

## Mid Wales Regional Tourism Forum

07 September 2023

11:00 – 13:00

Pentwyn Holiday Cottages, Merthyr Cynon, Brecon, LD3 9SB

### Minutes

#### Attendees

Chair - **Steve Hughson**

**Rob Holt, Claire Carew, Nathan Richards, Clare Dwight, Rob Holt** (Visit Wales), **Julie Lewis** (Powys County Council), **Gwenfair Owen** (Ceredigion County Council), **Dylan Roberts** (Salop Leisure), **Val Hawkins, Zoe Hawkins** (Mid Wales Tourism), **Anthony Rosser** (Lake Vyrnwy Tourism), **Aled Davies, Jenn Jones** (Natural Resources Wales), **Clare James** (Royal Welsh Agricultural Society), **Rhodri Llwyd Morgan** (Aberystwyth University), **John Davies** (NFU Cymru), **Dafydd Wyn Morgan** (Cambrian Mountains), **Aled Rhys** (Cambria Tours), **Michael Booth** (Dwr Cymru – Elan Valley), **Rebecca Butcher** (Cambrian Railway), **Gareth Price** (Twristiaeth Ceredigion Tourism), **Helen Roderick** (Bannau Brycheiniog National Park), **Ceri Scott-Howell** (Brecon Beacons Tourism),

#### Apologies

**Aled Rhys Jones** [**Clare James** standing in] (Royal Welsh Agricultural Society), **Kate Gardener** (National Trust), **Carol Williams** [**Helen Roderick** standing in] (Bannau Brycheiniog National Park Authority), **Beverly Dimmock** (RSPB), **Aled Rees** (Cambria Tours), **Arwyn Watkins** (Cambrian Training), **Rowland Rees-Evans** (Penrhos Park), **Paul Donovan** (WATO), **Rob Bullen** (CAT), **Victoria Leyshon** (TfW), **Greg Loweth** (Metropole Hotel), **Sue Wright** (Pentir Pumlumon).

#### Guest Presenters

**Neil Butt, Ashley Caddick** (Welsh Revenue Authority), **Julie Hanley, Elin Morgan** (Welsh Treasury), **Janine Price** (Walking the Brecon Beacons), **Dominic Turpin, Wendy Walton** (Brecon Mountain Rescue).

### 1. Welcome from Chair, Introductions and Apologies, Actions from 12 June 2023

- 1.1 SH thanked RH for his work across VW and the Event Sector over the years and wished him well in his forthcoming retirement.



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SH thanked the officials from the Visitor Levy and Welsh Revenue Authority teams for attending. He referenced a pre-meet that had taken place on 29 August when he had stated that he would urge the forum members to move away from trying to 'stop it happening' to working together to co-design the policy that works for all stakeholders.

SH thanked Mid Wales Tourism for meeting with MPs and AMs and MB for hosting a meeting with Members of the Senedd, the previous week.

**Visitor Economy Forum** – a meeting took place on 06 September between members of the VEF to review the structure and governance of the group with the intention of creating a Visit Wales Visitor Economy Board that works for all stakeholders. **Action - SH to update in future meeting.**

## 2. Introduction to Epynt Holidays and Overview of Agri-tourism

2.1 SH introduced JD and thanked him for hosting the meeting. In particular, the chair referenced the need to work across sectors and highlighted the venue as an example of farm diversification and promoting Welsh produce that sit within Rural Affairs.

JD explained the history of the local area and the business, including its growth from a farm into an Agri-tourism business with a low carbon footprint and a 'net-zero' priority. He stated that the NFU has over 3000 business in the tourism sector and highlighted the work and success of the Agri-tourism industry in Scotland, posing the question – how can we collectively work together to drive Agri-tourism in Wales and boost the visitor economy through hosting events?

JD sees Wales as being the place of choice for a low carbon holiday.

## 3. Industry Snapshot and Feedback

3.1 SH explained that the purpose of the agenda item was to capture the concerns and highlights within the Mid Wales tourism sector, to support the Chairs update to the Minister at the VEF to accurately convey the current position of the sector.

The following points were raised:

- cost of living affecting attractions/activities but visitor numbers not as bad as anticipated.
- Accommodation challenges – late bookings, inability to predict accurate numbers.
- Ynyslas/Bwlch Nant yr Arian both seeing growth in numbers and income when compared with 2018/2019 figures.
- Elan Valley visitor numbers up.  
Visits down 11-17% on 2018/2019 figures.
- Static sales down 38% on 2019 figures.



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- Motor home sales down 23%.
- Owner occupancy rates down on 2019 figures.
- Coffee shops/bars – sales up 17-30% but need to consider rising costs/bottom line.
- Shop sales down 17-22%.
- Strong occupancy but lots of late bookings.
- More marketing done to drive sales.
- Figures marginally up on 2019 figures.
- Resurgence of online travel agents.
- Catastrophic costs – double 2019 figures.
- Staffing challenges seem to be easing but having to provide accommodation for staff.
- Visitor numbers dependent upon weather.
- Secondary spend significantly down.

#### *Metropole Hotel (through RH)*

- Suppliers cutting the frequency of deliveries to rural areas due to rising transport costs and, where fixed price contracts in place, suppliers claiming to not have the products because it's costing the more – OJ for example.
- Cyclist, motorcyclist and (in particular) golfer numbers doing very well.

## 4. Visit Wales Update

### 4.1 CC updated on **Tourism Development:**

Dates and venues are confirmed for the autumn **Roadshows**. Booking link is also open. The roadshows will be an opportunity for VW to get back out and meet the tourism sector after what has been a long break in face-to-face engagement. The last roadshows took place in 2019. Each forum Chair has been invited to speak about the work of the forum and its members. There will also be a guest speaker from each region.

SW – Bluestone (sustainability / skills)

North – Wrexham Council focus on Hollywood and International (Spread)

Mid – Aled Jones Royal Welsh (spend)

SE – Martin Astley Bike Park Wales (seasonality). Opening up to family market

CC reminded members that the VW **e-newsletters** are published every 3 weeks. All news, future opportunities and links to useful business support tools can be found in the newsletter. WE ask you all to continue to share and encourage sign up particularly new businesses.

**Brilliant Basics** projects have been announced – successful applications from Powys (1), Ceredigion (1) and BBNP (2).



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**20mph speed limit** to be introduced on 17 September on restricted roads across Wales. [Introducing default 20mph speed limits | GOV.WALES](#). Assets are available for sharing on your social media platforms - [Main 20mph assets \(public\) - Prif asedau 20mya \(cyhoeddus\) - Google Drive](#)

**Reform of the school year** – consultation going ahead. Date to be published in the VW e-newsletter.

Additional updates regarding school year reform can be found on the webpage: [Reform of the school year | GOV.WALES](#)

### **Statutory licensing scheme for all visitor accommodation**

The responses to the 13-week consultation and findings from the stakeholder events held in May were published alongside a [Written Statement](#) by the Deputy Minister for Arts, Sport and Tourism on 05 July.

The overall view from the consultations is that a scheme of any kind is unfavourable. However, it was highlighted in the consultation that a registration scheme is more welcome than a licensing scheme. The future policy direction is focused on developing a scheme that is simple to and cost effective, thus reducing some of the concerns highlighted in the consultations and maximising the policy aims.

To supplement the feedback from the formal consultation exercise and supplementary consultation events, a visitor/resident omnibus survey was undertaken in early September with headline results due towards the end of September.

The Deputy Minister for Arts, Sport and Tourism will provide an update later in the year setting out proposals for how we intend to take the scheme forward.

#### **4.2 CD gave a presentation on marketing activity. Action – NR to share slides with the draft minutes.**

SH suggested a conversation take place outside of the meeting about promoting Agri-tourism, given the lessons from the venue of the meeting. **Action – CD to contact JD to arrange.**

### **Tourism Levy**

#### **4.3 EM from Welsh Treasury was introduced by SH, along with AC/NB from WRA. EB went through the indicative timeline for the Visitor Levy Bill/Act. Action – NR to share slide with draft minutes. EB said that WRA and LAs will be working closely with the sector, providing many opportunities for engagement**

with the levy team. WRA will be carrying out field research. Impact assessments will consider *all* policies affecting the sector.

Feedback during the session was excellent with members raising issues and looking to shape delivery. SH thanked everyone for their contribution and encouraged everyone to continue to engage to ensure that what is delivered works for the sector.

- 4.4** AC/NB gave the background of WRA and explained their role in developing the Tourism Levy policy. They emphasised the need for businesses to be involved in the design of the policy. AC/NB presented feedback from recently conducted research with tourism businesses across Wales which was carried out to establish the ecosystem for accommodation providers.

Gaps in the research were highlighted from around the room. The map displayed poor representation in terms of the geographical spread and types of businesses involved in the research. It was suggested that going forward, WRA also engage with larger organisations such as tourism associations and representative bodies such as British Holiday & Home Parks Association and UK Hospitality Cymru. **Action – NR to link AC/NB with AR/DS/VH.**

There was a call for a ‘vision’ to be made available to make clear the purpose and benefits of the levy, how it will be spent and further down the line, how it’s impact (on visitor numbers, businesses and on the areas ‘benefitting’ from the proceeds) will be evaluated.

SH voiced a feeling of need for strategic guidance and high-level governance around the policy. In particular, he asked how Welsh Government would seek to ensure the Levy delivers the strategic vision when delivery is delegated to Local Authorities, each of which could / will have a different approach.

**Action – the policy area becomes a standing item on the agenda for future meetings. WRA to be invited to future meetings and where necessary, to be accompanied by researchers.**

## **5. Events – Update on Recently Held, Regional and National Events / Future Planning**

- 5.1** RH updated on events and noted that an update on the strategy would be made at the Roadshow in October.

WG budgets are being scrutinised but 95% of the 2023/2024 budget has already been allocated due the lead times and are therefore not affected.

Events are in the diary up to 2030 including the Island Games on Anglesey in 2027 and a decision on 2028 Euros is imminent.

Recent and upcoming events in the region include the Mach Comedy Festival and Other Voices Welsh-Irish Music Festival.

A review of business events has taken place and the team are working to bring more business events to Wales.

RH mentioned the impact of policies on events. 20mph speed limit for example, could impact upon biking events, whilst shortening the school holidays in the summer would mean increasing difficulty in fitting events into an already busy calendar, as well as additional staffing issues if 16-18 are not available to work at events.

AR highlighted the need to re-engage with stakeholders who have fallen lost faith and trust due to the policies. RH encouraged engagement with the 'new' VEF and MWRT Forum. VH commented that the region maintains good dialogue with VW and WTA and stressed the need for that mechanism to continue.

## **5.2** CJ presented some headlines from the Royal Welsh Show held in July.

Attendance figures strong – up on 2022. High number of 'on the day' ticket sales. International visitor numbers strong – circa 800 visitors from over 30 countries, the majority from Ireland and Netherlands. RWAS has a vision for a new horticultural show.

## **6. Launch of the Cambria Line Window Seater**

Time constraints didn't allow for this item to be covered.

## **7. Walking the Brecon Beacons/ Brecon Mountain Rescue**

**7.1** JP gave a presentation on the growth of *Walking the Brecon Beacons* social media group and their future plans.

**7.2** DC gave a presentation on the work of the Brecon Mountain Rescue Team, including their roles, funding and statistics on the type of call-outs.

## **8. Closing remarks / AOB**

**8.1** Date of the next meeting was agreed – 7 December 11:00 – 13:00 at Dyfi Wildlife Centre, Machynlleth.



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**8.2** SH thanked members for sending in their sector updates and asked that those outstanding be sent to NR by CoP on 13 Sept 2023. The updates will be collated and circulated with the draft minutes.

***Actions:***

1. *SH to update on review of VEF in future meeting.*
2. *NR to share presentation slides with the draft minutes.*
3. *CD to contact JD to arrange discussion around Agri-tourism marketing.*
4. *NR to link AC/NB with AR/DS/VH.*
5. *Tourism Levy to be added as a standing agenda item going forward. WRA officials to be invited to future meetings and where necessary, to be accompanied by researchers.*