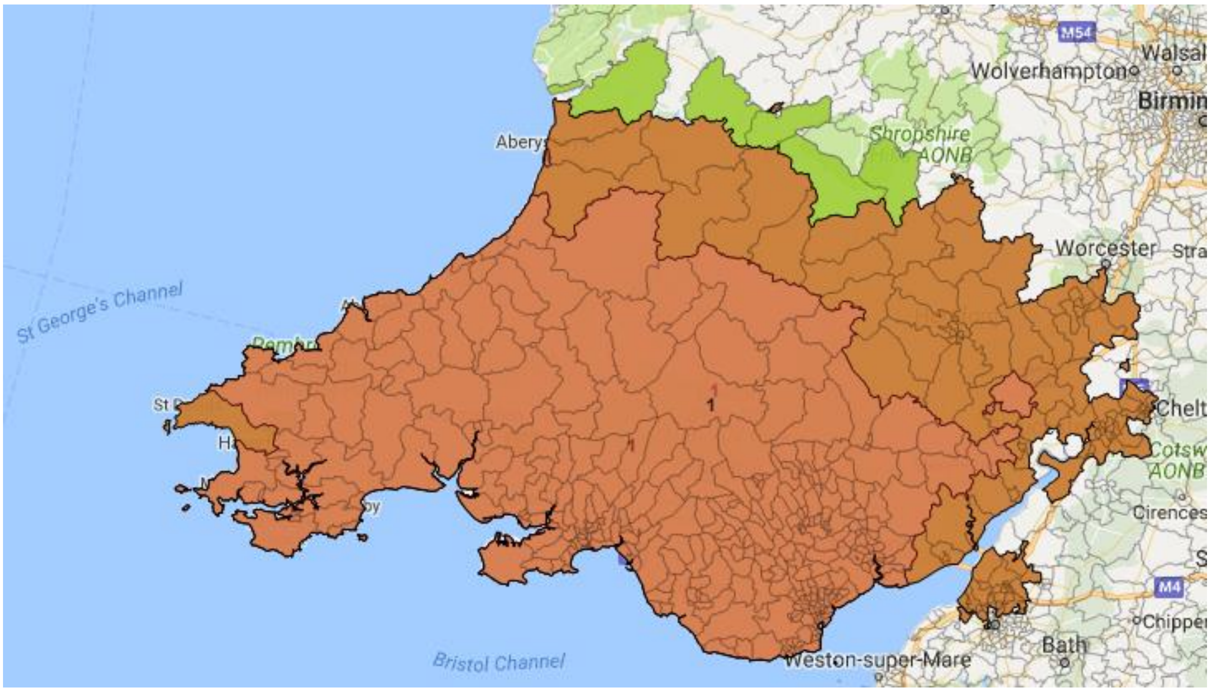
Drive Times (Minutes)	Mumbles	Rhossili Bay	Gowerton
	Residential Population		
0 to 30	372,306	14,753	423,251
0 to 60	1,170,327	501,837	1,136,204
0 to 120	3,309,972	2,377,469	3,294,852

Source: Geoplan

Drivetime maps

[11] Source: Geoplan on-line mapping information www.geoplan.com

On the map below we have overlaid the 2-hour drivetime contours for all three locations. This shows the more limited reach of Rhossili Bay equivalent to a lower market size just under one million residents.



Source: Geoplan

Age profiles

Mumbles

The table below shows the breakdown of the age profiles within all three drivetime contours.   In all contours, the representation of children aged between 0 and 15 years old is slightly below the national average, this is most pronounced within the immediate 0 to 30-minute drivetime catchment.

There is an under representation within the teenage and young adult age bracket (people aged 16 to 24) for both the 0 to 60 and overall 0 to 120-minute contours. However, within the immediate 0 to 30-minute contour the representation of older teenagers and young adults is some 10% above the national average.

The core family market age brackets – adults aged 25 to 44 and 45 to 64 is mixed across the different contours. There is a significant over representation of older adults (aged 65 and over) within both the 0 to 30 and 0 to 60-minute drivetime contours.

Age profile – Mumbles

Age	0 - 30 minute			0 to 60 minute			0 - 120 minute		
	Area total	Area %	Index	Area total	Area %	Index	Area total	Area %	Index
Age 0 to 15	65,432	17.58	94	212228	18.13	97	599,083	18	96
Age 16 to 24	48,869	13.13	110	138701	11.85	99	412,106	12	96
Age 25 to 44	94,592	25.41	93	293278	25.06	92	837,530	25	108
Age 45 to 64	96,245	25.85	101	313244	26.77	105	868,523	26	97
Age 65 and over	67,159	18.04	110	212856	18.19	111	592,695	18	91

Source: Geoplan

Rhossili Bay

The table below shows the breakdown of the age profiles within all three drivetime contours of Rhossili Bay. Similar to Mumbles the representation of children aged between 0 and 15 years is below the national average within all three contours. This is most pronounced within the immediate 0 to 30-minute contour, which is some 7% below the national average.

Within the 30-minute drivetime contour the representation of both the teenage and young adult groups (people aged 16 to 24) and for people aged 25 to 44 (part of the core family market segment) are significantly below the national average – some 31% and 28% below respectively. Within the 0 to 60 and 0 to 120 minutes overall contour the representation of older teenagers and young adults are 5% above and 5% below the national average respectively.

Within the 0 to 60 and 0 to 120 minutes overall contour the representation of adults aged 25 to 44 (part of the core family market) are 9% below and 9% above the national average respectively. In terms of adults aged 45 to 65 within the 0 to 60 and 0 to 120-minute contours the representation of adults within the age bracket are some 3% above the national average and 3% below the national average respectively.

There is a significant over-representation of older adults (aged 65 and over) within both the 0 to 30 (+57%) and 0 to 60 (+14%) minute drivetime contours.

Age profile – Rhossili Bay

Age	0 - 30 minute			0 to 60 minute			0 - 120 minute		
	Area total	Area %	Index	Area total	Area %	Index	Area total	Area %	Index
Age 0 to 15	2,576	17.46	93	88,766	18	94	432,989	18	97
Age 16 to 24	1,224	8.30	69	62,669	12	105	299,195	13	95
Age 25 to 44	2,901	19.66	72	124,725	25	91	599,077	25	109
Age 45 to 64	4,266	28.91	113	132,215	26	103	623,900	26	97
Age 65 and over	3,788	25.67	157	93,442	19	114	422,299	18	92

Source: Geoplan

Gowerton

The table below shows the breakdown of the age profiles within all three drivetime contours of Gowerton. Similar to Mumbles and also Rhossili Bay, the representation of children aged between 0 and 15 years is below the national average within all three contours. This is most pronounced within the immediate 0 to 30-minute contour, which is some 6% below the national average, which is in line with the other two locations. It should be noted that within the overall 30-minute drivetime contour the representation of the teenage and young adult groups (people aged 16 to 24) are above the national average by some 6%. However, the representation of young adults aged 25 to 44 are slightly below the national average by some 9% - this is also repeated within the overall 60-minute drivetime contour. Interestingly, within the overall 120-minute drivetime the representation of adults aged 25 to 44 are slightly above the national average (by 8%).

Similar to both Mumbles and Rhossili Bay within both the 0 to 30 and 0 to 60-minute drivetime contours there is a significantly higher representation of older adults aged 65 and over when compared to the national average.

Age profile – Gowerton

Age	0 - 30 minute			0 to 60 minute			0 - 120 minute		
	Area total	Area %	Index	Area total	Area %	Index	Area total	Area %	Index
Age 0 to 15	74,923	17.70	94	204,649	18	96	596,691	18	96
Age 16 to 24	53,613	12.67	106	134,520	12	99	410,500	12	96
Age 25 to 44	105,704	24.98	91	281,897	25	91	833,896	25	108
Age 45 to 64	110,525	26.11	102	305,045	27	105	865,192	26	97
Age 65 and over	78,465	18.54	113	210,036	18	113	588,463	18	92

Source: Geoplan

Market assessment - Business accommodation

The industrial and commercial market in South West Wales "has improved across all size ranges, particularly in the small and medium size category[12]". The larger units that have traded in Swansea Bay are generally secondary in nature. In line with other regions of South Wales, there is a need for modern floorspace of all sizes, most notably for B1 innovation units on Fabian Way, close to the new Swansea University Campus.

Demand and take-up continues to be in the urban centre and close to the M4, although good quality city centre supply is limited. City Centre regeneration projects, specifically those facilitated through the City Deal, are predicted to stimulate Swansea's office sector. For example, the £169m Bay Region project aims to generate more than 1,300 jobs in Swansea. It will create 100,000 square feet of new office space on Kingsway in the city centre for tech businesses and to support local enterprise and entrepreneurial talent. This project will also create a box village development on the University of Wales Trinity Saint David, currently under construction at the Waterfront Innovation Quarter in SA1. Built from shipping containers, this will provide affordable space for start-up firms with links to the university academic programme[13].

There appears to be a lack of any industrial or office space in rural Swansea. The closest major employment centre is the Swansea West Business Park, which is identified as a strategic employment location. Demand is strong, with the existing estate accommodating approximately 140 firms employing in the region of 1,500 people[14]. The emerging Swansea Urban Development Plan identifies some 40 hectares of additional land for employment use. Business accommodation includes Henley House, owned and operated by Business in Focus, which provides start-up office space varying in size between 300-1,000 sq ft.

Anecdotally, there seems to be a developing professional business service and creative cluster in rural Swansea although it appears the majority are homeworkers.

[12] JLL South Wales Report 2017
[13] http://www.swanseabaycitydeal.wales/
[14] http://www.swanseabaycityregion.com/en/swansea-west-business-park.htm

Key implications

- Of the three selected locations, Mumbles and Gowerton have a far stronger demographic profile in terms of population density within the primary market catchment.
- The area has a reasonably strong catchment for leisure visitors despite its rural / peripheral location
- Across all of the locations there is a higher representation of older residents than the national average which suggests a need to provide a service which meets the needs of this important user group. Conversely there is a lower representation of younger age groups and children apart from young adults in Mumbles no doubt boosted by the relatively high student population.
- It is clear that a new centre would have a significantly higher market reach if it is located at the gateway to Gower rather than on or near its western coast.

5. Research Programme and Outcomes

The Phase 1 work has included a detailed programme of engagement and consultation to understanding the needs and aspirations of key individuals, organisations and businesses in the area. The programme, which was agreed with the client project team, is included as Appendix 1.

5.1 Tourism Swansea Bay Members

In total, 36 businesses – all Tourism Swansea Bay Members - completed the survey. Some businesses provided their full address whereas others just said “Swansea”, with no post code, which has made it difficult to work out precise locations for the businesses that completed the questionnaire. What we can say:

- Tourism Swansea Bay, which provided the database, has a good spread of members throughout rural Swansea with a bias towards Gower;
- From the questionnaires received where post codes were provided, the majority (68%) were in the rural ‘west’ wards;
- There was a lack of responses from the rural north wards, which would suggest a need for the LAG to consider how to better engage with businesses in this area in future exercises

Market confidence

The results indicate that the overall outlook for the tourism sector in the sub region appears positive. Encouragingly, just over 28% of tourism businesses feel more optimistic about the future (as of June 2017) compared to the same period last year. A further 43% feel about the same.

A number of tourism businesses identified a number of challenges and obstacles, which are impacting on their business and perhaps acting as a barrier to growth, including:

- Maintaining a competitive position and a sustainable business – it is felt that the planning regime restricts growth *“until Swansea Planners understand the need to keep locals from leaving the area by allowing businesses to expand and therefore able to employ these locals. Gower is on the decline because no flexibility is allowed. Because of changing leisure needs a full twelve months occupancy is needed in Gower camping and caravanning sites*.”

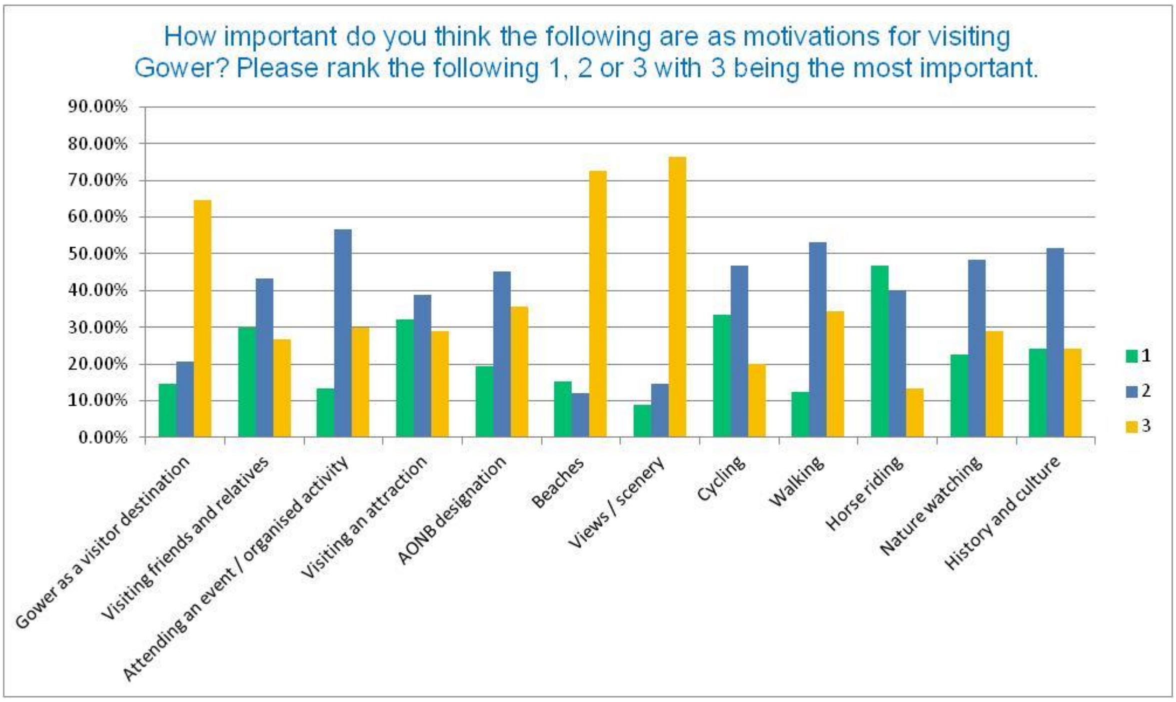
- Lack of support for tourism (closure of TICs) *“confidence in the council is at an all-time low as they close more and more tourist information centres and the lack of belief that Wales has a future in tourism...”*

- In respect of Brexit, experiences are mixed: *“I had a very good rapport with a French firm, however bookings from them are well down due I'm told to Brexit.”* Although one respondent commented that they have experienced *“big growth in accommodation demand since Brexit. Cycling and walking are growing in popularity.”*

Why are people visiting Gower?

Key motivations for people visiting Gower relate to the views and scenery, the beaches and Gower being a ‘visitor destination’ (please see bar chart below for detailed breakdown). The outstanding natural environment is a key asset of the area.

Taking part in an activity such as walking, horse riding and observing nature or attending an event and the history / culture of Gower are key secondary drivers and motivators.



One participant commented that watersports and attending a wedding are also a motivator of why people are visiting Gower. “*The wedding trade and water sports/surfing are also strong visitor drivers for Gower. The wedding industry in particular has seen strong growth.”*

Visitor facilities and services

There are some concerns around the overall visitor product on offer with only 9% of tourism businesses rating the visitor facilities and services available as very good. Some 54% rated the services and facilities as fairly good and 23% as neither good nor poor. 14% of tourism businesses rated them as fairly poor.

It was felt that investment in the 'things to do in Gower' should be the key focus of future development plans to improve the visitor product / experience (38% of respondents), followed by investment in marketing / communication initiatives (29%). 12% (11.76%) of respondents believe that investment should be focussed on information services located in Gower.

Awareness of the Visitor Information service

In respect of information provision, just under half of respondents (46%) had heard of the Visitor Information Point scheme.

There are opportunities to enhance the scheme and suggestions focussed on small-scale improvements and communication. For example, low cost initiatives included providing all weather leaflet dispensers to be used outside of prime locations/properties through to the use of social media and informing tourism businesses about the scheme. "*Ensure all tourism operators and marketing partners are made aware of initiatives such as this. Please ensure that all of rural Swansea, not just the Gower is included."*

One participant felt that there is a need to involve additional tourism businesses in the scheme and that the system used to 'top-up' leaflets needs to be improved (some of the leaflets displayed are out of date). It was recognised that there are some information gaps as the VIP 'box' only allows leaflets from partners to be displayed.

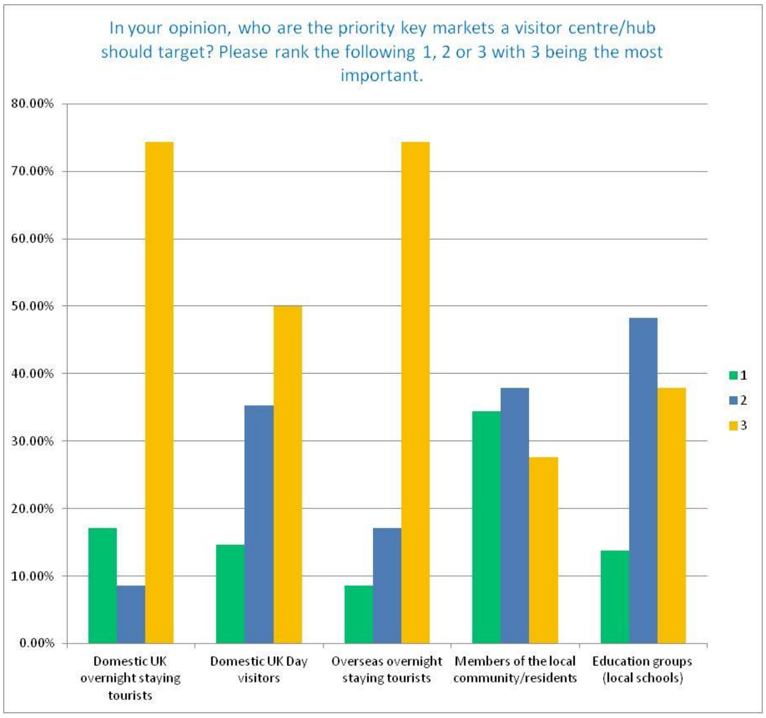
Developing a dedicated multi-functional visitor centre or hub

Tourism businesses feel there is a need to develop a multi-functional visitor centre or hub in rural Swansea – some 66% (65.71%) of respondents supported such a visitor centre/hub.

Key facilities to be included within a visitor centre / hub are set out in the table below (please note participants could select more than one 'answer).'

Answer Choices	Responses	
Flexible meeting space/community room	44.44%	12
Office space for rent (for micro-businesses)	44.44%	12
Electric vehicle charging points	44.44%	12
Craft units	51.85%	14
Cafe	55.56%	15
Interpretation about Gower (used to promote Gower)	59.26%	16
Bike hire	59.26%	16
Retail offer (potential focus on local Gower produce and products)	74.07%	20
Staffed visitor information service	88.89%	24
Visitor toilets	88.89%	24

The key priority markets for the facility to engage with are staying tourists with a lead focus on domestic UK overnight stays. Overseas overnight staying tourist are also acknowledged as important target markets ahead of domestic UK day visitors. Please see the bar chart below for a detailed breakdown of priority markets.



In terms of the location of a potential visitor facility / hub, just over 70% felt that it should be developed within an existing facility. There is little agreement on a preferred existing facility, although the Gower Heritage Centre was mentioned several times and to a lesser extent the National Trust's Visitor Centre at Rhossili was mentioned.

Some tourism businesses were concerned about the need to develop 'one' centre and several felt it may be more appropriate to develop 'several' centres (in part because there is no one entry point to Gower).

".... Maybe money could be better spent identifying a number of key satellite 'hubs' and developing their offer, e.g. Gower Heritage Centre, Llanmadoc shop, National Trust at Rhossili, Pennard Cafe etc partner satellite sites targeted around Gower. The problem with one fancy centre is that unless it is hugely impressive in terms of what it actually offers and/or located at one of the honey pots (bang on top of Cefn Bryn) or at Rhossili people might not make a special trip to visit it."

Other suggested sites included the services at Junction 47 of the M4 to capture tourists heading to Pembroke and the entrance to Swansea Airport which is visible from the A4118 road.

Of the participants who felt that there was no need for such facilities, reasons focussed on the existing provision of centres which should be supported (including the Gower Heritage Centre, Tourism Swansea Bay, Down to Earth, Three Cliffs Coffee Shop). One participant commented *"I thought there already was such a thing with the Tourism Swansea Bay place near the Gower Heritage Centre?"*

A limited number felt that visitors can find information online and that investment could be focussed in different areas. One participant commented *" I feel it would be a fruitless venture. People can gather all the information they require from the internet with ease in the modern day. Investment needs to be driven towards diversified accommodation (especially in Gower) and improving visitor attractions and facilities within the Swansea area and again especially in Gower. Cefn Bryn springs to mind, where a decent car park would be appreciated by visitors enjoying the views and visiting King Arthur's stone and perhaps some nice walkways to the stone itself."*

It was felt that the provision of information in key venues such as pubs, restaurants and hotels would negate the need to build a dedicated centre and with the development of the VIP scheme perhaps a single focal point is not required.

".....Visitors to Gower need information wherever they are and a series of better equipped VIPs would be more beneficial than just one overall point. There is a lack of co-ordination between providers and poor communication about how the existing infrastructure can be made to work. Tourism Swansea Bay Trade Association have a dedicated office resource for their members, and the Local Authority have their partners but there is a need for someone to take the lead in co-ordinating how the industry in Gower as a whole can better present itself to the visitor and locals alike. We have previously set up a dedicated Information Centre with support from VW but funding the provision of this has always been an issue as funding is often reliant on grants which run out with no continuity when needed....There is a need for all participants in the Industry to do better at providing visitors with information and understanding how to do this by training staff, supporting each other's services etc."

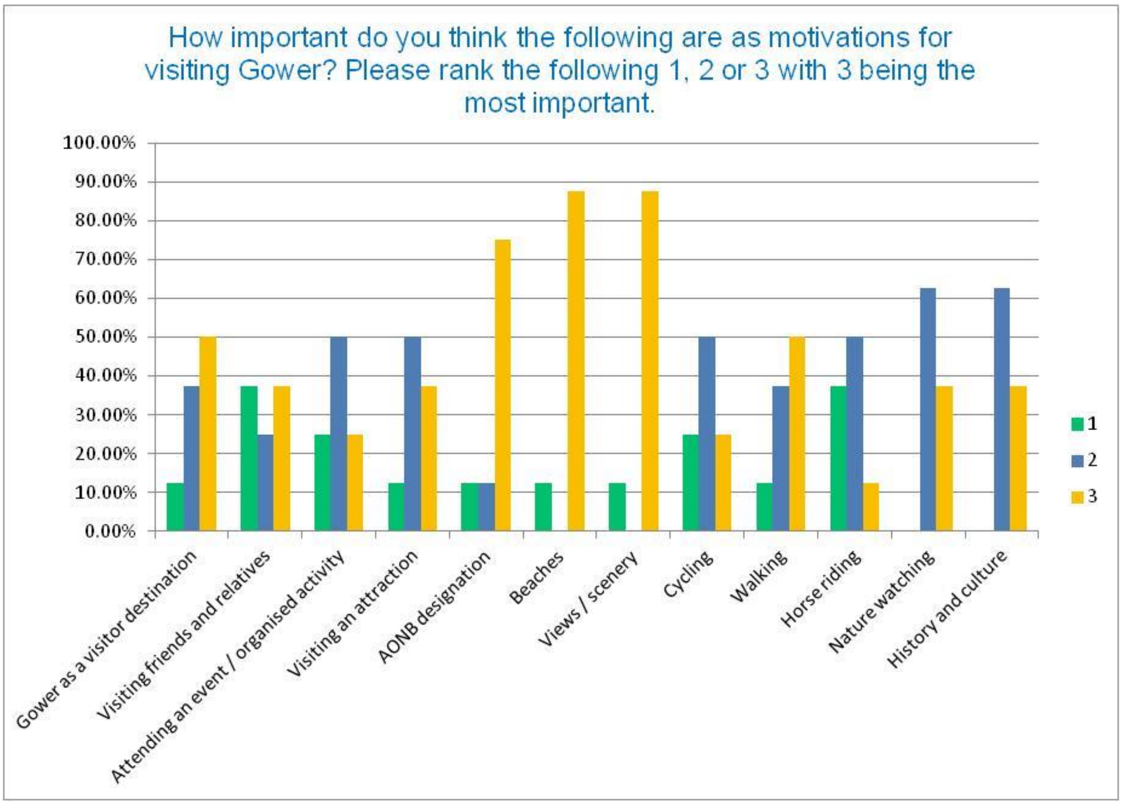
Importantly some 66% of respondents would like to be involved in developing the visitor centre/hub facility.

5.2 Visitor Information Points Providers

The survey generated a total of nine responses from Visitor Information Point providers, which represents over a third of VIP providers in rural Swansea.

50% of respondents felt more optimistic about their business prospectus now (July 2017) when compared to the same period in 2016. However, 37.5% of respondents felt less optimistic.

Visitor Information Point providers felt that the key three motivators for people to visit Gower are the beaches, views/scenery and the AONB designation (please see bar chart below for detailed breakdown).



There is a need to improve the visitor facilities and services

No participant in the survey rated the visitor facilities/service within Gower as very good. 50% rated it as fairly good, 37.50% as neither good nor poor and 12.50% as fairly poor. Key areas for future investment include investing in the range of 'things to do' in Gower (50% of respondents), in marketing and communications (25%) and investment in the quality and range of accommodation available (25%).

Visitor Information Point scheme

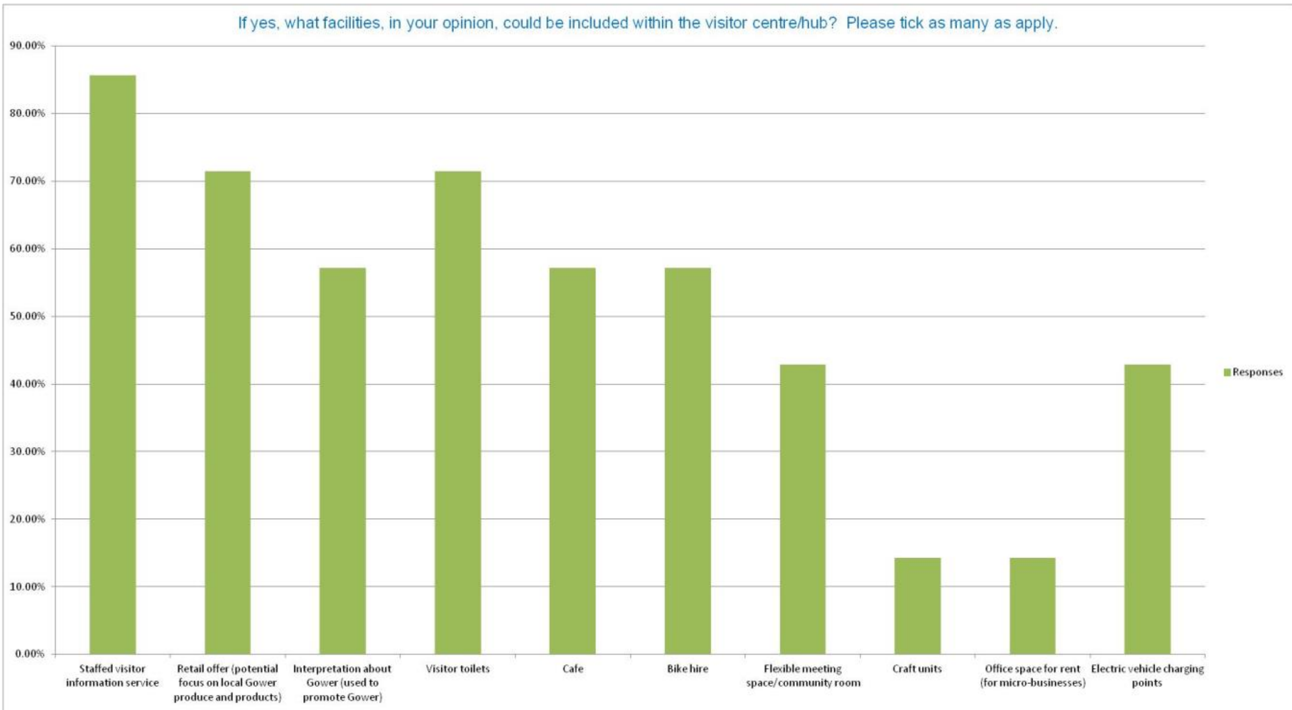
Participants were asked whether the scheme provides a good resource of information / advice for visitors to Gower and 62.5% of participants felt that it did not. Concerns focussed on a low level of awareness of the Visitor Information Service, participants commented *"more advertising needed as visitors never look for the sign. They look for the old TIC sign. Visitors only know about the scheme when told when they are at our premises and then given the Swansea Council leaflets."*

Interestingly, participants are hinting that perhaps a focus point is needed *"it's a good idea but it isn't in the public consciousness and so doesn't work in practice. A tourist would anticipate an information centre. There is nowhere to put our leaflets, this just carries the Visit Swansea range of marketing materials"* and "*I feel that the area benefits from the VIP scheme, but lacks a focal point. A place designated to Visitor Information."*

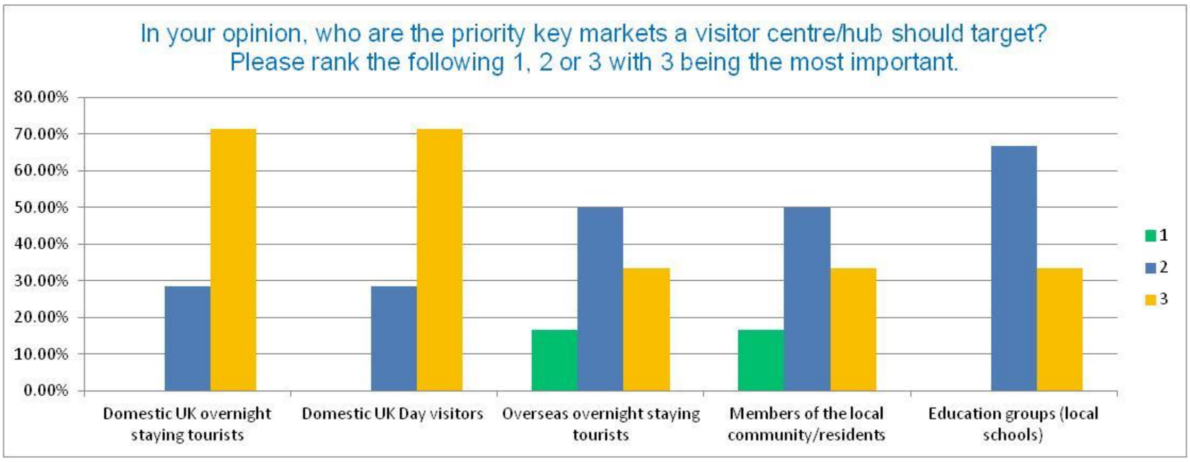
A key element of the Visitor Information Point scheme is to improve the general awareness of the scheme among visitors. Also, digital channels could be utilised for certain traditional queries which may be asked of a TIC.

Developing a visitor hub

Just over 70% of participants felt there is a need for a multi-functional 'visitor centre or hub facility' which would deliver visitor information and other services. Key facilities to include within the hub include a staffed visitor information service, a retail offer with a potential focus on local Gower produce and products and visitor toilets (please below for a breakdown of key facilities).



Primary markets which should be targeted include domestic day visitors and domestic overnight staying tourists (please see bar chart below for breakdown).



100% of participants who answered the question about a potential location for the visitor facility / hub felt that it should be located within an existing facility. Views on a potential location/facility were varied. Knab Rock, Mumbles was mentioned (the Gower and Mumbles Tourist Association has spoken to the Council previously regarding taking over the offices). Upper Killay or the Mumbles, Three Cliffs Bay Holiday Park, Penllergare Valley Wood (which could be considered as the 'Gateway to the Gower' (with existing infrastructure) could all be considered.

Participants were given the opportunity to provide any further comments. One participant felt there is a need for a dedicated Tourism Officer. The issue of seasonality was raised along with the need for wet weather provision commenting "*Gower is desolated for 9 months of the year and only busy on sunny days. Wet weather attractions required in Mumbles and Gower."* Also since the introduction of Premier Inn/Travelodge in Swansea, the bedstock in Gower has declined significantly. The lack of buses from the Mumbles to Gower is an issue.

5.3 Community Councils

All of the Community Councils represented in rural Swansea were contacted as a component of the research programme. Unfortunately, only two community councils (Rhossili and Ilston) responded to the survey, which makes it difficult to deduce any consensus as to the needs and opportunities for a multi-use facility within rural Swansea.

The key points raised by the small number of respondents included:

- As outlined by tourism businesses, beaches and scenery were the key motivations for visiting rural Swansea.

- Investment in the quality and range of accommodation and improving the provision of information services were seen as being critical to improving the visitor offer.
- There was total agreement on the need to develop a dedicated multi-functional visitor centre or hub to support the growth and development of the rural economy.
- Core facilities to be included in the centre were:
    - Improved visitor information service
    - Retail offer
    - Better interpretation about Gower
    - Visitor toilet and café
    - Office space
    - Flexible meeting space
- Due to its rural nature, there was a feeling that a visitor centre 'hub' was needed to provide destination focus and to direct visitor to all parts of Gower.
- A number of different suggestions were made regarding the potential location of a new facility (both north and south Gower were identified as potential locations). One view was to *"refurbish a derelict site…..with room for parking, powered by green energy and designed through an architectural competition with an agreed specification."*

5.4 Visitor research

Over the summer period face-to-face primary research was carried out at various locations including Gower Heritage Centre, Oxwich, Rhossili, Llangennith and at the Gower Show. This generated 113 responses of which 40% were completed by local residents and 60% by visitors.[15]

Respondents were classified as either being on a day trip or overnight stay as part of the research process. 51% were on a day trip, 18% on an overnight stay of 1 to 3 nights, 19% on an overnight stay of 3 to 7 nights and just 12% were on a stay of over 7 nights. This emphasises the importance of people on a day trip (which would include local residents) and people on short breaks in nearby locations. People on a short break are likely to have a higher spend level, on a person-by-person basis, in the local economy.

It is important to understand about the group composition of respondents particularly in terms of taking forward the development of a new rural hub or visitor facility. 55% of respondents were part of a family group only, 13% with their spouse or partner,

[15] Please note figures have been rounded in the main text

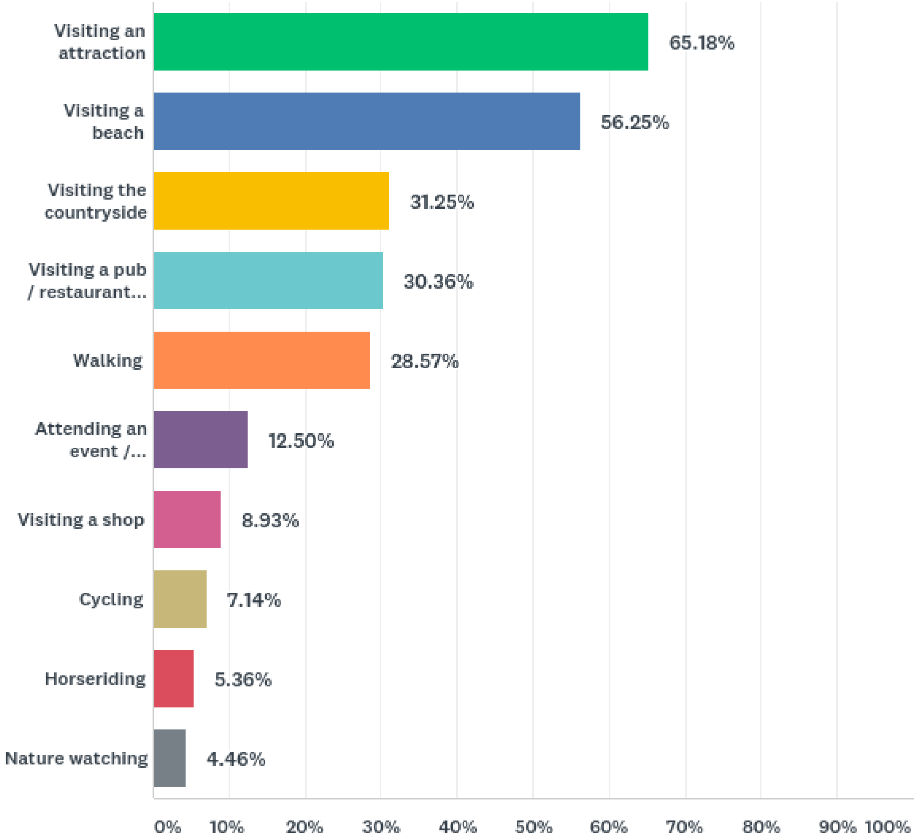
14% with friends only and 10% with family and friends. Interestingly only 5% were part of an organised trip.

57% of respondents are female and we show the age break down of respondents below.

Answer Choices	%
16-24	18.63%
25-54	56.86%
55-64	13.73%
Over 65	10.78%

What activities or places are respondents taking part in or visiting?

The table below summaries the activities/places respondents are either taking part in or visiting whilst in rural Swansea (respondents could select more than one answer). The most popular activity was visiting an attraction (65%), closely followed by visiting a beach (56%).   There is a drop between these and the next categories - visiting the countryside (31%), a pub, restaurant or cafe (30%) and walking (29%).



Respondents were asked about their overall enjoyment of Gower. 89% were either totally satisfied (68%) or fairly satisfied (22%). Less than 2% were unsatisfied.

It is important to understand how respondents found out about the activity they took part in or the place they visited and these are summarised in the table below (please note some respondents provided more than a single answer).

Answer Choices	%
Businesses own website	7.48%
Social media (Twitter, Facebook)	9.35%
Recommendation	58.88%
Visit Swansea Bay leaflets	18.69%
Outlet's own leaflet	13.08%
Visitor Information Point	2.80%
Online search - please specify website below	4.67%
Website....	8.41%

The research highlights the importance of the internet, including social media, which is likely to continue to grow in terms of providing information for both residents and visitors. Clearly the use of recommendations is the key driver of providing relevant information based on personal experiences. The use of leaflets (Visit Swansea Bay and the own leaflets of different businesses) continue to play a role in the visitor journey.

Nine respondents mentioned specific websites including Google, Swansea Life, Swansea Tourist Board, the Guardian, Enjoy Swansea Bay and a ‘heritage site’ (without naming the site).

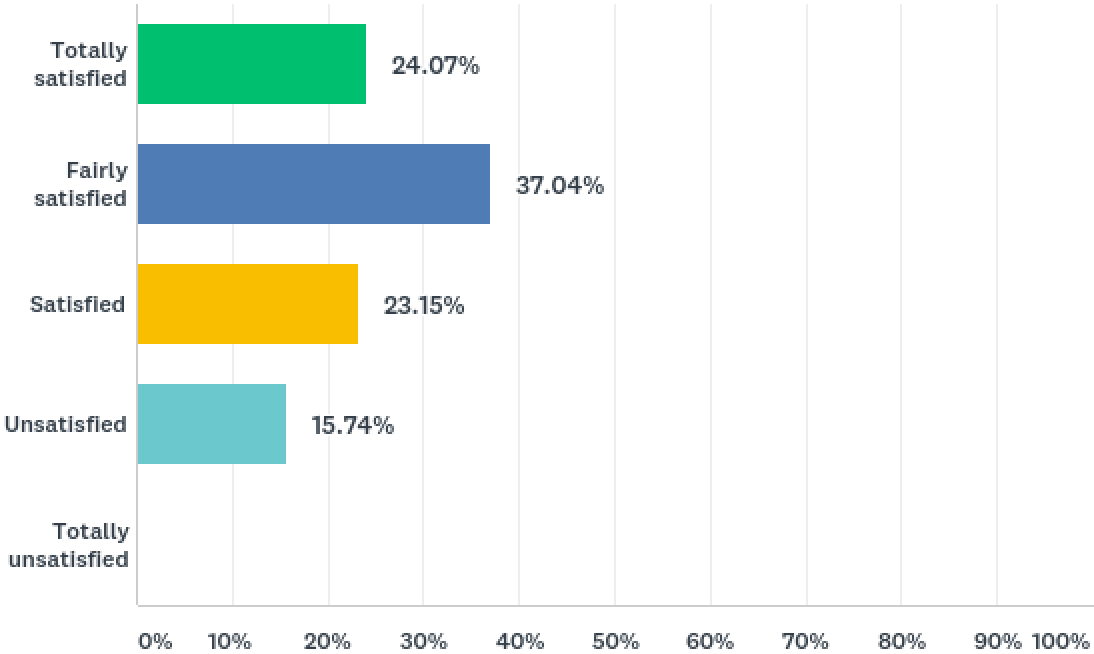
In terms of the Visitor Information Point service, only 16% of respondents had used the service in Gower. Points used include:

- On boards (not specified) 1
- Car park (not specified) 1
- Pitton Cross Caravan 1
- Park Mill 4
- Gower Heritage Centre 1
- Mumbles 1

- Rhossili 1
- Bank Farm Holiday Park 1

Visitor information

Information provision is a key part of the visitor journey and respondents were asked to rate the provision of information. This is shown in the chart below. 61% were either totally or fairly satisfied, 23% satisfied and 16% unsatisfied.

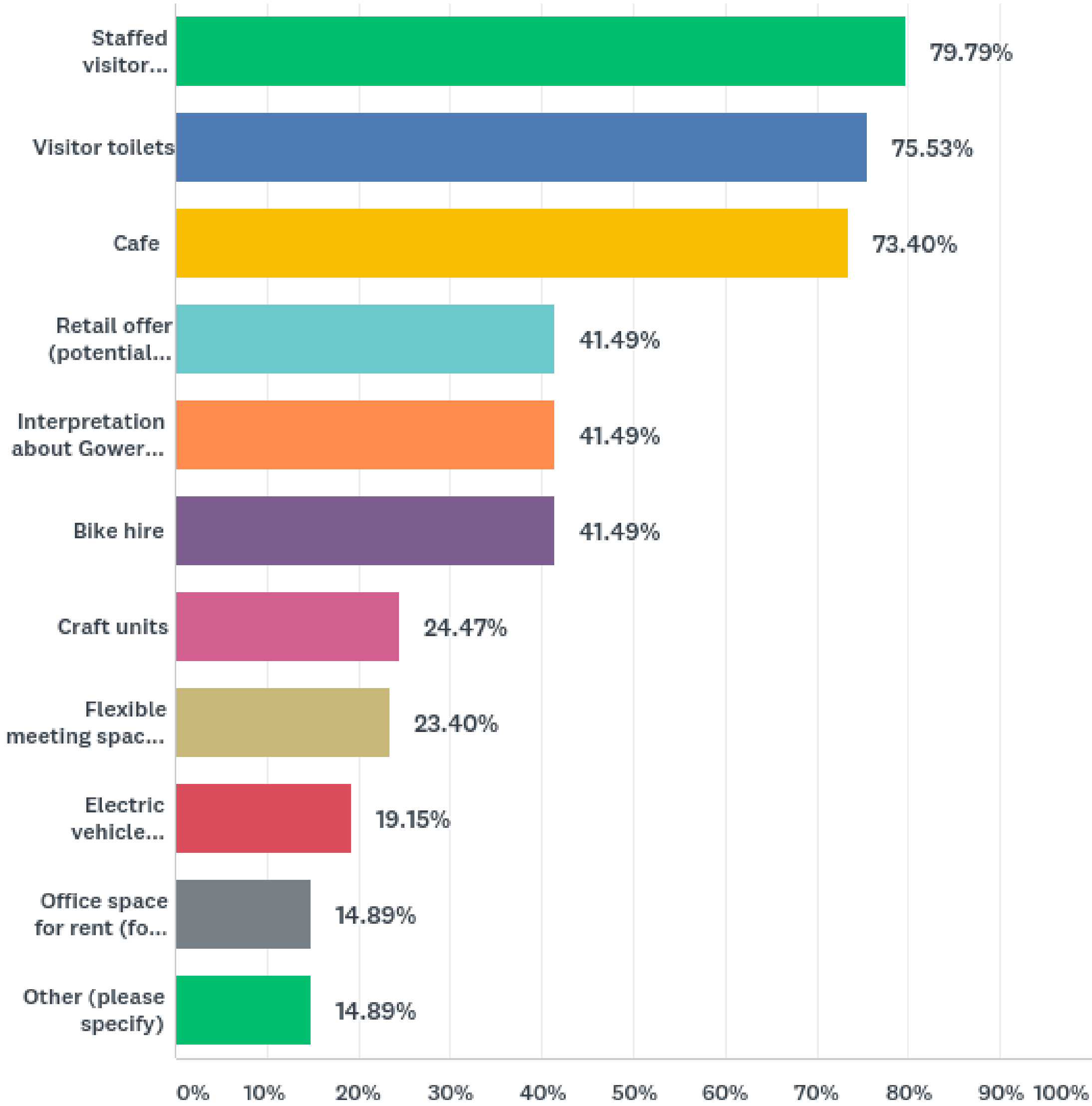


There appears to be an issue with the provision of information. The figure of 16% being unsatisfied is high and only 24% of respondents were totally satisfied with the provision of information which could be improved.

Is there a need for a visitor centre / hub for visitors and the local community within rural Swansea?

An overwhelming 82% of respondents felt that there is a need for a visitor centre / hub within rural Swansea.

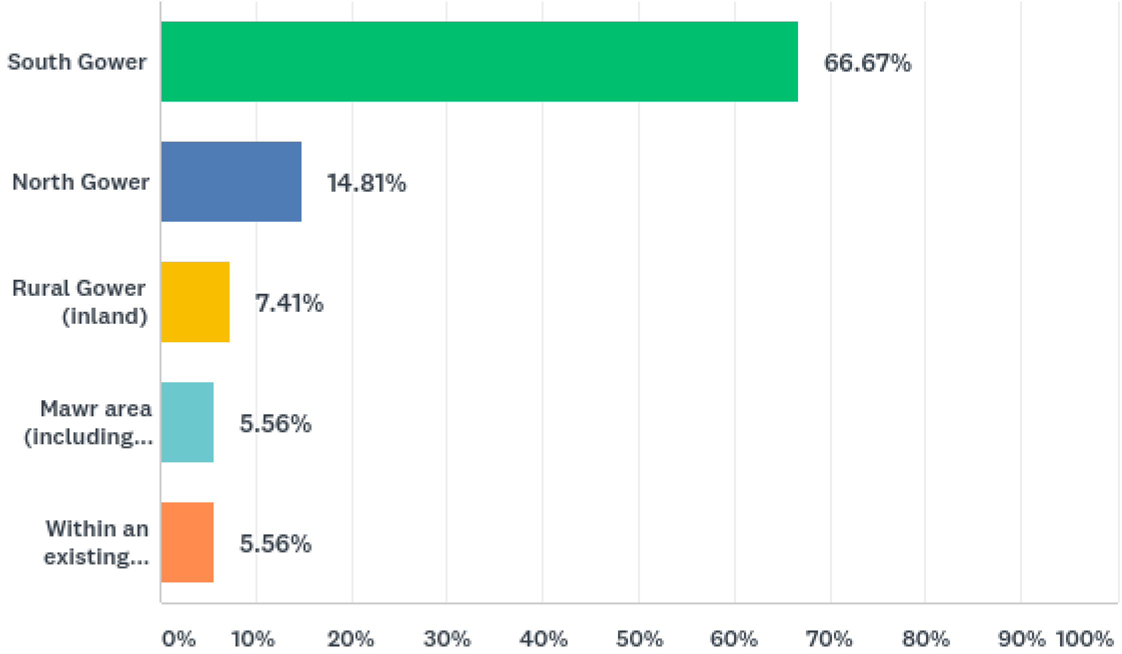
In terms of the offer the chart below sets out the key component elements (please note respondents could select more than one answer hence the total add up to more than 100%).



In terms of the other category people commented on:

- Providing WIFI – 3
- Indoor activities / facilities for children – 4
- To be dog friendly – 1
- Changing facilities for children/babies – 3
- Information on the cultural history of Wales – 1
- Parking – 1
- To be wheelchair accessible – 1
- Provision of information - 2

55% of respondents had a view as to where the centre/hub could be located and these responses are shown in the chart below.   South Gower is the preferred location – with 67% of respondents selecting this location.



5.5 Discussions with stakeholders

In addition to the research programme, we have undertaken one-to-one discussions with a number of key stakeholders and partners (Appendix 2), the majority of which were identified following discussions with the client team.

The key issues and points raised during these discussions are summarised below.

There seems to be a general consensus that action is needed to improve the visitor product offer. Despite an exceptional natural environment and world-class beaches, there is agreement that the visitor offer needs to "up its game" and is falling short in terms of scope and quality, specifically regarding:

- Visitor information provision;
- Interpretation, including the history, heritage and ecology of the area and
- Accommodating new products, e.g. outdoor activities.

There were a variety of views as to the form, function and location of a new centre. A number of stakeholders said that the focus should be on supporting investment in existing visitor hubs in rural Swansea. A high percentage suggested that the Gower

Heritage Centre already performed an important ‘hub’ function and further investment should be supported and encouraged to grow and develop the Centre.

Gower Heritage Centre itself is keen to develop and provide a support infrastructure to support and promote different categories of businesses particularly those which relate to its heritage / craft theme.

Other important existing potential hub centres identified included:

- National Trust Visitor Centre and Shop at Rhossili
- Three Cliffs ‘centre’, Pennard
- Penllergaer Woods

It is interesting to note that all have experienced investment to up-grade the facilities and all are identified as designated Visitor Information Points.

There was a majority view that money should be invested in a network of hubs and process for interconnecting and improving the quality /modernising/greening existing facilities. There was some scepticism that a new hub could look good but “would be lacking and miss a far greater opportunity of building on what is already here e.g. with much smaller investment places like the Gower Heritage Centre could deliver much wider benefits to tourism and local communities.”

There was also concern as to whether a new facility could sustain itself particularly as seasonality was a significant challenge for the area.

There was support for a multi-functional facility to assist economic development in rural Swansea. Although the focus was on the tourism sector given its continuing value to the area, there were some suggestions that other facilities could be structured within a new development. For example, Down to Earth was keen to promote a flagship business hub development to meet the need for both existing businesses on Gower, as well as providing the base facilities for supporting start-up businesses in rural and “green” skills. However, the lack of enterprise space is not seen as a barrier for local entrepreneurs and business growth. Discussions with Business Wales indicate that most of their clients are happy to work from home due to the convenience factor and the fact that taking office space would be seen as an additional overhead.

Walking and cycling have been recognised as important visitor groups and offer strong growth market opportunities for the area. Road cycling was identified as a particular growth activity, with a strong market in Gower, although some concerns were expressed about cycling road safety. The All Wales Coast Path is seen as being important as a way of 'connecting' the key gateways along the coast. However, more could be done to use the "brand" and link into the various local walking loops.

Arts and crafts present another opportunity to promote the area with product on the ground representing a diverse range of mediums. Consultees citing examples of trail development in areas such as Cornwall and Pembrokeshire (where workshops can be visited and art/craft products are often exhibited in a range of venues) as models that could be explored. The Gower Heritage Centre has a strong product focus on this area (and has the added advantage of passing traffic). The "arts lifestyle" audience (as opposed to hard core "culture vultures") offers a chance to promote art trails that also incorporate ancillary products such as eating out and walking routes. To develop this theme and drive spend, options such as provision of distinct gallery space (e.g. including at venues such as a destination food outlet) would need to be put in place.

Swansea Bay has always been the location for many of the UK's most prominent food producers, renowned for natural wholesome produce and for the expertise of its people. A number of stakeholders highlighted a growing food and drink cluster in rural Swansea. Penclawdd Local Produce and Craft Market is one of several regular local produce markets where a selection of cheeses, bread, pastries, meats and vegetables are available from local suppliers. The craft market includes woodturning, glassware, candles, plants and jewellery. Despite being a growing sector, a number of food and drink of enterprises face significant barriers to growth, including:

- Lack of capital finance;
- Transport issues and access to market;
- Meeting supermarket's standards;
- Premises not meeting business needs;
- Lack of appropriate food grade premises as well as cost of premise;
- The mindset, including lack of confidence, of some business owners.

A number of stakeholders, for example Down to Earth, were keen to explore the potential of developing a food-centric hub to promote local produce and ensure adequate availability and access to property for processing of primary products and food manufacturing generally. The provision could include premises for incubation/ starter units, expansion and inward investment which will support new and developing food businesses. Swansea Airport was identified as a potential location for such a facility.

Although it was recognised that the Gower peninsula was the focus for visitor activity, dispersing visitors to other parts of rural Swansea, particularly North Gower, was seen as being important in terms of managing tourism flows and ensuring that economic benefits were felt across the area. However, the majority of candidate 'hub' sites that were identified were in south Gower, e.g.:

- Gower Heritage Centre
- Rhossili Visitor Centre
- Swansea Airport

Day trippers continue to be the major part of the market with a strong Visiting Friends and Relatives (VFR) sector. However, future products and services need to be based around building a stronger staying market focussed on short breaks, events and special interest activities.

The overwhelming consensus was any 'hub' investment would need to be of high quality in terms of built facilities and infrastructure to meet the needs of modern day visitor expectations.

6. Research Conclusions and Good Practice

Research conclusions

- There is a strong policy framework that recognises the importance of the visitor economy to the UK and Wales; the local tourism sector is growing and has the potential to be a strong economic driver for the area creating new jobs and prosperity. There has been investment in developing the visitor product but the quality and range of all-weather attractions and built facilities is limited and generally poor quality by modern day visitor expectations. Any future hub development needs to have a strong emphasis on enhancing the visitor product offer.

- The tourism sector is heavily dominated by the day visitor market. The market demographics overall show a reasonably strong profile with potential to combine facilities which serve both a local (more regular) market as well as the short break and day visitor from Cardiff, Swansea and further afield. A new centre would have a significantly higher market reach if it is located at the gateway to the Gower rather than on or near its western coast.

- All stakeholders and partners supported the potential to build on the current visitor product, investment and assets to enhance the visitor offer along the heritage coast. The current visitor infrastructure in the study area is seen as lacking and being dated. Future proposals and projects need to inspire and attract higher spending visitors to the area as well as catering for the needs of local people.

- The lack of a dedicated visitor centre 'hub' in rural Swansea for visitors is perceived as being detrimental in growing the destination and retaining its competitive edge. Tourism businesses and stakeholders feel there is a need to develop a multi-functional visitor centre or hub in rural Swansea. To realise its commercial potential, the centre needs to perform a role as a 'hub' which directs visitors to specific points of interest in rural Swansea. The focus needs to be on providing a quality visitor hub and a focal point for visitors coming to the area. Clearly, this needs to align with current information provision, specifically the developing VIP scheme, which some businesses fulfils an information service function.

- The core facilities to be included within the hub include:
    - Improved visitor information service

  - Retail offer
  - Better interpretation about Gower
  - Visitor toilet and café
  - Office space
  - Flexible meeting space

- Consideration should also be given for including specific facilities to promote and support walking and cycling to take advantage of growing market interest.

- The focus should be on supporting investment in existing visitor hubs in rural Swansea. The general consensus was to identify a number of key satellite 'hubs' and develop their offer, e.g. Gower Heritage Centre, Llanmadoc shop, National Trust at Rhossili, Pennard Cafe etc partner satellite sites targeted around Gower.

- A number of stakeholders highlighted a growing food and drink cluster in rural Swansea. There could be potential to develop a specific Food Centre to promote local produce and ensure adequate availability and access to property for processing of primary products and food manufacturing generally. The provision could include premises for incubation/ starter units, expansion and inward investment which will support new and developing food businesses.

Good Practice: Considerations for Gower

A number of 'common threads' have emerged from a desktop research exercise looking at relevant centre / hub developments in the UK and our sister companies experience of operating visitor experience. (Appendix 3 identifies the centres that we have looked at). These help to shape recommendations for the provision of a 'hub' facility in Gower.

- Collaboration and partnership working is key – the Forestry Commission work with third parties who deliver specialist services e.g. catering, mountain bike operators and activity providers.

- In today's economic climate there is a need to ensure that revenue generating opportunities are maximised (and costs reduced). The examples rely upon rental (or other income) from third party 'partners' and also directly from car parking income on site.

- All centres highlight the need for flexibility in the design and operation of the facility to maximise revenue generation and usage. Flexible use of space to maximise the value of the revenue generating opportunities will be an important, for example, the use of a meeting room which can also be used for exhibits and hire for social and other functions.

- The role of sustainable technologies is becoming increasingly important. From a policy level (there is a need to reduce the impact on the environment and demonstrate strong environmental credentials. From an operator's perspective, it can for example lead to potential day-to-day cost savings in respect of operating the facilities.

- All face the challenge of fluctuations in visitor flows in high and low seasons. Due to the relatively low population density and seasonal tourism flows there may be a need to close the hub during weekdays outside of the main season.

- Festivals and events are seen as being important in engaging with the local catchment and different audiences, particularly to attract visitors throughout the year. The education market is critically important in generating visits and usage. All centres provide bespoke educational resources for teachers linked to the national curriculum.

7. Recommendations and Next Steps

The Phase 1 work has focused on a needs analysis and consultation to identify the needs of businesses, stakeholders and visitors to rural Swansea.

Rural Swansea, particularly Gower, continues to develop as a major visitor destination with its strong rural and coast product. However, the research confirms deficiencies in the product offer, which is impacting on growing the destination and retaining its competitive edge. A significant majority of businesses and visitors felt there was a need to develop some form of multi-functional centre or hub (s) to address this deficiency.

Recommendations

Tourism has a key role to play in supporting the rural economy. Further investment needs to be encouraged to develop a network of visitor 'hubs' in rural Swansea to support the growth and development of the sector and address the high seasonality factor.

The LAG needs to consider preparing a summary of the study in the form of an 'investment prospectus' to promote opportunities for investment support, specifically:

- Enhanced visitor services
- Café and retail (with a focus on local Gower produce and products)
- Improved interpretation
- Bike hire

Walking and cycling have been recognised as important visitor groups and offer strong growth market opportunities for the area. Road cycling was identified as a particular growth activity, with a strong market in Gower although there are safety concerns regarding developing the product. The All Wales Coast Path is seen as being important as a way of 'connecting' the key gateways along the coast. More product development and marketing is needed to develop these market opportunities.

The majority of businesses, visitors and stakeholders felt the focus should be developing existing facilities and 'hubs'. A network of 'hubs' should be promoted at key gateways in rural Swansea including consideration regarding:

- Common branding
- ‘Hub’ themes / specialism

The suggested candidate ‘hub’ sites include:

- Gower Heritage Centre
- Rhossili Visitor Centre
- Penllergare Valley Woods

Consideration needs to be given as to how the proposed ‘hubs’ will align with current visitor information services, specifically the VIP scheme and the developing Gower Ambassador programme.

The lack of business accommodation and starter units is not seen as a major barrier to business growth. However, the food and drink sector is seen as offering potential for future growth and development. Further work is needed to undertake an options and feasibility study to consider the development of a Food Centre for the area.

Appendix 1: Consultation programme

Audience	Survey Issues	Engagement methods	Timeframe
Tourism Swansea Bay Members	• Existing visitor information and facilities provision • Future needs and opportunities • Facilities and services to enhance the visitor product and rural economy • Commitment and interest in enhancing services and facilities	• Online survey • Case studies	May / June
Requirement:- Email Introduction about the project to Tourism Bay members Contact name and email address to Tourism Swansea Bay members within study area			

Audience	Survey Issues	Engagement methods	Timeframe
Other businesses, e.g. Visit Swansea Bay partner who are not members of Tourism Swansea Bay or VIP	• Existing visitor information and facilities provision • Future needs and opportunities • Facilities and services to enhance the visitor product and rural economy • Commitment and interest in enhancing services and facilities	• Online survey • Case studies	May / June
Requirement:- Email Introduction about the project Contact name and email address of businesses within study area			

<table>
<tr><th>Audience</th><th>Survey Issues</th><th>Engagement methods</th><th>Timeframe</th></tr>
<tr><td>Visitor Information Point ‘providers’ within the study area</td><td>Views on VIP scheme and existing visitor information and facilities
Gaps in provision
Future needs and opportunities
Facilities and services to enhance the visitor product and rural economy
Commitment and interest in enhancing services and facilities</td><td>Online survey
Round-table meeting with providers to be investigated (in partnership with Visit Swansea)</td><td>May / June</td></tr>
<tr><td colspan="4">Requirement:-
Email Introduction about the project
Contact name and email address of businesses within study area (already provided)</td></tr>
</table>

Audience	Survey Issues	Engagement methods	Timeframe
Key stakeholders (*)	• Existing visitor information and facilities provision • Future needs and opportunities • Facilities and services to enhance the visitor product and rural economy • Commitment and interest in enhancing services and facilities	• One-to-one discussions	April / May

(*) Organisation to include:	Contacts
Swansea LAG Tourism Sub-Group members	As per client group
Gower Heritage Centre	Roy Church
Three Cliffs Coffee	Jamie
Down to Earth project	Mark
Gower Society	Robin Kirby
Gower Unearthed	Helen
Gower AONB	Mike Scott / Chris Lindley
The Waterside Felindre	sue@thewaterside-felindre.co.uk

Audience	Survey Issues	Engagement methods	Timeframe
Community Council (Is it possible to distinguish between ‘essential’ and ‘desirable’?)	• Existing visitor information and facilities • Gaps in provision • Future needs and opportunities • Facilities and services to enhance the visitor product and rural economy • Commitment and interest in enhancing services and facilities	• Online survey • One-to-one meetings with key CC partners	May / June
Requirement:- Email Introduction about the project			

Audience	Survey Issues	Engagement methods	Timeframe
Visitors to the study area	• Visitor profile • Visitor experience, specifically: ○ Views on destination, including existing visitor information and facilities ○ Gaps in provision (what's missing) ○ Additional facilities and services to enhance the visitor product and rural economy	• Visitor survey: commissioning fieldworkers to undertake primary research with visitors at specific locations	July / August
Requirement:- Our suggested approach is to design and publicise a visitor survey for self-completion To encourage participation, a prize draw will be offered (we have used a Welsh Hamper in the past, which has been successful) To make this work, we need the support of VIPs and other providers to publicise the survey. In addition, we propose to commission fieldworkers to undertake primary research with visitors at specific locations			

Appendix 2: Stakeholders

Swansea LAG Tourism Sub-Group members
City and County of Swansea - Tourism - Economic Development
Gower Heritage Centre
Three Cliffs Coffee Shop
Down to Earth project
Gower Unearthed
Gower AONB
The Waterside Felindre
Business Wales
Penllergare Valley Woods

Appendix 3: Rural Resource Centres

- Dalby Forest Visitor Centre, North Yorkshire
- Lynemouth Resource Centre
- Bedgebury Visitor Centre, Kent
- Ludlow Food Centre
- Bodnant Welsh Food Centre
- Glamorgan Heritage Coast