

## South West Wales Regional Forum

Minutes from Friday, 5<sup>th</sup> October at Parc y Scarlets, Llanelli

### **1 Chair Introduction**

Nic Beggs (NB) introduced, and welcomed, Deina Hockenhull from Carmarthenshire County Council (CCC), Neil Jenkins from Milford Haven Port Authority (MHPA) and Hannah Worrall from Oakwood Theme Park.

The Minutes and Actions from June were agreed as correct.

He informed the group that, in line with discussions from the last Forum meeting where the 'Skills Gap' had been identified as a topic causing significant concern within the region, he and Peter Francombe (PF), VW, have been engaged in arranging a meeting - 28<sup>th</sup> November - with key business leaders, Careers Wales and the Universities which Forum members were welcome to attend, if they felt they had something relevant to offer. The meeting will be action led and look to address regional problems and seek solutions (lasting approx. 3hrs, venue likely to be Pembrokeshire). He asked for a show of interest and had: Mark Bulson, Nia Ball, Neil Kedward, Paul Renfro, Neil Jenkins and Tim Brace respond.

He referred to the revised Terms of Reference (pre-circulated) and asked for comment. It was agreed that these would be the applicable ToR going forward. It was noted that, if a member is unable to attend they should notify the Chair and nominate a substitute who would be issued the ToR by NB.

Discussion ensued re setting up sub-working groups but it was felt that it would be more appropriate for challenge and concern areas identified in meetings be pursued and those requiring action could be followed up in the same way as the Skills group going forward.

#### **ACTION**

Interested meeting attendees to be contacted as soon as detail for 28.11 meeting is confirmed

NB / PF

### **2 Update from TAB Member**

George Reid (GR), briefly, covered topics covered at the Tourism Advisory Board meeting held September including: Cardiff airport and the perceived benefits relating to the new Qatar, daily flights and world wide routes. The Wales Way, the new Digital Gateway, Brexit and the impact on business performance both positive and negative ie weak currency, increase in o/s tourism, long term effects and the movement of migrant labour, the National Tourism Awards now taking place in March 2018 and the continuing discussion on roles of Tourism Associations pan Wales – with a meeting taking place on 13<sup>th</sup> October.

NB queried the current position of the Advisory Board. GR confirmed that all Ministerial Boards are presently under review, awaiting decision on future structures. NB stated that it was imperative – whatever the way forward – that there is a clear, independent route for the region to be represented and heard at Ministerial level.

Gerwyn Evans (GE) confirmed that there is an announcement expected within a month.

#### **ACTION**

GE to provide detail when available

GE

### **3 Visit Wales Update**

GE gave apologies for Jason Thomas, the new Director of Culture, Sport and Tourism who had hoped to attend and is still looking to come to a future meeting having already stated that he is open to

<p>ideas and interested in hearing about industry challenges.</p> <p>He went on to give a comprehensive update on WG:</p> <ul style="list-style-type: none"> <li>o including referring to the new strategy launched 19<sup>th</sup> September, Prosperity for All with Visit Wales continuing to work to the strategy already in place until 2020 <a href="http://gov.wales/about/programme-for-government/?lang=en">http://gov.wales/about/programme-for-government/?lang=en</a></li> <li>o the proposed new 3 region approach ie North, South East and Mid &amp; South Wales for delivery - VW continues to state the case that the 4 tourism regions are still fit for purpose and relevant to the industry and,</li> <li>o the new taxation powers and the 4 new proposed taxes including a Tourism Tax (along with the other new taxes landfill, plastics and social care) which sparked heated and lengthy debate. Including how it would work, it being collected by Local Authorities (some with no statutory remit for tourism), its following a European model and the perceived impacts – whilst still to undergo consultation and engagement and only having been announced 48hrs ago it was suggested that the Chair prepare a letter expressing grave concerns</li> </ul> <p>It was suggested that it be a possible discussion topic / presentation for the meeting in January if there has been any progression.</p> <p>Gerwyn then stated the position regarding available funding with the TAI Scheme currently at approval stage with approx. 26 projects with £2.5m worth of activity re-opening Easter.</p> <p>It is proposed that the RTEF and TPI Funds are to be made available for application by the end of this month with the new round of funding having a two stage process. An EoI (probably 2 page max project proposal) which, if invited could then proceed to full application (from invitation there would be no guarantee of funding just the opportunity to move forward to full application stage). The timescale is perceived to be approx. 3 weeks from announcement to EoI with full application being invited January. The projects would need to align to VW priorities and focus on YoS, Year of Discovery (YoD) and the Wales Way. It will, as previously, be a competitive, all Wales process with decisions and funding anticipating being awarded from end Feb / beginning of March.</p> <p>GR reiterated that the Wales Way ethos is not to restrict projects to the 3 key routes.</p> <p><b>ACTIONS</b>          Prepare letter re proposed new Tourism Tax to Finance Minister: awaiting further detail          Forward information / detail on release of new funding as soon as it becomes available</p>	<p>NB VW</p>
<p><b>4 Business Barometer</b></p> <p>Following a short presentation by, Rob Lewis (RL), of the current business trends in tourism the forum expressed concerns that the positive growth and mood captured by this research did not reflect the industry success currently. Concerns were raised to the way that the data was collected and the questions being point more at profit and loss, costs to the business and income overall.</p> <p>RL explained that there are 800 businesses included in the survey (a quadrupling of the sample over the past 6yrs) with the final wave for this year still to come, that the stats are a reflection on confidence providing a snapshot on current situation as provided by those businesses. The survey is being re-tendered for 2018.</p> <p>The main discussion focussed on: how do we get a better and quicker return maintaining confidentiality (and data protection rules), are they useful when presented at Ministerial level if – as Forum members perceive – they are not a true reflection on the state of the industry and can we influence the questions going forward. It was agreed that questions could certainly be suggested by Forum members and RL would be willing to field same – NB to collate.</p> <p>Some concerns were raised on process re tele-calls and acknowledged, best practice to be pursued within next tender process.</p>	

<p><b>ACTIONS</b></p> <p>Any suggested questions re confidence / state of industry to Chair for compilation / forwarding and consideration by VW / RL</p> <p>RL to investigate procedure around marketing tele-calls</p> <p>Slides available on request</p> <p>Please see attached a link to the latest barometer wave and questions currently asked  <a href="http://gov.wales/statistics-and-research/tourism-barometer/?lang=en">http://gov.wales/statistics-and-research/tourism-barometer/?lang=en</a>  Also you will find contact details for Rob's department to feedback directly if you prefer</p>	<p>NB / VW / RL RL VW / RL</p> <p>All Forum Members to Chair</p>
<p><b>5 Visit Britain – engagement and opportunities</b></p> <p>Presentation by Lowri Jones (LJ) who explained her position within Visit Britain (VB), the role and priorities, how VW works with VB (its merger with Visit England) and opportunities for businesses to engage and the current campaign – Join the World. The resources available via VB including: research and insights, awareness and perceptions, luxury travel / rail and the on-line shop. That the on-line shop is commercially driven and requires product bookable in advance of interest to the international customer which confidently fits identified markets – the product would be assessed for suitability, commission-ability and whether it is 'package-able'.</p> <p>Discussion followed including frustrations in featuring on the on-line platform and the need to increase the overall Wales presence on the site. NB asked if we can influence VB in offering the viewpoint of the Forum particularly relating to 'suitability' of product.</p> <p>LJ went on to explain the opportunities offered by attendance at travel trade shows - example being Paula Ellis currently in US representing the Retreats Group with approx. 50 pre-booked appointments. The Forum members all agreed that the cost to attendance is a barrier, LJ suggested sharing stand space / combining product and mentioned the DIT grant – detail to be shared.</p> <p>GE stated that it may be possible that RTEF and TPI Funding may be able to be utilised.</p> <p><b>ACTIONS</b></p> <p>Slides available on request</p> <p>Detail re funding for travel trade are here should any Forum member wish to make a request or pass to industry colleagues. <a href="https://www.visitbritain.org/making-most-missions-exhibitions-events">https://www.visitbritain.org/making-most-missions-exhibitions-events</a></p>	<p>VW / LJ VW / LJ</p>
<p><b>6 VW Marketing update and National Tourism Awards</b></p> <p>Claire Carew (CC) gave a brief on:</p> <ul style="list-style-type: none"> <li>○ The Industry Engagement Roadshow held 2<sup>nd</sup> October, the positive vibe at the event with the 1-2-1 business clinic and food showcase both being well received. She commented on the large percentage of non-attenders who had pre-registered and the disappointing non-representation from some sectors</li> <li>○ The Wales Way – as outlined at the roadshow. A 10yr project still at initial build and discovery stage. Currently investigating the infrastructure, signage etc. and how to encompass and engage with all areas within Wales beyond the named routes</li> <li>○ Product launch with the Wales Way at World Travel Market and Year of Sea (YoS) having press release / launch scheduled for London PR in Nov and in Wales beginning of December</li> <li>○ She covered progress on Cymru Wales Brand, explaining the language, the feel, the reference to authentic, creative and alive and the fact that (following previous industry discussion and consultation) you can apply to use the logo at <a href="http://www.visitwales.com/brand">www.visitwales.com/brand</a> Applications will all be individually assessed reflecting a number of criteria</li> <li>○ YoS and progress to date referring to the recently released YoS industry guide available at <a href="https://businesswales.gov.wales/zones/tourism/YoS2018">https://businesswales.gov.wales/zones/tourism/YoS2018</a> and the 4 thematic periods as referred to therein. The new campaign advert has been filmed and is due for release over Christmas / New Year</li> <li>○ Volvo Ocean Race and its position on the global stage with even greater international reach than the UEFA final. The race will be based in Cardiff for two full weeks offering opportunities for package building for those attending, servicing and viewing the event. Members felt that this could, possibly, be a presentation for the next meeting January</li> </ul>	

<p>GR queried the position re the Wales Coast Path and its apparent disrepair in some sections. GE was able to add that Natural Resources Wales are proceeding with a project addressing identified issues.</p> <p><b>ACTION</b> Pursue possible presentation Volvo Ocean Race</p> <p>Peter Francombe explained the position regarding the National Tourism Awards. Following many months of consultation and discussion at TAB the Awards will now take place on 22 March, 2018 at the Celtic Manor Resort with nominations being invited from 1<sup>st</sup> November.</p> <p>It is anticipated that the Forum Chairs (pan Wales) will decide on finalists to put forward from each region assisted by a small core of members. NB asked for nominees from the meeting floor with response from: <i>Andrew Campbell, Nia Ball, Stephen Crocker, Zoe Wright, Tim Brace and George Reid.</i></p> <p>PF went on to explain the reduced categories – as they currently stand – which prompted animated discussion mainly on categories which are currently set at: 4 accommodation, product half or full day, event, large / small restaurant, best destination, best young ambassador, contributor and new business. It was agreed that PF would take forward feedback on attractions and activities having separate awards, possibly in place of 'product'. He also agreed to take comment on 'language' and use for marketing particularly in regard to the use of the word 'best' - suggestions included following the lead of the AA or Visit England who give awards for 'excellence' or 'product of the year'.</p> <p><b>ACTION</b> PF to follow up feedback</p>	<p>VW / CC</p> <p>VW / PF</p>
<p><b>7 Tourism Association Updates</b></p> <p>Tim Brace (TB) covered <b>Pembrokeshire Tourism's</b> (PT) position stating that they had 346 members but were striving to soon achieve 400-500 making their overall voice louder. The County trend being an increase in o/s visitors, the positive investments ie Saundersfoot Harbour and Llys y Fran showing commitment within the region and the positive and growing increase in major sporting events returning year on year. The small team focus is on social media and attendance at trade events and shows, the Dog Friendly Awards and the PT Awards to be held April 2018. The Associations barriers are chiefly: funding and sustainability – both long term with opportunities being seen in chargeable services ie consultation and event support with the long term future aim being becoming financially viable, lobbying and campaigning on subjects including business rates and ongoing liaison with bodies including PCC with their reduced budgets and activities.</p> <p>Positive activity within the County was shared including: Powerboat Grand Prix, City of Culture bid, the 28 Cruise Ships berthing at Fishguard and the upcoming Future Proofing Tourism Conference.</p> <p>Nia Ball (NiaB) spoke on behalf of <b>Carmarthenshire Tourism Association</b> (CTA) having canvassed members who identified trends included: shorter stays with last minute bookings and an increase in o/s visitors with a growth in the search for 'quirky' product and 'new' destinations with holidaying with dogs seeing a marked growth. Caravan and camping / glamping is doing well and s/c operators are adding new elements to their offer ie pods – with consumers looking for more luxury in those markets – conversely back to basics also being sought ie authentic family experiences offering digital detox. Challenges perceived and faced include: business rates (penalising growth being a barrier to expansion), planning – support and length of process, e.crime, the monopoly (and reliance) on large booking sites, air&amp;b (concerns and benefits) broadband speed and connectivity, Year of Sea and concerns for County inclusion, training and skills, rising costs, zero hour contracts, availability of staff in rural areas and lack of support from organisations including Visit Wales and Business Wales – with CTA striving to improve communications between smaller businesses and those agencies and also the County Council.</p> <p>Membership levels are static at 260 with little resource to develop membership as the small team covers project and core activity delivery (with membership having contracted from approx. 350 x 2yrs ago). Currently focussing on the upcoming Tourism Summit to developing and releasing a new</p>	

<p>web site, to growing membership and possibly changing their pricing structure and the Awards being held early April. And, in exploring commerciality ie funding for core activities. She shared frustration in the co-ordination of dates siting roadshows and summit and the need for continued relationship building.</p> <p>Stephen Crocker (SC) stated that <b>Tourism Swansea Bay's</b> (TSB) position reflected that of both the other TA's in the region. They have a core membership of 300 with an employee now focussing on membership sale, they are focussed on delivering their Awards Ceremony in November (with 22 categories with 970 nominations being held) before an exercise to re-direct their business plan, their direction as a 'service provider', their moving away from grant reliance, their continuing partnership with the County Council assisting and promoting their partner packages and liaising with other departments ie planning and on-going liaison with Neath Port Talbot. He reiterated concerns from the trade, as those stated by the other TA's including increasing costs, rates and taxes and the need to extend the season beyond school holidays. He did state that the picture is positive with a perceived desire to find solutions and move forward in presenting good product.</p>	
<p><b>8 AOB</b></p> <p>Paul Renfro (PR) outlined a 2yr project being undertaken by WATO: Adventure Smart Wales which will focus on a 'safe enjoyment' message encouraging responsible and safe interaction with the environment and sustainable use. The project has gained TPIF support and has 40 partners pan Wales - they hope for positive engagement with both the TA's and trade. The project is at early stage development but he will share detail as it becomes available.</p> <p>Neil Jenkins (NJ) gave a very brief presentation giving an overview of the Milford Haven project with construction starting 2017 and including the CC Funded floating hotel suites, a dry dock / private berthing opportunity, retail, residential, hotel and leisure development (with all tenants being connected to their solar farm park) plus further innovative development and opportunity for an indoor facility offering new key product for both Wales and the UK – NJ can offer further information on request.</p>	
<p><b>9 Chair - closing remarks</b></p> <p>NB proposed that the next meeting take place on <b>Thursday, 25<sup>th</sup> January 2018</b> (venue and timings tbc / anticipated morning) and suggested that topics for the agenda could include the new GDPR rules the UK City of Culture (as announcement due December) and the Volvo Ocean Race. As per previous meetings, suggestions – direct to him – are welcome.</p> <p>Jacqui Davies requested that an item / time consideration be given to 'accessibility' be considered.</p>	