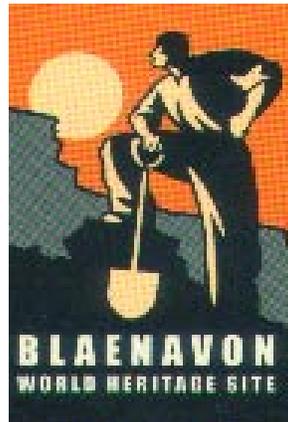


'Destination Blaenavon'



Blaenavon Industrial Landscape

Marketing Strategy

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May 2003

BLAENAVON INDUSTRIAL LANDSCAPE

MARKETING STRATEGY

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1. EXECUTIVE SUMMARY

- 1.1 The inscription of the Blaenavon Industrial Landscape as a World Heritage Site was the culmination of considerable effort and energies, and also a milestone in the regeneration of the area through heritage conservation and tourism development. The inscription provides credence to the outstanding universal value of the area in historic terms, however, inscription brings a number of obligations - namely, to protect, conserve, present and promote the World Heritage Site for the benefit of present and future generations.
- 1.2 This Marketing Strategy forms part of this on-going commitment and has been developed to reflect the needs of all the partners involved in the Blaenavon Partnership. The underlying objective of both the tourism / heritage product development and marketing activity is to ensure that the Blaenavon Industrial Landscape becomes a 'must-do' destination in specific target markets and becomes a known product in the general tourist market.
- 1.3 The visitor offer within the BIL currently has a few significant attractions Big Pit (The National Mining Museum for Wales), Blaenavon Ironworks, Pontypool & Blaenavon Railway, the Abergavenny Brecknock Canal, a Tourist Information Centre, some interpretation schemes but little in the way of visitor facilities. In order for the objectives of the BIL WHS to be met, the product offer requires significant development - everything from accommodation provision to shopping opportunities and toilets need to be brought on line. Significant product development needs to take place before the Blaenavon Industrial Landscape can be pitched as a 'must-do' destination to its specific market sectors or the general tourist market.
- 1.4 BIL needs to establish itself in the marketplace. This Marketing Strategy recognises that whilst BIL is a unique product with great potential, it is not of sufficient size and quality, at its current stage of development, to form a stand-alone product offering to more than a small sector of the market. This strategy sets out to provide a path for the development of the market, combining a range of existing and future developments that will meet the needs of the industrial history specialist and those of the general tourist market. These developments will also produce a product that has appeal to the longer break market as well as the day trip sector. By developing the product to appeal to a wider market the long-term benefits of World Heritage Status will help to ensure economic and cultural sustainability of this significant site.
- 1.5 Product development and marketing need to progress hand in hand, to ensure that the visitor has new products to view over time, thus creating repeat visits, in a controlled manner without building up customer expectations that can not be met. Products (attractions, infrastructure, visitor facilities etc) need to be developed across the area and marketing activity must increase as these come on line at both the local and regional level. Currently a wide range of marketing initiatives are undertaken that

include, where appropriate, the Blaenavon product. This strategy seeks to develop further the existing links to current initiatives rather than replace them.

1.6 While there are opportunities in marketing to develop the destination, the market for Industrial Heritage is limited and Blaenavon has to be linked to other products, at both local and sub-regional level, notably the traditional tourist offer of the Brecon Beacons Park and the rural attractions of Monmouthshire and mid Wales. The aim is to provide the range of products that the modern tourist seeks. This is also necessary to maximise the duration of stay and the economic benefits achieved. At the same time the tourist's other needs have to be met and thus the infrastructure must be developed.

1.7 In summary this strategy aims to assess potential markets suggests product developments, and sets out a costed medium term marketing programme.

2. BLAENAVON INDUSTRIAL LANDSCAPE

2.1 Overview

The Blaenavon Industrial Landscape was inscribed as a World Heritage Site in November 2000. In summary the reason given by the UNESCO World Heritage Committee was:

The area around Blaenavon bears eloquent and exceptional testimony to the pre-eminence of South Wales as the world's major producer of iron and coal in the 19th Century. It is a remarkably complete example of a 19th Century landscape.

Extract from ICOMOS report to the World Heritage Committee November 2000

The Blaenavon Industrial Heritage is a relict landscape in which exceptional evidence of past activities survives, showing evidence of extensive coal mining and ironmaking during what became known as the Industrial Revolution. All of the key components within the landscape benefit from statutory protection. There are two main preserved sites- Blaenavon Ironworks, which is a Scheduled Ancient Monument in state care, and Big Pit, now the National Mining Museum of Wales, is an historic coal mine and museum with many listed buildings. These sites are set in a fossil landscape of inter-dependant mineral extraction, manufacturing, transport and settlement. The total landscape includes a range of Scheduled Ancient Monuments of National Importance, many Listed Buildings of Special Architectural or Historic Interest and the Blaenavon and Cwmavon Conservation Areas. There are also four Sites of Special Scientific Interest, declared because of their ecological significance. Approximately 45% of BIL is within the Brecon Beacons National Park.

The extensive studies, evaluations and assessments undertaken in the context of the Nomination to the UNESCO World Heritage Centre in June 1999 have been beneficial in defining the values of this 'Cultural Landscape' and bringing forward proposals for its protection, conservation, presentation and promotion to the public. The development of a Management Plan was a requirement of the nomination process. The BIL Management Plan identifies the need for a marketing strategy in order that the widest possible audience be made aware of, and therefore have the opportunity to experience the cultural and natural heritage that the BIL has to offer.

Undoubtedly, World Heritage Site (WHS) Status provides the Blaenavon Industrial Landscape (BIL) with international recognition as a valuable cultural asset. It is however, recognised that the inscription will not automatically result in achieving greater awareness or appreciation of the area without considerable dedicated marketing effort, other than in very specific and specialist segments of the market. In order to maximise the potential that the site offers in terms of economic, social and environmental benefits, much broader take-up by the market is essential.

The Blaenavon Partnership (see details below) through this marketing strategy seeks to build on existing markets and to develop new ones. Starting from a relatively low base, activity will increase as awareness of Blaenavon grows and identified development projects highlighted within the WHS Management Plan come on line and additional resources for the marketing function become available.

Alongside this will run the product development plan – enabling greater access to be afforded to the public through the development of a range of quality visitor attractions and facilities, walks, cycle-routes, interpretation etc.

It is anticipated there will also be a growth in the infrastructure in terms of accommodation, restaurants and other services and facilities in and around the Blaenavon World Heritage Site. This should be led by the private sector taking advantage of Government and other grants and new economic opportunities arising from increased visitor numbers and planned developments.

2.2 Administrative Responsibilities

Strategic Interface

From the outset, a number of international, national, regional and local organisations have been fully committed to supporting the BIL bid for WHS Status, recognising that the area played a fundamental role in the development of the Industrial Revolution.

UNESCO through the inter-governmental World Heritage Committee, provides for the inscription of sites of “outstanding universal value” on the List of World Heritage Sites under the 1972 Convention For the Protection of the World’s Natural and Cultural Sites.

The UK Government through the Department of Culture, Media and Sport, has responsibility for preparing a Tentative List of sites which it wishes to nominate to UNESCO for World Heritage Site status. DCMS placed Blaenavon on the Tentative List in June 1999 and the actual nomination was made in June 1999. The Blaenavon Industrial Landscape was finally inscribed as a World Heritage Site in November 2000.

The National Assembly for Wales, through its agencies - CADW, National Museums & Galleries of Wales, The Royal Commission on the Ancient & Historical Monuments of Wales, the Wales Tourist Board and the Welsh Development Agency - are committed to the principles of the World Heritage Convention requiring the protection, conservation, preservation and promotion of the World Heritage site. To date the Welsh Assembly have been fully supportive of Blaenavon both administratively and financially.

The Blaenavon Partnership

In order that a co-ordinated approach to management of the heritage resource could be achieved the Blaenavon Partnership was established in August 1997. The Partnership now comprises Torfaen County Borough Council, Monmouthshire County Council and the Brecon Beacons National Park Authority which have direct management responsibilities, and Blaenau Gwent County Borough Council which lies just outside the nominated site boundary. The Blaenavon Town Council is also a member.

The Government agencies within the Partnership are Cadw, the Royal Commission on the Ancient and Historical Monuments of Wales, the National Museums & Galleries of Wales, the Countryside Council for Wales, the Wales Tourist Board, the Welsh Development Agency and British Waterways. The Partnership also includes the National Trust, which is the premier non-governmental agency concerned with heritage sites in the United Kingdom.

Within the framework of the Blaenavon Partnership the Blaenavon Industrial Landscape Management Committee has been established to agree an overall management strategy and recommend policies, plans and projects for implementation by the various partners acting within their own constitutional framework and using their individual executive powers and individual budgets. This advisory Committee meets twice per year.

The executive management for the Partnership is carried out by the Blaenavon Industrial Landscape Project Board. There are three working groups to deal with specific subjects, which meet as and when required and report back to the main Project Board. One of the groups is the Marketing Group attended by officers of the members of the partnership with tourism or marketing obligations.

Since 1997 the Partnership has maintained contact with community councils and groups including business leaders, residents and the local tourist association. The Partnership has also maintained contact with major landowners in the area and commoners associations who have a direct interest in much of the landscape. In implementing the management plan for the proposed World Heritage Site, these contacts will be maintained and a formal meeting will be called annually.

The Project Board is serviced by the Project Director, who is also charged with ensuring co-ordination and continuity of action between the various partners. There is a small budget available to the Project Director for day to day management. However, the main expenditure is made by the authorities, agencies and other partners within the Blaenavon Partnership through allocations in their individual budgets to specific projects.

The following list describes the partners and their interests in the nominated site:-

Torfaen County Borough Council (TCBC)

Torfaen County Borough Council is the lead authority in the Blaenavon Partnership. TCBC is the unitary authority for just over 50% of the nominated site (including the town of Blaenavon), and has full local government powers and duties including Town and Country Planning and other environmental matters.

Monmouthshire County Council (MCC)

Just under 50% of the nominated site lies within Monmouthshire, which is a unitary authority with full local government powers. However, planning responsibility for nearly all of this area resides with Brecon Beacons National Park Authority.

Brecon Beacons National Park (BBNP)

About 45% of the Blaenavon Industrial Landscape falls within the Brecon Beacons National Park. The purposes of the National Park designation, as amended under the Environment Act 1995, are to conserve and enhance the natural beauty, wildlife and cultural heritage of the area and to promote the understanding and enjoyment of its special qualities. Account must be taken of the economic and social interest of residents. The National Park is the local planning authority for the area within its boundary.

Blaenau Gwent County Borough Council (BGCBC)

None of the nominated site falls within the Blaenau Gwent County Borough Council administrative area. However, as a near neighbour BGCBC has a close interest in the designation and management of the proposed World Heritage Site.

Blaenavon Town Council (BTC)

This is the local council for the town of Blaenavon which is the main settlement within the nominated site.

Cadw: Welsh Historic Monuments

Cadw is an Executive Agency within the Welsh Office. Its general duties are:

- to secure the preservation of ancient monuments and historic buildings;
- to promote the preservation and enhancement of the character and appearance of Conservation Areas;
- to promote the public's enjoyment of, and advance knowledge about, ancient monuments and historic buildings and their preservation.;
- to control, and where appropriate, grant aid the conservation of historic buildings and ancient monuments.

Cadw also has direct responsibility as the guardian of Blaenavon Ironworks, and is preparing a guidebook to the Ironworks and the World Heritage Site, which will be available in 2003.

Royal Commission on the Ancient & Historical Monuments of Wales (RCAHMW)

The RCAHMW is the national body of survey and record. Its aim is to compile and make available an archive of Wales' historic buildings and ancient monuments for use by individuals and bodies concerned with understanding, conserving and managing the built environment.

National Museums & Galleries of Wales (NMGW)

The NMGW exists to preserve and promote the heritage and culture of Wales, within a world context. NMGW has a requirement from its Royal Charter to 'promote understanding and knowledge of the special industries of Wales through the collection and conservation of artefacts and their research, interpretation and display'. NMGW will have specific responsibility for the management of the Big Pit Mining Museum. Its special expertise in conservation and management is available on a day-to-day basis to the Blaenavon Partnership.

Countryside Council for Wales (CCW)

CCW is accountable to the Secretary of State for Wales and is the Government's Statutory adviser on wildlife, countryside, and maritime conservation matters in Wales. It is the executive authority for the conservation of habitats and wildlife. Through partnerships, as at Blaenavon, it promotes the protection of landscape, opportunities for employment and the support of those who live in, work in and manage the countryside. It has enabled the Blaenavon Partnership to pursue countryside management projects through grant aid and can assist with the management cost of the Sites of Special Scientific Interest. CCW were jointly responsible, with Cadw and ICOMOS UK, for the preparation of the Register of Landscapes of Outstanding Historic Interest in Wales, published in January 1998.

Wales Tourist Board (WTB)

The Wales Tourist Board has responsibility for development of tourism in Wales.

Welsh Development Agency (WDA)

The Welsh Development Agency has responsibility to the Secretary of State for Wales for promoting and enabling economic development in Wales and dealing with issues related to land reclamation.

British Waterways (BW)

British Waterways has responsibility for management and maintenance of British Waterways Canals, including the Brecknock and Abergavenny Canal. One of the principal remits of the board is to respect industrial heritage.

National Trust (NT)

The National Trust, as the principal United Kingdom non-governmental organisation with experience in heritage management, is able to offer valuable management advice and assistance.

Blaenavon Partners with specific responsibilities for Marketing

Several of the members of the Blaenavon partners have responsibilities for the promotion of Tourism as set out below. The Wales Tourist Board primary remit is to develop and market tourism in ways which will yield the optimum economic and social benefit to the people of Wales. Through the WTB the South East Wales Regional Tourism Forum has been established. This forum has developed a Tourism Strategy whilst focusing on consolidation rather than new developments expresses the need to undertake ‘creative product packaging’ in order to meet customer needs. The action plan identifies the need to invest in improvement in improvement of existing facilities and interpretation. The strength of the region’s heritage product is well recognised.

Within the World Heritage Site the three local authorities Torfaen County Borough Council, Monmouthshire County Council and the Brecon Beacons National Park all have staff dedicated to the promotion of tourism to achieve economic, environmental and community benefits through a range of product development and marketing initiatives. The Blaenavon Town Council within its modest resources tries to promote the history of the town.

Cadw have two responsibilities one is to protect the historic buildings and monuments of Wales and the other is to present these to the public. Cadw are closely involved in the promotion of the Blaenavon Industrial Landscape, notably as guardians of the historic Blaenavon Ironworks. At the Ironworks Cadw are conserving the historic fabric of the site. This is to enable safe access to the site by an increased number of visitors.

The National Museum and Galleries for Wales have the responsibility of promoting and marketing the Big Pit National Mining Museum of Wales.

The British Waterways Board have staff who are responsible for marketing the attractions of the Abergavenny Brecknock Canal.

The Royal Commission for the Ancient and Historical Monuments of Wales have as part of their responsibilities have a requirement to promote the history and culture of Wales.

The National Trust also promotes sites which it is concerned with protecting so that the general public may appreciate the historic and other qualities.

2.3 Blaenavon Partnership Management Objectives

“The purpose of the Blaenavon Partnership is to protect and conserve this landscape so that future generations may understand the contribution that South Wales made to the Industrial Revolution. By the presentation and promotion of the BIL it is intended to increase cultural tourism and assist the economic regeneration of the area.”

WHS Management Plan

Commonality of Objectives within the Blaenavon Partnership

For the purpose of developing a marketing strategy for BIL, the Mission Statements and organisational objectives of the Partner Organisations support the following principles:-

- To protect
- To conserve
- To promote
- To educate / inform
- To interpret
- To increase income levels
- To increase visitor throughput
- To increase economic, environmental and community benefits

3. SITUATIONAL ANALYSIS

Definitions

*A **tourist trip** is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purpose except such things as boarding education or semi-permanent employment.*

*A **day visit** is a trip away from home which lasts 3 hours or more and which is not taken on a regular basis.*

***Tourist nights** are those spent away from home using any type of accommodation, or in transit, on a tourist trip (as above).*

***Tourist spending** is expenditure incurred while away from home on a tourist trip and on advance payments for such things as fares and accommodation.*

***South East Wales** includes the unitary authorities of Bridgend, Rhondda Cynon Taff, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire.*

3.1 Trends

Free time is becoming an increasingly scarce resource for many sectors of the UK population. Work pressures and more complicated lifestyles are reducing the time available for leisure. Consumers will increasingly seek 'value for time' as well as 'value for money'. Higher earning groups will have less free time than those on lower incomes.

Working structures are becoming more fragmented. The rise of contract and self-employment has contributed to growing job insecurity and a rise in working hours in the UK which is traditionally reserved for leisure. Work and leisure will follow less structured patterns and time available for individuals will become increasingly varied, decreasing the importance of family outings, which will be further affected by changing household structures.

Western societies are ageing as life expectancy rises and fertility rates fall. The key changes to the age structure of the UK population until 2005 are:-

- Rapid decrease in number of those ages 25 – 34
- Strong increase in number of those in 'family life stage' – aged 35 – 44
- Rapid increase in number of older middle aged 55 – 64
- The middle-aged groups will tend to have higher levels of disposable income and their commercial status will increase in importance.

Tourism competes for discretionary spend with a wide range of other products and activities. A combination of global market forces and a low inflation policy in the UK is keeping wage increases down and as a result, income growth will rise only slowly. As a larger proportion of incomes will be spent on funding services previously provided by government, true discretionary spending will be further constrained. Any increases in disposable income will be tempered by greater pressures on time, leading to a cash-rich / time-poor society, making increasing demands for a quality experience and 'value for time'.

In the same way there are competing destinations areas within the UK. Wales, and specific tourism regions within Wales will be in direct competition for UK and overseas visitors with Scotland, the Lake District, the West Country and many other areas.

Long (4+ night) holidays within the UK have been declining since the 70s. Numbers of UK tourists taking holidays abroad is continually increasing, with demographic and lifestyle factors suggesting that this trend will continue. In contrast, the growth observed in short and additional holidays over the last decade is likely to continue.

Between 1993 and 1998 the number of domestic short breaks taken by UK residents increased by 50%, while expenditure increased by 39%, making this one of the fastest growing sectors in the UK domestic holiday market. It is forecast that the number of domestic short break trips will grow by 30.1% between 1998 and 2003. [Keynote, 1999]

Tourism to Wales

Domestic (UK) visitors represent the most important component of tourism demand for Wales. An important additional source of income is derived from tourism day visits to and within Wales.

WTB as part of their Strategy (Achieving our Potential), has set targets to increase visitor numbers to Wales by almost 30% by 2010. There are also good signs that Wales is beginning to make useful gains in international visitors. Between 1994 – 1997 the growth in overseas visits to Wales outperformed the growth seen at the UK level.

Overseas visitors tend to stay longer in Wales than UK visitors, travel more widely, spend more per visit and are more likely to stay in serviced than self-catering accommodation.

Visits to Attractions

Visits to attractions in the UK recovered slightly in 1999 from previous years. Between 1998 and 1999 there was an increase of 1.2% in visits to a constant sample of 3,611 attractions compared with a fall of 1.7% the previous year. This breaks down to a 0.2% increase to attractions in Wales. [*Sightseeing in the UK 1999*]

Visits to attractions by category
 [*Sightseeing in the UK 1999*]

| | |
|----------------------|-----|
| Museums | 19% |
| Country Parks | 18% |
| Historic properties | 17% |
| Leisure Parks | 10% |
| Wildlife Attractions | 6% |
| Other attractions | 30% |

Outdoor attractions fared better than indoor attractions, as the summer weather improved in 1999 compared with the previous year. Visits to steam railways increased their visitors by 4%, whilst in contrast visits to museums and visitor centres fell by 1% and those to historic properties decreased by 0.5%. Historic properties and museums which are more popular with overseas visitors than other types of attraction, would have been disproportionately affected by the 1% drop in overseas tourists that year. [*Sightseeing in the UK 1999*]

The four main consumer markets for tourist attraction visits are international tourists, domestic tourists, domestic day-trippers and local leisure visitors. International tourists account for approaching 20% of trips compared with 20% of residents on long holidays, 10% of residents on short breaks and the remaining 50% from day trippers and casual visitors. The customer/market mix varies considerably by type of attraction and location.

Overseas visitors as proportion of visits by sector
 [*Sightseeing in the UK 1999*]

| | |
|---------------------|-----|
| Historic properties | 33% |
| Museums & galleries | 23% |
| Visitor Centres | 17% |
| Workplaces | 16% |
| Steam Railways | 6% |
| Country Parks | 4% |

Overseas visitors accounted for 16% of visits, as in 1999. Attractions with 30% or more of their visitors from overseas saw a decrease in visits in 1999 (-0.9%) whereas those most popular with domestic visitors saw an increase (+1.9%). [*Sightseeing in the UK 1999*]

Visitor figures at both Blaenavon Ironworks and the Pontypool & Blaenavon Railway showed an increase in both 1999 and 2000 and look to improve again in 2001. (actual figures Blaenavon Ironworks 7,312, and Pontypool & Blaenavon Railway 8,710). Although in recent years visitor numbers at Big Pit have been falling, since their subsumation under the National Museums & Galleries of Wales umbrella, and subsequent

abolition of admission charges, visitor numbers have been rising rapidly (120,000 approx. in 2001).

Key Points

- Consumer requirements are changing – quality is an issue
- Traditional holidays are on the decline
- Shorter, more frequent breaks are increasing in popularity
- Middle-aged sector – significant increase in market size and higher levels of disposable income
- Lower income groups are time-rich, higher income groups are time-poor
- Increasing competition for consumer’s leisure-time and spend
- Value for time is a key issue, as is value for money
- Heritage-based attractions are amongst the most popular
- Weather is an important consideration in selection of attraction visit

3.2 The S.E. Wales Tourism Market

South East Wales has an important tourism economy with large numbers of visitors attracted to the area each year. It is this market that will form the core basis to visitors to the Bleanavon World Heritage Site. The following provides some background tourism data for the area.

Volume & Value

In 1998, domestic tourism trips to SE Wales totalled 2.1 million visitors, generating 5.9m tourism bednights. For the same year, 330,000 overseas visits were recorded, staying a total of 2.1million nights.

Total spending from overnight tourism and tourism day trips to South East Wales in 1998 totalled £606 million.

- domestic tourism £174m
- overseas tourism £70m
- tourism day trips £362m

| 1998 | Visits (000s) | Nights (000s) | Spend (£m) |
|-------------|----------------------|----------------------|-------------------|
|-------------|----------------------|----------------------|-------------------|

| | | | |
|----------------------|-------|-------|-----|
| UK visitors | 2,100 | 5,900 | 174 |
| Overseas | 330 | 2,100 | 70 |
| Total Tourism | 2,430 | 8,000 | 244 |

Source: UKTS/Day visits survey

Overseas Tourism

Overseas tourism to South East Wales had shown a steady growth between 1992 and 1997, recorded visits increased by 36%.

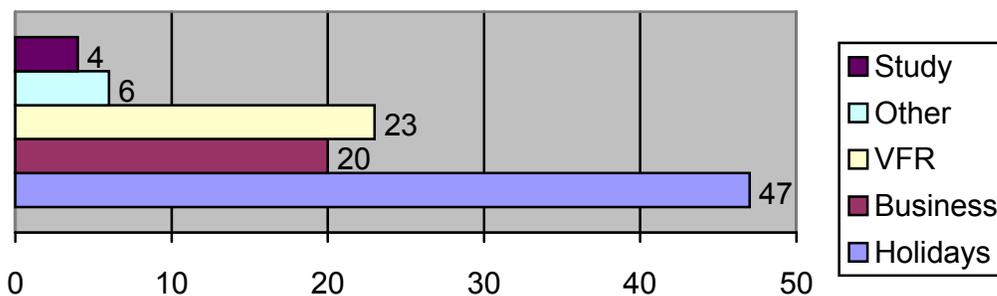
Despite the growth in overseas visits to South East Wales, the region has at best, maintained its share of overseas tourism within the context of all of Wales. The region's share of overseas tourism to the whole of UK has held steady at 1.5%. This sector is higher spending and longer staying than domestic tourism, providing greater economic benefit to the region.

Purpose of visit

Overseas visitors are attracted to South East Wales for a number of reasons. Just under half (47%) are holidaymakers, with one visitor in every five visiting for business reasons.

rc

Overseas Visitors to SE Wales - Purpose of Visit



Source: IPS

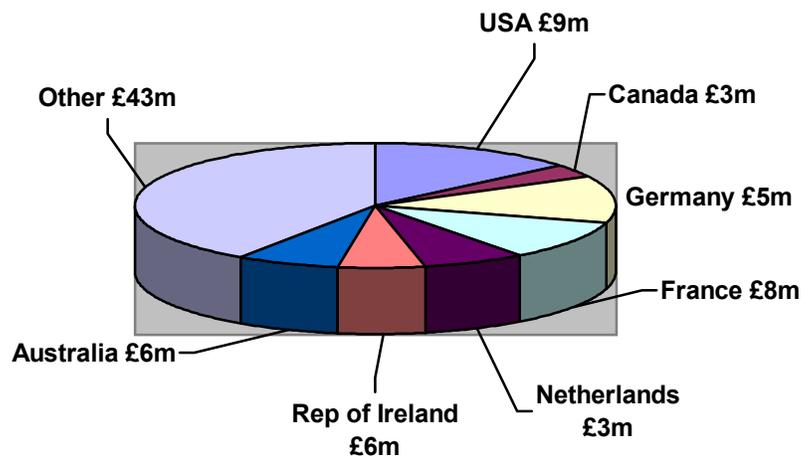
With holidays accounting for 47% of overseas visits, it is not surprising that the third quarter of the year (June – Aug) should be the most popular for overseas visitors to SE Wales, where visits are concerned.

Country of Origin

The United States in 1997 accounted for 16% of Overseas Visitors to SE Wales, is the single most important market for the region. However, the northern European markets collectively are more significant in term of revenue and visits.

Above average growth in visits has been recorded in relation to the French (164%) and Netherlands (71%) markets

Overseas Visitors to SE Wales - Country of Origin 1997



Source: IPS

Domestic Tourism

Over the seven year period between 1990 and 1997, domestic visitor numbers to S.E. Wales grew by 11%, and revenue increased by 17%.

Although there was an increase in domestic bednights to the region between 1990 and 1997, although a net decline was recorded during 1995-1997, indicating the loss in popularity of the traditional holiday, and the growth in short breaks.

In 1999 South East Wales received 2.1 m tourist trips from UK residents (19% of all trips to Wales). Whilst absolute numbers are growing, market share is relatively static. The average length of stay is 3 nights, average spend per trip £82.

Therefore, despite maintaining market share in terms of bednights, the lower rate of revenue resulted in the region producing no real impact in terms of increasing its share of domestic revenue.

Purpose of Visit

45% of domestic visits to SE Wales in 1998 were undertaken by holidaymakers. The other main categories, in terms of purpose of visit were non-holiday VFR and business, accounting for 40% and 13% of visits respectively.

| 1998 | Trips | | Nights | | Spend £ | |
|-----------------|------------------|-------------|------------------|-------------|--------------------|-------------|
| Holidays | 600,000 | 30% | 1,900,000 | 32% | 74,100,000 | 43% |
| VFR on holiday | 300,000 | 15% | 800,000 | 13% | 21,800,000 | 13% |
| Total Holidays | 900,000 | 45% | 2,700,000 | 45% | 95,900,000 | 55% |
| Non-Holiday VFR | 800,000 | 40% | 2,500,000 | 42% | 38,900,000 | 22% |
| Business | 300,000 | 13% | 500,000 | 9% | 34,900,000 | 20% |
| Other | 100,000 | 3% | 200,000 | 4% | 4,500,000 | 3% |
| Total | 2,100,000 | 100% | 5,900,000 | 100% | 174,000,000 | 100% |

Source: UKTS

In terms of bed nights, UK holidaymakers assume even greater importance, accounting for 51% of total bednights in the region.

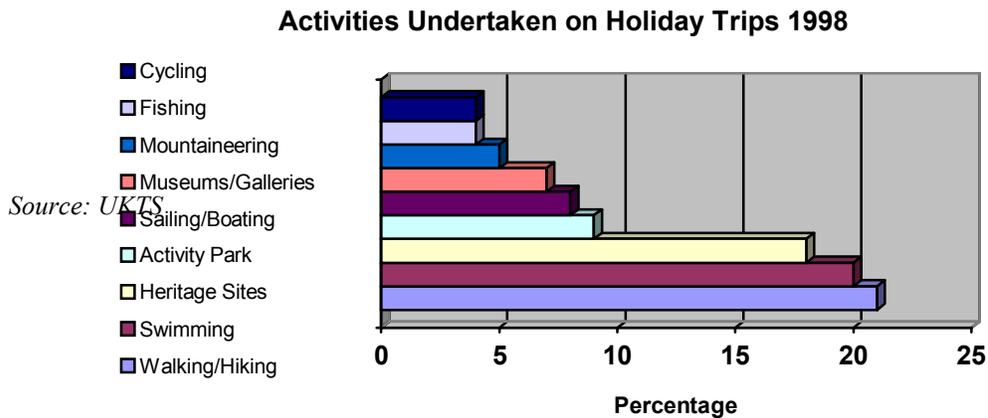
Accommodation Used

| Type | Trips % | Nights % | Spend % |
|---------------|---------|----------|---------|
| Serviced | 22 | 17 | 42 |
| Self Catering | 15 | 17 | 16 |
| VFR | 59 | 61 | 36 |
| Other | 4 | 5 | 6 |

Visiting friends and relatives was the most popular form of accommodation used by UK visitors to SE Wales in 1998. Although only 22% of all tourism trips were to some form of serviced accommodation, these trips accounted for 42% of all tourism spend.

The accommodation statistics for the area are dictated very much by the contrasting patterns of demand in different areas. 85% of the self-catering provision is in the coastal resorts, whilst in contrast, along the M4 corridor, Cardiff and Newport the accommodation is geared very much towards the business visitor. The Heads of the Valleys Road has seen some interest in budget inn investment, whilst the Valleys themselves have only a very limited supply of quality accommodation. The Wye Valley and Monmouthshire generally offers the most balanced array of tourist accommodation with a good selection of hotels, inns, guest houses, farms, self catering cottages and caravan and camping parks.

Activities undertaken on holiday trips



Holiday visitors participated in a range of different activities while visiting South East Wales in 1998. The most popular activities were walking / hiking / rambling (23%), with 11% of visiting heritage sites.

Source Markets

| 1998 | | Trips % |
|----------|-------------------------|---------|
| Wales | | 28 |
| Scotland | | 1 |
| England | South West | 19 |
| | South East | 24 |
| | Eastern | 10 |
| | West Midlands | 7 |
| | East Midlands | 2 |
| | North West / Merseyside | 5 |
| | Yorkshire/Humberside | 2 |
| | North East | 1 |

Source: WTB

In 1998, visitors from England accounted for 71% of all tourism trips taken in SE Wales (and a significant 76% of all tourism spend). The major regions of visitors from England were the South East (including London) and the South West. Welsh residents accounted for 28% of all tourism trips recorded for South East Wales in 1998.

Day Visitors

Some 19.9m day trips were taken in / to South East Wales during 1998. Interestingly, the majority (70%) of trips were taken by adults without children; 8% involved using a leisure attraction; 4% a castle or ancient monument. The average distance travelled was 36.2 miles, average spend £18 (slightly higher than the average for all Wales at £16). The largest portion of this is spent on food and drink.

The average duration of a day trip has been recorded at 5.23 hours, although time spent at the destination is only 3.27 hours. Most trips are made by car (71%), and only 8% by bus or train. Average party size is 4.3 members. There is no evidence of seasonal 'bunching', although weekends are more popular.

Age profile of day visitors

| To South East Wales | | | | | | | | |
|---------------------|-------|-------|-------|-------|-------|-------|-------|-----|
| Age | 15-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ |
| % | 6 | 19 | 21 | 16 | 10 | 14 | 9 | 4 |
| To all Wales | | | | | | | | |
| % | 6 | 12 | 20 | 16 | 13 | 19 | 10 | 4 |

Source: WTB

Seasonal Spread

| | Day Visitor Trips % | Holiday Trips % | Ave % |
|------------|---------------------|-----------------|-------|
| Jan – Mar | 26 | 20 | 23 |
| Apr – June | 22 | 17 | 20 |
| Jul – Sept | 27 | 40 | 33 |
| Oct – Dec | 25 | 23 | 24 |

Source: WTB

The seasonal distribution of day visitor trips was spread fairly evenly throughout the year, whilst holiday tourism tends to be more seasonal, peaking in the third quarter.

Travel Trade

Coach tours account for 8% of holiday trips to South East Wales, 55% of which are to the seaside although there are visible shifts to inland destinations and a growing importance of themed and special interest tours. The market is dominated by the over 55's and is forecast to grow by 20% over the next 10 years. Coach holidays are usually 4-5 or 7-8

nights duration. The seasonal is relatively long, with advantage being taken of the shoulder and low seasons. Average spend per night is £45.

The overseas coach market is approximately $\frac{1}{3}$ the size of the domestic coach market and is dominated by France, Germany and Benelux. The age profile is somewhat younger, with over 50% being under the age of 25 and only 6% over the age of 65. Average length of stay 4-8 nights, with 40% staying only 1-3 nights.

Coach day trips are very price sensitive and dominated by older age groups. Usually to a maximum of a 2-hour drive time and can include attractions, although mobility may be an issue. Operator-generated tours need to appeal to a variety of interests, with options often built in. Driver facilities and benefits are of extreme importance, and venues not offering driver 'comforts' will rarely appear on tour itineraries.

Special interest groups (historical societies, Womens' Institutes etc) have a high propensity to travel in organised groups.

Educational Markets

The educational market provides a significant source of visits to attractions. In the case of Big Pit - in excess of 40% of their visitors were from this sector. This is a good source of repeat business and for growth through further family visits.

Research suggests that there is an untapped educational market for visits to heritage sites in South East Wales from both sides of the border. The only barriers appear to be lack of curriculum related support material and marketing.

The formal education sector has a high propensity to visit sites that have a direct relevance to study areas, provided appropriate resource materials and support are available. This applies to both primary and secondary schools.

Key Points

- Holiday & VFR are the main reasons for visiting the region
- SE Wales has a sizeable existing visitor base
- The majority of visits are made by adults without children
- N. Europe & N America are growth markets for overseas visitors
- Overseas visitors are higher spending than domestic visitors
- Domestic visits appear to be relatively static, although spend is down
- VFR is the most popular form of accommodation for domestic visitors
- Self-catering accounts for only 15% of market share
- There is a limited supply of quality accommodation in the Valleys area, although a good range in Monmouthshire
- Informal recreation and heritage are amongst the most popular activities undertaken whilst on holiday
- M4 & M5 corridors and Wales are the key source areas for visitors to the region.
- The third quarter of the year is still the most popular for domestic and overseas markets time to visit Wales
- Educational markets show huge potential

3.3 The BIL Product & Market

The BIL Product

The Blaenavon Industrial Landscape is a mountain top landscape extending to 33,000 hectares.

The marketable product of the area defined by the boundaries of WHS nomination can be identified as all the component facilities, infrastructure and recreational opportunities that exist within the BIL. These include both the built and natural environment and the interaction that society has had on them.

The current tourism product within the Blaenavon Industrial Landscape is presently made up of the following components:-

| | |
|--|---|
| Big Pit National Mining Museum Pontypool & Blaenavon Railway Blaenavon Ironworks Tourist Information Centre at Ironworks Brecon Beacons National Park Brecknock & Monmouthshire Canal Workmen's Hall Industrial Archaeology St Peter's Church Events Accommodation | Keepers Pond Llanfoist & Govilon Wharfs Garn Lakes Walks Landscape Wildlife 'Refreshment' stops Informal recreation Activities National Cycle Route Cordell Country Tour Library & Community Heritage Centre |
|--|---|

The key attractions within the BIL collectively draw in the region of 100,000 visitors per annum. There is no mechanism for calculating the number of participants in informal recreational activities such as cycling, walking or touring.

Casual visitor numbers at Big Pit increased substantially in 2001 as a result of the abolition of admission charges earlier this year. Both Pontypool & Blaenavon Railway and the Ironworks are currently enjoying increasing visitor numbers, due largely to heightened marketing activities. Although school visits to the Pit and the Ironworks during the first half of the year suffered due to the outbreak of foot & mouth.

The refurbishment of the old Town Hall in the centre of Blaenavon is well underway, as are plans to establish a heritage centre in the basement of the building. Progress has been made at St Peter's School, taking the project a step further towards restoration and re-birth as a stand alone visitor attraction and centre for the World Heritage Site. A feasibility

study is currently being undertaken on the potential of an extended and expanded Pontypool & Blaenavon Railway.

SWOT Analysis

In planning the marketing strategy it is useful to consider the World Heritage Site's strengths, which can be promoted and built upon; its weaknesses, which must be compensated for wherever possible; the opportunities, which must be taken advantage of; and the threats, which may be counteracted.

| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> World Heritage Site inscription Distinct heritage product Proximity of recognised 'destinations' Wide recognition of key attractions Good road networks (for main part) Community support Strong partnership Support of key national players Authenticity Good local sign-posting | <ul style="list-style-type: none"> No accommodation base Poor public transport links Poor perception of 'Valleys' as a tourist destination Almost total dependence on public sector investment Poor local visitor levels No formal links between attractions Often hostile winter climate Vandalism / Litter Negative image Lack of facilities for children, elderly and disabled Single focus Limited product |
| Opportunities | Threats |
| <ul style="list-style-type: none"> Partnership Marketing New products / developments Existing marketing campaigns Compendium of inter-related products Development of 'distinctive' identity Proximity to sizeable markets NMGW take-over of Big Pit Improve / increase facilities Community involvement Introduction of free admissions to Big Pit South Wales Industrial Heritage Strategy | <ul style="list-style-type: none"> Competition – displacement effect of new attractions Public expenditure cuts 'Green' constraints on travel Any decline in educational markets Changing leisure patterns Over capacity in heritage markets |

Existing Markets

Whilst there has not been any recent visitor research undertaken within the World Heritage Site, previous studies undertaken by Torfaen County Borough Council (1994) and the Valleys Campaign (1998) provide helpful indicators to substantiate the profile of visitors to Big Pit. This information would be fairly representative of visitors across the WHS.

| Comparative Visitor Surveys Relating to Big Pit | | | |
|---|--------------|--|---|
| Visitor Profile | | Torfaen Visitor Survey 1994 | Valleys Campaign, Day Visitor Survey 1998 |
| Type of Survey | | Visitors to attractions in Torfaen surveyed: sample size 729. This information relates particularly to Big Pit | Day visitor survey: sample of 1,685 who requested day visitor information |
| Age Profile | UK pop'n (%) | % | % |
| 18 - 24 | 16 | 12 | 4 |
| 25 - 34 | 20 | 23 | 15 |
| 35 - 44 | 17 | 33 | 31 |
| 45 - 54 | 15 | 20 | 22 |
| 55 - 64 | 12 | 8 | 14 |
| 65+ | 20 | 4 | 12 |
| Social Classification | | High concentration in ABC1 group – 53.1% | Not available |
| Group Composition % | | | |
| Alone | | 1 | 3 |
| Partner / couple | | 26 | 23 |
| Family | | 39 | 68 |
| Friends | | 14 | - |
| Family & Friends | | 13 | - |
| Organised Group | | 7 | 4 |
| Type of visitor % | | | |
| Day visitor | | 36.5 | Day visitors only included |
| Staying visitor | | 63.5 | |
| Reason for visit % | | | |
| Holiday | | 67 | 33 |
| VFR | | 24 | 42 |
| Educational visit | | 4 | - |
| Business & other | | 3 | 17 |
| Previously lived in Wales | | | 8 |
| Distance Travelled % | | | |
| 0 – 30 mins | | 24 | Question not asked |
| 31 – 60 mins | | 43 | |
| more than 1 hour | | 32 | |
| Activities of most interest (ranked in order) | | | Castles & Heritage Shopping Adventure & Activities |

Source TCBC, Marketflair

In addition, a small visitor survey was undertaken for Big Pit by Beaufort Research in the summer of 1998 and Easter 1999. Key findings are listed below:-

- 42% of visitors came from within Wales, 43% from elsewhere in the UK and 15% from overseas.
- Majority travelled between 30 mins – 1 hour (40%)
- Visitors predominantly from South Wales (42%). The South (13%) and the south west (15%) of England represent the largest origin of UK visitors outside of Wales.
- 49% of visitors were concentrated within the 25 – 44 age range.
- Big Pit attracts a high percentage of people in AB and C1 social class groups; 33% classed AB; 35% as C1.
- 20% of visitors were travelling with partner or friends; 63% with family; 14% as part of an organised group.

Market Segments

Partners within the WHS grouping actively target the market segments listed below through a variety of campaigns. In the case of attractions, the product(s) are the focus of marketing activity, whilst in the case of the local authority and the BBNP, the destination is the prime focus, with attractions being used as a ‘hook’.

Local residents and day visitors

The population within a 30 minute drive time is in the region of 250,000. The regional population within SE Wales and Bristol, Gloucestershire, Hereford and Worcester is approximately 3 million.

- Day visitors represent around 40% of visitors in the summer and 60% of visitors in the low / shoulder season.
- There are few visits made by local residents to Big Pit and the other attractions in the World Heritage Site. The exceptions are perhaps the special events that are held at the Ironworks and the Pontypool & Blaenavon Railway.
- Day visits are drawn from South Wales, the south and the south west of England.
- Big Pit is one of the primary reasons for selecting the Gwent area for a day trip.

Tourists (UK & Overseas)

- In the region of 60% of tourist visits occur during the summer.
- The area (and attractions individually) are promoted in the main throughout a 1.5 hour drive catchment.
- Leaflets appear to be a successful promotional tool.

- VFR (Visiting Friends & Relations) represents an important market segment. Good source of repeat business.

Group Visits

(educational, special interest groups, coach tours & day excursions)

Big Pit, the Ironworks and Goytre Wharf currently welcome group visits. Other attractions and facilities within the World Heritage Site have never actively promoted to this market segment.

- The potential educational market for the World Heritage Site is in the region of 500,000 pupils (primary & secondary) within a 1.5 hour drive time. In addition to this there are higher educational and overseas educational visits which are not quantified.
- Experience at the Ironworks indicates that schools parties will travel from as far away as Essex if the trip meets with objectives.
- Approximately 55% of visitors to Big Pit and 75% of visitors to the Ironworks were part of an organised group (1998 & 99). Roughly half of these, in the case of Big Pit, were from overseas.
- Coach parties create seasonal, mid-week and day peaks at Big Pit. Coach operators tend to be more concentrated on summer weekends and school parties mid-week in the spring.
- Good source of repeat business if experience felt to be positive.
- Average group sizes are 39 for school parties and 27 for other groups.

The Wales Tourist Board have identified affluent retired couples, affluent empty nesters and better off families with older children as the primary target markets for Wales. Younger professionals and younger better off families form their secondary markets for targeting.

The Tourism Working Group of the South East Wales Regional Tourism Partnership (Capital Region Tourism) have also identified the same groups for targeting, although with slightly differing priorities taking into account the nature of the product offer. The overseas markets being targeted by the region are selected on the basis of market intelligence undertaken by the British Tourist Authority. Whilst many of these are co-terminus with the markets targeted by the WTB, the Partnership also target additional special interest segments.

Existing Marketing Activities

There is a range of marketing initiatives undertaken by the WTB, some in partnership with local authorities, through appropriate Area Marketing Campaigns, which actively target these market segments in a geographic context. Regional and National media are used through a co-ordinated UK marketing campaign supported by all local authorities in Wales. This has the benefit of maximising exposure and minimising costs. Each Marketing Area is free to buy in the most appropriate media elements in order to tailor marketing activities precisely to target markets

The Valleys of South Wales (Marketing Area 10), The Vale of Usk and Wye Valley (Marketing Area 12) and the Brecon Beacons National Park have boundaries within the World Heritage Site. Attraction and accommodation operators from within the WHS have the opportunity to buy space in these publications (which are backed by national advertising and direct marketing campaigns) where they feel it is of benefit.

In addition each of the attractions within the World Heritage Site undertake their own marketing activities, which vary according to the individual operators needs, benefits and constraints. A number of the attractions within The WHS also belong to a various marketing consortia which provide benefits of collective marketing campaigns.

The local authority undertakes a whole range of marketing activities to support the area and its tourism products. These can be summarised as follows:-

Overseas Marketing

Activities undertaken in Northern Europe, Canada, USA and Australasia. Operates as a partnership initiative with WTB and other local authorities within South East Wales. Additional activities are undertaken in conjunction with the BTA. Press, PR and familiarisation are an integral part of campaign activity. In the region of 30 overseas exhibitions are attended each year, a presence maintained in BTA overseas offices in the target market areas, which are combined with advertising, promotional activities and direct mail.

Travel Trade & Business & Conference

Aimed very specifically at these market sectors. Dedicated pieces of print produced. Targeted direct marketing undertaken. Trade press, PR and familiarisation activities undertaken. A full programme of exhibitions attended. Partnership of local authorities and private sector within South East Wales.

UK (Domestic Marketing)

A general marketing campaign, running alongside the WTB's promotional activities. Partnership of Valleys area authorities, making up Marketing Area 10 (currently promoted under the banner of Heritage Breaks). Activities include press and PR, familiarisation and media advertising in conjunction with the WTB. This campaign focuses on attracting staying visitors into the area, whilst the day visitor market is addressed on behalf of this campaign by the South East Wales Attractions Partnership.

Precinct Promotions

Torfaen have been undertaking precinct promotions this year for the first time, in an attempt to counteract the impact of Foot and Mouth last year. These appear to be going well with a generally positive response from the market. Evaluation of this activity will take place at the end of the initiative and decisions will be made as to continuation or otherwise.

Local fulfilment print

Torfaen produces a limited amount of print for local consumption, including an attractions and accommodation guide and an events publication. These are locally distributed through attractions and accommodation providers, all manner of public buildings and the Tourist Information Centres within the greater Gwent area. They are also mailed to enquirers and to the existing database.

Websites

Torfaen's recently developed tourism Website provides information on the area to potential visitors. It also links directly with operator's sites.

The WTB's 'data management system' is a vast portal of information on all of Wales, providing links, information and direct booking facilities.

The World Heritage Site Website was established during late 2000, providing information on the significance of the site in terms of the inscription.

All of these are at an evolutionary stage and will develop over time.

Themed Marketing

There are generally a few themed marketing campaigns in operation at any one time, taking advantage of emerging trends and market opportunities. Participation in these is undertaken where they are deemed to be applicable and where resources allow.

Consortia-based activities

The Council participates and assists Marketing Consortia such as the South East Wales Attractions Partnership, Gwent Association of Tourist Attractions. These organisations undertake valuable work in promoting the area with an attractions focused lead. They tend to be day-visit orientated, although not exclusive. They generally promote their members within an area of up to 2 hours radius.

Information Provision

The provision of information for visitors is handled in a variety of ways by the local authority. The Tourist Information Centre at Blaenavon is the key recognised focus for enquiries, be they in person, by telephone, fax or e-mail. The TIC is part of the WTB's DMS (Destination Management System - outlined above), and also the Wales TIC Network.

Enquiry handling is also undertaken by the tourism section, where it comes directly into the office.

Cwmbran Shopping provide information to visitors through their Information Centre located in the town centre.

All attractions and accommodation providers within the area act as advocates for each other, providing information to visitors and helping to spread them throughout the area. This aspect is reinforced through the Tourism Forum.

Key Points

- The Blaenavon Industrial Landscape area has a sizeable and varied product;
- Target markets for the region identified;
- Visitor generating areas identified
- A wide range of marketing activities are currently undertaken by public bodies, public/private sector consortia and individual operators;

4. DEVELOPING THE PRODUCT

4.1 'Destination Blaenavon'

If Torfaen County Borough Council and their World Heritage Site partners want to realise the benefits of World Heritage status, then they must work to develop the tourism product to make it a more attractive marketing proposition. Blaenavon has been internationally recognised for its historical merit, not for its visitor infrastructure. World Heritage designation can be used as a unique selling point to attract significant numbers of visitors into the area, but tourist infrastructure will have to be provided to ensure that these visitors have a positive experience.

This is not to negate the very real potential which is offered by the World Heritage listing for Blaenavon, but to highlight the inadequacies in the product that is currently offered to visitors. No matter how interested in industrial history Blaenavon's visitors may be they will need (and will expect) some visitor necessities and niceties!

- They will want to feel confident and excited about their visit, which should be reinforced through literature and welcoming entry signage.
- They will expect clear signage to car parks, and tourist facilities as well as visitor orientation at key entry points.
- They will want shops, cafes, pubs and restaurants where they can get something to eat and drink and buy postcards, maps, guidebooks and souvenirs of their visit.
- They may need to ask for directions from local people - to attractions, roads, hotels and campsites - and they will expect a knowledgeable and helpful response.
- They will need toilet facilities which are accessible for all (including families with babies and wheelchair users).
- They may want to stay the night/weekend in Blaenavon.
- They will also expect a level of quality in the provision of these facilities, which is based upon the international status which has been conferred upon Blaenavon.

The provision of these things adds up to a recognition, on the part of Blaenavon, that they are proud to be a World Heritage Site and ready to host visitors from around the world.

4.2 The Vision – Achieving 'Destination Blaenavon'

Torfaen County Borough Council and its partners must have a clear vision of what they want to achieve in Blaenavon - **an internationally recognised World Class Tourist Destination**, based upon the World Heritage Landscape. This will be the way that time and money invested in the nomination bid can best be returned to the local economy.

To achieve the relatively modest visitor target of 175,000 visitors pa (Blaenavon Economic Impact Study Report/Phase 2 by the Welsh Economic Research Unit, Cardiff Business School) to the Blaenavon World Heritage Site over the next 5 years investment needs to be made in product development and marketing - now. Product development, both physical work to improve the infrastructure and quality of the attractions, facilities and landscape of the World Heritage Site, and increased marketing activity to complement the physical improvements, must progress hand in hand.

Marketing activity must ensure that visitors do not arrive with false expectations of the World Heritage Site. It would be easy to frustrate visitors who cannot find public toilets or a place to stay or eat. So the marketing messages should be responsible and truthful. In fact visitors often like to feel they are seeing something before the 'masses' arrive, and with care and thought visits to the Blaenavon World Heritage site could be effectively promoted through this theme of a 'developing destination'. The key will be to grow the visitor numbers steadily, using existing facilities imaginatively, whilst developing the infrastructure on the ground.

Visitors must also be made aware of future plans and developments, so that they will make return trips to the area. This will avoid any visitor dissatisfaction with the product on offer at present. Education and orientation are crucial and until St Peter's School is in a position to receive and inform visitors, this activity must be carried out elsewhere in Blaenavon. Promotional material, as well as the attractions, have an important role to play in getting across the message that this is a developing tourist destination.

Product development and skilful marketing will be the key to Blaenavon's long-term success. Many product weaknesses have been identified in previous studies. Some have been, or are currently being addressed through funding bids. Several infrastructure projects have been included in the 'Matrix' list of projects identified by Torfaen for Objective 1 funding and other grants including Heritage Lottery Fund support. However product development does not happen overnight – it is a long-term strategy which needs investment and perseverance to see to fruition. Successfully pursued it will create a tourism destination that will be capable of attracting and pleasing hundreds of thousands of visitors annually, providing substantial benefits to the local economy – **'Destination Blaenavon'**.

This report on product development draws on all the studies and proposals that have been put forward for the World Heritage Site in an attempt to compile a comprehensive list of the various elements of the 'tourism product' which will need developing to achieve 'Destination Blaenavon'. These elements have been grouped together in relation to the development of 1) Tourism Infrastructure, 2) Tourist Attractions 3) Blaenavon Town 4) Countryside Access & Interpretation 5) and Marketing of the World Heritage.

Tourism Infrastructure

Weaknesses of the Tourism Product within the World Heritage Site

The list of weaknesses detailed below are by no means all of the weaknesses in the tourism product as it currently exists. However this list provides an indication of the depth and breadth of work which is required to overcome these problems.

- Lack of a clearly articulated vision for the future of the World Heritage Site.
- No public toilets
- Limited retail offer in the shops, (no postcards, guidebooks, maps)
- Many of the shops are boarded up or empty.
- Limited catering – few places to get food and drink.
- No accommodation available in town - no hotel, B&B, hostel, camping or self-catering.
- There is no visitor orientation point or visitor centre related to the World Heritage Site.
- Approaches to the town/World Heritage Site are untidy/uninspiring!
- The Tourist Information Centre is not accessible when the Ironworks are closed. There is no Out-of-Hours information for visitors arriving late in the town needing to find somewhere to stay. (There could be some winter provision in a local shop where leaflets about the town and accommodation details could be picked up.)
- There are no signs in the town to show visitors where facilities are.
- There's nothing to tell visitors they have reached, or are going through, a World Heritage site: there's nothing to show that Blaenavon has been recognised by the rest of the world as somewhere worthy of preserving!
- There is little animation, activity or interpretation within the World Heritage Site.
- Local people do not appreciate the opportunities of World Heritage Site status and are becoming cynical because change is slow.
- There is little in the way of comprehensive Tourist guides or leaflets providing information on '**Destination Blaenavon**'.
- There is only limited joint marketing between the attractions operating within the Blaenavon World Heritage Site.
- The tourism product is heavily skewed to interest an industrial heritage market. There are limited facilities having 'general appeal'. (The development at St Peter's School, and improvements to the railway and improved access to the canal and landscape will provide an integrated visitor experience for those not purely interested in a visit to a coal mine or ironworks.)
- The various sites are not linked together by any transport network.
- The limited access points out to the countryside of the World Heritage Landscape are poorly defined and without interpretation.

Developing Tourism Infrastructure

This section looks at the improvements needed to resolve key aspects of the tourism infrastructure within the world heritage site.

Interim Orientation and Visitor Reception Facilities

There is an urgent need for a temporary, ‘mini’ orientation/education centre within Blaenavon, to inform the local community and visitors about the World Heritage Site and its development. An empty shop in the town centre and space at Big Pit should be secured and dedicated to this purpose, until St. Peter’s School comes on line. A low-key and low-tech solution will be sufficient - displaying drawings, plans and maps which show the various proposals. This would provide a valuable educational resource until St. Peter’s is operational. It would also offer the opportunity to engage with the local community and to secure their long-term involvement in the development of the World Heritage Site. (To underestimate the value of this ‘development’ phase is to miss a huge marketing opportunity – visitor facilities provided to view the building of the Second Severn Crossing and the Channel Tunnel became important tourist attractions in their own right.)

A temporary centre would also provide an opportunity to discover more about the market and visitors’ expectations, desires and requirements which would help shape future product development. There could also be retail activity – sales of maps and guides and branded Blaenavon World Heritage site merchandise items, which are detailed later in this report.

Transport

Investigation should be made into the possibility of European funding to provide sustainable public transport to link the World Heritage Site attractions together. It might prove cost effective to buy an old bus and operate it as a tourist attraction its own right. Driver-guides should help interpret the World Heritage landscape. Bike racks and storage space for other countryside users’ equipment should be a consideration. As well as linking the industrial heritage attractions, the bus should provide access to walking and cycle routes within the surrounding countryside. It could also provide transport links with the Brecon Beacons National Park and Abergavenny, traditional tourist generating areas.

The key sites that need linking are Blaenavon Town Centre and St Peter’s School, the Ironworks, Blaenavon High Level Station, Big Pit, the Pontypool & Blaenavon Railway (and depending on the railway extension the Whistle Inn/Waunavon), Garn Lakes, Keeper’s Pond and Llanfoist Wharf.

Accommodation

It is vital that the accommodation sector is developed because there is no provision within Blaenavon, however, 45% of the World Heritage Site lies between Monmouthshire and the Brecon Beacons National Park. Facilities within the rural area have tended to benefit from visitor expenditure which would have been very beneficial to Blaenavon. This is particularly so for accommodation because it is one of the largest proportions of visitor expenditure. The potential leakage out of the local economy will remain large as long as there is nowhere to stay in Blaenavon.

As the product development planned for the World Heritage Site progresses, there will be too many attractions to see in Blaenavon in one day and the demand for local accommodation will increase. Once the product offer becomes of interest to the short break visitor there must be suitable accommodation available within the World Heritage Site.

To raise awareness of the opportunity for accommodation development projects it is proposed that a seminar, 'Opportunities for Accommodation Development' should be held in the town, aimed at local people. The seminar would explain the opportunities offered through World Heritage listing and provide assistance in accessing Wales Tourist Board grant aid. Partners in this seminar and follow up campaign would be Torfaen, the Wales Tourist Board and possibly the WDA.

It has been suggested that the cottages at Blaenavon Ironworks could be converted to self-catering accommodation. It is unlikely that Cadw would want to diversify into this sort of commercial activity, but if the National Trust are involved with St Peter's School, then they may see merit in closer involvement with Blaenavon, through the Stack Square cottages. They have a successful holiday property arm to their business and few properties in this part of Wales.

Car Parking

It will be necessary to improve car parking to allow easy walking access into the town centre, and safe parking at access points into the industrial landscape. Visitor orientation and pedestrian signage needs to be provided at each car park. Careful analysis of future space requirements needs to be made in the light of visitor targets. Enhancements to existing car parks within Blaenavon is under way. The key sites for car parking provision/enhancement during 2002/3 are:

- St Peter's School
- Blaenavon Ironworks
- Keeper's Pond
- Pwll Du
- Pontypool & Blaenavon Railway
- Llanfoist Wharf

Coach Parking

It is vital to designate coach parking space within the town close to the attractions, and to sign it clearly on the approaches into the town. Proposed provision of 2-3 coach spaces adjacent to St. Peter's may need to be revised upwards as visitor numbers increase. Consideration should be given to the provision of a suitable site for a coach driver's facility within the town centre. A self-contained room with toilet, TV, kettle, microwave and fridge facilities, would enhance the coach driver's experience of Blaenavon. This type of provision can repay the investment many times as it builds driver loyalty and repeat business. Possible sites include St. Peter's School, The Heritage and Cordell Museum, and the Ironworks.

Road Entry Signage

Securing road entry signage on all the main routes into the World Heritage Site is vital. Branding needs to be carried through on this signage and the World Heritage Site logo (or a simplified version of it) incorporated.

Tourism signage from the M4 corridor, A40, and A465 will be crucial in assisting visitor movements and raising the profile of the World Heritage Site. The possibilities of European and WTB funding should be investigated and an application made now to the Highways Authority/ Welsh Assembly as signage approvals are notoriously lengthy to achieve.

Pedestrian Signage

A comprehensive scheme for pedestrian signage around Blaenavon needs to be implemented. The World Heritage Site logo should be incorporated. To ensure a co-ordinated and consistent approach town centre signage should complement countryside trails and rights of way signs.

Public Toilets

Blaenavon has achieved international recognition and the town must provide the most basic of facilities - public toilets - for visitors who may have come from all over the world. Existing provision does not allow for the visitor who may need a toilet at 2pm on a Friday afternoon (when the Library is closed). Refurbishment or preferably replacement of the old toilets in Lion Street must be an integral part of the wider town improvement scheme.

4.3 Product Development at the Tourist Attractions

This section looks at the improvements required to develop the product at each of the tourist attractions within the World Heritage Site.

Big Pit National Mining Museum

Taken over by the National Museum & Galleries Wales in 2001 and renamed 'Big Pit National Mining Museum of Wales', this is Blaenavon's main tourist attraction and will remain so for the foreseeable future. It must sustain its visitor numbers if the World Heritage site is to become a genuine visitor destination. Big Pit has secured £7 million funding to be invested on capital development over the next 3 years, upgrading facilities and improving the product offer. When complete, the re-developed Big Pit will provide significant orientation about the World Heritage Site.

Product Weaknesses

Since taking over Big Pit's management National Museums and Galleries Wales have identified a number of weaknesses:

- Lack of investment over last decade.
- Urgent need for facilities to be upgraded and renewed.
- Need for a new attraction on site.
- Need to improve the landscape on the approaches between Big Pit and Blaenavon.
- A current weakness from this study's viewpoint is the lack of visitor orientation about the World Heritage Site at Big Pit, although this will be addressed as part of the de-development of the attraction.

Product Development Plan at Big Pit

National Museum and Galleries Wales are addressing many of these weaknesses through the capital investment programme. They will be carrying out improvements to the fabric of the site, restoring and conserving the Grade II listed buildings. Their aim is to maintain a historic core of buildings on the surface which look like a coal mine. The quality of the restoration and rebuilding work will be on a par with buildings that have been conserved at St. Fagans. This will ensure that in the future the site looks much more like a coal mine and less like a tourist attraction.

The capital development programme includes new build elements:

- An Operations and Resource Building with a research facility.
- A purpose-built Workshop & Store which will be designed to allow the public to view conservation in action, as conservators work on both fine and heavy objects. This will help combat criticism that much of the National Museum's collection is not accessible to the public. It will also help to make the visitor experience at Big Pit more interactive and will offer a wider appeal than the coal mine experience.

It is planned that a new exhibition will be housed inside the existing buildings. There will be mining galleries and mining simulation displays and the AV theatre will be updated using high-tech interpretation methods to interpret modern mining methods.

The Pithead Baths will remain a traditional museum with exhibition objects in glass display cases and supporting information panels.

It is proposed to locate a visitor orientation panel adjacent to the pithead baths, where there is a good panorama of the surrounding countryside and town. This will point out features in the World Heritage Landscape and allow visitors to work out where they are in relation to Blaenavon's other historic sites. There will also be some visitor orientation displayed in the reception area with information on the World Heritage Site.

The Underground Tour will remain largely unchanged apart from some amendments to improve the accuracy of the tour.

Work is scheduled to begin in 2002 and finish in 2004. A finance package involving funding from the Heritage Lottery Fund, Wales Tourist Board, The National Assembly for Wales, Garfield West, Private Trusts and the Coalfield Trust has been put together. By 2004 it is envisaged that there will be over 50 people employed on site and that Big Pit will be attracting in excess of 120,000 visitors.

Other Product Development Issues Not Addressed by the Current Investment Programme:

- The approach road from Big Pit to Blaenavon town needs to be improved to make it a more attractive entry route into the town.
- Big Pit's physical links with other sites within the World Heritage Site needs to be further considered – possibly through transport links.
- Big Pit will provide space for clear and easily accessible visitor orientation about the World Heritage Site. Visitors to Big Pit will not be allowed to leave the attraction without being aware of the World Heritage Site and the other attractions within it.

Developing Marketing Activity

Now it is part of the National Museums and Galleries of Wales's portfolio, Big Pit will benefit from the marketing activity of this major Welsh tourism operator. The priority is to address seasonality issues, spreading visitors over the shoulder months of November, December and January. This is particularly difficult when entry is free and visits are

heavily skewed towards the summer holiday months - a price sensitive policy doesn't work when there is no admission charge.

Joint ticketing is also problematic due to the free entry policy. Big Pit has made recent moves to carry out a joint ticketing venture with the Railway, who offer a ½ price travel discount to passengers showing a Big Pit ticket. The truck token proposal (which is detailed later) could be introduced at Big Pit.

Big Pit believes that best value can be put on the marketing effort through improving web activity and through regular networking with the other Blaenavon attractions. Big Pit also sees potential in looking at the educational offer of each of the attractions in Blaenavon and analysing how they fit together. A co-ordinated approach would improve the 'sales pitch' to teachers and increase the benefits to each individual site.

Key Issue To Address

The key issue for the World Heritage Partnership is Big Pit's relationship with the other attractions in the World Heritage Site and the town itself. As the major tourist draw in the area and a World Heritage partner Big Pit has a responsibility to act as a referral point for the wider Blaenavon Industrial Landscape, especially in the period before St. Peter's School comes on line. Big Pit must, over the next few years, act as the 'selling on' point for visits to other attractions in the town and the World Heritage landscape.

Blaenavon Ironworks

Under the guardianship of Cadw the Blaenavon site is one of the best preserved early Ironworks in Europe. There is an extensive programme of conservation work underway although Cadw is working towards a Monument Management Plan for the Ironworks, it can only increase public access to the site as conservation work allows. The desire to improve public access is secondary to conservation and safety objectives.

Torfaen County Borough Council manages the visitor services on the site, having responsibility for custodial duties, guiding and information provision. This is undertaken through a contractual agreement with Cadw who provided tapered funding (which has now ended). Torfaen should consider renegotiating funding arrangements for the site management services they are now providing to Cadw free of charge. (Cadw pay the costs of employing ticket sales staff at their other sites.)

Torfaen also operate the Tourist Information Centre located on the site in the restored former pay office. Through this centre increasing numbers of educational visits have been organised.

Enhancements to the car park adjacent to the Ironworks, and to the visitor approach to the Ironworks' entrance are underway. This will greatly improve first impressions of the site.

It is also hoped to get the water balance tower working as a participative visitor experience, taking people from the lower level to the top. This would give the Ironworks a unique and highly attractive visitor experience. However, given that conservation and safety imperatives must take a priority, it may never be possible to carry people up and down the tower without unacceptable modifications to the historic structure.

Events to bring the social history of Blaenavon to life have been held in recent years at the Blaenavon Ironworks including a highly successful 'Son-et Lumiere' in September 2001.

Recently Cadw have strengthened the interpretative information on this site by the provision of high quality models including one of the Ironworks in its heyday approximately 1850.

Product Weaknesses

- The temporary nature of the entrance to the Ironworks, and the visitor facilities, do not give a good first impression to visitors
- There is limited public access to the site.
- There is limited on-site interpretation.
- There are limited visitor facilities.
- There is little movement or action on site to capture the visitor's interest.
- The development of the site is constrained by Health & Safety issues.
- There is no formal, long-term visitor management plan for the Ironworks.
- There is confusion in the market place caused by free entry to NMGW attractions, such as Big Pit. The situation as it currently stands is irrational to the paying visitor.
- The site only receives c.7000 visitors p.a.

Product Development at Blaenavon Ironworks

Increased public access is important in ensuring that the Ironworks continue to grow as a tourist attraction.

As identified above, Cadw do not have a long-term visitor plan for the Ironworks site. However they are currently working on a number of schemes to improve public access to the buildings on the Ironworks site. They have designs in place for a path which will take visitors around the cottages in Stack Square, past the yard and up to the top of the balance tower. However the work involved in this could cost over £500,000 to resurface the paths, repair walls and provide railings. It is therefore unlikely that all of the intended improvements to visitor access will be achieved in 2002. Cadw do hope to secure public access to the furnace yard and the balance tower at least, during this year, if it is safe to do so.

The provision of a pedestrian footbridge has been suggested but would be costly. This would create a powerful visual link into the site and a new landmark for the World Heritage Site, allowing also a much safer access than the awkward road crossing (especially for school parties), and give a level access to the TIC.

From a product development viewpoint there is an urgent need to secure visitor access to the top of the balance tower, the cottages, the bottom of the balance tower and furnace 2 and 4. (The only other significant attraction on the site which could be opened up to public access is the top of the blast furnaces, but this would be a long term objective.)

Interpretation

The interpretation of the Ironworks was improved during 2001 with the installation of two scale models of the Ironworks and the Industrial Landscape. The interpretation of the cottages in Stack Square however remains limited, although Cadw have plans for extending this. In the longer term Cadw would like to provide some basic furnishings indicative of the nineteenth century within the end two cottages of Engine Row. (There are staffing issues related to any increase in security requirements on the site, and at the present level of conservation, Cadw feel there is insufficient justification to radically change the visitor experience.) However better interpretation, particularly of domestic history, would widen the product appeal and increase the number of visitors to the site.

Torfaen County Borough Council have been instrumental in developing a pool of first person interpreters who provide occasional re-enactments of life in the Ironworks. A small group has been established and a training programme is underway, with the goal of securing a number of volunteers who will be available during the peak months to enhance the visitor experience through re-enactments. This will be crucial in bringing colour, action and activity into the Ironworks visitor experience. Industrial heritage sites need careful human interpretation to broaden their appeal.

Unless the cottages are to become self-catering properties Torfaen and Cadw must agree proposals to improve interpretation and secure the required funding.

Events

Special events have also been held at the Ironworks site in the past. Events are crucial - bringing the site to life and encouraging visits by a wider section of the market. A formal events programme needs to be planned and promoted each year. Major events such as the 'Son et Lumiere' should be budgeted for, featuring in the annual events programme.

As part of an Objective 1 marketing bid (see later marketing section) funding could be secured for a 3 year event development scheme, which could also include budget elements for the re-enactments detailed above.

Visitor Management - a system of truck tokens?

The Tourist Information Centre is housed in the former Ironworks Pay Office where workers used to be paid. With a bit of imagination the Tourist Information Centre could act as a 'truck shop token' distributor. Visitors to the Centre could be given 'tokens' to be used at attractions and facilities throughout the World Heritage Site. This could be a way of channelling visitors into the town's cafes and shops and to the smaller attractions.

This would need to be a Council or World Heritage Partnership funded venture, but might become self-supporting in the medium to long term. Tokens could also be sold as souvenirs and for use in the proposed Truck Shop in the town centre. (see Town Development below)

The idea could be developed further. Visitors to Big Pit who have 'done' a shift underground could be given a pay slip showing the amount of pay due to them, which they have to take to the Ironworks pay office to receive their pay - a truck token or 'dib'. Tokens could then be exchanged for food and drink at venues in the town, or used for reduced entry to the Ironworks, the Heritage and Cordell Museum, or reduced cost of travel on the Pontypool & Blaenavon Railway. The system could be developed across the whole Blaenavon tourism product, tying together the varied sites of the area in an original, imaginative and educational way.

The scheme would have to be described in promotional literature as well as promoted at each participating venue. The idea could be developed first with educational groups and later extended to all visitors.

Key Issues To Address

The Balance Tower

Every effort should be made to allow the Balance Lift at the Ironworks to be restored to its working condition. Cadw should also explore the feasibility of carrying people up and

down the tower. This would bring much needed action to the site -making it less of a passive and more of an interactive visitor experience.

Bringing Life Back to the Ironworks

Interpretation on site could be made more imaginative and active. Interpretation in the cottages, through furnishings and people would be an attractive idea. Expanding costumed re-enactments and providing more events on site throughout the year will help to drive up the visitor numbers. The restoration of some the cottages for holiday rental should also be explored.

Switching the Promotional Machine On!

Cadw should be encouraged to advance the marketing and promotional aspects of the Ironworks site as fast as is practical.

Pontypool & Blaenavon Railway

Pontypool & Blaenavon Railway, a company limited by guarantee with no share capital, is run by volunteers. Located close to Big Pit the Railway makes up for limited facilities through the enthusiasm of its volunteers. The Railway offers a short ride on a steam or diesel engine from Furnace Sidings, as far as the Whistle Inn pub. There is also a locomotive and carriage collection, of interest primarily to rail enthusiasts. Christmas, Easter and other Bank Holiday 'Specials' are run for families and young children. The Railway receives about 7,000 visitors annually.

Product Weaknesses:

- Recent erosion to the track needs repairing before trains can operate this year.
- Limited visitor facilities.
- Not enough track for a comprehensive visitor experience.
- Run by volunteers which constrains opening.
- Over 100,000 visitors pass the entrance to the Railway every year going to Big Pit, but only about 7,000 go to the Railway.

Product Development Plans:

A detailed study of the development options for the Railway was undertaken by L & R in 2001. The possibility of extending the length of railway line in three phases, and the development of a Transport Museum were the main areas of investigation. The study recommended a phased approach to development as detailed below:

Phase 1a Proposal:

1. To extend the line to Blaenavon High Level Station and create a run round loop at Whistle Inn, increasing the line from 1km to 3km in length, increasing journey time threefold, and allowing opportunities to get on and off the train at Furnace Sidings, Whistle Inn and Blaenavon High Level Station, giving walking access to the town centre.
2. To develop visitor facilities at Furnace Sidings including toilets, café, interpretation, office and storage facilities for staff and rolling stock.
3. The development of a bus link between Big Pit, Furnace Sidings and the Ironworks and back via St. Peter's School and the town centre.

Phase 1b Proposal:

1. To extend the line to Waunavon from the Whistle Inn.

Phase 2 Proposal:

1. To extend the line to 2.9km to Varteg Road (Blaenavon High Level)

Phase 3 Proposal:

1. Development of the Railway Collection Centre.
2. Extension of the line from Varteg to Talywain.
3. Create a viewing point on the water tower at Furnace Sidings.

Key Issues to Address:

- The priority should be to implement Phase 1 proposals to extend the line, as they offer an excellent opportunity to develop the historic relationship between the railway and the other attractions within the World Heritage Site. There is a major financial threshold in the order of £2.5m to overcome. Torfaen County Borough Council should pursue every avenue to secure funding this work although realisation of this project will be very difficult.
- As the length of visitor stay on site is extended the need for improved visitor facilities at Furnace Sidings will become more important, especially toilets, a waiting room, interpretation, catering facilities and longer platforms. The long term goal of developing a Railway Collections Museum at Furnace Sidings (in partnership with National Museums and Galleries of Wales and/or British Waterways - possibly re-housing the Goytre Wharf tramway exhibits) should be reassessed once Phase 1 is complete.
- Signage from the Big Pit entry road to the Railway should be improved to ensure more of the 100,000 visitors to Big Pit who pass the entrance to the Railway site every year, actually take a trip on the Pontypool & Blaenavon Railway. Improved information about the Railway available at Big Pit, plus joint marketing activity with the Pit are key to raising visitor numbers.

- The marketing message for the Railway must emphasise the uniqueness of its product: its setting within the World Heritage Site, its history in terms of ‘firsts’, its position having the highest station in England and Wales, all of which set it apart from other steam railway rides in the UK

St. Peter’s School – World Heritage Site Centre

Located next to Church Road and adjacent to St Peter’s Church, St. Peter’s School is within easy walking distance of the town centre. It has a fascinating history as the oldest known ironworks school in Wales. Two adjacent buildings make up the site - the original school and the newer infants school.

It is proposed that this site becomes the main visitor orientation and information centre for the World Heritage Site. It will be called the Blaenavon World Heritage Centre and should be the first port of call for visitors who are not familiar with the area. A major conservation and development project has been submitted for Stage II Heritage Lottery Funding approval.

World Heritage Status will not realise its potential unless there is a focal point for the World Heritage Site within the local community. It is vital that St. Peter’s becomes this focal point.

Product Weaknesses:

- At present there is no formal orientation or Visitor Centre for the World Heritage Site.
- There are limited educational facilities for school and college groups visiting Blaenavon. (A schools’ room and associated facilities would improve the educational offer of a trip to the World Heritage Site.)
- A prominent and historically significant building, in need of urgent restoration, is currently contributing to the poor physical environment within the town.

Developing St. Peter’s – the Proposals

St. Peter’s School offers the opportunity to orientate visitors at an edge of town location, creating the potential to spread the benefits of tourism into the town. The aim of St. Peter’s will be *‘to inspire interest in the Blaenavon World Heritage Site, and an understanding and appreciation of the significance of the history and cultural value of the Blaenavon World Heritage Site, through the use of the Centre’s information resources’*.

St. Peter's will act as a focal point, helping to orientate people both physically and intellectually. It will explain the significance of the World Heritage Site and the implications of achieving World Heritage designation. Interpretation will not be limited to industrial objects and buildings within the World Heritage Site, but will also feature the families, social organisations, values, attitudes, religion and language of the people who made Blaenavon what it is today. This will ensure that the community and cultural aspects of Blaenavon are given importance.

It is proposed that the Centre will be responsible for the collection and management of information about the World Heritage Site. St. Peter's will complement its on-site services through outreach work off-site and on-line via the web. It will have an IT archive resource for educational purposes and for use by local people and visitors. It is also proposed to link the Centre with other related World Heritage Sites. An imaginative web site will be an important element facilitating access.

A number of zoned areas are proposed for St Peter's:

- The Data Zone will include data capture, data management and data output.
- The Story and Learning Zone will interface with the public and provide 'story-telling' packages – traditional, high-tech, on-site and on-line. It is proposed that drama, arts and lectures will be programmed by the Centre both on-site and off-site at other attractions as well as on the web.
- The Public and Community Facilities Zone includes catering, retail, toilets and meeting rooms. It is proposed that St Peter's will have educational facilities to support field trips and school visits to BIL.
- The Marketing, Management and Administration Zone will provide office space for staff and volunteers.

It is proposed to join the two schools with a new build reception area which will provide information, and sell tickets, souvenirs and books. Café, toilet, shop and cloakroom facilities are adjacent. The former infants school will house the exhibition space and lecture/meeting rooms. The original school building will house the introductory exhibition space, archive and study rooms.

There may be benefits in St Peter's School working closely with the Workmen's Hall Committee due to the close proximity of the two buildings and the range of accommodation available.

Proposals for the National Trust to be a key partner in the operation of St Peter's School should be carefully fostered. A nationally recognised institution with the membership and following of the National Trust, working as a key partner in visitor management, orientation and education in Blaenavon would be a major coup for the World Heritage Site. The credibility and profile of the site would be greatly improved by the presence of the National Trust. Visitor perceptions of the Trust respected and quality tourism operator will give invaluable benefit to the Blaenavon product. However, it must be appreciated

that the current practice of the National Trust is to take ownership of the properties in which they have an interest. This would not be the case at St Peter's where some form of innovative partnership would have to be arranged.

Issues Needing Resolving Before Development Proceeds:

- Who will manage and operate the Centre and to what standards and criteria?
- What exhibits and displays will go into the Centre?
- Will the community heritage group be involved?
- Will the Centre provide a local history/ family archive facility?
- Will staff be paid or volunteers?
- What staff will be required? Education officer, marketing and events officer, catering, reception, and administrative staff? Centre manager?
- Should school's room provision be provided at the Workmen's Hall?
- Should tourist information be provided here in the long-term?
- Is the proposed throughput of 15,000 (Locum Destination Consultants estimate) visitors too conservative?
- Pedestrian links to the town centre and the Workmen's Hall across the road need to be formally provided through a pedestrian crossing and pedestrian signage.

The Blaenafon Heritage & Cordell Museum

This is a new attraction currently being developed in the basement of Blaenavon Library, located on Lion Street close to the Town Centre. The Community Heritage and Cordell Museum will be a small but important attraction, adding to the interpretation of the Blaenavon Story. It is proposed that the Museum be run by volunteers, the Blaenafon Community Heritage Group.

Alexander Cordell based his international best-selling novel *Rape of the Fair Country* in and around Blaenavon. In fact, Cordell recognised the historical importance of the Blaenavon Industrial Landscape at least 50 years before the World Heritage Listing. A collection of some of Cordell's personal writing possessions, including his desk and typewriter are on display, alongside interpretation panels about the author and his writing. There is also a collection of books from Cordell's personal library, including foreign language versions of many of his most popular works.

The local community heritage group are providing a range of local history displays which will add a personal and human dimension. As it is planned that the Museum (which has toilets and catering facilities) will be operated by volunteers, it could become a very important interface between the local community and visitors to the town. Personal associations with the industrial landscape will be more meaningful to the visitor than high-tech interpretation.

Product Weaknesses

- The exact role and remit of the Museum needs deciding. Is it a collections-based Museum? What is their collections policy? Is it a local family history centre? Will there be duplication with provision at St. Peter's?
- Who will operate and manage the Museum and to what standards and criteria?
- There is no long-term plan to ensure that the Museum grows and develops.
- The attraction needs exterior signage to ensure local residents and visitors alike know where the facility is.
- Opening hours will be limited by volunteer availability.

Product Development

- There is potential to develop the Cordell Country theme considerably, both as an important marketing proposition, and physically as a reference point for those interested in literature and the work of Alexander Cordell. Walks offered by a World Heritage Site Ranger might include a series of 'walking talks' across the Blaenavon Industrial Landscape, pointing out sites featured in Cordell's novels.
- The development of a Cordell Literary/ Writing Prize will be an important development of the Cordell Museum. It will add value and credibility and has the potential to generate substantial media interest. It will help to develop the cultural aspects of the World Heritage Site.
- Close links with the library need to be fostered so that the displays and collection are 'owned' by the local community
- A long term development plan needs to be drawn up. The Museum is new now, but will need to develop over the medium term if it is to bring in sustainable visitor numbers.

The Workmen's Hall

This is primarily a local community resource, operated by a committee and staffed by volunteers. It is located opposite St. Peter's Church and St. Peter's School, forming a triangle of historic buildings and attractions close to the town centre. At present the Hall houses a cinema, catering facilities and various meeting / performance rooms, but the building should have an important role to play in telling the story of the Workmen's Hall tradition.

Product Weakness

- Uncertainty about how the Hall fits into the World Heritage portfolio. What is its role?

- No long term plan for development of the Hall.
- Run by volunteers so opening hours limited.

With its close proximity to the Blaenavon World Heritage Centre in the former St Peter's School, the Workmen's Hall is ideally placed to provide supporting facilities for the Centre. The cinema facility could be used to show films for educational groups. Meeting rooms on site could be used as educational classrooms for World Heritage Site visitors. (This would be a fitting use for a building that was originally provided to fulfil the workingmen's traditional goal of self-improvement.) Its theatre also offers potential for small-scale drama productions, talks, poetry readings etc. It could be the venue for the Cordell Literary Awards.

Proposal

A long term plan for the role of the Hall within the World Heritage Site needs to be drawn up.

The Brecon & Abergavenny Canal & Llanfoist Wharf

The Brecon & Abergavenny Canal runs through the World Heritage Site and the canal wharf at Llanfoist was historically linked to Blaenavon via Hill's Tramroad, a series of three self-acting inclines. The Canal is in the care of British Waterways, whilst the buildings at Llanfoist Wharf are in private ownership, including a boat hire operation - Brecon Park Boats. The Wharf is a well-used centre and an excellent entry point into the World Heritage Landscape. It was identified in the Gillespies' Countryside study as a key access point into the Blaenavon Industrial Landscape offering potential to refer canal-borne visitors at Llanfoist to the World Heritage Site.

Product Weaknesses

- Limited interpretation at present
- Limited remains of Hill's tramroad.

Product Development Plans

- British Waterways and Monmouthshire County Council have agreed proposals to interpret Hill's Tramroad at Llanfoist Wharf. In this context a new small car park has been provided by Monmouthshire County Council at Llanfoist adjacent to the main

road directly opposite the right of way leading to Llanfoist Wharf. The plans involve replacing a short section of the incline so that visitors will be able to see what the tramway looked like when it was operational. This will be supported by interpretation panels on the towpath at Llanfoist Wharf at the bottom of the incline, and at the top of the incline on the Bloreng, explaining how the tramway worked. There are also plans to locate a full-scale replica tram on the replaced tramway close to the warehouse at Llanfoist Wharf.

- British Waterways will be restoring the tunnel which carries the old parish road under the canal at Llanfoist Wharf. This will improve access to the site and the tramway/ Bloreng.
- Although outside the immediate World Heritage Site area British Waterways' Canal Centre at Goytre Wharf should be recognised as one of the key entry points into the World Heritage Site. With tourist information and interpretation about the canal, Goytre will undoubtedly act as an important referral point to the World Heritage Site. British Waterways have commissioned a cross section model of the Bloreng Incline for the Visitor Centre at Goytre Wharf, and plan to promote walks from the site into the World Heritage landscape, such as the Holy Well Walk across the Bloreng.
- Development plans for the Pontymoile Canal Basin to the south will also provide opportunities to orientate canal-borne visitors from the south to the World Heritage Site.
- Opportunities for referrals from the Northern terminus of the canal at Brecon should be capitalised upon, through interpretation/ information and through marketing activity.

Marketing

British Waterways are keen to promote the World Heritage Site to their audience. The attractiveness of the canal and its appeal to a wider market is an important marketing benefit.

4.4 Developing The Town of Blaenavon

This section looks at the town of Blaenavon and focuses on the vital aspects of product development which need to be implemented.

Blaenavon town centre is potentially very attractive. However, at this time the town centre does not offer the appealing environment generally expected of a tourist destination. Many shop fronts are boarded up or empty and there is limited retail and catering provision.

Product Weaknesses

- Image of Blaenavon as old industrial, depressed town.
- Limited commercial activity in the town.
- No accommodation provision.
- No public toilets.
- Limited and generally poor offer of retail and catering outlets.
- Low demand for local products, services and property reflecting the depressed local economy.
- Generally poor environmental quality.
- Decay hiding once attractive Victorian town street scene.
- Low take up of WDA's Town Improvement Grants as funding is for the exterior of buildings only. The costs of interior refurbishment (for which there are no grants) is often more than the value of the property.
- Little awareness amongst local people of the potential offered by World Heritage Site status/lack of entrepreneurial skill.
- Local people more aware of the planning constraints that World Heritage Site designation and conservation status has put on the town.
- No tradition of visitor service within the area. Limited tourism experience.

Proposals For Developing Blaenavon

- The education of local people is crucial. Raising awareness of the potential that World Heritage Site status offers must be the priority, to stimulate local business development.
- Positive support and encouragement must continue to be given to local people wishing to start up new businesses using vacant property within the town. New development must improve the visitor offer, especially in terms of retailing and catering
- The development of small businesses linked to heritage and cultural activities within the World Heritage Site Area is also crucial. A working group should be established to work with the local community to foster a new attitude of entrepreneurship. A workshop session, explaining the opportunities which are presented by World Heritage status, should be held in the town. The relevant agencies should be on hand to offer advice about grants/business start-ups, including WDA and WTB.
- Local people could be invited on a 'Blaenavon outing' to Ironbridge, to see at first hand what successful World Heritage Sites are doing.
- Progress should be made on issuing a planning policy statement which will allow change of use in the Town Centre for some of the 60 former 19th century shops which are no longer viable.
- The Town Scheme Partnership with Cadw needs progressing to address the renewal of buildings within the town centre.

- The town could have an attractive Victorian atmosphere - full of life and activity. Street markets and special events such as World Heritage Day in September 2001 would be an appealing marketing proposition. The buildings in Broad Street would lend themselves to a pleasant retailing and catering experience for visitors and locals alike. Refurbishment of 15-19 Broad Street should be promoted as a flagship project for Broad Street.
- As a short term measure Torfaen could fund and develop a 'truck shop' in one of the refurbished properties. This would be a small-scale attraction, of interest to all sectors of the market, but particularly educational groups. It would set an example for local businesses and create tourist interest in the town centre (The truck shop could also be located in the Heritage & Cordell Museum shop.)
- Pedestrian signage to the main attractions and facilities of the town centre will increase the likelihood of visitor expenditure locally.
- Basic tourism training/ service industry training such as Welcome Host needs to be provided for all operators within the World Heritage Site.
- A carefully designed series of 'industrial' artworks placed throughout the town, reusing obsolete industrial items from the locality, could create added interest to the townscape of Blaenavon. A competition funded through Artwork Wales could be run, generating publicity for Blaenavon. There are plans to locate a memorial statue to Alexander Cordell in the town. This could be located outside the Cordell Museum or in Bethlehem Square. Combined with the literary competition these arts projects would contribute much to the cultural development of the World Heritage destination.

4.5 Developing the Countryside Product

Improving Access to and Interpretation of the World Heritage Landscape

This section looks at proposals to improve the countryside product, focussing on recommendations made in the recent Gillespies Study.

The landscape around the town of Blaenavon was critical in securing the World Heritage Site designation as it contains many fascinating relicts of the industrial period. The effective promotion of the heritage landscape and the management of visitors within it will depend upon the World Heritage Site being easily accessible from a small number of recognisable, managed and marketable access points. Access to a number of important historic sites which are integral parts of Blaenavon's industrial past, can only be gained through the countryside. There are several scheduled Ancient Monuments for which Cadw can provide substantial repair grants. Improved access will increase the appeal of the area to a wider range of visitors, especially outdoor activity enthusiasts, walkers and mountain bikers. The countryside itself, aside from the urban fringe, is visually appealing and offers tremendous views across the surrounding industrial landscape.

Product Weaknesses:

- Currently difficult to get out into the historic landscape from the town of Blaenavon.
- There is little or no interpretation of the historic features of the Blaenavon Industrial Landscape.
- The area is not generally considered a countryside recreation destination.

Proposals:

- Funding needs to be secured so that the report's recommendations can be implemented
- Opening up Key Access Points.
Developing the key access points (identified in the Gillespies Report) at Govilon Wharf, Llanfoist Wharf, Keeper's Pond, Garndyrus, Pwll Du, Blaenavon Ironworks, Big Pit, Garn Lakes and St Peter's School must be a short term priority. Improved car parking and interpretation at the main sites of the Ironworks, Big Pit, Keeper's Pond and Govilon/ Llanfoist Wharf should be achieved during 2002.
- Developing Walking Routes & Bike Trails
As detailed in the Gillespies Report, the circular walk route linking Blaenavon to most of the industrial features of the surrounding landscape, and the strategically important Monmouth & Brecon Canal and Brecon Beacons National Park must be a priority for 2002/3. Improving access to the industrial heritage landscape through the National Cycle Network must also be a priority. Once in place a PR campaign with walking/ biking magazines should be used to raise awareness of the routes amongst potential users.
- Enhancement of the Urban Fringe & Approaches into Blaenavon
There is a real need to improve the approaches into the town and to tidy up the urban fringe which detracts from the countryside. Tidy Britain campaigns may have gone out of vogue, but a local town scheme (sponsored by the Council or the World Heritage Partnership) might help improve the urban character through annual awards for best kept street/ hanging baskets or floral displays. A community clean up week every Spring before the season begins could be instigated.
- Development of Strategic Interpretation Points
Interpretation of the historic landscape should be provided at the strategic access sites identified in the Gillespies study. Llanfoist Wharf, Garndyrus, Pwll Du, and Garn Lakes should be the immediate priority.
- Hang-gliding & Caving
The World Heritage Site area offers potential for specialist activities including hang-gliding and caving. One of the largest cave systems in Britain lies within the site and could potentially be opened up to public access. However, the appeal of these

activities is limited to specialists, and marketing and development resources would be stretched even more thinly if they are included on any priority action list.

- Development of a World Heritage Site Ranger Service
A World Heritage Ranger Service must be established now. The presence of uniformed rangers will raise the profile of the Site, especially amongst the local community, who will be aware of any new activity in the area. It is intended the rangers should operate out of St Peter's School. A programme of weekend and summer ranger-led walks and discovery trails around the Blaenavon World Heritage Site landscape should be established during 2002.

4.6 Development of Marketing Activity

Achieving 'Destination Blaenavon'

This section looks at development work which needs to be carried out to improve the marketing of Blaenavon.

Due to budget and staffing constraints marketing activity has not taken the fullest advantage of interest generated following the announcement of World Heritage status in 2000. The marketing of the World Heritage Site and its associated attractions and facilities has been low key and limited.

Weaknesses

- No clear responsibility for marketing World Heritage Site.
- No specific budget for World Heritage Site marketing activity.
- No dedicated member of staff to market the World Heritage Site.
- Marketing of the World Heritage site has been low key and limited.
- Marketing by the individual attractions is uncoordinated.
- No history of joint marketing activity between attractions.
- Application of World Heritage Site brand is weak, despite development of a strong brand logo.

Developing Marketing Activity

- Torfaen, as the lead authority should act now. Urgent consideration should be given to an Objective 1. This bid could be submitted, seeking funding under the relevant Priority and Measure, for a comprehensive marketing programme for the next 3 years. (Priority 1 Measure 2/3 and Priority 4 Measure 2/3 and Priority 5 Measure 4/6 all

offer potential funding sources). This bid should include the revenue costs of a member of staff dedicated to marketing the Blaenavon World Heritage Site, as well as funding for the marketing activity detailed here. Adequate staff resources and funding are vital if Blaenavon is to realise its potential.

- Marketing activity must focus on selling the idea of Blaenavon World Heritage Site as a tourist destination. The totality of the World Heritage Site landscape needs to be marketed.
- Blaenavon's USP is its outstanding industrial heritage and the World Heritage Site designation adds marketing credence. It is a recognised 'seal of approval', inspiring confidence that a visit to the site will be rewarded with a rich cultural and educational experience. This must be capitalised on to achieve 'Destination Blaenavon'.
- To market Blaenavon as a destination each partner must promote not just their own attraction or 'patch', but the corporate whole - the World Heritage Site. This means Monmouthshire must dedicate copy/photography to the World Heritage Site in the Wye Valley and Vale of Usk brochure. Similarly the Brecon Beacons National Park Authority must feature the World Heritage Site in their print.
- The World Heritage Site should use the established and successful destinations of the Brecon Beacons & the Wye Valley/Vale of Usk to 'piggy-back' on their activity, both in UK and Overseas Markets. This activity is mutually beneficial. The WHS is a new and prestigious attraction for the established areas, and 'piggy-backing' allows access to their established markets for the emerging.
- Each attraction's individual marketing strategy must have at its core a commitment to mutual support for promotional purposes of all the facilities within the World Heritage Site.
- A corporate advertisement should be drawn up which can be used by all the partners – it would be the aim that whenever a partner is buying advertising space to promote the individual attraction that the World Heritage site can purchase space alongside the advert to promote the whole site. Similarly attempts should be made to secure editorial coverage relating to the Site.

5. MARKETING STRATEGY AND ACTION PLANS

Whilst the key objective of the Blaenavon Partnership is to protect, conserve, promote and present the BIL World Heritage Site, the purpose of marketing activities is to generate awareness of the target markets in order that growing numbers of consumers have the opportunity to partake of the experience offered by the BIL.

Remit of the Blaenavon Partnership Marketing Sub-Group

The marketing sub-group of the Blaenavon Partnership was established in April 2000. The group is made up of various professionals from the member partners with expertise in marketing and tourism. The task of the group is to market the BIL in the context of the BIL WHS management plan. The group have identified the following mission statement:-

Mission Statement

To develop, a 'must do' destination which encompasses the range of attractions within the BIL boundary.

The marketing sub-group aim to :-

- develop an effective marketing strategy including building an effective brand for the Blaenavon Industrial Landscape World Heritage Site.
- work together so that the group benefits from mutual understanding and experience. By working together it is intended to ensure that the various attractions within the BIL compliment each other and do not compete unnecessarily.

5.1 Short Term/Interim Marketing Strategy

In order to promote the BIL as quickly as possible a short term marketing strategy was effectively implemented in 2000/2001. This sought to use new and existing channels, to enable BIL to benefit from inclusion in a broad range of marketing activity.

The objectives of a short term marketing strategy were :-

Short Term Marketing Objectives

1. Ensure inclusion of BIL in existing campaigns
2. Co-ordinate optimal distribution of existing product print
3. Maximise opportunities for media coverage
4. Undertake pro-active public, community & press relations activities
5. Produce dedicated BIL flyer to run alongside partners' existing product print and as 'stand-alone' leaflet.
6. Produce dedicated BIL bedroom browser leaflet.
7. Prepare a programme for the launch of WHS (conditional upon achievement)

5.2 Long-term Marketing Strategy & Action Plan

To develop a 3-5 year marketing plan with identified (and secured) resources, which will build on the work undertaken by individual attractions, and where possible evolve into joint activities, thereby achieving greater impetus and impact.

Key Aims

- That tourism should play a significant, increased, and sustained part in the economic regeneration of Blaenavon, promoting and not endangering the environmental and cultural qualities of the area.
- That BIL should present itself, and function, as a distinctive well-integrated high quality tourist destination area – in terms of management, linked attractions, tourism infrastructure, accommodation services and marketing.

Objectives

1. To highlight the importance of the Blaenavon Industrial Landscape and its WHS designation to a wide range of audience groups.
2. To position and develop the World Heritage Site as a ‘Gateway’ site for industrial heritage in South (East) Wales.
3. To develop the profile of Blaenavon Industrial Landscape as a viable multi-faceted destination.
4. Increase visits from day visitors and domestic and overseas tourists.
5. Develop educational visitor markets.
6. Target and increase visits from special interest markets.
7. Develop and increase repeat visits.
8. Engender Community ownership.

Current Position

During 2000 / 2001, the Interim Marketing Action Plan was designed and implemented in order to introduce the World Heritage Site into the marketplace. This was intentionally a short-term solution allowing a strategy to be developed in the meantime. Torfaen CBC took the lead in marketing activities with funding support from Monmouthshire County Council. PR for the launch of the World Heritage Site was handled by CADW in conjunction with TCBC. Information on the Interim (short term) Strategy is contained in the previous section of this report.

As part of the preparation to launch the marketing activities of the Blaenavon World Heritage Site, a branding exercise was undertaken in consultation with Partners and representatives of the community. This resulted in an iconic image being generated representing the World Heritage Site and has been used since the beginning of 2001 on all publications, advertising and print associated with the promotion of the Site and component parts.

The following action plan proposes a comprehensive range of marketing activities that can be undertaken from the outset, focusing on existing attractions and facilities. It is a snapshot and does not take into account any planned or initiated product development initiatives that are not yet complete. Constant work in the product development field is underway, which will result in more facilities coming on line over time, adding to and strengthening the compendium of products that make up the World Heritage Site.

Developing Marketing Resources - Staffing and Budgets

If the World Heritage Site is to succeed as a visitor destination it needs to have the staffing and financial resources to allow marketing to happen at a level commensurate with the status of a World Heritage Site. Torfaen should take responsibility on behalf of the Blaenavon Partnership for resourcing a member of staff to develop this marketing activity. This would be eligible for Objective 1 funding. Given that the focus for the World Heritage Site will be St Peter's School this post will need to be considered in the context of the staffing required to service the proposed St Peter's School, Blaenavon World Heritage Centre. This staffing issue will be referred to in the bid to the Heritage Lottery Fund for grant assistance to achieve the restoration of St Peter's School as the World Heritage Centre.

A separate marketing budget for the World Heritage Site should be established. A budget can be created using contributions from the partners, to draw down European and WTB funding. WTB Tourism Destination Area grants may also be available. (To illustrate: a contribution of £3,500 from each of the partner organisations, would create a marketing budget of £98,000 with match funding from Europe).

Structure & Reporting

Each of the partner organisations has within its remit the promotion and development of its own product and this strategy does not intend to undermine that activity, but to superimpose an additional level of activity which will enable the Site in its entirety to be marketed as a single product. In so doing, the product is expanded to a much larger entity, providing encouragement to visitors to stay longer or return, thereby increasing economic benefit to the area.

It is imperative that the task of marketing the World Heritage Site is undertaken with a full understanding and appreciation of the marketing activities of all Partners.

The existing Blaenavon Partnership Marketing Sub-Group was established in order to drive forward the collective marketing of the WHS. This Group should continue to input into and monitor the proposed marketing activities. Once the strategy has been agreed, finalised and resources made available, accountability for implementation should be clearly defined. Full advantage should be taken of existing tourism and marketing expertise within the partnership, and have a direct input into existing marketing activities undertaken by Torfaen and other organisations. This would provide access to a wide market sector coverage and direct links into the Wales Tourist Board's marketing efforts.

The Torfaen tourism unit actively participates in the following marketing initiatives, which provide the BIL with access to a number of existing and successful marketing campaigns at a significantly reduced cost.

- Overseas Marketing via the 'Southern Wales' campaign
- UK Domestic marketing via 'Heritage Breaks', 'Usk & Wye Valley'
- Travel Trade campaign
- Business and Conference Campaign
- WTB's co-ordinated marketing activities
- Precinct Promotions (TCBC)
- Torfaen's tourism publications
- Literature distribution channels

The tourism unit has direct input into to the Wales Tourist Board's and the British Tourist Authority's UK and overseas marketing campaigns and access to their PR departments.

In product development terms, the WTB's Strategy - 'Achieving our Potential' and 'Competing with Confidence', the South East Wales Regional Strategy establish an agreed direction for the industry. The tourism unit provide input into both of these documents during the compilation and reviews. It is imperative that recognition of the significance of the World Heritage Site remains in the successor documents.

The Blaenavon Project Director is a member of the Steering Group for the recently announced South Wales Industrial Heritage Strategy which aims to present the Industrial Heritage of South Wales in a fresh and dynamic manner. This strategy will also consider

tourism development in relation to the agendas of regeneration, social inclusion and education.

Developing World Heritage Site Literature

A quality leaflet promoting the World Heritage Site Destination needs to be produced and distributed across South Wales and the near Midlands. The aim of this piece of print is to create a more credible consumer offer for the World Heritage Site as a tourist destination, by linking facilities and attractions and packaging them more effectively as part of a wider product offer - the Blaenavon World Heritage Site Destination. '*A Visitor's Guide To The Blaenavon World Heritage Site*' will provide all the information visitors need about the area including accommodation and transport details as well as attractions' information.

A budget of £5,000 will be required initially for a print run of 50,000 leaflets. In years 2-5 the print run should increase to 200,000. The leaflet should include:

- Map of World Heritage Site Area showing main attractions.
- Map of town showing key attractions, location of facilities.
- Small locator map showing where site is in South Wales.
- History of the World Heritage Site - and Cordell Country links.
- Future development of the World Heritage Site.
- Listings and information about tourist attractions in the area
- Accommodation details.
- Tourist Information Centre.
- Transport Details.
- Countryside Activities. (It is anticipated that separate detailed print will also be produced for countryside activities.)

This publication should also be made available in French, German and Welsh in order to address the needs of those markets. An allocation of £5,000 per publication should be made available for this purpose.

The World Heritage Site also needs an official guidebook – and two pieces of print are currently in the pipeline – a guide produced by Cadw and a guidebook written by Chris Barber. They should be fully supported by the partners.

Improving Literature Distribution

Leaflets about the World Heritage Site need to be distributed professionally throughout South Wales and the near Midlands. A budget of £1000 p.a. should be established for this purpose. A large proportion of visitors to the World Heritage Site will be staying with

Friends and Relatives, so it is vital that literature is constantly out in the South Wales/ Midlands market place.

Developing Education Markets

Blaenavon with its numerous assets related to the industrial revolution makes it a museum resource of particular interest to educational markets. This area, in particular, needs all the attractions to work in partnership to provide the best educational offer possible. A partnership education officer may be the best way to access and serve this market. Web based educational resources will also be required. It is envisaged that this post would be co-ordinated centrally through the St Peter's School / World Heritage Site Visitor Centre, covering all educational elements within the WHS. An allocation of funding for promotional activities associated with developing these markets has been identified as part of this marketing plan. Costs for developing educational resource materials are not covered within this plan.

Development of e - tourism marketing opportunities

Analysis of web based information relating to Blaenavon, its attractions and the World Heritage Site Status highlights the sparcity of information available at present. Big Pit is the only site currently accessible on line. An imaginative web site is crucial as the future of tourism marketing lies with web-based applications. The World Heritage Site cannot afford to omit this interactive and responsive medium from its marketing activities.

The information contained within the proposed *Visitor Guide to the Blaenavon World Heritage Site* leaflet should be made into web pages, providing a web information resource quickly and at low cost. Links to the Tourist Information Centre, Big Pit, the Ironworks and accommodation operators should be integral.

A budget of £10,000 needs to be established to develop and implement this World Heritage Site web site now. Once St. Peter's is operational the management of the website should become a function of the WHS management team.

Networking opportunities offered by the WTB's new Destination Management System should be linked into the web site.

Merchandising - Development of a range of branded items

A budget of at least £15,000 needs to be established to develop the branding of the World Heritage Site for promotional and retail activity.

The World Heritage site has a powerful and eye-catching logo which if used imaginatively and consistently will create a very positive and strong brand for Blaenavon. The official Blaenavon World Heritage Site logo should be applied across a range of merchandise both for retail use and promotional activity:

- T shirts & Caps
- Mugs
- Tea Towels
- Pens & Pencils
- Rubbers & Pencil sharpeners
- Pencil Cases
- Note Pads
- Postcards/ Posters (set of 4 different designs one to be existing logo, plus similar style pictures of Ironworks, Canal, Big Pit). Indicative costs are supplied in Appendix 2.

Developing Advertising Activity

As the product development comes on line in Blaenavon the budget will need to be increased to at least £30,000 pa specifically for advertising the World Heritage Site.

Developing Events

Events are an excellent way of raising the profile for the area, and of involving the local community. A budget of at least £15,000 p.a. should be secured. This would finance major events such as the Son et Lumiere and historical re-enactments at the Ironworks. It should be possible to secure match funding from Europe for a 3 year events development programme, or through the WTB's Tourism Destination Area grant scheme.

Public, Press and Media Relations

A budget of at least £10,000 p.a. is required for public relations activity. A modest budget of this size can generate large amounts of press coverage. PR activity will be crucial to raise awareness of the World Heritage Site and its developing attractions. It needs to be closely tied in with the product development programme to ensure that pr messages and reality do not conflict.

Photography

One of the most effective ways of developing the product from a marketing perspective is to invest in new photography. Perceptions of an area can be radically altered through attractive and innovative photography, which interests and excites the public. Investment should be made in a portfolio of shots of the main sites and landscapes that make up the

World Heritage Site. Photography should capture people and activity as well as the attractions themselves (and could include local personalities from Blaenavon, to convey the character of the World Heritage Site as a living landscape inhabited by the descendants of the original coal and iron-working families).

An investment of £2000 would guarantee a range of shots which could be used to support press releases and features generated through pr activity. An approach should be made to both the British Tourist Authority and the Wales Tourist Board suggesting a joint photo shoot around Blaenavon. This would ensure first class images of the World Heritage Site are used in the BTA's literature in key overseas markets and by the WTB in their promotional material (and the cost would be halved).

Targets

Currently, the attractions within Blaenavon attract in the region of 130,000 visitors each year. An aspirational target figure of 175,000 visitors per annum by 2010 has been put forward for the WHS. In order to achieve this target, substantial resources and effort need to be injected into the product development and marketing of the World Heritage Site. Basic visitor facilities, information, interpretation and new attractions need to be in place before significant progress towards this target is made.

In order to maximise the economic potential for the communities within the WHS, it is also essential the stay of visitors is extended. Collaborative marketing can affect the propensity of extending visitor stays and encouraging repeat visits.

Marketing Budget

There are significant resource implications associated with any marketing activities. In this instance, cost have been kept as low as possible, subsuming BIL into existing marketing campaigns which already have funding commitment from the local authority. The costs outlined below are primarily associated with BIL having a raised profile within these activities, buying into proven successful and properly funded activities rather than trying to 'go it alone'.

In addition there is an allowance made for the production of a dedicated BIL piece of print, the translation of this into at least French and German, the further development of the BIL Website and a dedicated educational website/page.

WHS Marketing Budget

| | Yr 1 | Yr 2 | Yr 3 |
|-----------------------|---------------|---------------|----------------|
| | £ | £ | £ |
| UK Domestic | 61,000 | 41,000 | 45,000 |
| Overseas | 12,000 | 14,000 | 14,000 |
| Travel Trade | 1,000 | 5,000 | 5,000 |
| Educational | 3,000 | 5,000 | 10,000 |
| Staff costs | 20,000 | 20,000 | 20,000 |
| Research & Monitoring | 0 | 10,000 | 10,000 |
| | | | |
| Total | 97,000 | 95,000 | 104,000 |

Monitoring, Evaluation and Review

If funding is secured from external sources then monitoring of visitor numbers and evaluation of marketing activity will be vital to provide output information for grant claims. There may be a need for traffic flow measurement at key entry points to the Blaenavon Landscape - especially the countryside access points where there is no paid-for entry but where there may be large numbers of visitors.

All marketing activity should be monitored to evaluate success. Review and revision should be undertaken accordingly and visitor trends should be tracked and monitored.

Blaenavon World Heritage Site

5.3 Marketing Action Plan

| Market | Activity | Objective | Actions | Timescales | | | |
|--|---------------------------|-----------------------|---|--|---------------|---------------|-------|
| | | | | YR 1 | YR 2 | YR 3 | |
| UK Domestic <i>Inc:- short break Day visitors VFR</i> | A | Market segmentation | 3, 4, 6 1. Identify key market segments 2. Agree priority segments 3. Agree appropriate mix of activities for each segment 4. Monitor & review | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | B | Print | 3, 4, 6, 7 | 1. Ensure inclusion of BIL in all partner's print 2. Produce general, stand alone leaflet for localised fulfilment | 0 | 0 | 0 |
| | | | | | 5,000 | 5,000 | 5,000 |
| | C | Print distribution | 4, 6, 7 | 1. Saturation throughout South Wales 2. Key TICs in England & Wales 3. Sectoral affiliations (eg Ironbridge, Crompton Mill etc) | 1,000 | 1,000 | 1,000 |
| | | | | | | | |
| | D | IT Channels | 1, 2, 3, 4, 6, 7 | 1. Develop, maintain & manage BIL website 2. Develop internet enquiry facility 3. Promotion of IT access in literature 4. Develop appropriate links | 10,000 | 1,000 | 1,000 |
| | | | | | 0 | 1,000 | 0 |
| | | | | | 0 | 0 | 0 |
| | | | | | 0 | 0 | 0 |
| | E | Partnership Campaigns | 1, 2, 3, 4, 6, 7 | 1. Ensure BIL representation in existing tourism partnership marketing activities | 0 | 0 | 0 |
| | | | | | | | |
| F | Advertising | 1, 2, 3, 4, 6, 7 | 1. Brochure space / advertorial in appropriate regional and sectoral publications 2. Paid-for advertising, based on maximisation of potential benefits 3. Monitor effectiveness and review annually | 3,000 | 3,000 | 3,000 | |
| | | | | 5,000 | 10,000 | 15,000 | |
| | | | | 0 | 0 | 0 | |
| G | Press and Media Relations | 1, 2, 3 | 1. Develop and implement PR plan in collaboration with partners 2. Develop and utilise media database 3. Utilise existing events listings 4. Encourage and host press visits | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | | | | 1,000 | 1,000 | 1,000 | |
| H | Public Relations | 1, 2, 3, 6, 8 | 1. Develop material for a mobile display promoting BIL 2. Ensure profile for BIL in local publications 3. Facilitate open and easy access to information and communication for the local communities within BIL | 2,000 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| | | | | 0 | 0 | 0 | |
| I | Events | 3, 4, 6, 7, 8 | 1. Encourage and develop events by local groups, partners and organisations 2. Compile a listing for distribution and inclusion in regional and national listings, where appropriate | 15,000 | 15,000 | 15,000 | |
| | | | | 0 | 0 | 0 | |
| J | Exhibitions | 2, 4, 6 | 1. Attend a series of appropriate consumer shows and promotional events | 2,000 | 2,000 | 2,000 | |
| | | | | | | | |
| K | General | | 1. Develop Photographic stock 2. Produce branded merchandise | 2,000 | 2,000 | 2,000 | |
| | | | | 15,000 | | | |
| Indicative annual costs | | | | 61,000 | 41,000 | 45,000 | |

| Market | Activity | Objective | Actions | Timescales | | |
|--------------------------------|------------------------|---|--|---------------|---------------|---------------|
| | | | | YR 1 | YR 2 | YR 3 |
| Overseas Markets | A Print & distribution | 1, 2, 4, 6, | 1. Editorial in all partnership print 2. Dedicated foreign language print 3. Distribute shows and exhibitions as part of partnership activities 4. Follow up specific enquiries | 0 | 0 | 0 |
| | | | | 5,000 | 5,000 | 5,000 |
| | | | | 1,000 | 1,000 | 1,000 |
| | | | | 0 | 0 | 0 |
| B Advertising | 1, 2, 4, 6 | 1. Brochure space / advertorial in WTB and/or BTA publications 2. Support publications produced by BIL partners in this market | 3,000 | 3,000 | 3,000 | |
| | | | 0 | 0 | 0 | |
| C IT Channels | 1, 4, | 1. Translation of BIL web site into most appropriate languages | 3,000 | 3,000 | 3,000 | |
| D Press & Media relations | 1, 2, 4, 6 | 1. Encourage and host press visits, working with third parties | | 2,000 | 2,000 | |
| Indicative annual costs | | | | 12,000 | 14,000 | 14,000 |

| Market | Activity | Objective | Actions | Timescales | | |
|---|--------------------------|-----------|---|--------------|--------------|--------------|
| | | | | YR 1 | YR 2 | YR 3 |
| Travel Trade <i>UK & overseas coach and tour operators</i> | A Development | 4, 6, | 1. Compile package of products and facilities suitable for group market 2. Optimise benefits of shared database in conjunction with partner LA's | 0 | 0 | 0 |
| | | | | 0 | 0 | 0 |
| | B Trade Shows | 2, 6, 7 | 1. Attend trade shows in partnership 2. Follow-up enquiries | 1,000 | 1,000 | 1,000 |
| | | | | 0 | 0 | 0 |
| | C Familiarisation visits | 1, 2, 6, | 1. Host familiarisation visits in conjunction with partners 2. Participate in familiarisation visits arranged by third parties | 0 | 1,000 | 1,000 |
| | | | | 0 | 0 | 0 |
| | D PR & advertising | 2, 3, 6 | 1. Arrange travel trade launch 2. Ensure travel trade receive press releases and event information 3. Take targeted advertorial space in key publications | 0 | 1,000 | 0 |
| | | | | 0 | 0 | 0 |
| 0 | | | | 2,000 | 3,000 | |
| Indicative annual costs | | | | 1,000 | 5,000 | 5,000 |

| Market | Activity | | Objective | Actions | Timescales | | |
|---|-----------|---------------------|--|---|--------------|--------------|---------------|
| | | | | | YR 1 | YR 2 | YR 3 |
| Educational <i>Primary, secondary, overseas, FE & HE</i> | A | Product development | 5, 7 | 1. Compile 'product offer' print for educational market 2. Develop, maintain and manage database of school group travel organisers | 3,000 | 0 | 3,000 |
| | B | IT Channels | 1, 2, 5, 7 | 1. Develop website appropriate to market 2. Link with other appropriate sites 3. Use of 'new media' as a marketing tool | 0 | 0 | 0 |
| | | | | | 0 | 5,000 | 1,000 |
| | | | | | 0 | 0 | 0 |
| | C | Direct Mail | 5, 7 | 1. Mailshot all relevant contacts in educational establishments within appropriate geographical area | 0 | 0 | 2,000 |
| D | Workshops | 1, 2, 5 | 1. Host familiarisation visits 2. Plan and attend follow up workshops | 0 | 0 | 2,000 | |
| | E | PR & Advertising | 1, 2, 5, 7 | 1. Ensure database informed of new products as they come on line 2. Secure advertorial in appropriate targeted publications | 0 | 0 | 0 |
| | | | | | 0 | 0 | 2,000 |
| Indicative annual costs | | | | | 3,000 | 5,000 | 10,000 |

6. CONCLUSIONS

‘Destination Blaenavon’ Making it Happen

This report has attempted to draw together the many strands of the tourism product, which will make up **‘Destination Blaenavon.’** It has tried to draw out the key issues and recommendations of the various studies, which have previously analysed, often in isolation, the different sectors of Blaenavon’s tourism product.

The bigger picture, which is drawn here, must be the focus of activity amongst the World Heritage Site partners – now. Funding must be secured and priorities identified. Work must now intensify if we are to make Blaenavon’s potential a reality, a world-class tourism destination.

The marketing action plan has identified and recommended actions to be undertaken in order to develop a profile in the marketplace for the World Heritage Site. It uses, where appropriate, existing Torfaen and partner marketing activities in order to maximise benefits and prevent duplication.

The UK, Travel Trade and Overseas marketing campaigns are long established and effective activities undertaken by local authorities working in partnership in order to present a comprehensive offer to the market place, in a cost efficient manner. (As an example, Torfaen contributes £3,000 to the overseas campaign. Total campaign fund is in the region of £150,000). It is therefore important that BIL takes full advantage of these campaigns.