Planning for sustainable tourism development in Wales: An analysis of destination management plans

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Abstract

Tourism is a vital component of the Welsh economy and the need to incorporate sustainability principles into new and more responsible forms of tourism development is now widely accepted. Sustainability in a tourism context is multi-faceted, involving consideration of the economic, sociocultural and environmental impacts of tourism on all of the people and places impacted by it, including tourism and non-tourism businesses, residents and guests. Planning for sustainable tourism is therefore complex, requiring integration with other relevant planning processes; wide-ranging stakeholder participation; and, an integrative, iterative and strategic approach. This study assessed the extent to which Wales' regional tourism entities have to date incorporated a stakeholder-driven, sustainability-focused mindset into their planning activities. Evaluation of 22 recent destination management plans revealed that there are many opportunities for improvement in the extent to which the desires of the industry, visitors and residents, and the conditions of the local economy, society and environment, are given equal consideration in tourism planning efforts. The need to refocus is especially important in light of Visit Wales' recently articulated new ambition for tourism and the broader aspirations of the Well-being of Future Generations Act.

Introduction

As is the case in many national economies, tourism is now recognised as a vital component of the Welsh economy. In 2018, domestic and international visitors made 10.962 million overnight trips to Wales, resulting in £2.3 billion of expenditures. Domestic day visits accounted for another 95.7 visits and £4 billion in spending (Welsh Government, 2019b). Combined, these visits contributed 6% of all Gross Value Added in the Welsh economy in 2016; tourism has recently been growing more quickly than the economy as a whole, and the industry continues to account for almost 10% of all Welsh jobs (Welsh Government, 2020).

The study – and increasingly the practice – of tourism are widely accepted to have entered a sustainability phase (Macbeth, 2005). The notion of sustainable tourism as an endpoint of development remains contested due to the inherent requirement of travel to/from the destination, the vast majority of which continues to take place by plane or car. Nevertheless, the need to incorporate sustainability principles into new and more responsible forms of tourism development is widely accepted. Key elements of such forms include attempts to maximise economic benefits for people living in tourism destinations whilst minimising economic,

sociocultural and environmental harms; active involvement of host communities in the governance of tourism; provision of meaningful experiences to visitors; and, concern for the overall wellbeing of both people and places, now and in the future (e.g., Gunn & Var 2002; Moscardo & Murphy 2014). From a planning perspective, a sustainable approach should integrate tourism planning with other planning processes within a community; should be cooperative, integrative, iterative and strategic; and, should place as much emphasis on implementation as on plan development (Hall 2008).

Similarly, Simpson (2001) has argued that if sustainability is indeed accepted as a desirable goal, then (i) stakeholder participation is essential to its achievement, and (ii) strategic planning is an ideal framework within which stakeholder-driven tourism development can occur. Simpson defines stakeholder participation to involve the inclusion of "all individuals, organisations and groups whose lives are affected by tourism development" in determination of the nature of that development, and strategic planning as involving "a long-term and holistic approach" (2001: p.20). Hall (2008) emphasises the many benefits of strategic planning for destinations of all scales and sizes, including the sense of ownership and purpose that the process and associated outputs can bring for those involved.

Visit Wales' recently articulated ambition for tourism through 2025 is to "Grow tourism for the good of Wales." Achievement of this mission is envisaged via five more specific goals, centred upon economic growth; environmental, cultural and health well-being; and, the satisfaction of both locals and visitors (Visit Wales 2019, Welsh Government 2020). Ultimately, then, Visit Wales has committed to a more sustainable tourism future, a future that is as equally respectful of the people and places involved in tourism as it is focused on increases in visitor numbers and related spend. This commitment is reflective of the national strategy's focus on a broadly-defined notion of prosperity for all (Welsh Government 2017), which is more explicitly described within the Well-being of Future Generations Act 2015 to include the desire to build a more prosperous, resilient, equal, healthier, cohesive and responsible Wales, with a vibrant culture and thriving Welsh language (Welsh Government 2015).

Accomplishment of a sustainability-driven agenda will require adequate planning at the national and sub-national levels; it is on the latter, finer scale that the current paper concentrates. Specifically, we investigate the extent to which Wales' regional tourism entities have to date incorporated a stakeholder-driven, sustainability-focused mindset into their planning activities. Terms of reference for destination management in Wales, which include designation of responsibility for the preparation of destination management plans (DMPs) to local authorities, were established by Visit Wales in 2009. Most current DMPs were prepared in the mid-2010s, during the era of "Partnership for Growth 2013-2020" (Welsh Government 2013); this strategy identified five key areas of focus, namely: promotion; product development; people; profitable performance; and, place building. As such, the current assessment is timely in that it provides the opportunity to make critical recommendations regarding preparation of the next round of DMPs in a manner likely to precipitate more sustainable growth of the Welsh tourism industry in a way equally beneficial to economy, society and environment and to businesses, visitors and residents.

Method

Simpson's (2001) tourism planning process evaluation instrument, developed and tested at the subnational level in New Zealand, was used to conduct the assessment; use of an existing instrument enabled comparison with results of Simpson's and other prior analyses. The original instrument consists of 51 items divided into five sections designed to measure the extent to which a tourism plan and the process associated with it: (i) incorporated the participation of multiple types (e.g., public sector agencies, tourism industry, visitors, residents) and levels (local, regional and

national) of stakeholder participation (13 items); (ii) identified local values as well as a future vision (6 items); (iii) included a comprehensive situation analysis of the area, including natural, sociocultural and human resources (15 items); (iv) specified appropriately broad goals and specific objectives (12 items); and (v) clearly documented implementation and review procedures (5 items). Given space constraints, the reader is referred to the appendix of the original paper for the full list. The instrument was amended as necessary to fit the Welsh context, i.e., references to Maori involvement were eliminated; this resulted in reduction in the number of items from 51 to 50.

A comprehensive search for city- and county-level tourism plans was conducted; reference to Visit Wales' dedicated destination management partnership webpage was supplemented by an online search combining place names with the keywords 'destination plan' and 'destination management.' Twenty-one plans were identified, representing all but one (Powys) of Wales' 22 principal administrative districts.

Each plan was independently evaluated by each author; prior to this, the authors met to discuss and reach consensus on the meaning of each item in a Welsh context, to minimise variations in interpretation of them. Assessments were then collated and average scores calculated. As per Simpson's original instrument, each item was scored from 0 to 3, where 0 indicated that an item had been completely omitted or ignored during the planning approach (i.e., there was no mention of it); 1 indicated peripheral/incidental inclusion; 2 indicated the item appeared to have been regarded as a valuable/useful component of the planning process; and, 3 indicated the item was clearly essential/vital to the process. Though these categorisations might be open to some difference of opinion between multiple scorers, the averaging of scores was considered an adequate means of capturing these and was thought preferable to the reliance on any single person's judgment.

Findings and Discussion

Results of the evaluation are enumerated in Table 1. Plans are ranked by their overall score (out of a maximum of 150). Given space limitations only summary scores for each of the five groups of factors are presented; please contact the corresponding author for the full set of results by item. The number of items (and maximum possible score) within each of the five sections and overall is listed in the final row of the table; in the row above, the average score across all 21 plans is listed for each section and overall, with that score expressed as a percentage in brackets underneath each average.

Overall scores ranged from 26.8 (17.9%) to 103.7 (69.1%), with a mean of 54.4 (36.3%). By far the best performing plan was Ceredigion, followed by Monmouthshire, Gwynedd and Conwy, whilst the lowest scorers included Wrexham and Flintshire. As a whole, the plans fared most highly in the stakeholder participation section (with an average score across all plans of 48.1%); performance was consistently lowest, on the other hand, with respect to vision and values (20.0%). Scores within each section are next described before results are compared with those of previous studies.

Stakeholder Participation. Most plans took a relatively long-term (4-5 year) orientation, resulting in an average score across the plans of 2.3 (out of 3.0); Conwy was unique with a plan covering a decade, and thus received the highest score. Given Visit Wales' delegation of destination management and associated planning responsibilities to local authorities, it is not surprising that the participation and influence of regional government was consistently high (averaging close to 3.0). Whilst some plans did reference Visit Wales and the Partnership for Growth strategy, only a handful clearly indicated the active participation of this or any other national agency in the planning process (average 0.7). Evidence of the participation and influence of the regional and/or local tourism industry and/or associated organisations was variable across the plans (averages 1.9-2.1), whilst

Table 1. Plan Compliance with Assessment Criteria

Local Authority	Years Covered by Plan	Evaluation Scores by Section					Overall Score
		A	B	C	D	E	
Ceredigion	2013-20	72.7	51.9	81.1	69.0	45.6	69.1
Monmouthshire	2017-20	67.1	24.1	51.9	39.8	51.1	49.2
Gwynedd	2013-20	58.3	37.0	49.6	30.6	43.3	45.0
Conwy	2019-29	47.2	29.6	47.4	55.6	7.8	43.2
Vale of Glamorgan	2018-20	62.5	35.2	38.9	36.1	10.0	40.6
Bridgend	2018-22	42.6	14.8	40.7	38.9	57.8	39.3
Caerphilly	2014-16	61.1	3.7	39.3	27.8	50.0	38.6
Blaenau Gwent	2016-19	60.7	5.6	38.9	28.7	46.7	38.4
Denbighshire	2017-20	45.4	35.2	23.7	44.0	55.6	38.3
Carmarthenshire	2015-20	63.0	27.8	42.2	25.0	4.4	37.6
Torfaen	2013-15	47.2	14.8	39.3	35.2	30	36.3
Isle of Anglesey	2016-20	45.4	22.2	30.0	36.1	26.7	33.9
Cardiff	2015-20	30.6	13.0	37.0	38.4	30	32.2
Swansea	2017-20	59.7	13.0	29.6	20.8	23.3	32.1
Neath Port Talbot	2015-20	40.7	18.5	30.0	29.6	31.1	31.2
Rhondda Cynon Taf	2014-20	34.3	3.7	41.9	21.3	26.7	29.0
Newport	Not stated	25.9	9.3	30.7	32.4	0.0	24.3
Merthyr Tydfil	2016-18	31.5	16.7	24.8	15.7	4.4	21.2
Pembrokeshire	2013-18	30.6	24.1	10.0	28.7	3.3	20.4
Wrexham	2018-20	30.6	5. 6	17.4	11.1	30.0	18.9
Flintshire	2017-20	23.2	9.3	15.6	19.0	20.0	17.9
Average score		17.3	3.6	16.9	12.3	4.3	52.6
		48.1%	20.0%	37.6%	34.2%	28.7%	35.1%
Number of items (maximum score)		12 (36)	6 (18)	15 (45)	12 (36)	5 (15)	50 (150)

A = stakeholder participation, B = vision and values, C = situation analysis, D = goals and objectives, E = implementation and review

that of the participation and influence of both visitors and residents was virtually non-existent (averages 0.1-0.6).

Vision and Values. About one-half of the plans contained a clear vision statement. However, the majority of those focused exclusively on visitors and the visitor experience, with very few explicitly or even implicitly considering local community values and attitudes, lifestyle features or current issues. Averages for the six items in this section ranged from 0.2 to 1.2.

Situation Analysis. Scores within this section varied widely across items. All but two plans referenced annual numbers of visitors and their contribution to the economy in terms of spending and jobs; the Scarborough Tourism Economic Activity Monitor (STEAM) is used by all local authorities in Wales thus all

counties should have access to these key data. However, very few plans went beyond a basic listing of visitor counts and average length of stay, direct spending and/or job numbers. About one-half of plans identified principal tourism sites (1.9) and evaluated current capacity of plant and infrastructure (averages 1.9 and 1.6, respectively), though fewer assessed the adequacy of industry business skills (0.9). It should be noted that scores pertain to the identification, description and evaluation of the county's tourism resources and infrastructure in the planning document, rather than to their quantity and/or quality per se. A county with limited resources and/or infrastructure could, therefore, score highly, whilst a county rich in attractions and/or supporting infrastructure could receive a low score. Besides providing a useful inventory, a thorough situation analysis including evaluation of current and potential tourism sites as well as assessment of levels and types of visitation to them can assist with prioritisation of those venues most likely to generate additional – and in particular higher spending – visitors. Beynon, Jones, Munday and Roche (2018), for example, have illustrated variations in the ability of heritage sites in Wales to support regional GVA. Understanding of skill levels and gaps is also critical (Haven-Tang and Jones 2008).

Reference to basic elements of a region's features (geography, climate, flora and fauna, population, land use, etc.) was consistently limited (averages 0.2-1.3). Not all plans included a clear SWOT (strengths, weaknesses, opportunities, threats) analysis. Acknowledgement of the need to integrate local tourism strategies with national policies for tourism development varied from no mention at all of Visit Wales, to adoption of the Partnership for Growth's five foci (promotion, product development, people, profitable performance, place building) as the framework around which the entire DMP was based (average 1.9).

Goals and Objectives. Amongst those plans which included clear goals, those relating to the nature and scale – and to the economic benefits – of future tourism development were

most prevalent (averages 1.6-1.7). Emphasis of the local benefits of tourism development was less common (1.2), whilst mention of the need to protect the environment or community values and lifestyles was even less likely (0.6-0.9). Identification and evaluation of alternative strategies via which to achieve goals was virtually non-existent (0.1). The objectives stated in most plans seemed achievable (1.7), though fewer were clearly measurable (1.1), and fewer still targeted the equitable distribution of tourism's benefits (0.5).

Comprehensive quantification of the different types of tourism impact is possible using tourism satellite accounting (TSA), and has been demonstrated for environmental effects in the Welsh context (Jones and Munday 2007). Continued use of TSA at the national and subnational level will enable assessment of the extent to which tourism is contributing to achievement of the aspirations of the Well-being of Future Generations Act. In particular, Welsh Government is committed to addressing climate change and promoting a low carbon future (Welsh Government 2019a). Combination of a traditional TSA approach with an input-output framework and ecological footprint techniques (as proposed by Jones and Munday) is critical to a more complete and realistic understanding of the full range of environmental externalities associated with tourism consumption, particularly in terms of the transportation component both within but also to/from Wales.

Implementation and Review. Many of the documents included an action plan, listing in some cases dozens of proposed actions or tactics pertaining to the previously identified broader goals. Responsibility for the implementation of key tasks was assigned to one or more entities in more than half of the plans (average 1.7), typically via the identification of a lead – and sometimes supporting – agencies or entities. Objectives and/or related activities were prioritised in some manner in more than one-third of cases (1.3), though typically in a qualitative manner

Table 2. Comparison of Evaluations (Range of Scores) by Dimension

Dimension	Australia	New Zealand	Wales
Stakeholder participation	0-78%	38-73%	23-73%
Vision and values	0-75%	9-98%	4-52%
Situation analysis	0-80%	13-83%	16-81%
Goals and objectives	0-83%	30-80%	11-69%
Implementation and review	Not assessed	2-60%	0-58%
Total	1-70%	29-73%	18-69%

Table 3. Comparison of Evaluations by Overall Percentage Score

Percentage of Points Earned	Australia (n=30)	New Zealand (n=19)	Wales (n=21)
0-25	53%	0%	24%
26-50	30%	53%	71%
51-75	17%	47%	5%
76-100	0%	0%	0%

(high-medium-low priority or short-medium-long term) rather than in terms of start dates and durations. Clear articulation of a review and evaluation mechanism was the exception rather than the rule (1.0), and estimation of resource costs and their allocation received the lowest scores across all 50 items (0.1-0.2), being completely missing from most documents. Clearly, the assignment of precise costs to large numbers of proposed activities across a 4-5 year timeframe would be an onerous task, though estimation could assist in prioritisation and related fund raising.

Comparison with Previous Studies. When judged relative to prior studies using the same evaluation instrument, Wales fares comparably. Simpson (2001) characterised the 19 subnational plans he reviewed in New Zealand as demonstrating satisfactory levels of inclusion of multiple stakeholders and of statement of goals and objectives; mediocre attention to the establishment of community values and vision, and to the conduct of a local situation analysis; and, especially low scores on implementation and review. Ruhanen (2004, 2008) assessed local tourism planning documents associated with 30

destinations in Queensland, Australia; "plans were generally found to not be meeting the sustainable planning criteria" (2004: p.251) across the four dimensions reviewed (implementation/review was not investigated). Wales' scores fell within the ranges found in Australia and New Zealand across all five dimensions (Table 2), and no plans scored more than 75% as a whole across any of the three nations (Table 3). The proportion of Welsh plans scoring 51-75% of the available total was noticeably lower than in Australia or New Zealand, with most Welsh plans falling in the 26-50% scoring range (Table 3).

Conclusion and Recommendations

The analysis conducted provides a snapshot of the extent to which those entities responsible for subnational tourism planning across Wales appear to have incorporated a stakeholder-driven, sustainability-focused mindset into their most recent planning processes.

Overall, the findings suggest ample room for improvement in the extent to which destinations across Wales demonstrably plan for tourism in a manner that recognises the equal importance of the industry, visitors and

residents, and of economy, society and environment. It would appear, then, that the challenge of "how to move the wealth of sustainability knowledge in academic circles into the 'real world' where those who are actually making decisions have the resources, knowledge and skills to implement sustainable approaches to planning and management" (Ruhanen 2004: p.251-252) remains an ongoing one.

Many of the plans reviewed have recently expired, and are therefore currently or soon to be revised or replaced in light of Visit Wales' new, more sustainability-focused, five-year strategy (Visit Wales 2019; Welsh Government 2020). Key recommendations regarding the preparation of this next round of DMPs are provided in the paragraphs that follow. However, other authors have long highlighted the often stark differential between a stated focus on sustainability in tourism plans and policies, and the reality of a business-as-usual approach emphasising short-term economic return in both planning and implementation phases (Ruhanen 2010). Putting principles into practice will necessitate more concerted efforts on the part of all those involved in planning for and delivering tourism across Wales if the industry is to pay more than lip service to the concept of sustainability in a meaningful manner. Moreover, the desirability of independently evaluating not just the written planning documents, but also the actual execution of the implementation processes identified and their outcomes, is clear. Even the very best plan, capturing all elements of Simpson's instrument, is meaningless without continuing and concerted efforts to put those pieces into place within each county.

Reviews were based on those planning documents publicly available, supplemented by supporting documentation where that was both cited in the plan and publicly available or forthcoming from the local authority when requested. Given that responsibility for destination planning and management falls to public entities – local authorities – all associated documentation should be easily accessible to any interested stakeholder from within or beyond jurisdictional boundaries.

Some websites currently provide easy access to all materials, whereas others provide little or none. The plans varied considerably in explication of processes employed and stakeholders involved; it is recommended that future plans clearly document who was involved in their development and how that involvement occurred, i.e., in what numbers and via what activities and channels. Tourism is notoriously fragmented in nature, directly and indirectly involving a wide variety of agencies, entities and individuals across multiple scales. Active inclusion of all those not only involved in – but also likely to be impacted by – tourism activity should commence with a thorough stakeholder audit and can be encouraged using a variety of in-person and online engagement methods, from townhall meetings, focus groups and surveys to more innovative participatory techniques (Hall, 2008). Involvement should occur throughout the process, rather than consisting of presentation of the completed plan as a fait accompli post-development.

Despite the heavy emphasis on visitors and the visitor experience in stated visions, goals and objectives, visitor participation in and influence on the planning process itself was extremely low, suggesting a general lack of incorporation of actual visitors' opinions in plan development and hence limited strategic thinking in terms of the needs and wants of the customer. Involvement of residents was even lower. Some authors have proposed that tourism should be reconsidered as a tool for achieving sustainability, as a means to the end, rather than the end itself. Such a reconceptualization prioritises forms of tourism that actively provide utility for residents via planning processes that emphasise the enhancement of community assets and identification of others ways in which tourists and tourism "could be used to meet the needs and aspirations of destination residents and non-tourism businesses" (Moscardo and Murphy 2014: p.2544). The almost complete lack of engagement with residents across Wales' destination management plans is of intense concern, especially since visitors' experiences can be impacted by interaction with any local people,

not just those employed in the tourism sector and thus more likely trained in basic elements of hospitality.

As described in the introductory section, Visit Wales defined terms of reference for destination management across the nation, including the establishment of local destination partnerships, in 2009. These partnerships were envisaged to include all relevant industry stakeholders and to take a leading role in guiding tourism across each region. Though referenced in many plans, it would appear that these entities should continue to broaden and deepen their activities, expanding their remit to consider a wider network of stakeholders including those typically not referenced or involved in the plans reviewed, i.e., non-tourism businesses, visitors and residents.

The lack of consideration of non-human capital is equally problematic. Visit Wales' thematic years campaign – which has, since 2016, highlighted the Year of Adventure, Legends, the Sea, Discovery, and currently the Outdoors – is clearly predicated upon the quality of the nation's natural and cultural attractions. Yet identification of these resources and consideration of the need to protect them whilst simultaneously promoting visitation was conspicuous by its absence across the vast majority of plans reviewed. Avoiding exceedance of the carrying capacity of individual attractions and entire destinations – as recently recognised in the growing observation of 'overtourism' in some places (e.g., Burgen 2018; CNT Editors 2018) – should be considered in future strategic planning efforts.

To aid in the achievement of a more sustainable tourism future, Wales' destination management entities are advised to actively adopt and more clearly mirror Visit Wales' new vision and goals in their future planning activities. Genuine commitment to all five of the new goals will necessitate a fundamental shift in thinking for many regions, from the traditional focus on marketing, typically measured in terms of profitability and volume/spend growth, to a more holistic, proactive and longer-term emphasis on all aspects of the industry and its

impacts. Investment of time and effort into the identification of more measurable objectives is also advised, to allow easier and more meaningful performance tracking during plan implementation and at the end of each plan's lifecycle.

Ultimately, though, those involved in planning for tourism across Wales should be reminded that "planning is difficult – it is irrational, complex, political, value-laden and, often, frustratingly incomplete" (Hall 2008: p. xiii), involving values, choices, bargaining, negotiation, compromise, coercion, and politics. Nevertheless, the potential prize – of a thriving tourism industry respectful of all people and places, now and for future generations – justifies the investment. Follow-up to the secondary analysis conducted here would enable richer understanding of the planning principles and practices embedded across the Welsh counties. Appropriate methods of primary data collection would include in-depth interviews with those responsible for commissioning and/or conducting the plans and associated planning processes (e.g., with county tourism officers and tourism consultants) and broader surveys of destination residents and the industry. The latter could be used to gauge perceptions of involvement in the planning process as well as opinions regarding the effectiveness of both the process and its outcomes.

As noted above, this study provides a single snapshot in time. Repetition of this analysis in the next 3-5 years, by which time all areas should have revised their plans in light of Visit Wales' new strategy (Visit Wales 2019; Welsh Government 2020), will allow for longitudinal assessment of improvements in the incorporation of the sustainability principles identified and evaluated here. Though not a metric within Simpson's instrument, an additional issue for future consideration would be the degree of interaction and cooperation between adjoining counties. Tourism does not occur in a spatial vacuum, and for most visitors the jurisdictional boundaries of the places they visit are immaterial. A few plans did reference attractions in nearby areas, but more concerted focus on not just proximate amenities but also

surrounding counties' tourism opportunities and challenges would allow for a more holistic and integrated approach to long-term planning.

Finally, it should be noted that this project was conceptualised and the analysis completed prior to the outbreak of coronavirus in the UK. Clearly that event has significant implications for the short- and longer-term functioning of Wales' tourism industry and these need to be taken into consideration during future planning efforts. The pandemic has exposed the economic reliance of many places on visitor activity as well as the fragile nature of many small providers. While the emphasis in the short term is likely to be on reopening and recovery, particularly from the industry's perspective, in the longer term a more concerted emphasis on building the resilience of the sector is desirable. Attainment of greater resiliency – in a way that is both robust enough to weather future challenges yet also flexible enough to capitalise on future opportunities – would benefit from the inclusive and strategic approach to long-term planning emphasised in this paper.

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