

**Fforwm Twristiaeth Rhanbarthol De Orllewin Cymru**  
**South West Wales Tourism Forum**  
**Amgueddfa Cyflymder, Pentwyn / Museum of Land Speed, Pendine**

**Minutes**  
**Wednesday 13 September 2023**

**Forum Member present:**

GR, Chair: Glangwili Mansion	MS, Call of the Wild
SB, Carmarthenshire Tourism Association	IT, Visit Pembrokeshire /
RB, Swansea Valley Cottages / NPT DMP	PLANED
AC, University of Wales Trinity St Davids	DB, Folly Farm
JD, Clydey Cottages / PASC UK	SH, Swansea Council
PE, Retreats Group	HP, Carmarthenshire County
RC, WAVA	Council
MN, NBGW	KD, NPT Council
GG, WTSWW	HO, Visit Wales
FK, Oakwood	CC, Visit Wales
JL, Regional Learning & Skills Partnership	CJ, Visit Wales
JP, PCNPA	JD, Visit Wales
PR, WATO / PCF	JO, Events WG
RR, Bluestone Resort	AP, Welsh Revenue Authority

**Apologies:**

LW, MHPA  
MC, Pembrokeshire CC  
SC, Tourism Swansea

<b>Croeso / Welcome – GR (Chair)</b>	<b>Action</b>
<p>Welcomed members to the Museum of Land Speed which has recently opened its doors following significant EU, WG and LA funding. The Museum tells the iconic story of Pendine Sands and the renowned sporting records set here.</p> <p>The Chair had recently met with Cefin Campbell MS to discuss some of the policies within the co-operation agreement impacting the sector.</p> <p>The Chair had also had a recent meeting with the other fora chairs to discuss Governance of VW and the Visitor Economy Forum (VEF). There is consensus that the group, which was established during the Covid Pandemic, is no longer fit for purpose. It is being proposed that a Board (similar to CADW and Creative Wales) is established.</p>	

## Adborth ar y tymor / Feedback on the Season

Visit Pembrokeshire:

- Not negative Season but feedback has been that things have been a little flat in comparison with past few years. Weather was disappointing. Visitors are being careful where and how they are spending.
- Key events including Longcourse Weekend and the Pembrokeshire County Show had provided good opportunity for engagement and to bring on board new members. VP have hit their targets for this year in terms of membership and strategic partners. Currently approx. 400 members and 8 Strategic Partners.
- New PR company appointed – 4 Corners PR.
- Concerns from industry on 182 days and Tourism Levy
- Annual Croeso Awards to be held at Pembrokeshire College on 02 November Event to be hosted by Wyn Evans.
- Visit Pembrokeshire currently working on updating DMP.

Carmarthenshire Tourism Association:

- Similar feedback from trade in Carmarthenshire. They are yet to poll their members, but anecdotal feedback is that the season was a bit flat. Not as busy as previous 2 years. Back to pre-covid levels.
- Concerns from industry on 182 days and Tourism Levy
- CTA have lost staff members and membership is down on what it has been previously (approx. 75 members currently)
- They are currently looking at replacing office staff and are looking to re-launch this Autumn. They are currently offering free membership to tourism related businesses.

AC noted that representation from businesses is low.

As SC was unable to attend GR provided feedback on behalf of Tourism Swansea Bay. General feedback from businesses on Gower is that they have had a poorer Summer than previous years.

SH added that the figures they have at LA level are looking positive with 80% occupancy in Swansea City Centre. They also had a very good response to their recent trade survey with over 122 responses.

RR commented that it was disappointing that Ironman Wales at Tenby was held in the school holidays this year. It is usually a weekend or two later which helps in increasing the Season.

FK added that 2024 will be held on 22 September which is preferable.

JP added that their visitor attractions have had their busiest year on record.

DB added that Folly Farm was down 8.9% although they are focussing on revenue rather than visitor numbers and they had a good season. The occupancy rates at the holiday park are very high.

## Diweddariad Croeso Cymru / Visit Wales update

**HO – Deputy Director – Marketing Tourism and Business Wales**  
**(slides shared following the meeting. Main discussion points:**

- Following feedback from the sector there has been a focus on marketing of Visitor Attractions over the Summer months

- The [VW Roadshows](#) will return in the Autumn. SW to be held at Swansea Stadium.com Stadium on 08 November.
- VEF Governance already mentioned but this will be taken forward over next few months.
- Brilliant Basics Funding – 29 projects funded across Wales. Further info [here](#)
- 20mph changes coming into effect on Sunday – significant media coverage on this. Related assets available [here](#)
- New figures from the Great Britain Tourism Survey have just been published. In 2022, there was £4.6 billion of associated expenditure on tourism trips within Wales. It is excellent news that between April to December 2021 and April to December 2022 there was an increase of 13% in the volume of trips taken in Wales and an increase of 35% in spend.
- Significant media coverage recently on International visitors to Wales being 30% down which is not the case. We will be briefing media.
- VW have been above the line throughout the Summer
- Working on a number of partnerships including with TFW
- HO shared some examples of recent PR achieved on Wales including piece in The Times
- Working closely with team behind Welcome to Wrexham to increase awareness of Wales and increase interest into visits
- TXGB a big focus and we will be hosting a workshop on TXGB as part of the VW roadshows

Comments from members:

- GR noted that it takes a significant amount of time for some of the visitor figures to come through
- RC added that feedback from Gower is that visitor figures are not back to 2019 figures and that they are approx. 30% down on last year
- RR added that Bluestone have seen an increase in international visitors
- PE added that they have a significant number of international visitors – approx. 50%
- AC added that the methodology on measuring international visitors to Wales is flawed. IPS consider passengers arriving at major UK ports and airports (which are in England). The evidence is flawed

## **Trafodaeth ar sut gellir defnyddio Ardoll Ymwelwyr posibl / Discussion on how potential Visitor Levy monies generated could be used**

### **HP – Carmarthenshire County Council:**

- Just over a year ago HP joined WG panel looking at the proposal to introduce a tourism levy
- Although introduction of a possible tourism levy is some way off, the decision whether to introduce the levy will lie with LA's
- HP noted that it would be useful to start having early discussions and gather feedback from key stakeholders around the table to feedback to colleagues/cabinet members within the LA on areas such as:
  - How could we make best use of the funding collected through a levy?
  - Should it be shared geographically through the county?
  - Should it be ring-fenced?
  - Should it be used to develop new resorts?
  - Should it be used to fund public conveniences used by visitors?

### **Some of the feedback from members:**

- There should be a public/private body that has shared responsibility on where the tourism levy collected is spent
- If the LAs are asking accommodation providers to collect a levy, then they should have considerable input on where that money is spent
- Businesses could have a say perhaps through their tourism associations
- The decision on where the levy funding is allocated should be made by a combination of stakeholders, and it should be ring-fenced for tourism
- A percentage will need to go to cover services that are not statutory such as litter collection / public toilets etc.
- Concerns that the funding be used to fund statutory LA services as many have a funding gap
- Query on whether residents will need to pay a levy to stay in their own county
- Emphasis that each LA is very different and have different issues. NPT for example have a lower level of bed stock but face significant visitor pressures at locations such as Waterfall country
- Emphasised the need for the voice of the industry to be heard and for their involvement throughout
- Emphasis that skills are an issue. There is an exodus of young people from areas of SW Wales and funding is needed to help address this
- The SLS is critical to the tourism levy - we need to have an accurate picture of bedstock so that it's a level playing field for all

## Diweddariad a thrafodaeth ar yr Ardoll Ymwelwyr / Levy Update and discussion

### Anthony Pritchard – Welsh Revenue Authority (slides shared after meeting):

- WRA currently responsible for collecting Land Transaction Tax and Land Disposal Tax and will also be responsible for collecting the Tourism Levy
- Envisaged that the Tourism Levy Bill will be introduced to the Senedd in 2024 and would potentially get Royal Assent Summer 2025. The LAs would then need to undertake their own consultation process and decide whether or not a Levy is introduced. Once a decision is taken, they would then need to provide the WRA with 12 months' notice prior to a levy being introduced. The earliest a tourism levy is likely to be introduced is April 2027
- Many larger OTS have said they would be able to implement a tourism levy into their systems with 12 months' notice
- WRA would welcome the opportunity to work closely with the industry to make the process as easy as possible

Some comments / queries raised following presentation:

- Query on exemptions
- Can industry be involved in designing the way the information is collected. Emphasised that it needs to be simple as possible
- Query on whether OTA's will charge commission on the levy collected
- Concerns that we have a shortage of accommodation in some areas to meet demand. Will this put many operators off?

## Diweddariad Digwyddiadau Cymru / Update Event Wales

### Julie Osmond – Head of Major Events – Welsh Government:

- Informed members that Rob Holt will be leaving WG at the end of October. Recruitment underway
- The [New Events Strategy](#) was published last year with Steve Hughson Chair of the new Events Wales Industry Advisory Group
- The strategy is based around 3 key themes:
  - Align the industry: working in collaboration towards common outcomes
  - Authenticity: Events in Wales will have a distinct 'Welshness'
  - All of Wales: spread its events across Wales and across the year and aim to achieve equality, diversity, and inclusion
- Budget is committed for this year with a long pipeline of events over the next few years
- The Events Sector Development Fund has been paused
- Examples of Events supported in the region recently include The Big Retreat Festival and the recent Tour of Britain from Margam
- Currently awaiting result of the UK bid to host Euros 2028. Hopefully announced on 10 October

AC wished for thanks to be passed on to Rob Holt for his contribution over many years.

### AOB

- CC provided some further info on the [VW Roadshows](#) and encouraged members to please sign up and share the registration details with colleagues/contacts.

**Date of next meeting:** Wednesday 06 December