Isle of Anglesey County Council	
Report to:	**Executive Committee**
Date:	25th April 2023
Subject:	Draft Destination Management Plan 2023-2028
Portfolio Holder(s):	Cllr. Neville Evans (Leisure, Tourism and Maritime)
Head of Service / Director:	Christian Branch Head of Regulation & Economic Development Service
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Local Members:	Applicable to all Elected Members

A –Recommendation/s and reason/s

The Executive Committee is asked to approve and support the draft Destination Management Plan (2023-2028) for consultation with key stakeholders.

The draft Destination Management Plan (DMP) sets out the Council's ambitions for destination management over the next 5 years and takes account of both local and national strategies including the new draft Council Plan.

The Plan sets out principles and actions which will bring about economic, social and environmental benefits, and will ensure that the special qualities and communities of the Island are at the heart of the tourism offer but will not be adversely impacted as a consequence.
The visitor economy retains its pivotal importance, and the consultation process will establish stakeholders buy into to this approach.

B – What other options did you consider and why did you reject them and/or opt for this option?

This Plan replaces the previous version which spanned 2015-2020. The preparation of the new Plan was delayed by, and takes account of impacts of the Covid pandemic.

It is a requirement to undertake consultation to inform preparation of the Plan.

C – Why is this a decision for the Executive?

The decision is sought from the Executive as approval is needed for the Plan to become a public document and consulted upon.

Ch – Is this decision consistent with policy approved by the full Council?

The DMP is fully aligned with the new Council Plan and has the key general principle of delivering sustainable economic development at its core. Furthermore, it will ensure by 2028 that we have

- capitalised on additional investment for the benefit of the local economy
- Grown and promoted the visitor economy in a respectful and sustainable manner to secure benefits for our communities and visitors

The visitor economy is fundamental to the sustainable economic position of Anglesey, and the strategy highlights the commitment to further enhancing this. However, it has become increasingly evident over the past 3 years that unchecked tourism can adversely impact the lives of people and the unique qualities which make the Island so synonymous and drive the vast majority of tourist activities.

The Plan will redress this imbalance and ensure through a new multi organisational/interests group that the benefits of a vibrant and diverse offer is able to enhance the key qualities of language, culture, environment and heritage.

A drive for improvements to infrastructure such as car parking, toilets and access provision is a key part of the strategy, and by ensuring these critical building blocks are in place, we will have greater opportunities to release the potential of enhanced sustainable tourism offers which will bring about economic, social, health and wellbeing benefits to visitors and the people of Anglesey.

The Plan draws together all responsibilities and priorities of Destination and will act as template for a more collaborative and holistically minded approach to destination management moving forward.

D – Is this decision within the budget approved by the Council?

Budget within Destination Function to prepare and implement the Plan. However, other external funding opportunities will be explored to maximise the delivery and impact of the Plan

Dd – Assessing the potential impact (if relevant):		
1	**How does this decision impact on our long term needs as an Island?**	Tourism remains the largest economic sector. Plan aims to maximise benefits, and mitigate impacts, to realise meaningful socio-economic benefits for the Island
2	**Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?**	Aim is to invest in tourism infrastructure to improve quality, strengthen resilience and reduce financial burden on the Council of infrastructure that is in need of investment. It's a co-ordinated Plan to identify and prioritise future activities
3	**Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.**	Internal and cross-Service collaboration on the development of the draft Plan, and collaboration on the recommendations. This decision will act as a precursor for formal engagement with stakeholders.
4	**Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.**	The formal consultation will offer citizens the opportunity to refine the Plan.
5	**Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.**	The Planaims to provide an offer which has benefits for all society.
6	**If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.**	The Plan aims to enhance the economic wellbeing of the people of Anglesey, and bring about new employment opportunities from sustainable tourism.
7	**Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.**	Celebrating the Island's Welsh language and culture is a key part of Plan.

E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	
2	Finance / Section 151 (mandatory)	
3	Legal / Monitoring Officer (mandatory)	
4	Human Resources (HR)	
5	Property	
6	Information Communication Technology (ICT)	
7	Procurement	
8	Scrutiny	
9	Local Members	

F - Appendices:
Draft Destination Management Plan 2023-2028

Ff - Background papers (please contact the author of the Report for any further information):

DRAFT
Isle of Anglesey
Destination Management Plan
2023 -2028

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1. Setting the scene

The Destination and visitor economy are essential to the prosperity and unique offering of Anglesey.

We are blessed with a diverse environment, culture and heritage which is matched only by the scope for varied tourism offers and visitor experiences.

The rugged coastline is home to some of western Europe's most important habitats including lowland heath, dune and maritime grasslands, and rare species of flora and fauna rely on the health of these habitats. Inland from the coast, fens and lakes provide important internationally protected habitats to some of Europe's most threatened species.

Equally important is the uniqueness of Anglesey's culture and heritage tracing human's relationship with place from prehistoric times, thorough Anglesey's industrial heyday to the cultural vibrancy we see in our communities today

We are blessed with a diverse environment which is matched only by the scope for varied tourism offers and visitor experiences. Anglesey is the county most reliant in the UK on this industry, generating upwards of £360m per annum in the local economy, and directly supporting ~3,698 jobs. As such, it is vitally important that this plan supports and delivers meaningful benefits to the people and communities so economically reliant on this sector.

There is, however, an underlying fragility to the economy on Anglesey, characterised by high levels of migration amongst young people, as well as unemployment and social deprivation.

One of the major difficulties facing peripheral economies like Anglesey is the ability to generate new employment. Tourism is one of these sectors that can, and has, contributed to local prosperity and quality of life in Anglesey.

This fragility is mirrored in the natural environment, with habitats and species becoming ever more threatened and fragmented. Tourism can play a significant role in highlighting the importance of Anglesey's natural environment, and as such help address the 'nature crisis' as well as bring health and wellbeing benefits.

However, the visitor economy can also have negative impacts. The continued growth in visitor numbers can create unwelcome pressures for the local community.

Tourism cannot therefore be left to grow unchecked; it must be managed in a sustainable way, to maximise the benefits for long-term prosperity and mitigate potential negative impacts.

Through a collaborative approach, Anglesey has the opportunity to act now through clear forward-planning and actions. There is a need to enhance the existing offer by ensuring that basic needs such as highway infrastructure, enhanced public access, public conveniences and information provision are fit for purpose, and resilient against pressures such as climate change.

By ensuring this basic need is provided, we have the opportunity for existing offers to be strengthened, safe in the knowledge that the experience will be further enhanced by the Anglesey welcome which is already a cornerstone of the visitor offer.

New opportunities will grow from this strengthened position, and in conjunction with partners and communities, we can grow the offer based around the unique qualities of Anglesey in a sustainable manner
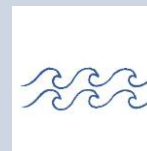
Who does the plan represent?

- 68,900 Residents
- 56% Speak Welsh
- 3,698 Employees in tourism
- 5.2 million visitors
- 50Km Heritage Coast
- 1 UNESCO Global geopark
- 32 SSSI's — Sights of special Scientific Interest
- 221 Sq KM Size of our AONB
- 75 Scheduled Ancient Monuments
- 2nd Busiest Port in the UK And Wales busiest cruise port
- 35,843 Bed spaces
- 125 Miles Coastal Path

2. A Vision for Anglesey 2023-2028

The Isle of Anglesey is a uniquely special place, with a rich history, culture and heritage, coupled with unspoilt and ecologically diverse landscapes.

We seek a visitor economy which is empathetic to the Island's sense of place, and is seen to benefit the people, environment, culture, heritage and language, and continues to play a pivotal role in the economic stability of the island.

This plan seeks to enhance a spirit of collaboration and holistic thinking to develop an offer which enhances these key qualities, and delivers economic and social benefits to the local communities.

3. What is Destination Management?

Destination management is about 'managing the destination in its widest form for the benefit of all'

This is a place-centred concept, concerned with the whole environment in which visitors, locals and tourists interact.

It focuses on the elements that attract visitors, as well as the infrastructure and services that support their visit. The term 'visitor' applies to those spending their holidays in an area as tourists, but it also includes local people visiting an area just for a day or less.

Destination management therefore not only involves tourists, but the wider impact of people, including locals and nearby visitors, who use services, infrastructure and enjoy local assets. It extends to all aspects of the economy and requires collaboration to run effectively and sustainably.

It involves the physical, financial and operational management of a destination, but also its planning, development and marketing.

4. Why Destination Management ?

There are many factors driving the need to update Anglesey's destination management plan to make it ready to work with the challenges and opportunities of 2023 and beyond.

The visitor economy, and wider political, economic and environmental context is very different than it was in 2015 when the last plan was drafted.

These changes, amongst others, are shown in the graphic opposite and illustrate the need for an updated plan and delivery model.
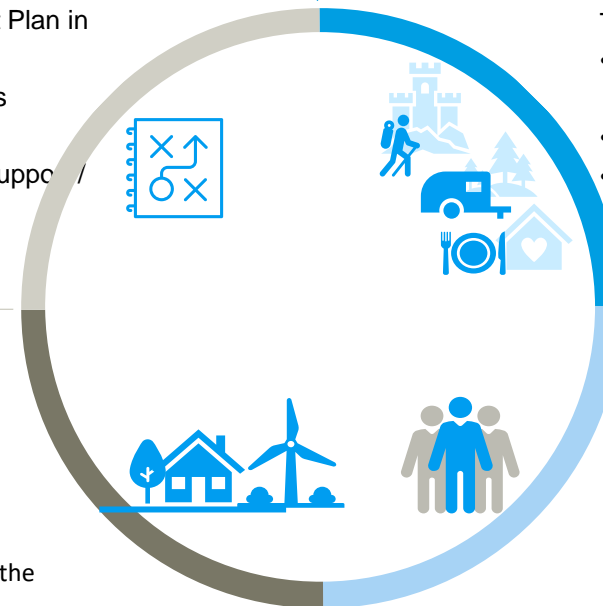
Policy context

- This Destination Management Plan is needed to acknowledge the changing policy context since the last Destination Management Plan in 2016, including but not limited to:
- Key national, regional and local policies (explored on the following page)
- Reduced capacity for Local Authority support / delivery
- Protection of the Welsh language
- Levelling Up Funding & investment in Holyhead
- Second home policies and taxes

Visitor economy

The visitor economy has changed since the 2016-2020 Destination Management Plan. This plan will have to respond to:
- The changing visitor profile: day visitors vs. overnight stays
- Increasing second home ownership
- Growth in short term lets (Airbnb & VrBo) properties
Digital transformation

Sustainability and net zero

The physical risk of climate change, along with the increasing pressure of visitor numbers on the environment is driving the need adopt more environmentally sustainable practices and transition to net zero. This is reflected in :
- IACC Towards Net Zero Plan 2022-2025
- Biodiversity Plan
- Need for resilience and natural resource management

Economic context

The Covid-19 pandemic highlighted the need to embed resilience into destination management, with a need to address:
- Infrastructure and capacity: how to get the basics right, ensuring benefits and no disruption to locals while delivering a quality visitor experience
- Skills and employment gaps in the sector

5. A strategic approach

This Destination Management Plan aims to take into account and support the wider strategic objectives laid out in the local, regional and national policies shown in the diagram opposite. Key policies and plans are starred and include:

★ **Welsh Government Wellbeing of Future Generations Act, 2015** A key aspect of Anglesey's visitor offering is highlighting the thriving culture and language of Wales, which links directly to the aspirations of this Act.

★ **Welcome to Wales: Priorities for the Visitor Economy, 2020-2025** encourages the sector to combine a local-first focus celebrating culture, home-grown skills and businesses and community (Bro) with international levels of quality and ambitions (Byd). This, along with Visit Wales' key priorities are reflected in Anglesey's Destination Management Plan.

IACC Corporate Plan (2023-2028)

★ Tourism is a vital part of Anglesey, therefore the Island's policies and plans will need to and support existing tourism infrastructure and businesses as well as facilitate opportunities for future development. Equally, this plan will need to align closely with the aims Isle of Anglesey County Council are seeking to achieve for the local community.

At the time of preparing this plan, there is no clarity on the implementation of a tourism levy or statutory registration scheme. If relevant, this plan will support our work with the Welsh Government on the successful implementation of the scheme.

This graphic shows examples of policies, plans and legislation relevant to the Destination Management Plan - it is not an exhaustive list

6. The impact of Anglesey's visitor economy

Economic impact in 2021:

£342.87 million economic impact

3,698 full time employees (tourism related sectors)

2021 saw a 46.7% increase in economic impact compared to 2010

90% of economic impact comes from 53% of visitors (those staying over night). Staying visitors contribute much more per person in terms of economic impact

Anglesey's visitor economy provides a significant source of income and employment for the Island. This plan seeks to build upon its strengths and help it grow sustainably

Visitor numbers in 2021:

1.48 million visitors, 91% of pre-2020 level

5.28 million visitor days

15% of the year's visitors (over 250,000) visit in August

Accommodation figures in 2021:

0.76 million visitors (50% of total) staying in paid accommodation

97% of visitors with accommodation are in non-serviced accommodation

1,067 Short term let (AirBnB &VrBo) listings

A 53% increase in listings since 2017*

*Source: the Bevan Foundation
All other figures 2021 STEAM data

7. Challenges & opportunities for Anglesey's visitor economy

This plan considers both the challenges facing Anglesey's visitor economy, as well as the opportunities for collaboration, innovation and sustainable growth.

CHALLENGES:

- **Available funding** for the local authority has fallen significantly in the period since the last DMP, especially on non-statutory functions (such as tourism) and the funding profile is often short term, limiting the ability for strategic change
- Over tourism and **capacity** constraints
- **Inclusivity** - the shift to **digital** technologies can exclude some demographics. Age profile and language must be considered
- **Environmental fragility –** climate change and development is increasingly threatening local habitats and species.
- **Perceptions** of tourism – there is little recognition amongst the wider community of tourism's contribution to the Island; as a key employer, entrepreneurial incubator and contributor to wider employment in retail, finance, telecommunications and Holyhead Port.
- **Profile** of visitors – there was a greater drop in staying visitors compared to day visitors in 2021 compared to 2019*. 2021 share of day visitors is 47%, despite being only 10% of spend (contributes to challenges around capacity and infrastructure
- **Second home & Airbnb** ownership increasing
- Sectoral **skills** shortages

OPPORTUNITIES:

- Consumers have long been encouraged to 'discover what's on your doorstep' and 'think global, **act local**', however during the covid-19 pandemic this became much more tangible concept
- **Becoming a sustainable destination** – embracing sustainability is an opportunity for Anglesey to further develop its brand, for instance through promotion of active and more sustainable travel, embracing the lack of roadbuilding and becoming a "green island"
- The visitor economy bring multiple **benefits to the local community**, but there is an opportunity for these to be further developed and better communicated.
- **Culture, heritage, uniqueness** is undersold (history, Welsh language, UNESCO Geo Park, AONB). Opportunity to improve awareness of place through signage and celebrate local identity and brand
- **Dark Sky tourism** Further support and promote the benefits of the dark sky
- **Digital** transformation and marketing
- **Food Tourism** Strategy
- **Increase in adventure sports** & wellbeing tourism
- **School involvement and education** – increase engagement of children learning about their place
- **Strength and performance** of the tourism sector in Anglesey: historically outperformed Wales and North Wales averages (over the period 2006-2017)
- **Welsh Coast Path** Investment in the infrastructure, marketing and development of the coastal path

*STEAM data

8. Guiding Principles & Priorities 2023-2028

1. Vibrant communities who are celebrated, respected and protected.

- A visitor economy where the local communities feel ownership and empowered to drive forward the regenerative tourism model.
- A visitor economy which embraces and sustainably utilises the existing strengths of our language and culture and brings our heritage to a wider audience.
- A visitor economy where the culture is embraced, and at the heart of all product and promotional activities

2. An enhanced visitor offer with sustainability at its core.

- A visitor economy which can grow sustainably based around a high-quality offer where visitors value and respect Anglesey's culture, heritage and environment.
- A visitor economy which is based around activities and experiences which take advantage of, but do not degrade the culture, heritage and environment.
- A visitor economy where quality visitor infrastructure and access provision offer enhanced recreational opportunities and with this improved health and wellbeing

3. A natural environment which is respected, understood, improved and helps tackle the nature and climate crises

- A visitor economy where the natural environment is understood and enhancements to natural capital bring about benefits in terms of wellbeing to all.
- A visitor economy where activities are in harmony with the natural environment, and enhance both the offer and the land and sea upon which they take place.
- A visitor economy which becomes more 'climate change ready' and is increasingly carbon neutral.
- A visitor economy where users are empowered to directly contribute to tackling both the nature and climate crises.

4. A visitor offer which serves to improve our communities, and as a result social and well being benefits are seen.

- A visitor economy whose infrastructure and resources are enhanced to the benefit of local communities, and adapts to mitigate the impacts of climate change.
- A visitor economy where local people are given the opportunities to be at the heart of the offer, taking advantage of new skilled roles and local supply chains.
- A visitor economy with sustainability at its core and able to grow in economic and social value and provide health and wellbeing opportunities for all.

9. High-level Action Plan

Vibrant communities who are celebrated, respected and protected.

Why is this important ?

Nothing embodies the spirit of place more than its people, its language and its culture.

Anglesey's unique culture and heritage is key to its sense of place, making it a memorable destination. This, along with our natural environment, is the foundation of the visitor offer. There is opportunity to communicate and celebrate this further.

What are we going to do?

- We will deliver this destination management plan in close collaboration with local community stakeholders to ensure they feel empowered to drive forward a regenerative tourism model.

- We will embracing the existing strengths of our language and culture to bring our heritage to a wider audience.

- We will develop a visitor economy where culture is embraced, and at the heart of all product and promotional activities.

- In doing so, we aim to create a destination that is distinctive and authentic to be enjoyed by the people of Anglesey and future generations.

How are we going to do it?

- We will work with partners to improve the, heritage, history and cultural offer, developing better information for visitors and using cultural stories and place setting to develop new visitor experiences.

- We will embed and promote the Welsh language and our unique cultural heritage across all elements of the visitor offer, ensuring inclusivity and the culture are core components.

- We will continue to build on and celebrate the investment in the Anglesey Food Tourism Strategy, the Welsh Coast Path, Dark Sky Tourism, adventure sports and wellbeing tourism. We will manage these itineraries with a focus on local heritage and sustainability.

An enhanced visitor offer with sustainability at its core.

Why is this important ?

Sustainable all year visitor infrastructure ensures visitors can experience Anglesey at its finest. Getting these right, with an inclusive welcome and a sense of being in a unique natural environment, will drive longer stays and repeat visits.

Ensuring this infrastructure and offer serves to protect and enhance the environment will be key in growing the visitor economy in a sustainable manner.

What are we going to do?

- We will develop and promote a shared Anglesey brand and shared commitment, celebrating the local community, language and landscape.
- We will build a dynamic and inspiring visitor experience offer based around sustainable enjoyment of the unique qualities of Anglesey, starting with getting the basics right.
- We will ensure key facilities and visitor infrastructure are high quality.
- We will capitalise on Holyhead's position as a gateway for international visitors.
- We will strengthen Anglesey's all-year round product, extending the season and developing an increased number of compelling experiences for visitors and residents to enjoy indoors and outdoors.

How are we going to do it?

- We will improve visitor facilities including car parking, toilets, and electric vehicle charging, as well as a network of quality, accessible footpaths and cycle routes.
- We will consider better ways to signpost attractions, either through digital technology or improved signage and wayfinding.
- We will explore opportunities to integrate destination management considerations into all planning decisions in to ensure public transport, infrastructure and development projects support the visitor economy and the people of Anglesey.
- We will collaborate to ensure cruise and transient visitors provide economic and social benefits to the Island in the most sustainable and environmental way possible.
- Engage with partners to collect, interrogate and share data about tourism in Anglesey, particularly to understand tourism impacts in different parts of the county.

A natural environment which is respected, understood, improved and helps tackle the nature and climate crises

Why is this important ?

The landscapes, seascapes and natural environment of Anglesey is diverse and dramatic, but under threat from a multitude of factors including climate change, over-tourism and tourism offers which degrade these special qualities.

The value of an authentic, coherent destination so rich in natural assets cannot be underestimated. Nature is a core element of Anglesey's brand identity, connecting visitors and locals to the place, its values and character. This can drive measurable wellbeing, economic, social and cultural benefits and must be celebrated and protected.

What are we going to do?

- We will embed effective sustainable destination management principles across all areas of our work, and ensure that the offer enhances rather than degrades the natural environment.

- We will utilise the natural and cultural resources of Anglesey to create and promote a special, distinctive place, distinguished from other destinations.

- We will work with partners to plan projects focussed on delivering a landscape which is healthier, more ecologically rich and connected, and able to act as a catalyst for new visitor opportunities and a reconnection between people and nature.

- We will ensure that the impacts of climate change on destination management are fully understood and that we can make our visitor economy resilient to these impacts.

How are we going to do it?

- We will manage sensitive sites and develop interventions to protect, enhance, and conserve them.

- Through the planning process, we will control development which could threaten the quality of the coastal environment, the Island's visitor appeal, or disproportionately impact individual tourism businesses.

- We will ensure the importance of destination management is embedded in the work of the AONB and natural environment partners.

- We will draw upon research to appraise the likely impacts of projected changes to seasonality of weather on the visitor offer, and plan to mitigate these impacts.

- We will explore opportunities to link destination management with coastal adaptation/natural flood management projects.

A visitor offer which serves to improve our communities, and as a result social and well being benefits are seen.

Why is this important ?

The tourism and hospitality sector are vital to Anglesey's local economy, employing many people. However, support is required to address skills shortages and realise the visitor economy's full potential in delivering social, cultural and economic wellbeing for Anglesey.

Whilst training may be one issue behind this, there are also other more complex factors, such as the seasonal nature of many businesses, or indeed the way young people see tourism as a future career.

What are we going to do?

- We will engage with the community to promote the importance of the visitor economy and supporting infrastructure and services, so residents, partner bodies and businesses alike are bought into the delivery of the experience.

- We will collaborate with education, further and higher education establishments and work with partners to identify both immediate and future key skill sets and resource issues.

- We will work with partners to encourage greater engagement with food producers and local supply chains.

- We will support private sector-led initiatives that deliver economic growth, fair work, employee upskilling and a reduction of carbon footprints on the Island: the kind of behaviours we need for a sustainable tourism industry.

How are we going to do it?

- We will foster opportunities for skilled year round employment

- We will collaborate with the education sector to coordinate action on skills, the perception of careers in tourism, skill shortage and raising awareness of opportunities that the tourism and hospitality sector can offer.

- Ensure that local people are given the opportunities to be at the heart of the offer, taking advantage of new skilled roles and local supply chains.

- We will work to ensure that local low carbon, sustainable supply chains are developed across the industry.

- Ensure that the tourism offer contributes to the viability of services and facilities which are essential to the host communities.

10. Next steps

The first step to delivering the Destination Management Plan is to establish a new partnership model for a Destination Management Organisation (DMO).

A new partnership model is recommended in order to:

- ensure collaboration and buy-in from key private, voluntary and public sector partners;
- make best use of existing resources;
- facilitate effective ways of working which may attract further investment when needed to deliver the objectives of the Destination Management Plan.

Once the DMO is established and supported with a Terms of Reference, the group will work in collaboration to define priority next steps with a SMART action plan.