

**Fforwm Twristiaeth Rhanbarthol De Orllewin Cymru**  
**South West Wales Tourism Forum**

**Canolfan Arfordirol Rhyngwladol Cymru / Wales International Coastal Centre**

**Minutes**

**Wednesday 06 December 2023**

**Present:**

GR, Chair: Glangwili Mansion  
CE, Carmarthenshire Tourism Association  
EB, Retreats Group  
RC, WAVA  
TF, Seren Collection  
FK, Oakwood  
JP, PCNPA  
PR, WATO / PCF  
DB, Folly Farm  
JM, North Pembrokeshire Trade and Tourism

GW, Swansea Council  
HP, Carmarthenshire County Council  
KD, NPT Council

SR, Visit Wales  
CD, Visit Wales  
JD, Visit Wales

CC, Visit Wales  
CJ, Visit Wales

**Apologies:**

AC, University of Wales Trinity St Davids  
RB, Swansea Valley Cottages / NPT DMP  
LW, MHPA  
MC, Pembrokeshire CC  
SC, Tourism Swansea Bay  
JD, Clydey Cottages / PASC UK  
MN, NBGW  
GG, WTSWW  
JL, Regional Learning & Skills Partnership  
RR, Bluestone Resort  
ET, Visit Pembrokeshire  
MS, Call of the Wild

<p><b>Croeso / Welcome – GR (Chair)</b></p> <p>The Chair welcomed members to Saundersfoot and congratulated The Grove on their recent award – SLH Hotel of the Year.</p> <p>He commented on the positive opportunity to celebrate successes with several of the members at the recent Pembrokeshire Croeso Awards.</p> <p>GR noted that he has been part of the Tourism Levy working group being led by the Wales Revenue Authority and meetings to date have been positive.</p> <p>He welcomed JM to the meeting as an observer.</p>	<p><b>Action</b></p>
<p><b>Ymchwil a Mewnwelediadau / Research and Insights</b> George Reid</p> <p>Slides shared following the meeting.</p> <p>RC – Businesses who are members of Tourism Swansea Bay are reporting an approximate 20% drop in visitor numbers in comparison with 2019.</p> <p>JP commented that of the total visitors to Pembrokeshire, approx. 9% are international however businesses such as Retreats Group and Elm Grove have reported that approx. 15% of their visitors are international.</p> <p>TF commented that the hospitality industry is undoubtedly in recession. The pressures on the sector currently are huge. The luxury end of the market is doing ok but it is the middle of the market feeling the impact the most. Costs have gone through the roof – especially energy costs.</p> <p>CD commented that we saw great growth in tour operators including Wales in their itineraries between 2010-2019. A number of them had to reduce the number of tours following the pandemic and this is what we see reflected in the research, but the appetite for Wales and future potential is huge.</p> <p>TF added that they have more international groups booked for 2024/2025 and next year is looking much better in terms of international visitors.</p>	

## **Diweddariad Croeso Cymru / Visit Wales update**

### **SR – Deputy Director – Tourism Development and Sport:**

- Wales has not bounced back to pre-pandemic levels on international side yet, but it is reassuring to hear of the positivity down the line. The report published by the Welsh Affairs Committee looking at Wales as a global tourist destination was largely complimentary of the work undertaken by Visit Wales and highlighted several areas for development, including the role of Visit Britain in promoting all regions of the UK and transport links.
- SR noted that it was good to be in Saundersfoot and to see the positive impact the TAD investment has had locally.
- WG budgets are looking very challenging for the next financial year on the back of the recent Chancellors Statement. The draft WG budget will be announced on the 19 December. Difficult decisions to be taken by Ministers including a decision on NDR relief.
- The Visit Wales Industry Roadshows held over past few weeks were well attended and very useful. Many thanks to those that attended.
- The [consultation](#) on reforming of the school year in Wales has gone live. One of the proposals is to reduce the Summer break by 1 week and have an additional week during October half term. The policy team are looking to set up a small stakeholder group with representatives from across the Visitor Economy to get into the detail around the potential impact the changes could have.

TF – it would be valuable if those working on the policy could sit down with the businesses impacted.

RC – WAVA members recently met with team leading on the policy to discuss the direct impact the changes will have. Many attractions rely on the 6-week Summer. The impact it could have on staffing was emphasised. Noted that the consultation form itself is written with a focus on educational impacts. 90% of questions not relevant to the visitor economy.

CC – we are ensuring that a range of stakeholders are represented on the focus group. They will meet in January. If anyone would like to be part of that group, please let us know.

### **CD – Senior Tourism B2B Marketing Manager**

- Visit Wales hosted a very successful Discover Wales event in and around Cardiff in early October for almost 30 major inbound tour operators - responsible for bringing in thousands of international visitors to the U.K. from all over the world. Many thanks to the businesses in SW that participated inc Elm Grove, Visit Pembrokeshire, NBGW and Retreats Group. 100% of the tour operators surveyed plan to feature and sell more Wales holidays.
- VW also attended WTM, and will be at Showcase Britain, VB Nordics workshop, ITB Berlin. Also hosting c.20 U.S. tour operators as part of Showcase Britain visiting all regions of Wales in January.
- Places are still available for BIM (Britain and Ireland Marketplace) and BTTS (British Travel and Tourism Show) for anyone who would like to join.
- VisitBritain relationship being strengthened through a new strategic approach across all of the Visits working even more closely with VisitBritain. Focus is on

<p>international ready bookable product to feature in VB campaigns and global activities.</p> <p>Campaigns</p> <ul style="list-style-type: none"> <li>• Digital and TV activity as part of our Autumn phase of the Llwybrau campaign finished end of October. We now have our 'always on' BAU activity running and includes paid social, PPC, programmatic and lead generation.</li> <li>• Our focus is now on our 2024 campaign and we're excited to have fresh, new creatives, showing people enjoying Wales. New shoot this year in North Wales, Portmeirion and the Ffestiniog Highland Railway used along some existing edits. New ad will be live from Boxing day onwards on all major linear channels as well as streaming services and on demand/catch up.</li> <li>• As part of the 2024 new campaign there will be OOH in London, underground, overground and a key roadside spot in January for 2 weeks as well as media partnerships.</li> <li>• Lonely Planet recognised Wales Trails in their Best in Travel for 24 List – first time they have included a sustainability category and the focus is on Wales as one of the world's first countries to legislate for sustainability - it features the SW referencing the improved rail links coming for 2025.</li> <li>• How can business/industry can get involved with our campaigns? Make sure product detail pages on visitwales.com are up-to-date with refreshed content for 2024. Share content on social using #Llwybrau #WalesbyTrails</li> </ul> <p>CE &amp; RC – expressed an interest in attending future events and will pick up a discussion with CD.</p> <p>CC - reminded members of the opportunity for businesses to apply for the <a href="#">Wales Tourism Investment Fund (WITF)</a>. Recent funding has been provided for <a href="#">Tenby Golf Club</a></p>	
<p><b>Diweddariad a'r Gynlluniau Rheoli Cyrchfan ac Ariannu</b> <b>Destination Management Plans &amp; Funding update</b></p> <ul style="list-style-type: none"> <li>• Abertawe / Swansea – Geraldine Williams – update sent with meeting papers.</li> <li>• Sir Benfro / Pembrokeshire – James Parkin – update sent with meeting papers.</li> <li>• Castell Nedd Port Talbot / Neath Port Talbot – Karleigh Davies – update sent with meeting papers.</li> <li>• Sir Gâr / Carmarthenshire – Huw Parsons – update sent with meeting papers.</li> </ul> <p>Comments: RC – great to hear about the significant investment going into the region. We need to get these positive messages out about the investments being made.</p>	
<p><b>AOB</b></p> <p>GR noted that the VEF meeting will be held on 13 December with the Deputy Minister and that feedback provided today will be fed into that meeting. He emphasised that the current governance structure is under review. They would welcome time with Ministers for further discussion on policies impacting the sector.</p>	

<b>Date of next meeting:</b> tbc	
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