

## Visit Wales – North Wales Regional Tourism Forum

14 July 2020 – Virtual (online) Meeting

Present	
	Representing
MB	Chair Tourism Forum
SPJ	Cyngor Gwynedd
MT	IOACC
JM	CCBC
JR	CCBC/NWEF
CO	Chair DMP Conwy
PM	Denbighshire CC
IL	Chair Destination Denbighshire
RJ	Flintshire CC
JS	Chair Destination Flintshire
SR	Chair Destination Wrexham
JB	Wrexham CBC
RE	Cyngor Gwynedd
CF	NWT
NJ	ATA
CW	GUEST WATO
JE	Guest of CO
AJ	Chair Destination Gwynedd
Visit Wales	
RH	Deputy Director, Tourism Development
RM	Head of Tourism Development
LVW	Head of Marketing Tourism
JC	Head of Research & Insights
AF	Regional Engagement Manager

### Apologies

SJ	WLGA
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#### 1. Welcome

MB welcomed everyone to the meeting and paid tribute to everyone around attending the meeting for their joint efforts for getting us to this point of reopening the visitor. MB reflected that whilst the accommodation side of his business was buoyant the attractions side was getting a much more cautious response. He added that the process of re-opening underground attractions had begun.

#### 2. Update from VW

RH thanked MB for his support over the past few weeks and outlined the process which officials have to undertake to advise Ministers in order to change regulations. RH outlined dates on what had/would be opening. VW had taken the lead on a fast track review (with representatives of the industry and Trade Unions & blue light services to develop mitigations). VW are

hoping indoor hospitality could re-open from 3 August and camping from 25 July. VW were continuing to work with stakeholders on mitigation to re-open underground attractions and funfairs. WG were working on strong communications re TTP with a webinar on the subject scheduled for 24 July.

VW are also involved in the mitigation of moving from 2 – 1m where needed i.e. hairdressers, transport and hospitality and we have launched the Good to Go Standards and the ADDO promise. We still have a good way to go on events. Weddings remain an issue and we continue to work on these sectors.

RH reminded everyone on 'The Eat Out To Help' scheme, the cut in VAT, and our continued lobbying for the continuation of the furlough scheme which has not happened. VW are aware of the need for long term support and we continue to lobby at UK level. Working around skills what do we need for the new norm and we move to recovery phase.

JR asked about extension to opening of caravan and camping and Holiday parks. RH stated that this was being looked at with WLGA following meetings with stakeholders.

LVW gave an update on marketing and the Good to Go Scheme with circa 3.5k uptake in Wales to date. We would share breakdowns ASAP and support via VW Website those who had signed up. LVW updated and presented on the Wales Promise (Addo / Pledge). A business toolkit would accompany the initiative. The initial uptake after 24 hours was very encouraging and it would be a core part of the VW summer promotion managing visitors as they return. It's a scheme that fits in with the Action Plan.

RH added that the community aspect of re-opening was very important and we need to ensure communities are comfortable as we move forward.

A discussion took place on dealing with possible spikes in the virus and visitor numbers overwhelming certain destinations as we open up.

RH and LVW reported that VW were in discussion with LA and NPs colleagues re local tourism management. This multi-agency approach has helped.

JC gave an update on research to date.

COVID-19 Consumer Sentiment Tracker, run jointly with VisitBritain and VisitScotland to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time. Weekly GB-level reports are published on VisitBritain's website (non-GSR). Week five is shown here (these were before the Wales, England and Scotland announcements) <https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>

A monthly Wales-focused report profiling those intending to visit Wales will be published.

International consumer work – We are partnering with VisitBritain, VisitScotland and London & Partners to commission consumer studies in around ten of the UK's main international markets over the next few months to understand current and evolving views in relation to travelling and visiting the UK.

COVID-19 impact work - The team has been feeding economic and social impact evidence into various papers used in discussions around re-opening parts of the tourism sector, and is compiling a summary piece on the impact of COVID-19 on the visitor economy in Wales.

Domestic forecasts - We are working with VisitBritain to develop forecasts on the impact of COVID-19 on the visitor numbers, taking into account the differences in the home nations in terms of lifting restrictions.

COVID-related redundancies within Tourism - We intend to assess the redundancy impact within Tourism in the next Business Barometer which we expect will take place in late July after some parts of the sector have re-opened, and are also working with regional networks to gain informal feedback on redundancies across Wales to feed into discussions internally. A note will go out to Fora next week but anything you have can go through the Regional Engagement Manager as well.

Research summary – will be sending out research summary mid and end of July and then decide on regularity.

Community Engagement in Tourism - Given concerns from some communities about the risks associated with re-opening tourism, we are asking local authorities and local partners to feed in any findings from community engagement that they undertake. This will be collated to inform internal discussions on re-opening and mitigating the impact of visitors on local communities. Anything you have can go through the Regional Engagement Manager as well.

GB Tourism Survey and GB Day Visit Survey is planned to start back from early July in England and mid - July elsewhere. We are considering when to restart the Occupancy survey.

Tourism Performance 2019 annual report was published in June - The official tourism statistics publication, a comprehensive report that includes 2019 Q4 2019 and annual data from the main tourism surveys. It showed a really strong performance for Wales' tourism industry before the pandemic.  
<https://gov.wales/wales-tourism-performance-2019>

Ongoing activity - Visitor Survey 2019 Research, Regional Factsheets.

MB asked about the information redundancy – when data would be available – JC confirmed that the data would be collected by the barometer in August. But information would also be available via LA and WG activity being undertaken.

Profs Nigel Morgan & Annette Pritchard gave a presentation on research being undertaken on behalf of the NWEAB which was commissioned in June. The report would examine how we can build low carbon economy, green transport and local supply chains to build a sustainable tourism offer. Key points to include:

- This would be a thought piece which would report on the impact of COVID-19
- It would look at opportunities to renew and refresh as we rebuild the sector
- It would present simple analysis extrapolating data and anticipating a loss of £1b to the regional economy
- It will considering effect of tourism employment
- It will look at what tourism will look like post COVID-19 – general trends being identified by industry and academics are ongoing and now hot housed – emotional connections but augmented by safety and hygiene; multi-generational trips, sustainable and responsible tourism, growth to explore lesser known destination as a reaction to safety and responsible tourism. Authenticity, sense of place an culture
- Address how we grow in digitisation to develop bookable product

A discussion took place around the SWOT analysis and how NW builds a sustainable offer and what are the key transformational projects for the regional and how do we build a stronger community value for the industry.

MB asked if the initial findings on over tourism were a concern for communities and NM stated that is was not akin to places like Venice & Dubrovnik but was on a scale proportionate to the destination.

HP agreed it was very localised and added that for communities the impact outweigh any benefits and because they have had a spring without visitors, we need to acknowledge how communities feel and respond to concerns. We also need to talk about NW in a different way as a ‘stunning fragile landscape’ and not a ‘playground’.

MB added that he and JR had presented to a cross party Senedd group on these themes but had been challenged that the mass/volume tourism of certain parts need to be included future plans. NM agreed it needs to be considered.

CO was concerned that there was no mention of coach tourism, the perception that this was budget end was a misconception with some high spend groups visiting the region, coaches can be green and gentle on the environment. AP agreed, with these green credentials it could be good for

north Wales. CO was encouraged by the number of older customers still wanting to travel.

JM challenged a negative point re caravan parks as demographic changed to ownership from rental and that CCBC were undertaking some research in this sector. MB asked if this could be discussed a future forum

RM asked about the investment element of the study and limited Government finance at this time so we need to understand were best to focus this investment and was interested to know what initial findings were showing. The banks may be cautious of investing in the sector moving forward and should be supporting the sector to hibernate or grow

NM agreed re bank confidence in the sector, initial reaction is to stick with what you know but innovation will be key to recovery. We talk about bookable product but only about 10% of product bookable on line we need to upskill business. AP agreed bookable product key and cited Loch Ness as a good example of development of winter offer with passes etc. to build a year round season. MB agreed we need to support development and innovation.

RH reported on transport and a recent meeting with colleagues on regulations. RH wanted to thank the Forum for all their input and wants to maintain this as we move forward

MB invited for updates from members.

RHYS, concerned on the two week hiatus before they can fully open all facilities and that England open fully. We need to manage some positive messaging. LVW – we have changed our communications as we re-open, with a welcome message. But we need to ensure people feel safe as they return.

CO concerned that the full hospitality sector not opened up. My perception is the trade is infuriated that they can let rooms but not have their restaurants open yet. The demand for takeaway food was causing a problem with litter.

CF agreed with comments and the feedback from NWT members the same, you can travel over the border and eat in a restaurant. CF welcomed the ADDO initiative. We just want to get open fully now

JR with respect to litter – we have never seen the levels of littering on the first weekend. We have increased numbers of street cleaners and the toll on the council is a concern.

SP updated on the community and industry partners concerns. Visitors disappointed that showers and toilets on campsites not yet open and agree with other comments on eat in dining options and the increase in litter and Cyngor Gwynedd are tackling this. No issues on the weekend on the coast

<p>but protection issues on Snowdon. Working with business to highlight how they are opening safely to ensure visitors safety.</p> <p>Regarding priorities for the future in Gwynedd looking at developing sustainable and responsible tourism and COVID-19 has given us the opportunity to re set.</p> <p>MT IOACC – similar issues to Gwynedd; slipways and toilets open but problem with camper vans just turning up and wild camping and need be giving stronger messages across the border that regulations are different in Wales.</p> <p>JB – Similar issues in NEW but possibly not as extrema due the proximity to the border. Consumer confidence is an issue. No major issues noted following the restriction of the five mile travel restrictions. One are of concern for the NE was the inability of wedding venues to reopen and clarity was needed. LVW assured the for a that this was being addressed</p>	
<p><b>AOB</b> There were no other matters arising</p> <p><b>Next meeting</b> 17 September 13:30 – 15:30</p>	