

CARDIFF
Tourism Strategy & Action Plan
2015 - 2020:

***“Innovation and Partnerships
to
Deliver Growth”***

08 January 2015
City of Cardiff Council: Scrutiny



TOURISM IN THE CITY'S ECONOMY

1.9m overnights
18.9m day trips
20.9m visitor days

1.02bn
Total Spend
(46% of region)

£565m
direct spending
(45% of region)

13,613
FTE JOBS
(43% of region)

CARDIFF:

**The MOST important destination in
WALES,**

**Gateway to the region and Wales
and**

**the DRIVER of tourism in SOUTH
EAST WALES**

SITUATION

ANLAYSIS:

Where are we now?

THE UPS:

- * Recent strong performance;
 - * Destination hotels;
 - * Success of NATO;
 - * Lots of accolades;
- * Driven by sporting events and stadia;
 - * Dominated by days visitors;
- * Strength of retail and entertainment;
- * Commitment to tourism by CCC & CBC;
 - * Investments announced for city

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GREAT PLATFORM.

THE DOWNS:

- * Lacks world class attraction;
 - * Absence of signature event;
 - * Limited direct air access;
 - * Hotel capacity;
 - * City basics: arrival, litter, taxis;
 - * Reputation management;
 - Absence of a DMO;
 - * Unclear roles, duplication;
 - * Relevance for markets;
 - * Absence of brand & positioning;
 - Leisure v business balance
- =

FRESH APPROACH NEEDED.

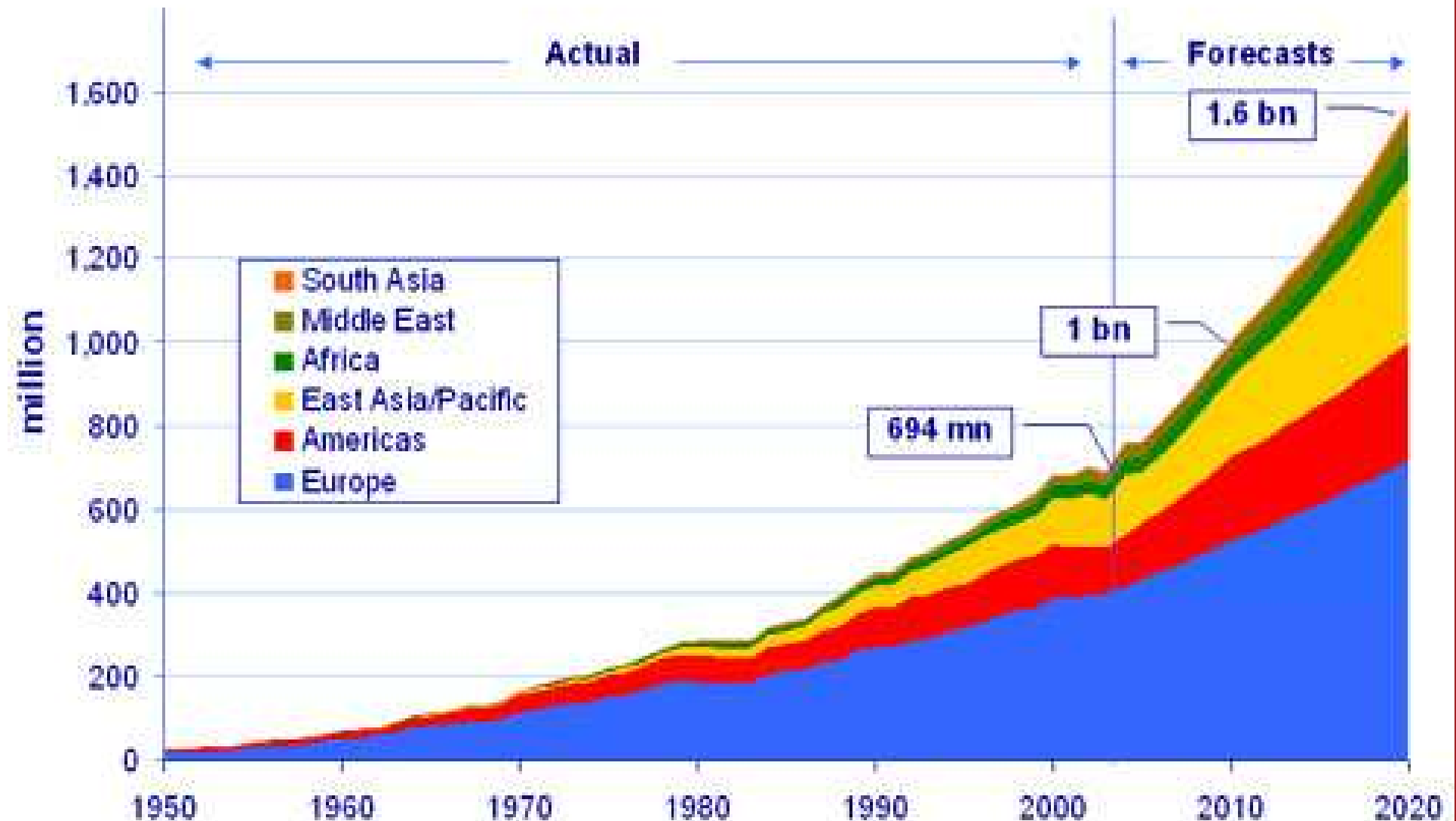
KEY TOURISM TRENDS

THE CONTEXT:

- * Tourism in growth
 - * EC 'Blue Growth;
 - * EU Maritime Tourism Strategy;
 - New strategy for tourism in Wales;
 - * Post NATO factor;
 - * Potential for regional approach;
 - * Rise of city tourism;
 - * City regeneration strategy;
 - * Increasing competition
- =

OPPORTUNITIES FOR TOURISM.

UN WORLD TOURISM ORGANISATION: GLOBAL INTERNATIONAL ARRIVALS FORECASTS. 2011



DRIVERS OF CITY TOURISM:

City renaissance;

New enlightenment & World citizenship;

Young people (16-34);

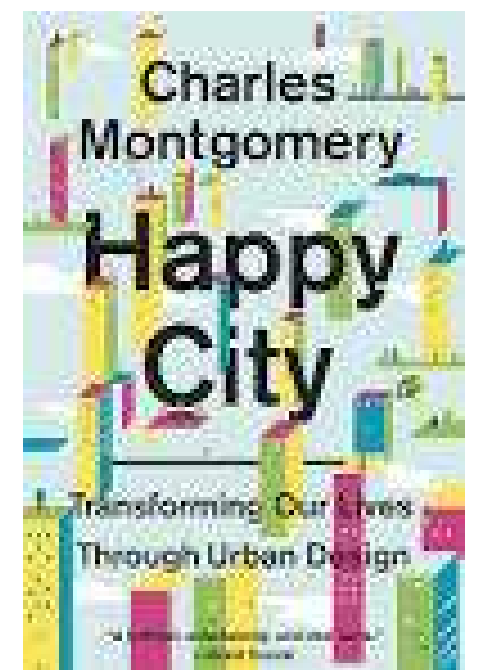
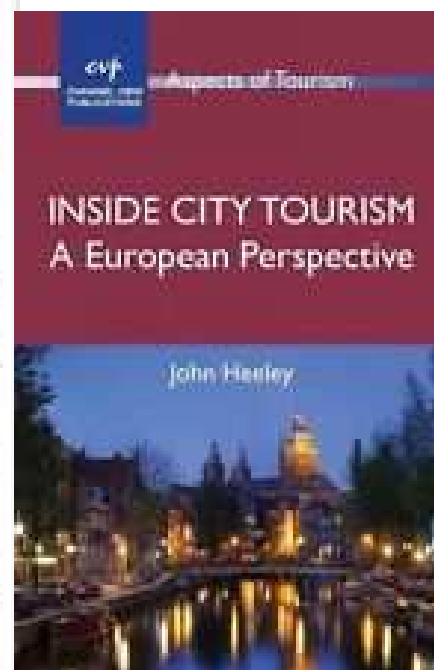
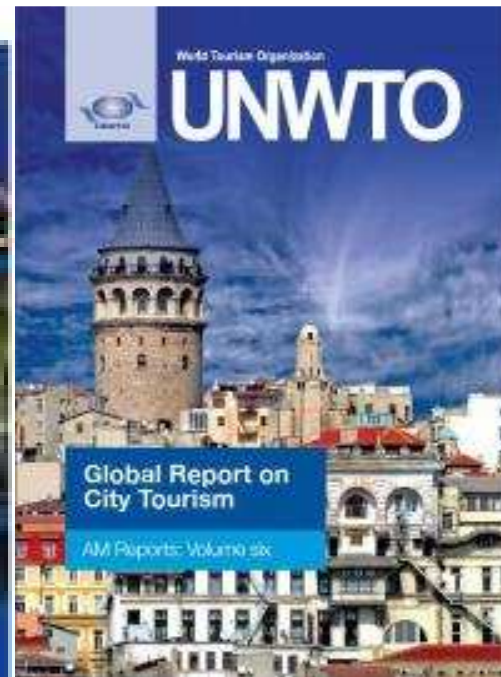
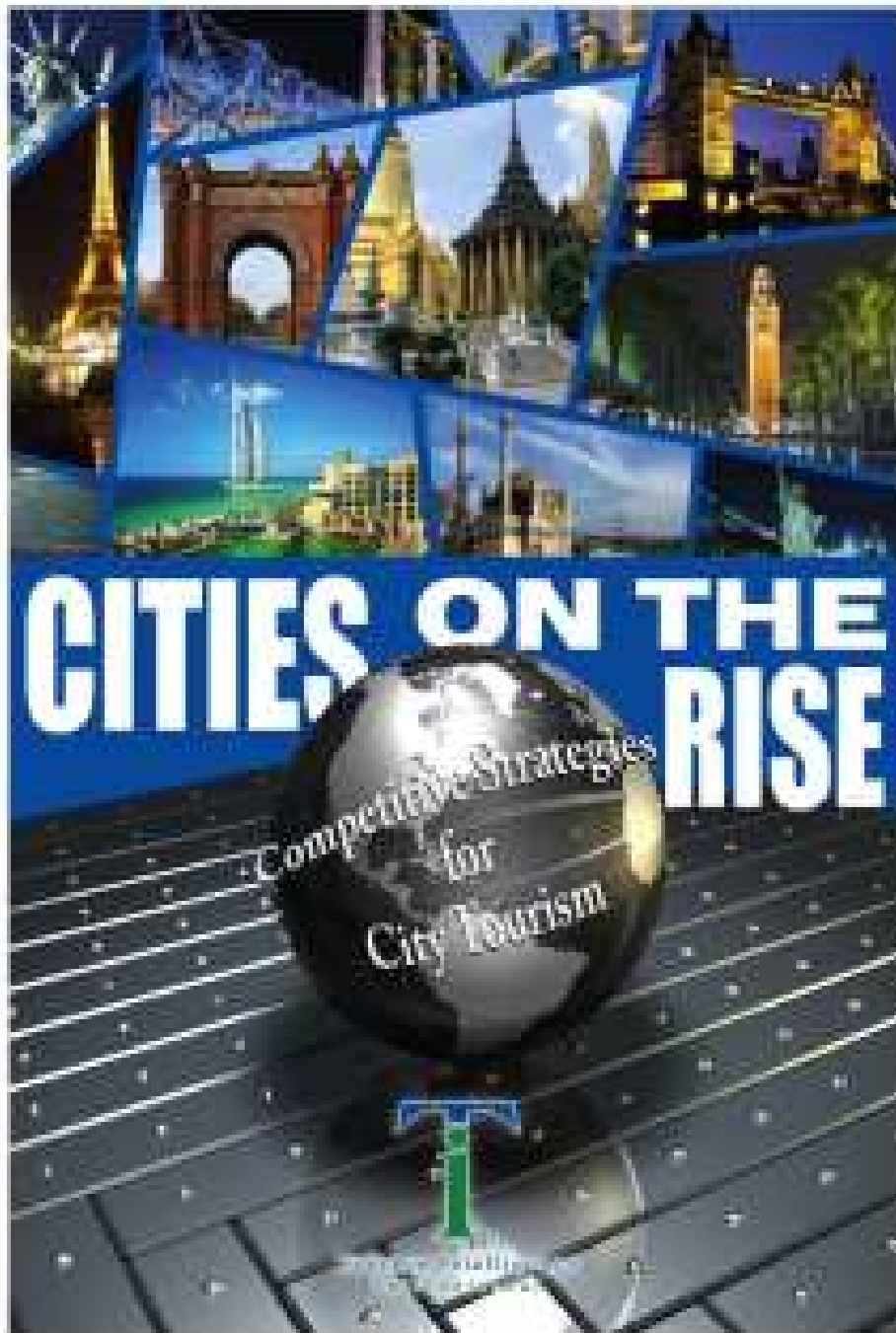
Urban sports tourism;

Shopping tourism;

Local stories and products;

Hybrid solutions: events, products, etc.

(UNWTO, 2014)



Uber

Competitiveness

Expansion of Low Cost Carrier Networks 2001 - 2006



IMPLICATIONS FOR US:

Address major barriers to growth;
Focus policy, growth markets & activity;
Willingness to experiment;
Ethics and responsible growth;
Information to knowledge shared;
Differentiation and brand position;
Importance of spaces, places
& aesthetics;
City tourism is driven by the young.

CITIES

THAT INSPIRE:

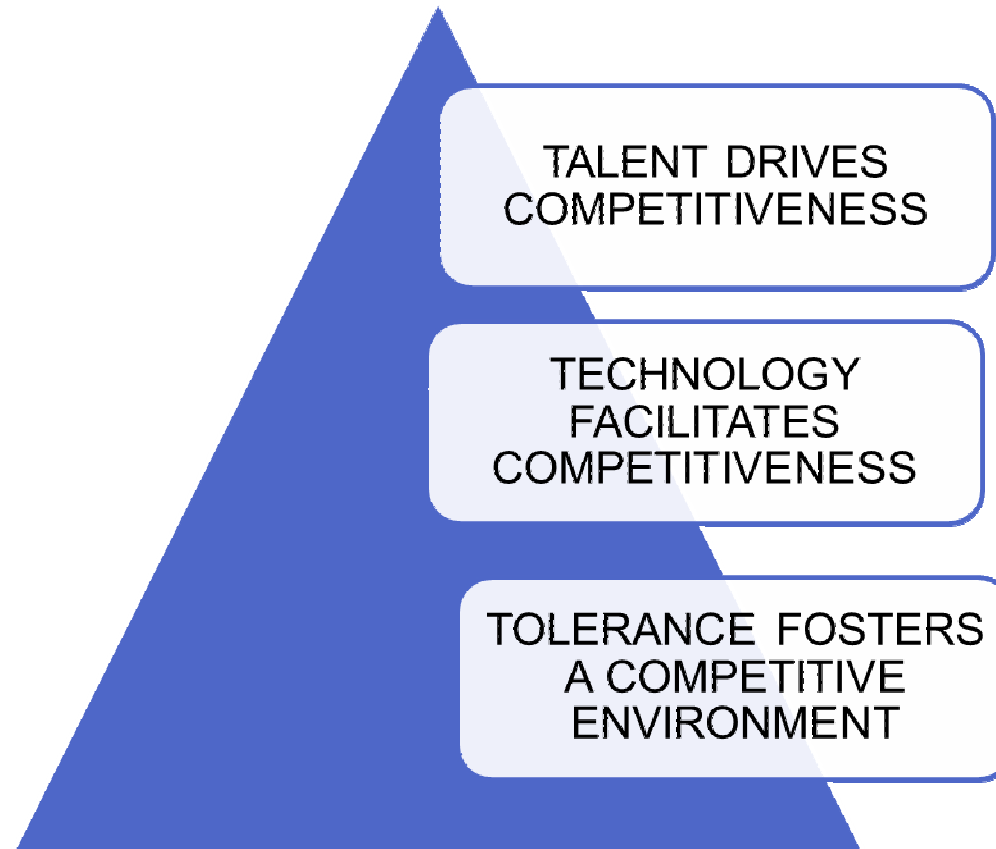
Benchmarking

Amongst others...

- * Austin, Texas
- * Bilbao, Spain
- * Bremerhaven and Bremen, Germany
- * Copenhagen and Aarhus, Denmark
- * Cape Town, South Africa
- * Glasgow, Scotland
- * Helsinki and Turku, Finland
- * Nantes, France
- * Oslo, Norway

CITIES ON THE RISE, 2014
“THE LAW OF THE FIVE Ts”

SUCCESSFUL CITY TOURISM
=



TERRITORIAL ASSET MANAGEMENT

**THE
OPPORTUNITY:**

WHERE ARE WE GOING?

THE

POTENTIAL TO

GROW THE VALUE OF TOURISM IN

CARDIFF AND THE CAPITAL REGION

VISIT EUROPE
VISIT BRITAIN
VISIT WALES
VISIT CAPITAL REGION
VISIT CARDIFF

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VISIT CAPITAL REGION

VISIT CARDIFF

A CITY WITH NO BORDERS:

Cities increasingly collaborating with region;

Economies of scale and critical mass;

Examples:

Copenhagen (Denmark) Malmö (Sweden) - WoCo;

Bilbao Metropolis - Bilbao International;

Bournemouth + Poole + New Forest - Bournemouth

Destination;

Turku and South West Finland - Turku Touring.

AMBITION:

- * International;
- * Young;
- * Highly differentiated;
- * Innovative and creative;
- * Added value;
- * Attracting talent;
- * SMART.

AMBITION BY 2020?

= MORE HIGH YIELD TOURISTS, STRONGER REASONS TO VISIT, STAYING LONGER, MORE THINGS TO DO, MORE PLACES TO STAY, SPENDING MORE MONEY, HIGHER LEVELS OF SATISFACTION, CREATING MORE WEALTH, MORE JOBS AND ENHANCED REPUTATION FOR THE CITY AND ITS REGION.....

CARDIFF AMBITION BY 2020?

(A) as per WG +10% = **£1.12bn**

(B) as per WG + a Cardiff factor of + 40% =
50% = **£1.5bn**

OR

(C) Double it ? = 100% = **£2.1bn and 4m
overnight stays**

The Strategic Framework:

harnessing **ingenuity**;

stimulating hybrid **innovation**;

injecting **impetus**

attracting **investment**;

being **international**.

THE PRIORITIES

- * Urban sports;
- * Water and maritime activity;
- * Signature festivals and events;
 - * Contemporary visual arts;
 - * Accommodation - + X rooms
 - * Business tourism;
- * Movement corridors, modes of transport.

IMPORTANCE V PERFORMANCE

- * REPUTATION MANAGEMENT;
- * ORGANISATION AND CAPACITY BUILDING;
- * UNIQUE PRODUCTS.

**Experiences are universal.
So what will make CARDIFF**

different?

**Experiences are now the brand.
Signature CARDIFF experiences?**

HOW DO WE GET THERE?

THE WAY FORWARD =

- * Strong leadership and ambition;
- * Strategic framework;
- * Greater collaboration;
- * Highly focused approach;
- * Prioritised actions.

“The next 10-15 years will be a time of unprecedented experimentation where old formulas no longer hold true; where traditional forms of partnership and collaboration will have to change and where hybrid solutions created by hybrid thinkers will prove to be winners”

The Editor/Wired, 2013.

“Interesting things happen when you allow different clusters to collide”

Patrick Torrent Guell
Deputy Director, Catalan Tourism 2012

*“The industry needs hybrid thinkers
and hybrid solutions..
But this industry is **NOT**
sufficiently innovative and creative
to deliver.”*

Claus Sendlinger
CEO, Design Hotels, 2011



Jerry Garcia
(Marketeer/Songwriter)
“The Grateful Dead”

“You cannot merely want to be considered just the best of the best. You want to be considered the only ones who do what you do.”



TOURISM ACTION PLAN:

consultation with variety of stakeholders

**Hudson & Stevens Destination Model & score card
workshop**

Private dinner in Mansion House with industry

stakeholder/ venues & hotelier sessions

AIM OF THE ACTION PLAN :

Increasing competitiveness through collaboration

The development of a unique tourism and day visitor offer based upon innovative and especially curated experiences and high levels of service standards.

This will allow tourism to make a significant contribution (in terms of economic value, enhanced profile and reputation, social and cultural benefits) to Cardiff becoming one of the most appealing cities in Europe as a place to live, invest, work, study and visit.

Link to strategic projects.

THE ACTION PLAN WILL ADDRESS :

- * Reputation - what current / future?
- * Market potential - who and why visit?
- * Territorial assets - what and where?
 - * Investment priorities - what?
- * Capacity: city/region leadership - how?

THE ACTION PLAN WILL ADDRESS

* Reputation management

eg Establish a Leadership Group,

City & region guest card,

collaborative marketing & cross selling to maximise existing assets,

establish a Cardiff+ marketing campaign,

Digital & SMART destination.

THE ACTION PLAN WILL ADDRESS

* Capacity building

eg. Leadership academy with international partners ie Cornell,
William Clinton Leadership institute in association with Belfast &
Liverpool

work with partners to introduce a new approach to hospitality &
service industry training

THE ACTION PLAN WILL ADDRESS:

* Product development

eg. Establish and manage City Hall as a dedicated conference venue supported by Mansion House & Cardiff Castle,

Create a programme of music and events & establish signature events and festivals that will generate bed nights,

Fully exploit opportunity presented by major events ie RWC 2015, 150th Anniversary sailing of the Mimosa 2015, The Roald Dahl Anniversary 2016 and The Volvo Ocean Race 2018,

Establish floating stage on the Bay

