Rhondda Cynon Taff County Borough Council

STRONG HERITAGE | STRONG FUTURE
RHONDDA CYNON TAF
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Tourism Opportunities Study
For the Heads of the Valleys area of Rhondda Cynon Taff

Final Report

March 2007

Report no: NE02687-NETP-NER-V7

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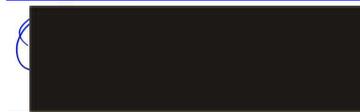TREFTADAETH GADARN | DYFODOL SICR

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For the Heads of the Valleys area of Rhondda Cynon Taff

Final Report

Author: R. Tufnell / D. Brown/ O. Davies

Checker: A. Warr/O. Davies

Approver: G. Webber

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Hyder Consulting

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1   Introduction

1.1   Introduction & Objectives

Hyder Consulting (UK) Limited were commissioned by Rhondda Cynon Taff County Borough Council (RCTCBC) to study the potential tourism opportunities within the defined Heads of the Valleys area of Rhondda Cynon Taff (the Study Area).

The overall aim of the Study is to identify and evaluate potential tourism opportunities and in so doing:

- Identify the potential for linking heritage and rural assets to opportunities;

- Identify ways in which linkages between different projects and activities in the wider area can be developed or strengthened to ensure cohesive projects;

- Consider ways in which the Valleys within Rhondda Cynon Taff can best be connected;

- Examine current communication links feeding the Study area and the effectiveness of existing infrastructure;

- Identify opportunities for the development of tourist related infrastructure, including support services;

- Identify appropriate gateways opportunities for development as tourism hubs from which services are promoted and act as start and stop off points; and

- Identify all major funding packages accessible for each element of the work.

1.2   Our Approach

This is the Final Report, and to ensure that all of the identified aims and objectives are fully met the study has taken the following approach:

- **Task 1** – Familiarisation and Appraisal work – this has comprised of a detailed policy review of national, regional and local policy documents that are relevant to the study and assess the tourism marketing information available along with site visits for familiarisation purposes.

- **Task 2** – Identification of Tourism Facilities & Infrastructure - this has taken the form of a review of assets the facilities in the study area that relate to tourism and are illustrated as spatial plans.

- **Task 3** – Development of Key Objectives – these have been derived from the policy review, market appraisal and asset review and assist with defining priorities and identifying opportunities.

- **Task 4** – Identification of Opportunities & Linkages – based on the asset review this has also involved meetings and consultations with stakeholders to identify the opportunities and the potential for developing linkages between infrastructure. A stakeholder workshop was held as part of this task to discuss more fully the tourism opportunities and to priorities key issues and opportunities.

- **Task 5** – Development of the Strategy – this has drawn together components of the previous tasks and refined the list of opportunities into themed categories which explain the benefits of each opportunity, how existing infrastructure is built upon, and identifies gateways hubs and linkages.

- **Task 6** – Evaluation / Costs / Funding – this has involved the development of a framework matrix to evaluate the options and ensure opportunities are practical, realistic and robust.

1.3 Consultations

Consultations with various organisations, individuals and agencies have been undertaken throughout the course of the study and findings are referred to throughout the report. A full list of consultees is presented in Appendix A.

Alongside general consultation a workshop was be held during the early stages of the study to discuss initial opportunities and objectives with representatives from RCTCBC, adjoining local authorities, Visit Wales, Valleys Tourism, Heritage in Action (HERIAN) and many other organisations and local groups. A full list of attendees and key findings can be found in Appendix B.

1.4 Study Area

As set out in the study brief, the study area has been defined as the Heads of the Valleys area of Rhondda Cynon Taff. This area relates to the Heads of the Valleys Programme, a Welsh Assembly Government (WAG) initiative for the regeneration of some of the most deprived areas of the South East Wales. The area has been defined using a range of socio-economic criteria which seek to provide a strategic focus on those areas in most need for future investment. The Programme supports cross cutting initiatives which also draws in areas outside of the Heads of the Valleys programme area that share some of the same issues.

For the purposes of this study, the Heads of the Valleys area of Rhondda Cynon Taff has been considered as the core study area which includes the upper reaches of the Rhondda Fach and Cynon Valleys including Aberdare, Mountain Ash, Ferndale and Maerdy. During the later stages of

the study the Heads of the Valley's boundary was extended to include the wards of Treherbert and Treorchy, located at the northern end of the Rhondda Fawr Valley and these settlements have also been included in the study.

Since the tourism sector and tourists pay little attention to administrative boundaries, the study has, in addition to its core area, identified a peripheral area of influence. The periphery consists of the remainder of Rhondda Cynon Taff County Borough and also recognises the wider influence of the Heads of the Valleys programme area. The core and periphery areas are illustrated in Figure 1.1.

Figure 1-1   Study Area

Heads of the Valleys Tourism Opportunities
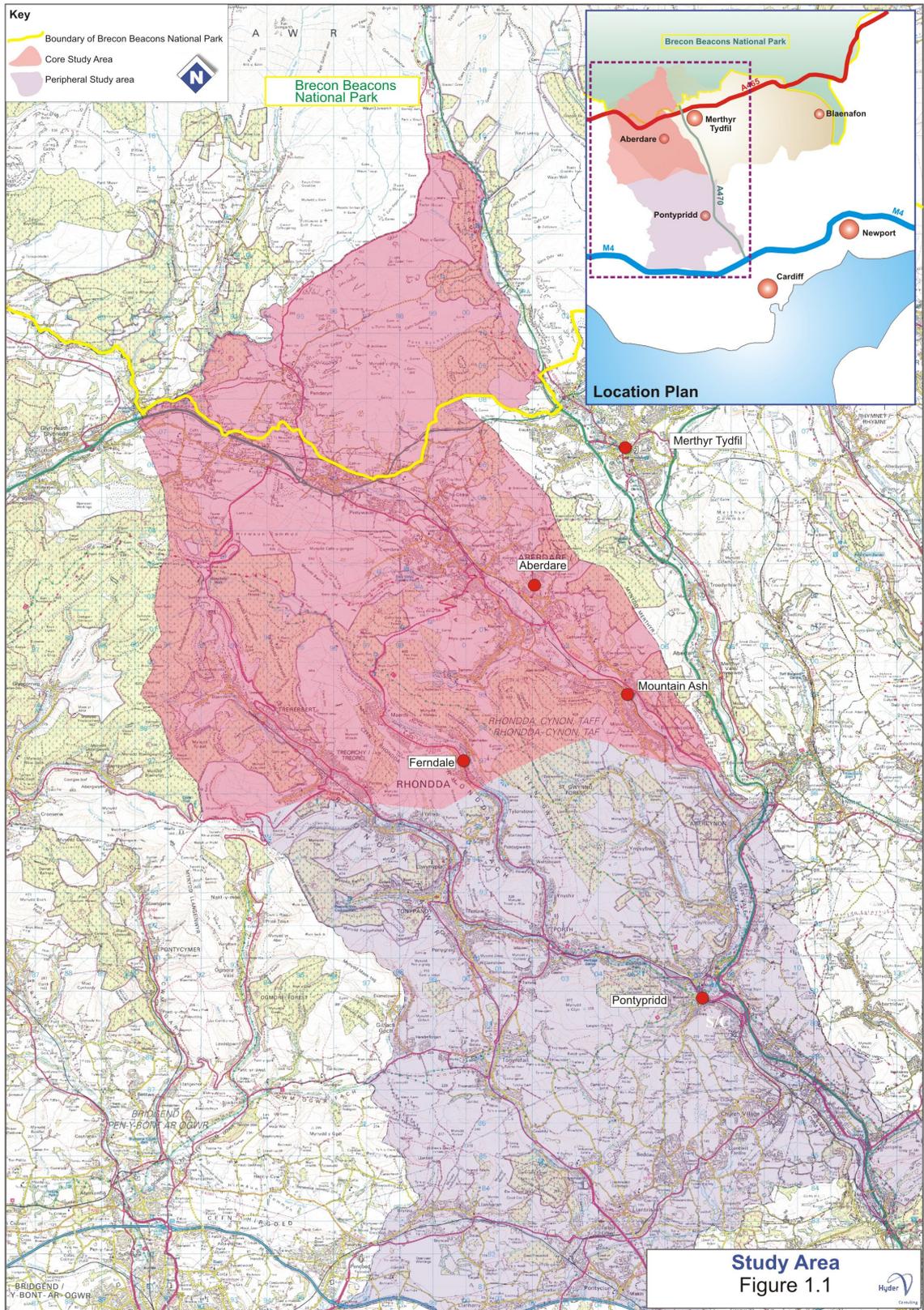
1.5   Definition of Terms

In order to establish a clear point of reference, it is essential that the definition of 'tourism' is agreed from the outset of the Study. This provides a clear differentiation between the roles of community related facilities and those that are for tourism. For the purpose of this study the definition used is that defined by the Tourism Society and quoted in the recently published revised Technical Advice Note (TAN) 13 for Tourism. This definition sees tourism as:

> *"The temporary short term movement of people to destinations outside the places where they normally live and work and the activities during the stay at these destinations"*

Although this definition covers tourism in its general sense it is important to differentiate between a 'tourist' and a 'day visitor'. The World Tourism Organisation defines day visits as:

> *"Visits taken for the purpose of leisure or business; lasting for three or more hours away from home and not undertaken on a regular basis".*

2   Strategic Context

2.1   Heads of the Valleys

Rhondda Cynon Taff County Borough Council recognises that the Heads of the Valleys area with its close geographic proximity to the Brecon Beacons National Park and rich cultural heritage is a unique asset. The Council believe that by developing the area as a centre of excellence for tourism experiences it will contribute significantly towards regeneration by being the common driver for sustainable enterprise development in a thriving local economy. The current and planned improvements to the Heads of the Valleys (HoV), such as the upgrading of the A465, provide strategic opportunities for unlocking and maximising the tourism potential within the northen areas of Rhondda Cynon Taff (RCT).
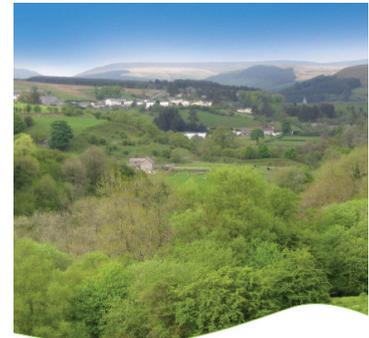
Turning heads...
A STRATEGY FOR THE HEADS OF THE VALLEYS
2020

In essence, the study of tourism opportunities is a reflection of the strategic focus currently placed upon the Heads of the Valleys. The review (see Appendix C for the full strategic review) identifies the key documents and studies for the study area which include the framework for the Heads of the Valleys. The regeneration of the area is a strategic priority for the Welsh Assembly Government which has received widespread support for its 'Heads – We Win…'[1] framework published in 2005. The framework identified a need to address a broad range of structural problems including:

- Economic inactivity;

- The loss of population;

- Low levels of educational achievement and basic skills;

- High levels of deprivation;

- Over reliance on incapacity and other benefits;

- Poor communications between Valleys towns and communities;

- Limitations on the capacity of individual organisations to deliver, with relatively little co-ordination amongst the key players;

- Limited sharing of information about good ideas and practices and a general lack of confidence about the area.

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[1] Heads - We Win… A Strategic Framework for the Heads of the Valleys, WAG, (March 2005)

There is however great untapped potential for the area and the framework recognises strong communities with a clear sense of purpose, a high quality natural landscape on the doorstep, an ever improving physical environment, rapid road and rail links to the Capital City and the wider region. These are all major attributes and opportunities which need to be harnessed particularly through developing tourism.

'Turning Heads'[2] is the strategy that accompanies Heads – We Win, and recognises that in order for the Heads of the Valleys to prosper, there needs to be a collective action to change an unfavourable image, poor quality health, housing and town centres, limited transport and telecommunications links and in some areas, the poor maintenance and management of key natural and historic assets. The image of the Heads of the Valleys is still overshadowed by its industrial legacy and this can only be addressed through comprehensive regeneration of the area on a number of fronts.

The Turning Heads strategy identifies several strategic goals which include the creation of an appealing and coherent tourism and leisure experience with tourism and leisure sectors contributing a more significant role in the economic prosperity of the area. In order to deliver the vision two strategic objectives have been defined which provide a framework for the Study and the identification of tourism opportunities.

SP9 Linked Local and Regional Attractions and Facilities

- Initially establishing the area as a successful day visitor destination, and then seek to encourage its development into a short break location.

- Initially making the most of the existing offer, including sites within the HERIAN (Heritage in Action) initiative and attractions such as Big Pit, and then expand the range by adding more quality, family-oriented facilities.

- Some large regional-scale projects, such as a Valleys Regional Park, will be promoted.

- Encourage the development of an integrated support network of cultural, heritage, leisure, retail and tourist facilities, within (or linked to) town centres, including places to eat and stay, and provision for business tourism.

SP10: An Integrated Offer

- Within the context of promoting the South Wales Valleys as a visitor destination, work with partners to ensure that there is an increased focus on tourism in the Heads of the Valleys.

- Create a unified and coherent, well-branded proposition, which clearly illustrates what the area has to offer.

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[2] 'Turning Heads' – A Strategy for the Heads of the Valleys until 2020, WAG, (June 2006)

- Organise events to help change perceptions and raise the profile and image of the area.

- Use marketing as well as literature, public art and well placed and creatively designed signage, to tell the 'Heads of the Valleys story', recognising and valuing the cultural and historical character of the area, including the Welsh language.

- Through all forms of media, reinforce the advantages of the Heads of the Valleys as a base for exploring the Brecon Beacons National Park, South Wales and the wider region, and for events such as the Ryder Cup 2010.

If the regeneration objectives of the Study are to be achieved it is necessary to address a broad range of improvements identified by Turning Heads. Opportunities should therefore seek a better range of facilities, more visitors staying for longer, changed perceptions, increased use of local facilities and more local employment opportunities. The identified tourism opportunities have themselves, the potential to benefit from special Heads of the Valleys funding which will act as a focus for investment in the first three years of the programme. It is proposed that during 2008/2009 that a 'critical mass' of tourism activity is supported by £5m for the development of the tourism and leisure offer.

2.2   Tourism Strategies

As well as the regeneration context set by the Heads of the Valleys the Study has been undertaken within the strategic tourism context of South Wales. Particular reference has been given to the various strategic documents produced by tourism organisations, local authorities and strategic partnerships as they provide the development context for the tourism sector (Appendix C for full details).

The Wales Tourist Board (WTB) which has recently merged into WAG/Visit Wales and published the strategy. Achieving our Potential in 2000[3]. The strategy refers specifically to the Heads of the Valleys area and provides an important analysis of the area from a tourism perspective. The strategy identifies the areas scenery, natural environment, heritage and culture; its proximity to the Brecon Beacons; affordability and special interest and activity holidays as key strengths. The analysis also drew on the weaknesses of the area which included the negative image of the Valleys; lack of quality accommodation; seasonal demand; low profile of tourism in the economy and the perception of down market, low spending holidays. The strategy also identified a number of opportunities including a longer tourism season; proximity to key markets; overseas markets; profile and community perceptions; ICT and events. Threats identified include cheap overseas destinations; lack of links from airports; recruitment problems;

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[3] Achieving Our Potential – A Tourism Strategy for Wales, WTB, (2000)

Heads of the Valleys Tourism Opportunities

lack of funding; ineffective visitor management and planning and ad hoc tourism investment.

Reflecting the key potentials for tourism development in Wales, WTB has also produced a number of themed strategies which identifies culture, sports and adventure tourism as key opportunities. The Cultural Tourism Strategy [4] refers to the need to change perceptions through raising the profile of Wales as a unique cultural tourism destination drawing on its language, history, and the arts. An Adventure Tourism Strategy for Wales[5] indicates the continued growth of the sector in Wales with the breadth of adventure sports that its natural resources can accommodate. However, there is a need to develop the quality and quantity of the infrastructure to support activity operators. Sports Tourism in Wales[6] identifies Wales as one of the best locations in the UK for outdoor activities although it suffers from negative perceptions about the infrastructure and quality of facilities available.

WTB/Visit Wales have also produced a series of Activity Product Tourism Strategies (WTB) involving the pro-active marketing and development of campaigns specifically promoting walking, adventure activities, cycling, fishing and riding. The core aim is to raise the standard of Wales as an activity tourism product and to raise the level of presentation and marketing to a level that gives the country competitive advantage and a greater proportion of the UK and Europe activity tourism market. Each activity is identified as contributing to the development of sustainable tourism and reducing problems with seasonality.

More recently WTB/WAG have drafted a report for Tourism Development Opportunities in Wales[7] which identifies that Wales is dominated by small attractions with less than 50,000 visitors per annum. The report identifies that new attractions of this nature are not normally encouraged by either the WTB or local authorities as they tend to dilute visitor numbers at existing attractions, reducing profitability and thus, their ability to maintain/improve quality.

WTB/WAG is currently preparing a Sustainable Tourism Framework[8] designed to help the tourism sector become more sustainable. It identifies controlling the scale, pace and character of tourism development and

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[4] The Cultural Tourism Strategy for Wales, WTB (2003)

[5] Time for Action: An Adventure Tourism Strategy for Wales 2002-2008

[6] Sports Tourism in Wales: A Framework for Action, WTB (2004)

[7] Tourism Development Opportunities in Wales (Draft) , WTB, (2006)

[8] Sustainable Tourism Framework (Draft) WTB, (2006)

activities to safeguard Wales' environmental, historical and cultural assets including the Welsh language.

The document also identifies and discusses the strategic challenges in making Wales a more sustainable tourism destination. Those challenges are firstly to retain the economic benefits of tourism to a greater extent within the local and national economy whilst maximising the benefits of tourism to local communities. Secondly, to ensure that tourism is based on Wales' environmental, historical and cultural asset, and respects the resources of the location and the identity of local communities. The final challenge is to mitigate the adverse environmental and social impacts of tourism.

Green Community Tourism in Wales[9] is a Communities First Support Network publication which provides an overview study into Green Tourism in Wales and identifies where it is most relevant to community economic regeneration. The study seeks to identify the policy context for community tourism, and uses examples of tourism projects within sustainable development approaches that benefit local communities.

Capital Regional Tourism (CRT) is the regional tourism partnership serving South East Wales and is the lead body for tourism in the region. The prime role of CRT is to oversee the implementation of the regional tourism strategy The agreed strategic vision seeks to established the region as a leading short-break leisure destination with cultural and sporting opportunities, heritage attractions and the activities based on the coast, mountains, valleys and vales. The vision also seeks to develop business tourism, based on facilities for conferences, meetings and incentives, coupled with exciting leisure opportunities.

The regional strategy has recently been subject to a review. In summary, the review recommends the following approach to determining investment priorities:

- Invest behind strong brands in the region;

- Invest in noted locations;

- Invest in destinations;

- Invest in consumer propositions.

The consumer propositions identified in the strategy as priorities for the region include:

- Business Tourism - accommodation, meetings and conference capacity, incentive opportunities, exhibition space;

- Urban Breaks - range of accommodation, cultural and sporting events, retail, food, entertainment, attractions;

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[9] The Green Community Tourism in Wales: Communities first Support Network, (Sept 2004)

- Heritage Breaks: - accommodation, attractions, events, "soft" activities;

- Luxury Short Breaks - resort hotels, country house hotels, accommodation, food, "soft" activities;

- Golf Tourism: courses, range of nearby accommodation, food;

- Breaks based on Coastal and Rural Activities: range of accommodation, rural attractions watersports, cycling, walking.

In building destination brands the review notes the importance of ensuring that sufficient "attractors" are in place supported by "services" (hospitality, accommodation etc.) and "infrastructure" (information, transport links, amenities etc.).

Geographically and thematically targeted investment is also identified by the strategy. In this regard, the South Wales Industrial Heritage Initiative – HERIAN is important to the study area as it seeks to optimise the cultural heritage of the former industrial South Wales through enhanced levels of interpretation, regeneration of heritage assets and physical and thematic linkages between heritage sites, building on the achievement of World Heritage Site status for Blaenavon and the development of a new Waterfront Museum in Swansea. Key Investment Priorities for HERIAN include:

- Implement major interpretation and presentation strategy based on "hubs" and "clusters"

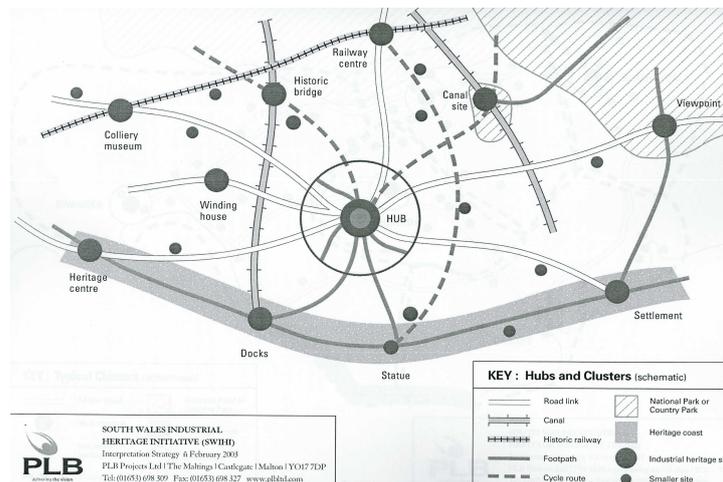- Tourism infrastructure, accommodation and services to support the interpretation strategy

Figure 2-1 HERIAN 'Hub & Cluster'

At a local level the Rhondda Cynon Taff Tourism Strategy[10] focuses on several key objectives. Whilst the strategy is dated, it is still of relevance to the study as it identifies developing strategic tourism locations including the catalyst role of Rhondda Heritage Park to encourage tourism development, the development of infrastructure to serve visitors needs, and in particular the improvement of visitor accommodation. A key measure of the Rhondda Cynon Taff Community Plan[11] is the creation of a vibrant community and essential to the theme 'Boosting the Local Economy' are the number of visitors to local attractions.

The more recent Strategy for the Development of RCT Visitor Attractions[12] identified how to improve the County's tourism profile through the development and operation of the Council's Recreational, Tourism and Cultural/Heritage based attractions. The study identified the need for:

- Marketing a clear branding for the local authority;

- Products being able to maximise the level of tourism when consumer demand/interest is low;

- Promotion that focuses on generating additional tourism visits;

- Web site that focus on tourism;

- Signposting to increase awareness of, and visits to, the County's attractions;

- Tourism development that creates "best of class" facilities that would grow the area's overall profile at the same time as increasing the economic contribution of tourism to the economy.

The study identifies three sites with realistic tourism potential within Rhondda Cynon Taff County Borough Council's area.

- Rhondda Heritage Park - it could have a much stronger role as the centre for the presentation of the area's heritage and mining history

- Glyncornel/Dare Valley Country Parks - there could be an opportunity to take the best of the two and develop a single "best of class" environmental education centre at Dare Valley.

- Ynysangharad Park - it could have a flagship role for RCT on the basis of its events but to capitalise on this the overall presentation of the park should be pristine to have a positive influence on visitors' perceptions of the County Borough as a whole.

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[10] Rhondda Cynon Taff Tourism Strategy, RCTCBC, (1999)

[11] A Better Life – Rhondda Cynon Taff Community Plan 2004-2014

[12] Strategy for the development of RCT Visitor Attractions, Atkins (2005)

In light of the above observations, the report makes two key recommendations; firstly to establish a central marketing function that is focused on driving tourism and building the tourism profile of the County Borough. Secondly, that the tourism development resource becomes progressively more dedicated to driving tourism and less diluted by the need to service other non-tourism related activities.

The Brecon Beacons National Park Authority: Sustainable Tourism Strategy[13] applies to the northern sector of the study area and focuses on conserving and enhancing the sensitive landscape so it can contribute to a better quality of life for all. With reference to Rhondda Cynon Taff the Strategy states that "*the Valley communities have much to gain from a close working relationship with the Park and visa versa*". The analysis conducted throughout the Strategy leads to the conclusion that "*partnership working rather than a competitive mindset needs to be applied to the development of the industry*".

2.3   Summary

The Heads of the Valleys programme provides the major impetus behind the transformation of tourism within the study area and the strategy will be supported by the opportunity to spend £5m for the development of the tourism and leisure offer during 2008/2009. The strategic review has identified the following key finding which should guide the development of tourism opportunities for the area:

- There is a need to firstly establish a successful day visitor destination for the area, and then as a short break location.

- It is necessary to make the most of the existing offer; new attractions that are likely to attract less than 50,000 visitors are not normally encouraged as they tend to dilute visitor numbers at existing attractions, reducing profitability and thus, their ability to maintain/improve quality.

- Expand the range of attractions only by adding more quality, family-oriented facilities to existing attractions and some large regional-scale projects, such as a Valleys Regional Park.

- Create a unified and coherent, well-branded proposition, which clearly illustrates what the Heads of the Valleys has to offer e.g the scenery, natural environment, heritage and culture; its proximity to the Brecon Beacons; affordability and special interest and activity holidays

- Encourage town centres to develop as integrated cultural, heritage, leisure, retail and tourist facilities, including places to eat and stay, and with provision for business tourism.

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[13] Brecon Beacons National Park Authority: Sustainable Tourism Strategy, 2002

- Focus on growing markets and opportunities to strengthen the areas activity product, rural, sustainable and green tourism, heritage breaks and golf tourism.

- Capitalise on the Heads of the Valleys as a base for exploring the Brecon Beacons National Park.

- Change perceptions and raise the profile and image of the area through events marketing as well as literature, public art which recognises the cultural and historical character of the area, including the Welsh language.

Heads of the Valleys Tourism Opportunities