

Visit Wales
South West Wales Regional Forum

Minutes from Thursday, 7th February
Folly Farm, Kilgetty, Pembrokeshire

Present

George Reid (GR)	Carmarthenshire Tourism Association
Nia Ball (NiaB)	Carmarthenshire Tourism Association
Jacqui Davies (JDa)	Clydey Cottages
Vicky Martin (VM)	Dŵr Cymru / Welsh Water
Tim Brace (TB)	FBM Holidays and Pembrokeshire Tourism Association
Zoe Wright (ZW)	Head of Marketing, Folly Farm
Nic Beggs (NB), Chair	General Manager, LC
Huw Francis (HF)	National Botanic Garden of Wales
Paul Stone (PS)	Oakwood Theme Park
James Parkin (JP)	Director of Delivery and Discovery, PCNPA
Rachel Clegg (RC)	Regional Skills Partnership (SW&MW)
Paula Ellis (PE)	Group General Manager, Retreats Group
Tom Beynon (TB)	Three Cliffs Bay Caravan Park
Stephen Crocker (SC)	Tourism Swansea Bay
Andrew Campbell (AC)	Chair, Wales Tourism Alliance
Gina Gavigan (GG)	WTSWW
Mike Cavanaugh (MC)	Pembrokeshire County Council
Sarah Owen (SO)	Carmarthenshire County Council
Steven Hopkins (SH)	Swansea Council
Karleigh Davies (KD)	Neath Port Talbot County Borough Council
Laura Webley (LW)	Neath Port Talbot County Borough Council
Kate Clark (KC)	Deputy Director Policy and Engagement, Culture Tourism & Sport
Philip Abraham (PA)	Regional Engagement Manager, VW
Jane Donald (JD)	Regional Engagement Team, VW
Claire Carew (CC)	Marketing Manager – Product Experiences, VW

Apologies

Glenn Hewer	Bluestone Resorts Ltd
Kevin Davies	Gwesty'r Emlyn Hotel
Clare Stowell	Milford Waterfront
Emily Beaumont	National Trust
Jane Lewis	Regional Learning Partnership
Nigel Morgan	Swansea University
Neil Kedward	The Grove and Seren Collection
Matthew Evans	Tourism Marketing Group
Adam Smith	Village Hotel Club
Paul Renfro	WATO / POCG
Gerwyn Evans	Head of Programme Development, VW

1 Chair Introduction

Nic Beggs (NB) welcomed attendees and gave a brief overview of the structure of the meeting introducing Kate Clark (leading on item 4).

2 Visit Wales update

Phil Abraham (PA) briefed on:

- Eluned Morgan, the new Minister, and her portfolio International Relations and the Welsh Language with Lord Dafydd Elis Thomas remaining Deputy for Culture, Sport and Tourism
- The National Development Framework, which will replace the current Wales Spatial Plan, the inclusion of tourism as a foundation sector and the role of the Forum as an influencer
- The recently announced TAIS investment of £875k in South West Wales
- £800k investment via RTEF / TPIF in new product in the region from the last round of funding and applications to the new round, at second stage, amounting to approx. £850k
- He reminded Forum members of their role in cascading information from the Forum back to the industry and vice versa

3 Marketing update

Claire Carew (CC) updated the group on:

- the Year of Discovery (YoD) and the industry guide and focus on self discovery, coast, winter breaks, events and the 'experience' market, mindfulness, authenticity, responsible tourism and nostalgic travel being significant for YoD - she requested that partners feed through items with appropriate fit – calendar available within the guide
- the campaign team and activity: 1st March release of re-purposed television ad, outdoor advertising at Waterloo, Liverpool St and Victoria as well as Birmingham and Manchester and Press activity including Country Walking, the National Trust, Evening Standard and Lonely Planet
- the 'in Wales' campaign will focus on user generated content from Instagram, FB and Pintrest using 'real' images for an audience related and generated campaign
- Ireland – TV and partnerships, Germany – ITB Berlin
- Travel Trade and Consumer Events including BTTS in March with 14 partners, UK Inbound, Explore GB and a USA Fam. Trip planned for April and
- the new Digital Gateway and changes to VisitWales.com from the end of February changing the view to consumer / inspirational content

There followed wide-ranging discussion touching on: seasonality and campaign timings, the continued impact of companies (not all UK based) including airbnb, the continuing issues re competitiveness and profits going overseas, the measurement of impact on campaign activity and justification of spend including the re-purposed VW advert.

Action: CC to provide statistics on advert and campaign impact / activity

CC

4 & 5 Partnership for Growth: a reflection on WG's Tourism Strategy

Kate Clark (KC) introduced herself and her role particularly relating to the review of the Partnership for Growth Strategy.

Partnership for Growth launched in 2012 helping VW make the case for investing in tourism within the Welsh Government and setting out key priorities for the period to 2020. In 2016 there was a mid-term review to assess how we were doing, what was on track and identifying areas where we needed to rethink priorities. With the Strategy coming to an end we need to look back at how we have done taking into account comments and thoughts from the Forum in order to shape and inform any future strategy.

KC outlined the need to consider what worked and what did not and to look forward at the emerging issues with any future strategy vital in helping focus scarce resources. With the Economic Action plan identifying tourism as one of the foundation sectors, sitting alongside major industries, there will be challenges and potential opportunities with our international visibility with perceptions of Wales becoming more important than ever.

We need a future approach for tourism that:

- is high level, simple, accessible and inspiring without too many detailed actions
- that demonstrates continuity with Partnership for Growth and creates a framework that will enable us to focus resources on the areas that make the most difference eg markets and places
- that links clearly to wider government agendas
- that listens to the sector, visitors and others to understand the critical issues facing tourism and to identify where WG can best make a difference

KC stated that the current thought process is to launch 'ten questions' at the Tourism Summit which will help to shape the future direction of a new strategy allowing internal and external partnership engagement in the strategy development process over the coming year.

Working Groups to reflect the current strategy and future strategic planning

KC stated that these workshops are the beginning of a 10mth process being repeated at each Forum meeting pan Wales to understand the industry's opinions in terms of the delivery of the Partnership for Growth and the shape of future strategy.

The questions for discussion

- what have been the highlights for the sector over the past 6 years and what should Wales be most proud of?
- where do you feel that Visit Wales and the sector have best made a difference and what have the biggest challenges been?
- how is tourism changing and what do you see as the biggest challenges over the next few years?

Feedback

What has VW done well?

- major events
- cruise tourism
- changing perceptions of Wales through the brand
- really changed perception of Wales for food and drink– microbreweries etc
- major investments – TAD is a particular success and good support for innovation
- thematic years a great success – inclusive and industry can piggy back

- strategy has helped businesses survive hard times but next strategy needs to look at growth
- long distance routes are good
- now seen as a destination that can look after luxury
- NW as leading adventure capital of Europe – Zip world has transformed economy
- better digital capability
- Ambassadors
- promoting authentic Welsh culture

Things we have done less well

- events should not be Cardiff centric
- 'Years of' too short
- need to maximise cruise spend
- there is not a single Wales booking place
- improvements in skills not really delivered
- TAs find grant process cumbersome and not helpful

Current Challenges

- SW region is 45% of spend – but needs more investment
- focus more on outcomes
- understand more about who is influencing tourism the most at present
- changing customers – more short breaks, people also pay for quality
- Future role and sustainability of TAs – struggling to be sustainable – membership dropping – recognition for communication role?

Future Priorities

- more working in partnership – a complementary sector rather than a competitive one
- need to understand the new tourists – more knowledgeable, seek quality, experiences
- impact of Brexit on physical landscapes
- planning needs to support tourism
- further define the Wales brand
- promote benefits of tourism for local communities
- widen scope of tourism – for example Welsh Water see their reservoirs as visitor attractions and are promoting social prescribing
- connectivity – huge parts of Wales need better links
- think about our UK market segments
- work in partnership with airlines flying out of Cardiff, grow the airport
- replace EU grant funding
- find a balance between internal focus for VW and developing the sector
- note importance of broad band and phone signal
- package holiday rules post Brexit – can these be relaxed
- investment that makes a difference
- single booking place
- image of the industry – it is great for younger generations – 85% staff under 25 – often gain transferable skills – industry does not have to be for life
- The best toilets in Wales?

Barriers to growth

- tourism tax
- staff recruitment and skills
- air passenger duty at Cardiff
- business rates

- VAT
- retaining money in Wales

6 TA Updates

Nia Ball (NiaB) noted that members had been asked and provided feedback for the above discussion. That they had held their annual Tourism Summit with over 200 attendees which included key industry speakers, a Food And Drink showcase and Talk and Taste session, 1-2-1's and a large, open networking forum. Their on-going budget constraints, recruitment and retention of members and concerns re 'packaging' regulations and positive engagement with the other TA's re how to showcase their roles, structures and sustainability.

Stephen Crocker (SC) reiterated the comments made by Nia. He mentioned their successful, on-going programme of events and their looking at changing focus to developing income streams particularly relating to digital opportunities and their continuing push for new members.

Andrew Campbell (AC) echoed the above issues relating to membership and the struggle regarding income touching on the current strategy mentioning 'support to the TA's' which needs to come from WG with, possibly, a remit for communication as an example. He remarked on the recent position and changes within PCC and on going discussions around a potential new DMP organisation. He mentioned current funding secured including Interreg bids (Celtic Ports and Aged Connection) of approx. €3.5m. The Riverside Development at Haverfordwest, the Dog Friendly Tourism initiative and the recent summit and supplier to buyer events and, on behalf of WTA, Wales Tourism Week commencing 12th May.

7 Current Brexit Position

Item deferred due to time constraint.

8 AOB

Next meeting to be May-June avoiding B/H's and UK half term dates. Elected as Thursday, 23rd May (venue tbc).

Nic Beggs thanked the members for their diligence in attendance, investment in time and the positive vibe and atmosphere in the meetings. He added that if you are unable to attend and wish to nominate someone in your stead then you should advise him in the first instance. He commented that there were many exciting developments in the region with updates to follow.

Rachel Clegg introduced her role within the Regional Learning Partnerships regarding her remit and engagement within the region. She shared two items

- a call to action re the employer annual survey offering the opportunity to be part of changing the skills landscape in the South West and Mid Wales region – she asked that members complete the attached [survey](#) and pass on to all stakeholders and partners for their participation and
- that they are currently, actively, seeking a new Chair for the industry cluster groups – anyone wishing to nominate either themselves or a colleague should mail Jane Lewis direct at jelewis@carmarthenshire.gov.uk

<p>Paul Stone from Oakwood explained his remit and the current position within the Park and their work to address recent perceived negativity. They are actively renovating and refurbishing infrastructure and engaging staff to encourage a quality experience with a 'new to the Park' ride being installed in March for the beginning of the season.</p> <p>Vicky Martin from Dŵr Cymru Welsh Water commented on the exciting new makeover at Llys y Fran following ERDF investment of approx. £1.4m, with a 12mth build and re-opening anticipated for Spring 2020. The park is currently closed (apart from some Right of Way, the Children's Play Area and some bank fishing – not actively advertised).</p> <p>Peter Francombe (PF) gave an update on the position relating to the National Tourism Awards 2019 and the recently agreed regional Awards alignment from within the south west and also the ongoing dialogue regarding categories and scoring with the regions having greater responsibility in providing the 'best of' to go forward ie 1x winner for each category and not x3. Discussion focussed on: how the selection (from 3 to just 1) could be decided upon, the possible use of a reciprocal, independent judge and using the highest overall score (with scoring needing to be consistent and transparent). PF confirmed that the scoring and criteria details would be available by the end of February.</p> <p>Action: George Reid to find independent judges to join forum members for final decision making</p> <p>Action: PF to confirm scoring system in detail with categories Action: PF to confirm funding and the distribution of this to regional TA's</p> <p>VW is working with Careers Wales to encourage more businesses to link with local schools through the Education Business Exchange (EBE) with a targeted social media campaign starting next week (w/c 11th February). If you are interested in further detail, please ask PA who can provide appropriate contact within VW or see attached link:</p> <p>https://www.careerswales.com/en/employers/working-with-schools-and-colleges/education-business-exchange/</p>	<p>GR</p> <p>PF</p>
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Date of next meeting: 23rd May 2019