

#GwyneddEryri35

Yr Athro Terry Stevens

Gwynedd
& Eryri 2035

Cynllun Economi Ymweld Cynaliadwy
Sustainable Visitor Economy Plan



Mae'r **Athro Terry Stevens** yn ymgynghorydd rhyngwladol aml-wobrwyol sydd wedi gweithio ar bob agwedd o ddatblygu twristiaeth a rheoli cyrchfannau mewn 55 o wledydd – o Seland Newydd i Norwy ac o Canada i Dde Affrica. Mae ei Gleientiaid yn cynnwys nifer o fwrdd twristiaeth cenedlaethol a sefydliadau cyrchfan, busnesau blaenllaw ac asiantaethau byd-eang mawr (gan gynnwys Twristiaeth y Cenhedloedd Unedig, UNESCO, UNDP, y Pwyllgor Olympaidd Rhyngwladol, a Banc y Byd).

Mae wedi derbyn gwobrau am ei gyfraniad oes i dwristiaeth gan Lywodraeth Slofenia a Maer Belfast a Maer Abertawe. Am bedair blynedd yn olynol, derbyniodd wobwr ymgynghorydd rheoli cyrchfannau'r flwyddyn a ddyfarnwyd gan banel twristiaeth rhyngwladol. Mae Terry wedi cadeirio Uwchgynadleddau Gweinidogol byd-eang ar dwristiaeth ac yn siaradwr allweddol rheolaidd mewn digwyddiadau o'r fath ar ran y Cenhedloedd Unedig, y Sefydliad Lles Byd-eang a'r Sefydliad Rhyngwladol dros Heddwch trwy Dwristiaeth.

Wedi'i leoli yng Nghymru, mae wedi gweithio'n helaeth ledled y wlad ac roedd yn Is-gadeirydd (Strategaeth) Bwrdd Twristiaeth Cymru. Mae ganddo dros 350 o gyhoeddiadau i'w enw, gan gynnwys '*Wish You Were Here: The stories behind 50 of Europe's best destinations.*'

#GwyneddEryri35

Professor Terry Stevens

Gwynedd
& Eryri 2035

Cynllun Economi Ymweld Cynaliadwy
Sustainable Visitor Economy Plan



Professor Terry Stevens is a multi-award-winning international consultant who has worked on all aspects of tourism development and destination management in 55 countries – from New Zealand to Norway and from Canada to South Africa. His Clients include many national tourist boards and destination organisations, leading businesses and major global agencies (including UN Tourism, UNESCO, UNDP, International Olympic Committee, and the World Bank). He has received life-time contribution to tourism awards from the Government of Slovenia, and the Mayors of Belfast and Swansea.

For four years running he received the destination management consultant of the year awarded by an international tourism panel. Terry has chaired global Ministerial Summits on tourism and is a regular keynote speaker at such events for the UN, The Global Wellness Institute and the International Institute for Peace Through Tourism. Based in Wales, he has worked extensively across the country and was Vice Chair (Strategy) of the Wales Tourist Board. There are over 350 published works to his name including 'Wish You Were Here: The stories behind 50 of Europe's best destinations.'

**RHEOLI CYRCHFAN:
ARFER GORAU RHYNGWLADOL**

**DESTINATION MANAGEMENT:
INTERNATIONAL BEST PRACTICE**

BANGOR, 14.2.2025

Y RHAGLEN THE AGENDA

1. CYD-DESTUN
SETTING THE SCENE
2. ARFER DDA
BEST PRACTICE
3. GWERSI ALLWEDDOL
KEY LESSONS

TRAWSNEWID CYRCHFANAU TWRISTIAETH

**Sialensau newydd,
chwarewyr newydd,
cyfrifoldebau newydd**

**CYFLEON
NEWYDD**



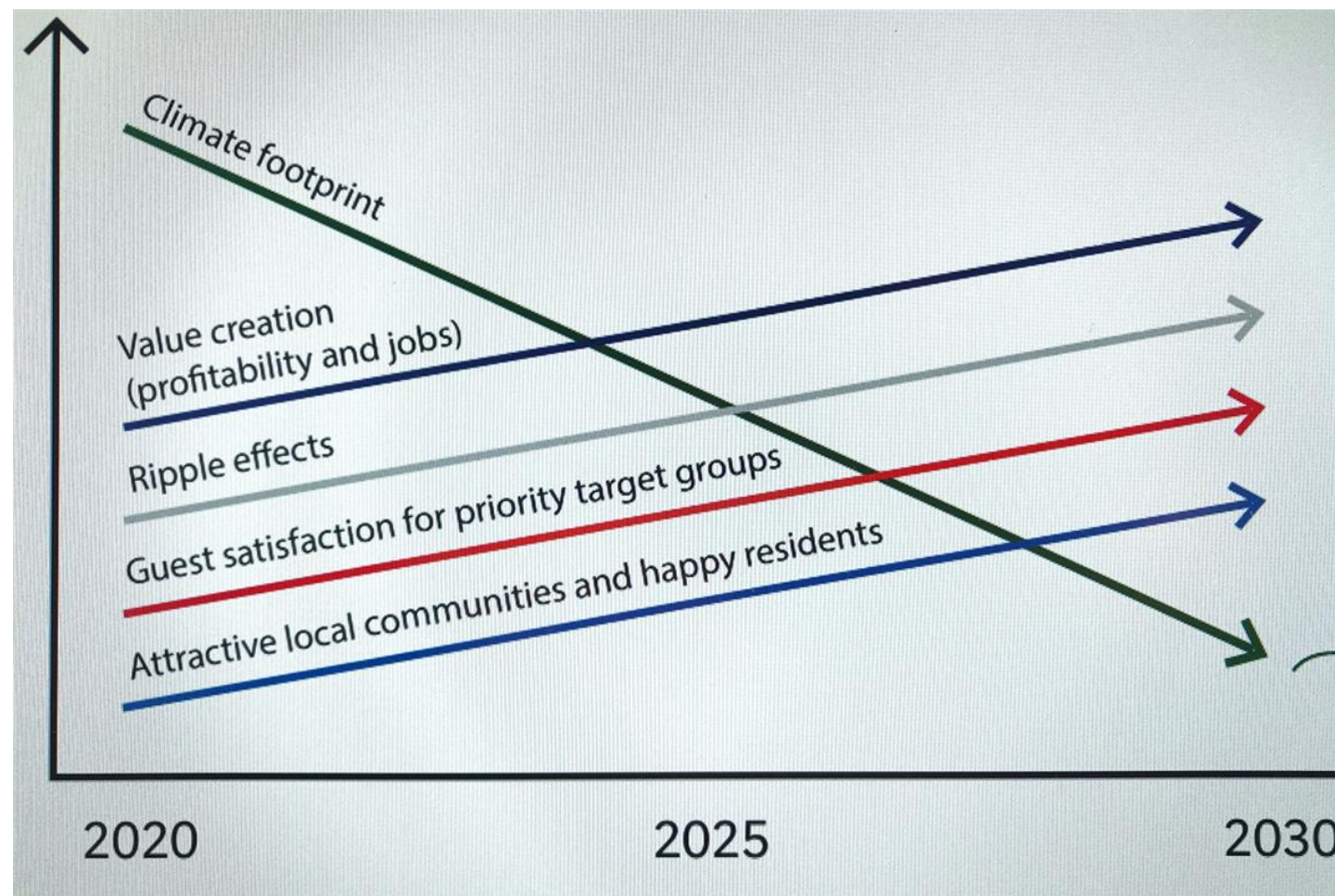
TRANSFORMING TOURISM DESTINATIONS

**New challenges,
new players, new
responsibilities**

**NEW
OPPORTUNITIES**

SUT YDYCH CHI AM
FESUR
LLWYDDIANT
TWRISTIAETH YNG
NGWYNEDD ERBYN
2030?

HOW DO YOU WANT
TO MEASURE
SUCCESS FOR
TOURISM IN
GWYNEDD IN 2030?





**RHEOLAETH CYRCHFAN YDI'R SWYDD BWYSICAF MEWN
TWRISTIAETH
DESTINATION MANAGEMENT IS THE MOST IMPORTANT JOB IN
TOURISM**

PWYSIGRWYDD RHEOLI
CYRCHFAN A SEFYDLIADAU
RHEOLI CYRCHFAN
IMPORTANCE OF DESTINATION
MANAGEMENT (DM) & DM
ORGANISATIONS.

“The term destination management refers to the organisation of the cooperation between stakeholders who jointly lead development at a destination, be it formally or informally.”

 Norway

National Tourism Strategy 2030

Big impact, small footprint



Economeg Cyrchfannau Twristiaeth

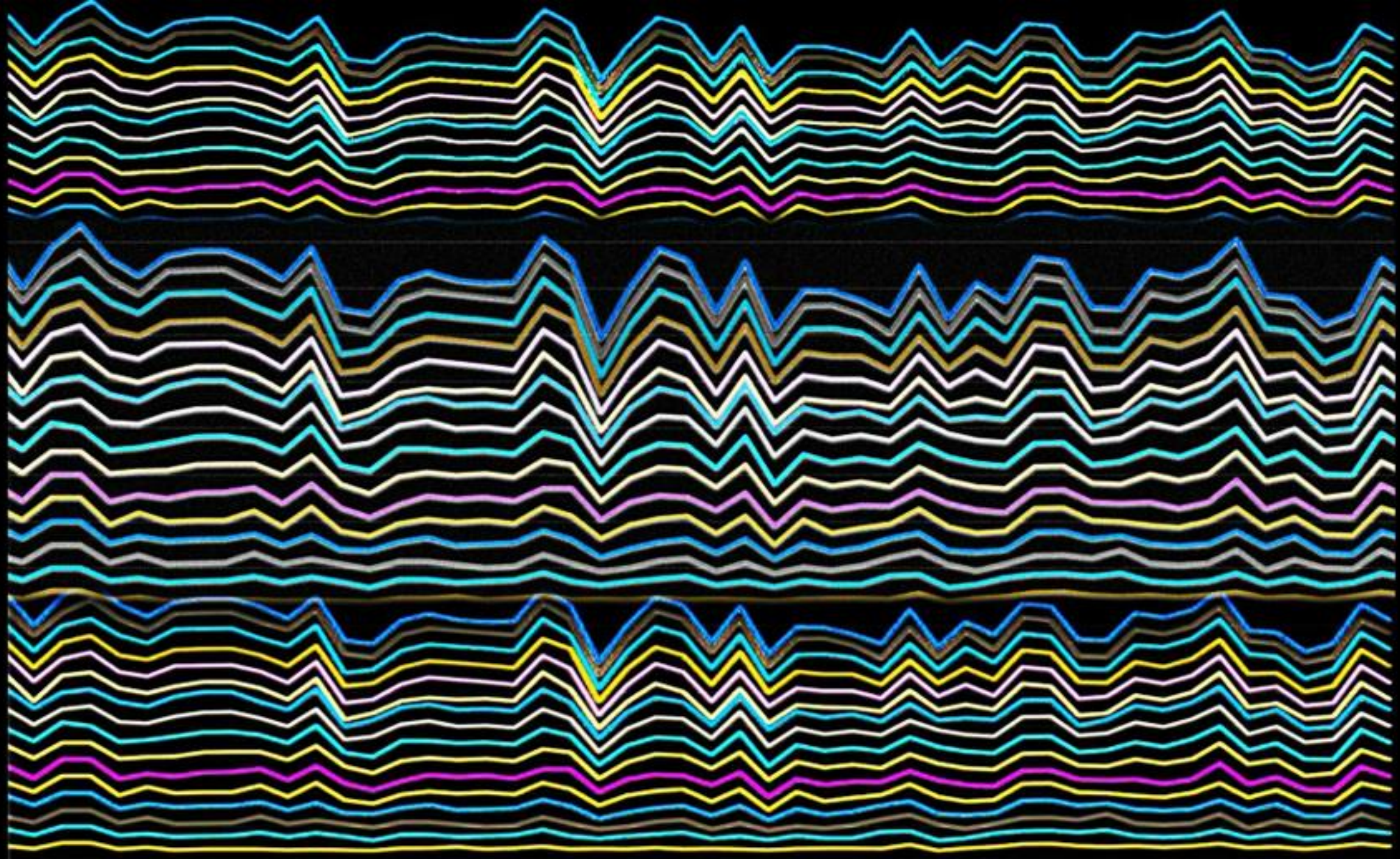
The Economics of Tourism Destinations

“This is an entity which, from the tourism and community management point of view, is managerial.”

Professor Van Hove, 2007

**MODEL STEVENS O
GYMHWYSEDD RHEOLI
CYRCHFAN** (200 Cyrchfan Ryngwladol)

**THE STEVENS MODEL OF
DESTINATION MANAGEMENT
COMPETENCY**
(200 destinations globally)



6 MAES I WELLA

6 AREAS FOR IMPROVEMENT

- Datblygu profiad ymwelydd
- Buddsoddi mewn Rheoli asedau Cymunedol
- Creu a meithrin rhwydweithiau cyd-weithio newydd
- Ymgysylltu efo meddylwyr ac arloesi hybrid
- Buddsoddi mewn pobl (sgiliau a thalent)
- Alinio polisi a chynllunio
- Developing visitor experience
- Investing in community asset management
- Creating and nurturing new networks for collaboration
- Engaging hybrid thinkers & innovation
- Investing in people (skills and talent)
- Aligning policy and planning

ANODD RHAGWELD-

hinsawdd, agwedd prynwyr, economi, ffactorau
bodolaeth

UNPREDICTABILITY –

climate, consumer behaviour, economy,
existential factors





Mae ymwelwyr y dyfodol yn poeni!
Tomorrow's tourists care!

5 NEWID PATRWM

CYRCHFAN A CHYMUNED MEWN CYDBWYSEDD

1. **HYBRID** – atebion newydd, unigryw, arloesedd
2. **MENTRWYR** – cystadleurwydd 'pwy fyddai wedi meddwl hynny'
3. **CYD-GREU A CHYD-DDIBYNIAETH** - yr eco-system nid yr 'ego-system'
4. **YSTWYTHDER** – hyblyg a chwim, CYFLYMDER newid
5. **GWERTH**—Ail-raddnodi gwerth canfyddedig / gwirioneddol

5 PARADIGM SHIFTS

DESTINATION & COMMUNITY IN BALANCE

1. **HYBRIDITY** – novel, unique solutions, innovation
2. **OUTLIERS** – ‘who would have thought it’ competitiveness
3. **CO-CREATION & CO-DEPENDENCY** – the eco-system not the ego-system
4. **ELASTICITY** – fluidity, flexibility and agility, PACE of change
5. **VALUE** – re-calibration of perceived / real value

TRETH TWRISTIAETH – parodrwydd
i dalu?

TOURISM TAX – willingness to pay?



Y RHAGLEN THE AGENDA

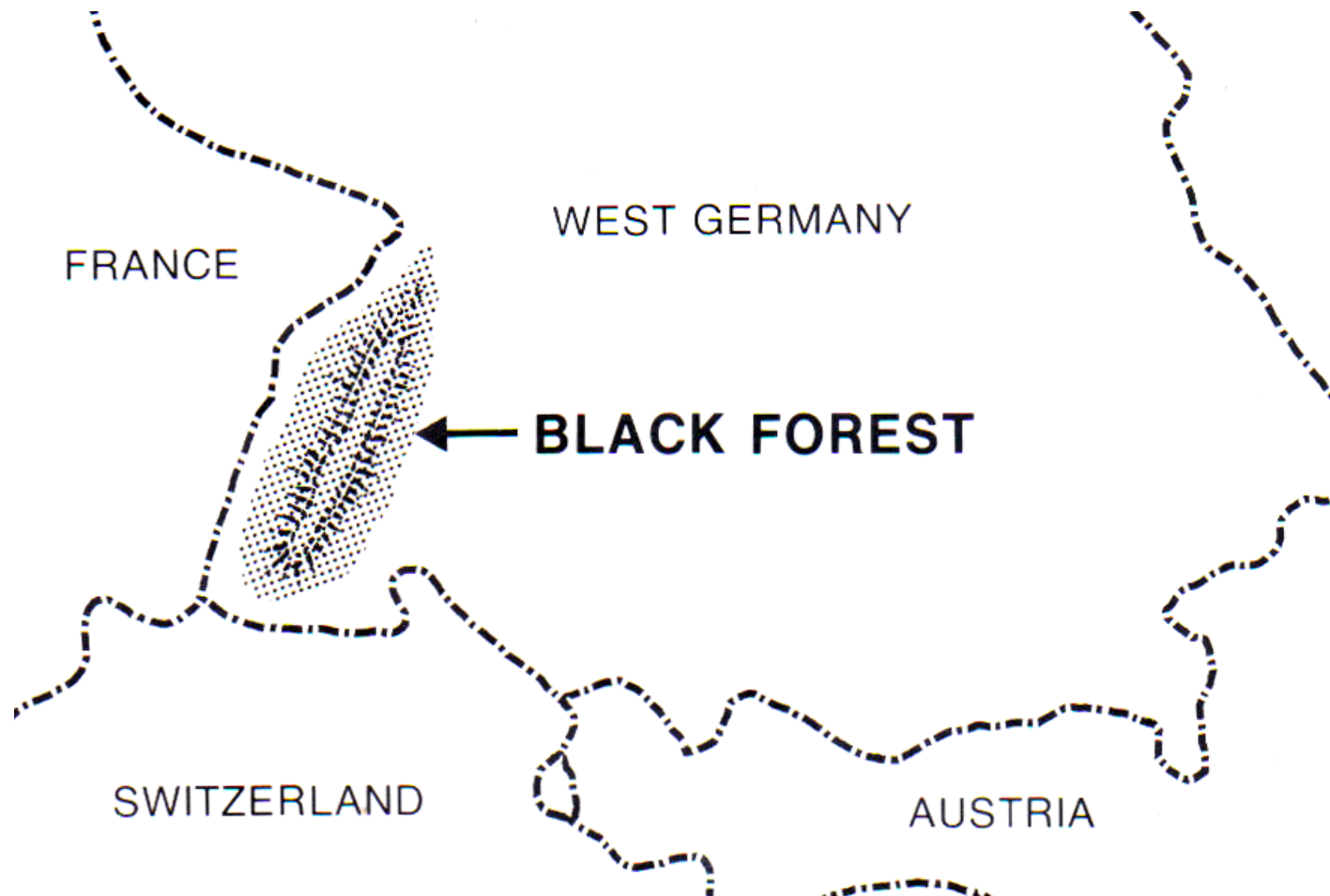
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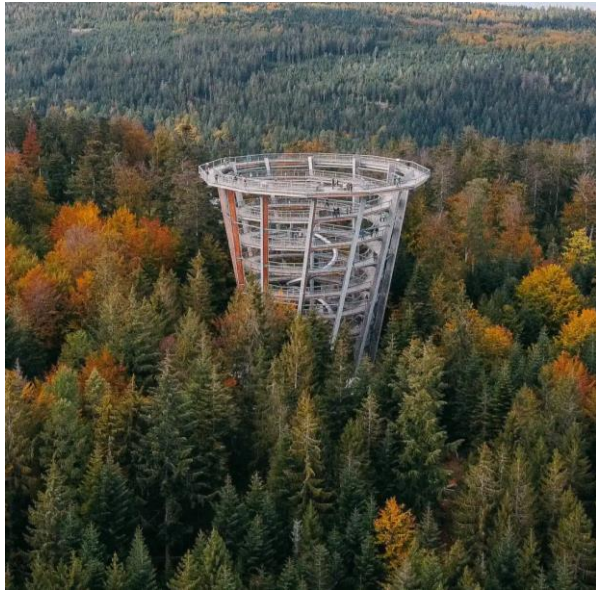
YR ASTUDIAETHAU ACHOS

THE CASE STUDIES

- YR ALMAEN – Y GOEDWIG DDU
 - AWSTRIA – BREGENZERWALD, SAALFELDEN & WILDER KAISER
 - SLOFENIA – BOHINJ
 - CROATIA - ISTRIA
 - GERMANY – THE BLACK FOREST
 - AUSTRIA – BREGENZERWALD, SAALFELDEN & WILDER KAISER
 - SLOVENIA – BOHINJ
 - CROATIA - ISTRIA
- 

**Y GOEDWIG DDU,
YR ALMAEN
BLACK FOREST,
GERMANY**





ASEDAU'R GYRCHFAN

DESTINATION ASSETS

- Ucheldiroedd gyda llynnoedd a rhaeadrau
- Cystyrau Bwyd a Diod - 17 bwyty Michelin
- Trefi a phentrefi hardd (cystyrau cynnyrch)
- Ffermdai nodweddiadol, cacenau, ham, cerfio pren, clociau'r gôg, dyfeisio'r botel siampên, gwisgoedd traddodiadol, crefftau a gwyliau
- Llwybrau cerdded a beicio a nifer o lwybrau gyrru
- Gwestai o ansawdd sy'n eiddo ac yn cael eu rheoli gan deuleuoedd
- Jurgen Klopp o Glatten !!
- Cymdeithas Twristiaeth y Goedwig Ddu (2006) = cwmni cyfyngedig nid-er-elw gyda budd cymunedol + DMOs lleol
- Upland landscape with lakes and waterfalls
- Food & drink cluster - 17 Michelin restaurants
- Picturesque towns and villages (product clusters)
- Typical farmhouses, gateaux, ham, wood carving, cuckoo clocks, invention of champagne bottle, traditional costume, crafts and festivals
- Hiking and cycling trails & multiple driving routes
- Family-owned, managed, quality hotels
- Jurgen Klopp from Glatten!!
- Black Forest Tourism Association (2006) = not-for-profit limited company with community interest + local DMOs

FFEITHIAU TWRISTIAETH CYRCHFAN

DESTINATION TOURISM FACTS

- 2 barc natur (1999 a 2000) a'r Parc Cenedlaethol (2014)
 - 320 o gymunedau – poblogaeth c 500,000
 - Twristiaeth yn dominyddu gweithgarwch economaidd
 - Wedi'i yrru'n fawr gan dwristiaeth ddomestig
 - Ymwybyddiaeth brand cryf mewn marchnadoedd rhyngwladol
 - 2023 8.3m o dwristiaid: 23m dros nos (6m domestig: 2.2m rhyngwladol)
 - 2,800 o sefydliadau masnachol gyda 10 gwely +
 - 11,000 cyfwerth ag amser llawn (FTE) mewn twristiaeth
 - Arolwg 'Tourism Acceptance Survey' 2023 = 76% cadarnhaol o ran rôl economaidd; 71% cadarnhaol o ran gwella delwedd; 60% yn dweud bod yn helpu i ddatblygu diwylliant.
- 2 nature parks (1999 & 2000) and national park (2014)
 - 320 communities – population c 500,000
 - Tourism dominant economic activity
 - Highly driven by domestic tourism
 - Strong brand awareness in international markets
 - 2023 8.3m tourists: 23m overnights (6m domestic: 2.2m international)
 - 2,800 commercial establishments with 10beds+
 - 11,000 FTEs in tourism
 - 2023 Residents *Tourism Acceptance Survey* = 76% positive of economic role; 71% positive image enhancement; 60% helps development of culture.

ARLOESED Y GYRCHFAN

DESTINATION INNOVATION

- Profiadau o lwybrau (car a rheilffordd) – cerflunwaith, amgueddfeydd crefft cymunedol, taith greadigol, *'German Clock Road'*, *'Three Lakes Railway'*
- Celf a phensaernïaeth gyfoes – y daith greadigol
- Bwyd a diod cyfoes
- Cydweithrediad 2023 â Puma (www.sneaker.de) a FC Bayer Leverkusen Ewro 2024)
- Digideiddio a cherdyn cyrchfan ddigidol
- Experiences of routes (car and rail) – sculpture, community craft museums, creative tour, German Clock Road, Three Lakes Railway
- Contemporary art and architecture – the creative tour
- Contemporary food and drink
- 2023 collaboration with Puma (www.sneaker.de) and FC Bayer Leverkusen (Leveraging the Euros 2024)
- Digitalisation and digital destination card







**BREGENZERWALD,
AUSTRIA**

**BREGENZERWALD,
AUSTRIA**







**SAALFELDEN-LEOGANG,
AUSTRIA**

**SAALFELDEN-LEOGANG,
AUSTRIA**

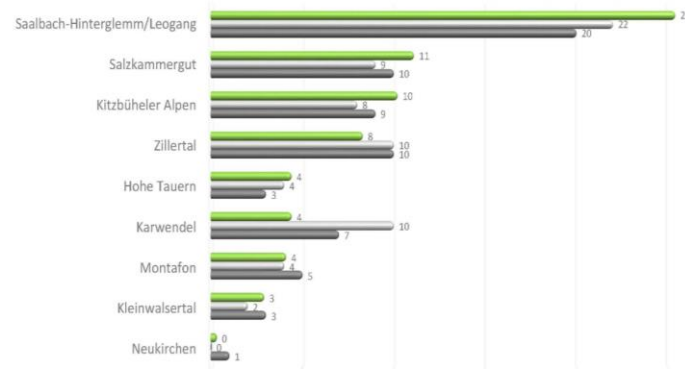


SEFYDLIAD RHEOLI CYRCHFAN
SAALFELDEN LEOGANG
DMO

Nächster Bike-Urlaub in Österreich

DELIUS

BASIS: GEPLANTER BIKE-URLAUB IN DEN NÄCHSTEN 12 MONATEN IN ÖSTERREICH = 100%



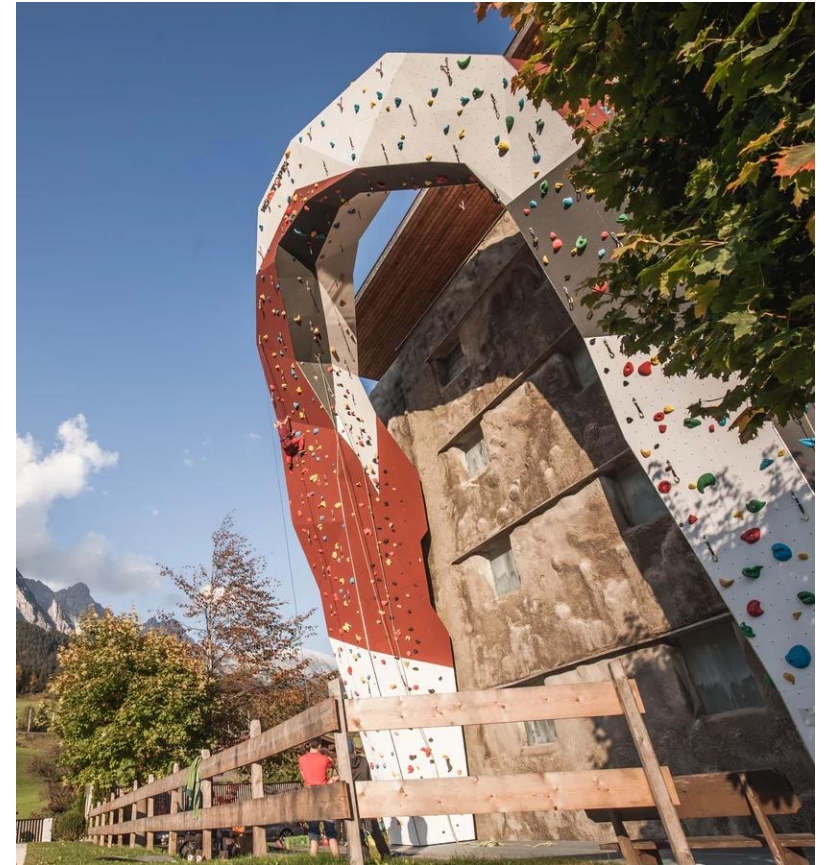
BIKE Leserumfrage 2014 – Angaben in %

Sonstige 29% (2013 = 31% / 2012 = 33%)

bil







CANOLFANNAU DRINGO, GWYLIAU A
CHYNHADLEDD SY'N EIDDO I'R GYMUNED

COMMUNITY OWNED CLIMBING,
FESTIVAL & CONFERENCE CENTRES



GYDA'N GILYDD, YN
GRYFACH

STRONGER TOGETHER

**WILDER KAISER,
AWSTRIA**

**WILDER KAISER,
AUSTRIA**

GWELEDIGAETH A CHENHADAETH

VISION & MISSION

Strategaeth

Strategy

"ansawdd bywyd trwy twristiaeth gynaliadwy"

"quality of life through sustainable tourism"

sydd bellach yn ffurfio'r
sylfaen a'r fframwaith
hirdymor ar gyfer yr holl waith
twristiaeth yn y rhanbarth.

now forms the long-term
foundation and framework
for all tourism work in the
region.









Y LLWYBR PERSBECTIF
GAN SNØHETTA

PATH OF PERSPECTIVES BY
SNØHETTA

ECONOMI'R DAIONI I BAWB

THE COMMON GOOD ECONOMY

Ni ddylid mesur llwyddiant twristiaeth yn bennaf gan ddangosyddion ariannol ond gan y cyfraniad i les cyffredin – ffordd fwy cyfrifol, cydweithredol o fyw gyda'n gilydd.

Mae gan yr *'Economi Daioni i Bawb'* bedair piler o werthoedd: urddas dynol, undod a chyfiawnder, cynaliadwyedd ecolegol a thryloywder, a gwneud penderfyniadau ar y cyd.

Tourism's success should not be measured primarily by financial indicators but by the contribution to the **common good** – a **more responsible, cooperative way of living together.**

Common Good Economy has four pillars of values: human dignity, solidarity and justice, ecological sustainability and transparency, and joint-decision making.

TARGEDAU

TARGETS

- 33,000 o drenau yn cyrraedd y flwyddyn (tair gwaith mwy o westeion o'i gymharu â 2018) a datblygu a hyrwyddo dewisiadau amgen i'r car preifat
- Un parth cerddwyr fesul pentref fel y gall pobl leol fanteisio ar yr amodau gwell sydd ar gael i westeion
- Cynnydd o 20% yn nifer yr arosiadau dros nos yn y tymor isel gyda chynnydd o 50% mewn arosiadau dros nos yn y tymor ysgwydd
- Cynyddu parodrwydd i dalu am frand Wilder Kaiser trwy ansawdd uwch
- Meddwl a gweithredu'n rhanbarthol - cyfuno twristiaeth ag amaethyddiaeth a choedwigaeth, crefftau llaw rhanbarthol ac â gwyddoniaeth ac ymchwil
- Gwella delwedd y diwydiant yn lleol trwy wella cyflogau a buddion ar lefel y cwmni a'r rhanbarth, gwella amodau ategol fel gofal plant, llety a thrafnidiaeth leol
- 33,000 train arrivals per year (triple number of guests compared to 2018) & development and promotion of alternatives to the private car
- One pedestrian zone per village so locals can take advantage of the better conditions available to guests
- 20% increase in the number of overnight stays in the low season with 50% increase in overnight stays in the shoulder season
- Increase willingness to pay for the Wilder Kaiser brand through higher-quality
- Think and act regionally - combine tourism with agriculture & forestry, regional handicrafts and with science & research
- Improve the image of the industry locally by improve pay and benefits at the company and regional levels, improve supporting conditions such as childcare, accommodation and local transport

CYLLIDEB Y DMO 2023/2024

2023/2024 BUDGET FOR DMO

INCOME

Tourism tax	€4.665m	(44%)
Compulsory member tax	€4.696m	(45%)
Grants	€0.073m	(1%)
SALES		
Media placements	€0.011m	
Merchandise	€0.120m	
Event ticket sales	€0.440m	
Other commercial	€0.439m	
Total sales	€1.000m	(10%)

TOTAL
€10.500m

EXPENDITURE

Maternity leave	€0.550m
Salaries and wages	€1.830m
Distribution of grants	€0.700m
Event costs	€1.950m
Administration	€2.300m
Other	€0.830m
Depreciation	€0.200m
TOTAL	€8.400m
Reinvested into capital fund	€2.300m
TOTAL	€10.700m
Loss	€0.200m

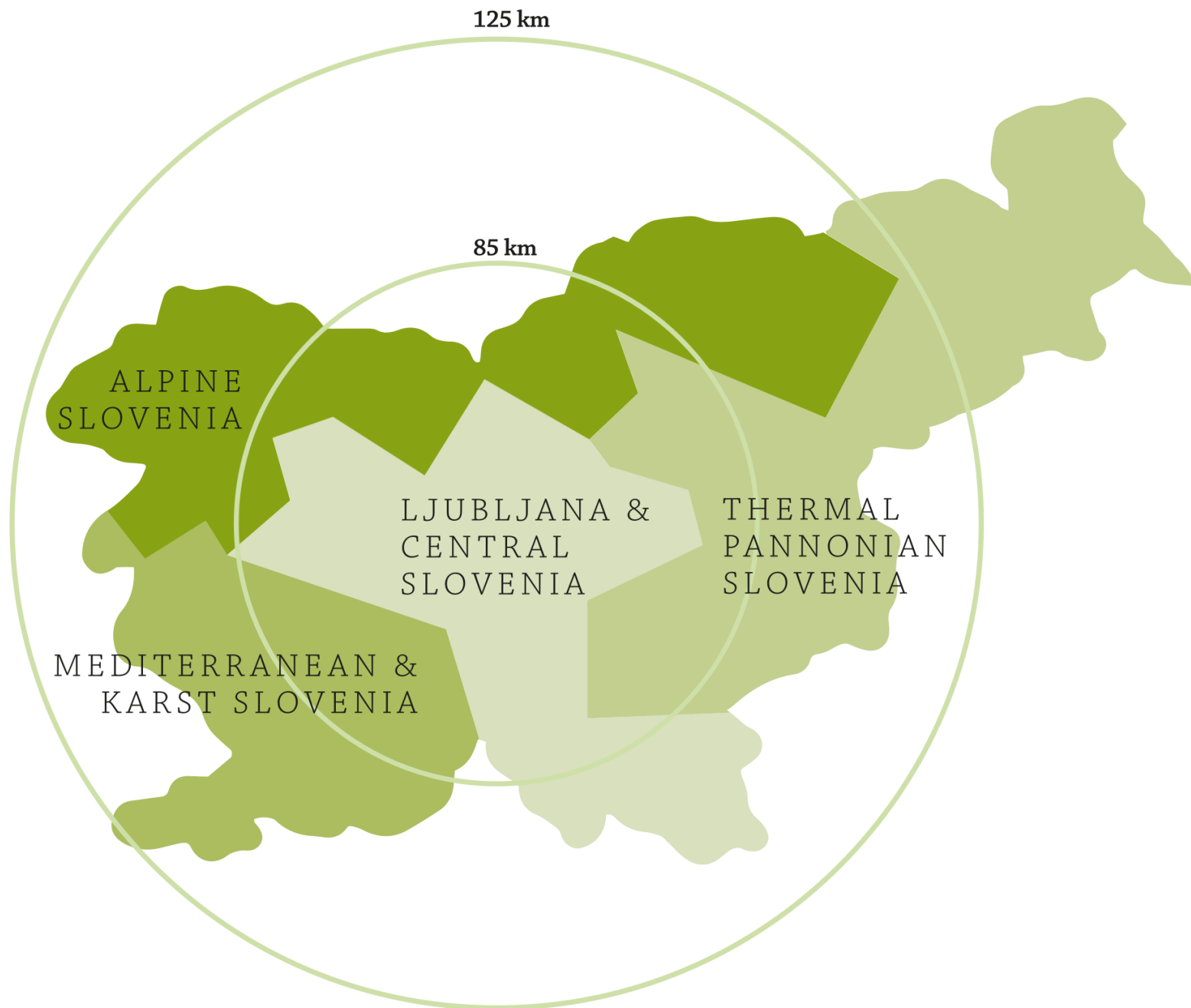
**BOHINJ, (PARC
CENEDLAETHOL TRIGLAV)
SLOFENIA**

**BOHINJ, (TRIGLAV
NATIONAL PARK)
SLOVENIA**

I FEEL
SLOVE

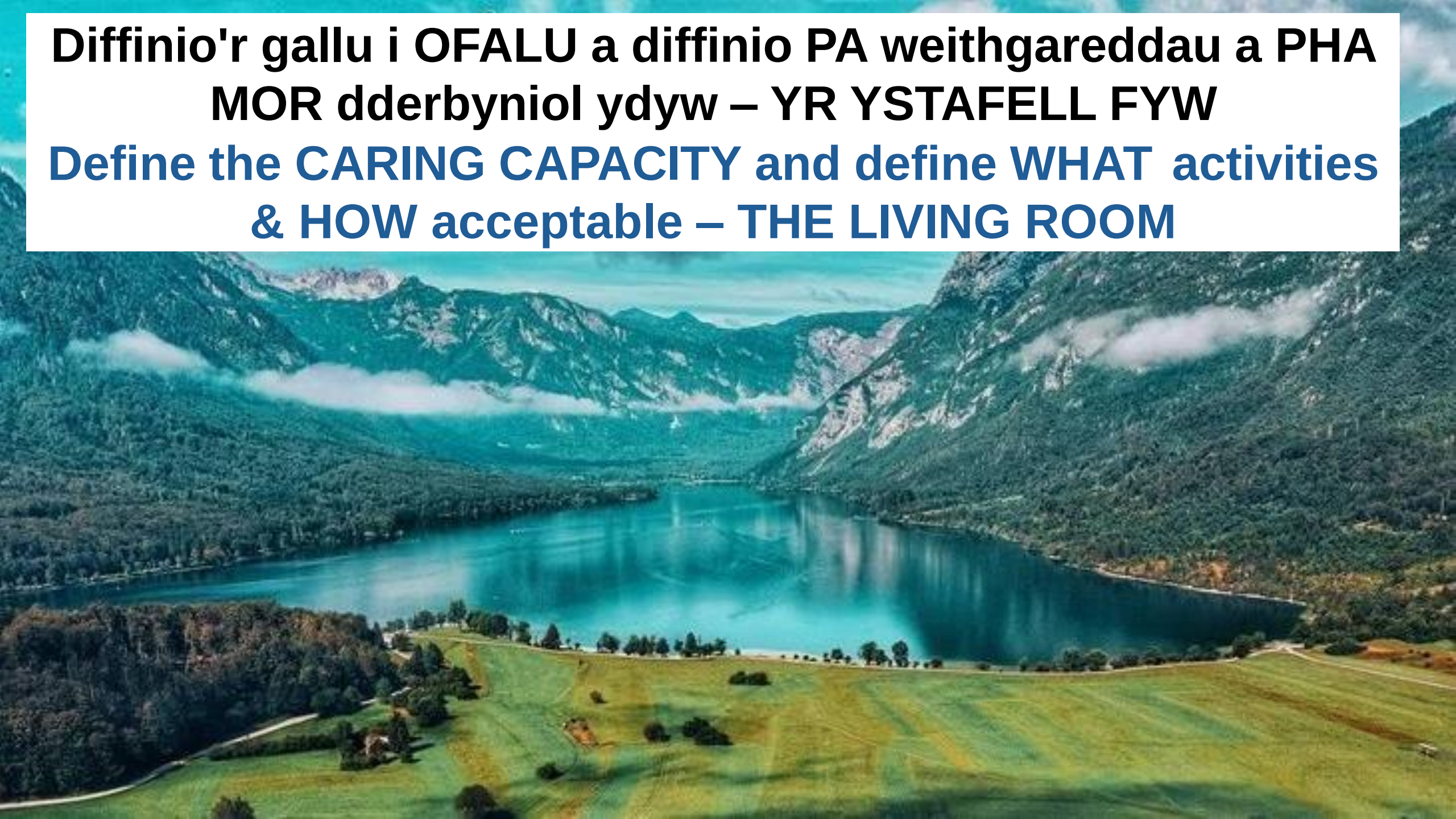


As product clusters



**Diffinio'r gallu i OFALU a diffinio PA weithgareddau a PHA
MOR dderbyniol ydyw – YR YSTAFELL FYW**

**Define the CARING CAPACITY and define WHAT activities
& HOW acceptable – THE LIVING ROOM**





3 AGWEDD YR YDYM YN MYND I'R AFAEL Â NHW
(yn unigol yn ogystal â'r gwrthdaro rhyngddynt)

3 ASPECTS WE ARE ADDRESSING
(individually as well as the conflicts between them)

=

NATUR
EITHRIADOL
EXCEPTIONAL
NATURE

=

TREFTADAETH
DDIWYLLIANNOL
EITHRIADOL
EXCEPTIONAL CULTURAL
HERITAGE

=

ARDAL AMAETHYDDOL
AGRICULTURAL AREA
(Roedd ardal y llyn yn wreiddiol yn le i
wartheg a chynhyrchu bwyd).

(the whole lake basin area is originally
a place for cattle and to produce food).

ISTRIA, CROATIA



Istria.
Year-round.
Responsible.
Premium.
Green.
Mediterranean.





LLEOLIAD CLYSTYRAU

POSITIONING OF CLUSTERS

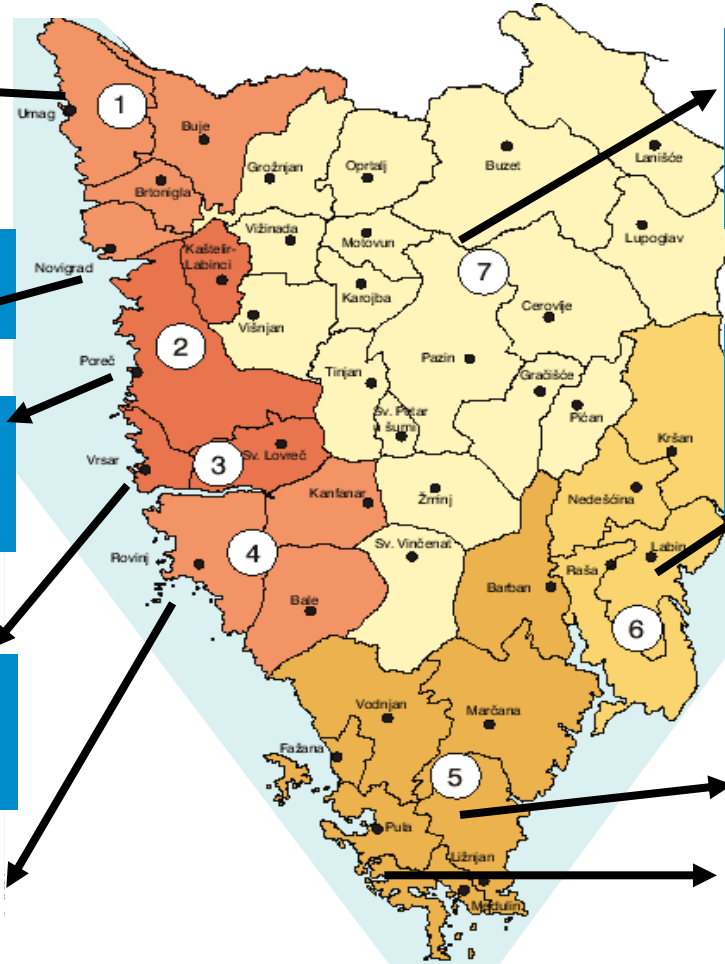
Gwyliau Actif ac arosiadau byr sy'n gysylltiedig â chwaraeon a ffordd iach o fyw
Active Holidays and short stays connected with sports and healthy lifestyle

Pentrefi pysgota gyda ffordd heddychlon o fyw
Fishing villages with a peaceful way of life

Antur gyda threftadaeth ddiwylliannol gyfoethog
The concentration of active adventure with rich cultural heritage

Pentrefi pysgota gydag ynysoedd delfrydol a chelf
Fishing villages with idyllic islands and a touch of art

Dinas Rhamantaidd, hamddenol yn Môr y Canoldir
Romantic city in a relaxed Mediterranean environment



Ffordd draddodiadol o fyw, mwynhau diwylliant, gastronomieg a natur Istrian
Traditional way of life preserved, enjoying the Istrian culture, gastronomy and nature

Cyfuniad o natur a threftadaeth, paradwys i artistiaid. Lle mae'r brynau yn cwrdd â'r môr.
The combination of nature and heritage, a paradise for artists. Where the hills meet the sea

Arfordir wedi'i warchod ar gyfer gwyliau teuluol actif. Gwerthoedd naturiol.
Preserved coast for active family vacation and based on natural values

Diwylliant, Hanes ... a'r traeth, lle ar gyfer eich cyfarfodydd
Culture, History ... and the beach, a place for your meetings



TWRISTIAETH AMAETH & FFOCWS PENTREF

AGRITOURISM & VILLAGE FOCUS





Offizieller Partner des
FC Bayern München



Istrie

Istrie



GALWAD NEWYDD I WEITHREDU

NEW CALL TO ACTION

- Newid o niferoedd (rhesymeg busnes) i dwristiaeth gyfrifol (dull llinell waelod driphlyg)
- Gwarchod yr amgylchedd yn allweddol i dwristiaeth gyfrifol mewn cytgordd ag anghenion trigolion lleol
- Addysg, Cyfathrebu a Marchnata Mewnol
- Dylunio o ansawdd a ffordd o fyw yn siapio profiadau
- Cyfoethogi ac ehangu hyfywedd busnes
- Gwahanol dangosyddion perfformiad ar gyfer pob tymor
- Darparu gweithredu integredig â ffocws (yr amgylchedd, cynllunio defnydd tir, rheoli adeiladu)
- Gwylliau a digwyddiadau – yn enwedig gastronomieg a diwylliant
- Shift from volume (business logic) to responsible tourism (triple bottom line approach)
- Preserving the environment key to responsible tourism in harmony with needs of local residents
- Education, communication & internal marketing
- Quality design and lifestyle shape experiences
- Enrich and expand business viability
- Different KPIs for each season linked to spatial distribution
- Focused integrated action delivery (environment, land-use planning, construction management)
- Festivals and events – especially gastronomy and culture

CYNNYRCH PRODUCT

- 5 gweithgaredd allweddol bob blwyddyn
- Rhaglen fuddsoddi arbennig gyda phob banc.
- Gostyngodd ITB gyfraddau llog ar gyfer busnesau twristiaeth teulu 8% gydag ITB yn darparu 1.5% a'r Llywodraeth Ranbarthol yn darparu 1.5% = 5% ar gyfer busnesau
- O leiaf 25 buddsoddiad bob blwyddyn
- Categorioidio arbennig o fwytai – (a) bwyty, (b) knoba, (c) ffermdy
- Cyllideb ar gyfer 2024-2025 = €11.5m sy'n deillio o: trethi twristiaeth, ffioedd aelodaeth, nwyddau gwerthu a digwyddiadau, partneriaethau (80%) + UE
- Cyfanswm cyfartaleddau buddsoddi €300m mewn prosiectau sy'n gysylltiedig â thwristiaeth bob blwyddyn
- 5 key actions each year
- Special investment programme with all banks.
- ITB reduced interest rates for family tourism businesses 8% with ITB providing 1.5% and Regional Government providing 1.5% = 5% for businesses
- Minimum of 25 investments each year
- Special categorisation of restaurants – (a) restaurant, (b) knoba, (c) farmhouse
- Budget for 2024-2025 = €11.5m derived from: tourism taxes, membership fees, sales merchandise and events, partnerships (80%) + EU
- Total investment averages €300m in tourism-related projects every year



Y RHAGLEN THE AGENDA

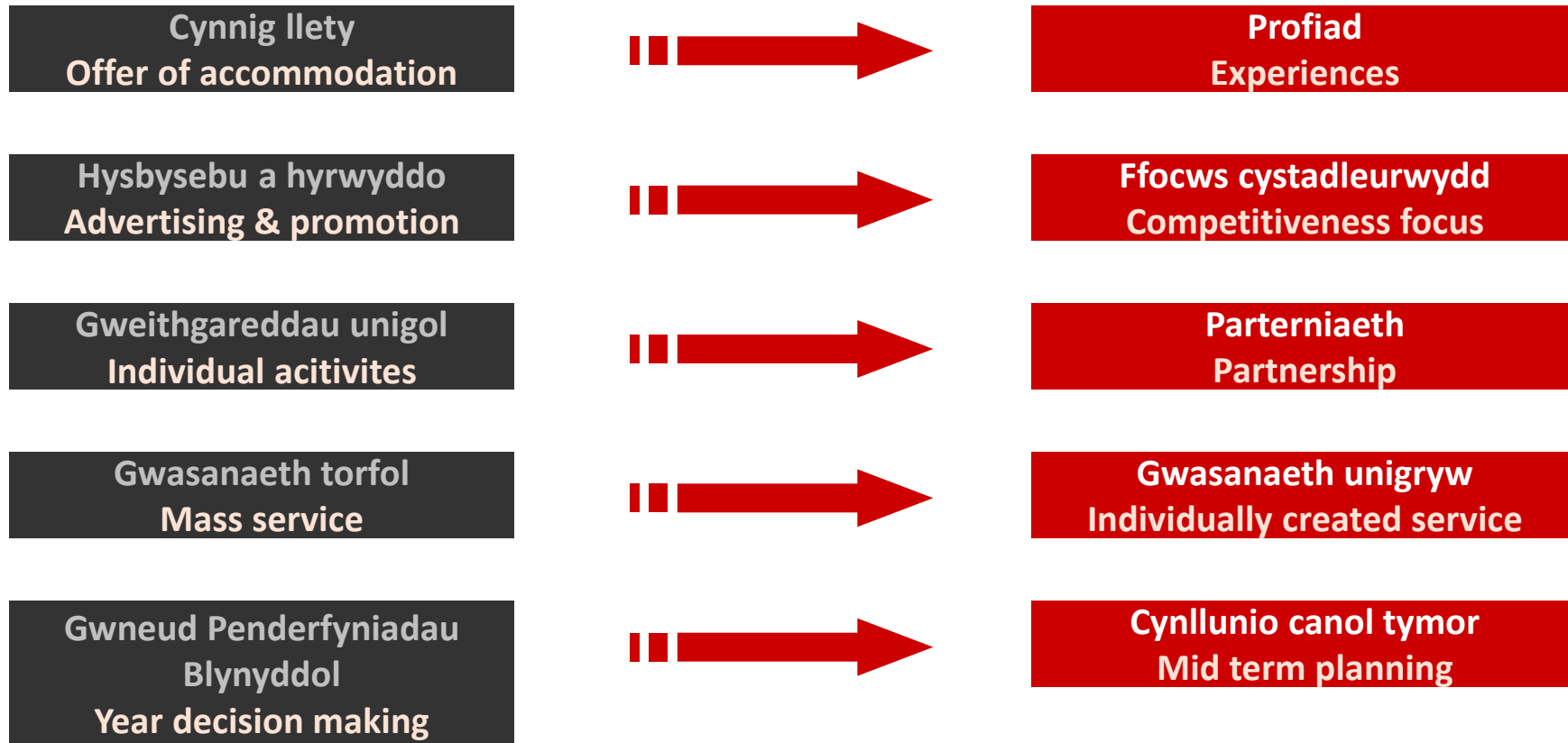
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FFORDD NEWYDD O WEITHIO

NEW APPROACH

O/ From

I/ To



8 CAM I WYTNWCH

8 STEPS TO RESILIANCE

- **Trigolion lleol ydi'r galon sy'n curo.**
Rhoi anghenion trigolion cyn ymwelwyr. I fod yn le da i ymweld, rhaid i rywle fod yn le da i fyw.
- **Blaenoriaethu cartrefi i fyw**
- **Rheolau agweddau.** Mae ymwelwyr yn westeion
- **Anadlu'n braf.** Di-gar, ardaloedd i gerddwyr, llwybrau cerdded a beicio, cynlluniau parcio a beicio.
- **Locals are your lifeblood.** Put the needs of residents before tourists. To be a great place to visit, a place must be a great place to live.
- **Prioritise homes for living**
- **Etiquette rules.** Tourists are guests
- **Breathe easy:** go car-free, pedestrian-only areas, walking and cycling routes, park-and-cycle schemes.

8 CAM I WYTNWCH

8 STEPS TO RESILIENCE

- **Economeg twristiaeth 101.** Deallwch buddion net twristiaeth
- **Amddiffynnwch yr organau hanfodol.** Diwylliant a threftadaeth yw'r enaid. Mae cynhyrchwyr, artistiaid a chrewyr yn gyswllt byw
- **Tamaid i aros pryd.** Mae cwtdogi cadwyni cyflenwi yn cynyddu gwytnwch
- **Mae amrywiaeth yn cyfoethogi** cymunedau a thwristiaeth
- **Tourism economics 101.** Understand your tourism net benefit.
- **Protect the vital organs.** Culture and heritage are the beating heart.
Local makers, artists and creators are living link
- **Food for thought.** Shortening supply chains increases resilience.
- **Diversity enriches** communities and tourism.

FFORDD O WEITHIO

APPROACH

"Tourism is not an end in itself, but one of several ways to improve quality of life in a region. To achieve this improvement, we need to examine the benefits it brings, such as leisure opportunities, infrastructure, gastronomy, social encounters and much more... but also honestly deal with the negative side effects such as traffic, energy and land consumption, noise, rubbish or crowds, and find solutions to them together,"

Tourist Board Managing Director Lukas Krösslhuber on the participatory approach behind Strategy 2024.