



City and County of Swansea

Notice of Meeting

You are invited to attend a Meeting of the

Economy & Infrastructure Service Transformation Committee

At: Multi-Location Meeting - Gloucester Room, Guildhall / MS Teams

On: Thursday, 21 September 2023

Time: 2.00 pm

Chair: Councillor Philip Downing

Membership:

Councillors: C R Doyle, W G Lewis, P Lloyd, N L Matthews, S J Rice, W G Thomas and T M White

Watch Online: <https://bit.ly/3P5rB2u>

Agenda

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1 Apologies for Absence.	
2 Disclosures of Personal & Prejudicial Interests. www.swansea.gov.uk/disclosuresofinterests	
3 Minutes: To approve & sign the Minutes of the previous meeting(s) as a correct record.	1 - 2
4 Destination Management Plan 2023-2026.	3 - 48
5 Work Plan 2023-2024.	49

Next Meeting: Thursday, 2 November 2023 at 2.00 pm

A handwritten signature in black ink that reads 'Huw Evans'.

Huw Evans
Head of Democratic Services
Thursday, 14 September 2023

Contact: Democratic Services - (01792) 636923

Agenda Item 3



City and County of Swansea

Minutes of the **Economy & Infrastructure Service Transformation Committee**

Multi-Location Meeting - Gloucester Room, Guildhall / MS Teams

Thursday, 20 July 2023 at 2.00 pm

Present: Councillor P Downing (Chair) Presided

Councillor(s)

W G Lewis
S J Rice

Councillor(s)

P Lloyd
W G Thomas

Councillor(s)

N L Matthews
T M White

Officer(s)

Scott Dummett
Phil Holmes
Clare James
Paul Relf
Mark Wade
Samantha Woon

Lead Lawyer
Head of Planning & City Regeneration
Economic Development Manager
Economic Development & External Funding Manager
Director of Place
Democratic Services Officer

Also present

Councillor R Francis-Davies, Cabinet Member for Investment, Regeneration, Events & Tourism

Apologies for Absence

Councillor(s): C R Doyle

9 Disclosures of Personal & Prejudicial Interests.

In accordance with the Code of Conduct adopted by the City & County of Swansea, no interests were declared.

10 Minutes:

Resolved that the Minutes of the Economy & Infrastructure Service Transformation Committee held on 8 June, 2023 be approved as a correct record.

11 Local Economic Delivery Plan Strategic Framework.

The Economic Development Manager presented a 'for information' report which outlined the draft strategic framework for the new Local Economic Delivery Plan (LEDP) for Swansea.

She referred to the update provided to the former Economy & Infrastructure CDC on 26 January, 2023 and detailed the contents of the LEDP, the indicative timescales for completing the work and the evidence base for the development of the LEDP.

Members noted the strategic context, the three ambitions and the draft strategic framework.

The Chair thanked the Economic Development Manager for informative update.

Resolved that:

- 1) a further update report be submitted to the Committee on 2 November 2023.

12 Swansea Bay Strategy Status Report.

The Head of Planning & City Regeneration provided an update on the workshop session held on 4 July, 2023 which explored opportunities for development within five of the six Swansea Bay destinations.

He detailed the background and workshop outcomes.

Member discussed the outcomes, in particular focussing on St Helen's, Mumbles (Quarry Car Park and the Tennis Courts) and Langland.

The Cabinet Member for Investment, Regeneration, Events & Tourism referred to the lack of parking facilities in Mumbles and the facilities at Langland. He agreed that the Committee include the Quarry Car Park and Mumbles Tennis Courts in their examination of the Swansea Bay Strategy.

Resolved that:

- 1) The Chair organise a site visit to Mumbles and Langland.
- 2) A second workshop be convened following the site visit to Mumbles and Langland.

13 Work Plan.

The Chair introduced the 'for information' Economy & Infrastructure STC Work Plan 2023-2024.

The topics for discussion at the following meeting were noted:-

- 21 September 2023 –
Destination Management Plan.

The meeting ended at 2.30 pm

Chair

Agenda Item 4



Report of the Cabinet Member for Investment, Regeneration, Events and Tourism

Economy and Infrastructure Service Transformation Committee - 21 September 2023

Destination Management Plan 2023-2026

Purpose:	The report presents the Destination Management Plan (DMP) 2023-2026 for Swansea
Policy Framework:	Swansea Council Corporate Plan Priority: 'Transforming our Economy and Infrastructure' Swansea Wellbeing Plan Wellbeing of Future Generations Act
Consultation:	Finance, Legal, Access to Services.
Report Author:	Steve Hopkins
Finance Officer:	Peter Keys
Legal Officer:	Debbie Smith
Access to Services Officer:	Catherine Window
For Information	

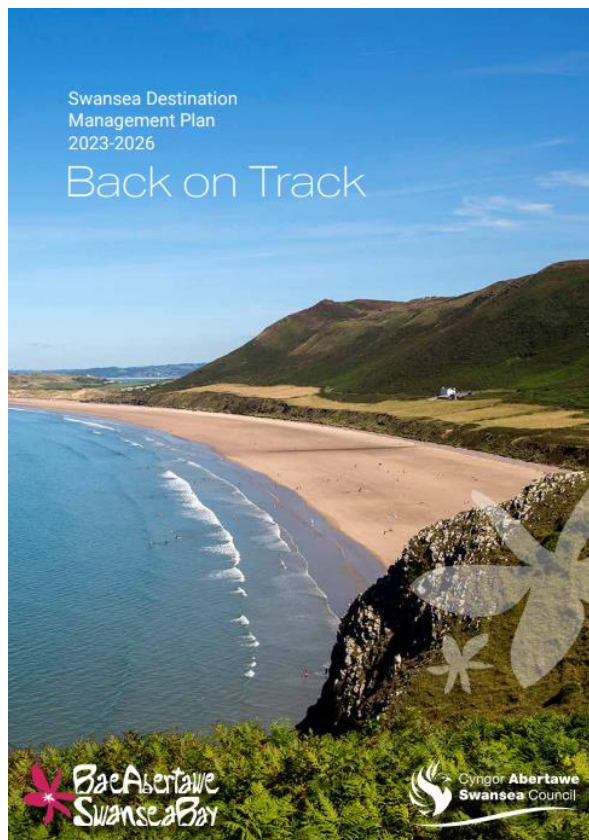
1. Background

The Development and Regeneration Scrutiny Performance Panel has requested to look at the Destination Management Plan 2023-2026, which is due for Cabinet Approval in October 2023.

In this report we give an overview of Swansea Bay as a visitor destination, the research that informed the new DMP, its strategic priorities and delivery mechanism.

2. Content

2.1 Setting the scene



What is a Destination Management Plan?

A Destination Management Plan (DMP) is best described as ‘the process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a quality visitor’s experience, taking account of the needs of visitors, local residents, businesses and the environment.’
(Source: VisitBritain.org)

Great destinations are great places to live, work and visit. A well-managed destination can bring long-term growth to the local economy, attract new investment as well as safeguard and create employment opportunities.

Our Destination Management Plan 2023-2026 is a combined response by Swansea Council and its private and public sector partners. It offers renewed hope for economic recovery following the successful re-opening of the tourism and hospitality industry and focusses on the strategic priorities for the next 4 years.

Visitor economy recovery in Swansea

Throughout the pandemic, we continued to engage with our customers and to support local tourism businesses. In 2022, signs of recovery were evident in

terms of consumers' confidence to return (4.2M visitors), continued inward investment in the destination and optimism amongst tourism operators – despite new economic challenges around rising costs and staff shortages.

This DMP is informed by three strategic pieces of research: a 7-month long visitor survey (1,000 face-to-face interviews), our largest ever survey of local tourism businesses (120+ responses) and a Hotel Demand Study commissioned to assess the current supply and future demand drivers for hotel developments in the city centre.



2.2 Strategic Priorities and Outcomes

1. **Driving Quality:** to build on success and further enhance the destination in order to deliver a distinctive and high-quality visitor experience.
2. **Breaking free of seasonality:** to develop creative, targeted marketing campaigns to enhance the area's appeal to the UK and wider world and build a stronger tourism offer outside the summer months.
3. **Encouraging Sustainability:** to nurture a more sustainable approach to tourism, both economically and environmentally, to the benefit of the environment and the wellbeing of all.
4. **Working Partnerships:** to continue to support the private sector directly and work with our public and third sector partners in order to achieve growth and prosperity for the local economy.

Priorities	Actions	Impacts	=	Outcomes
Driving Quality:	Protect and enhance natural environment	Well-managed natural environment		A distinctive, high-quality visitor experience
Breaking free of seasonality:	Develop high quality tourism product	Thriving city centre		A stronger tourism offer outside the summer season
Encouraging Sustainability:	Improve visitor experience	Reduced seasonality		A more sustainable approach to tourism, both economically and environmentally
Working Partnerships:	Continue to deliver targeted marketing campaigns	Improved tourism offer		
	Improve infrastructure and facilities	Increased visitor spend		
	Develop strong partnerships between public, private and third sector	Skilled workforce ready to meet future opportunities in the sector		
	Identify relevant funding and attract further investment	Strong destination brand		Growth and prosperity for the local economy
		More tourism businesses accessing relevant training and funding		

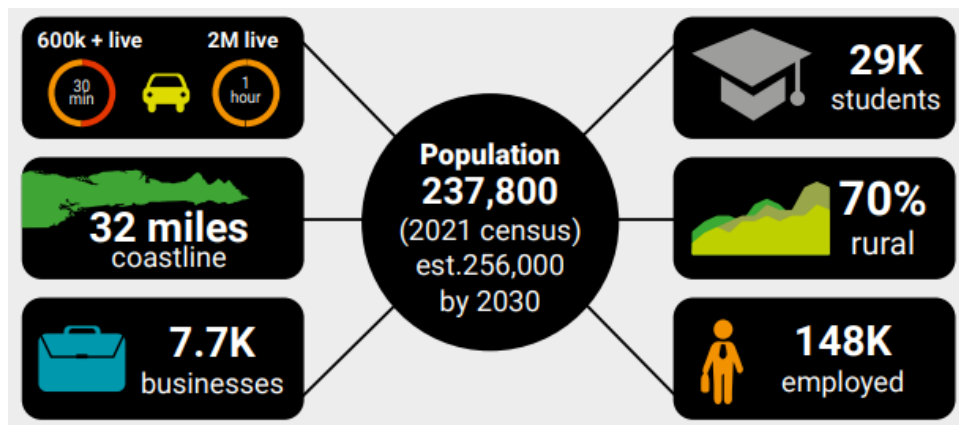
2.3 The Bigger Picture

- Swansea City Centre undergoing a major transformation into a premier destination to live, work, study and visit.
- Completed projects:
 - Swansea Arena in the new Copr Bay district
 - Amy Dillwyn coastal park
 - Landmark bridge connecting city centre with waterfront
 - £3m improvement of Wind Street into greener and more family-friendly hospitality and leisure destination
 - Redesign of the Kingsway with more public spaces, better pedestrian and cycle routes and new high-tech office development at 71/72
 - Opening of Penderyn Swansea Copperworks Distillery
- In development
 - New public sector hub on Oxford Street – Y Storfa
 - Refurbishment of Palace Theatre and Albert Hall
 - Enhancement of Castle Square and Swansea Amphitheatre
 - New entrances to Swansea Market and Quadrant Shopping Centre

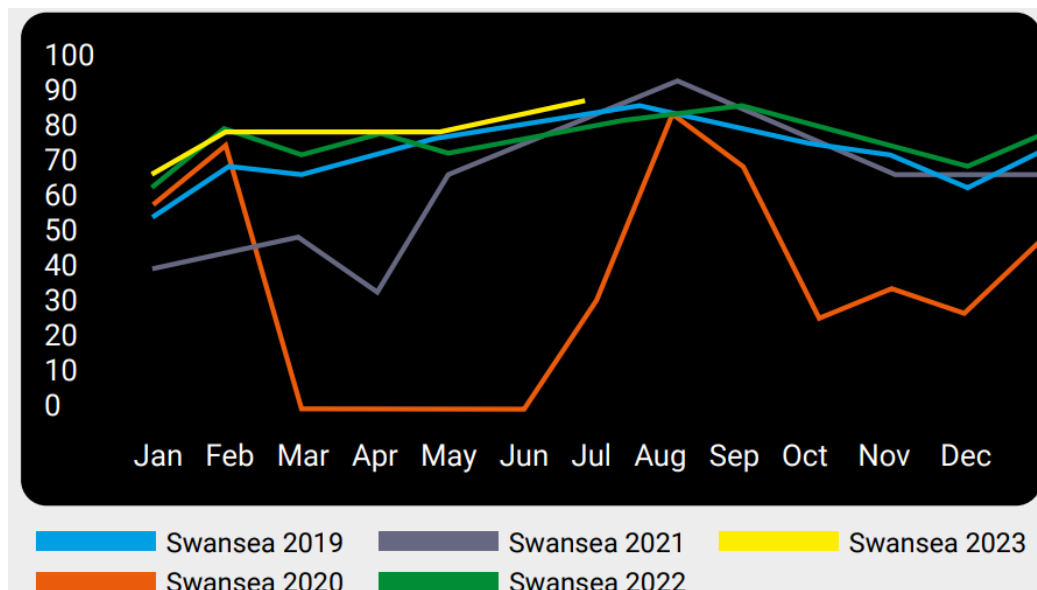
- Hafod Morfa Copperworks transformation into a leisure destination with new outdoor attraction Skyline planned for 2025 and floating pontoons
- Partnership with private sector developers Urban Splash for the mixed-use transformation of Civic Centre site and former St David's Shopping Centre
- Major hotel developments
- Early discussions about a visitor attraction and an aquarium for the Civic Centre / Paxton Street development sites
- Major events programme: Swansea is home to the Wales Airshow, IronMan 70.3, World Triathlon Para Series, Swansea Bay 10k and headline concerts in Singleton Park
- A planned programme of projects backed by Shared Prosperity Fund

2.4 Swansea Visitor Economy

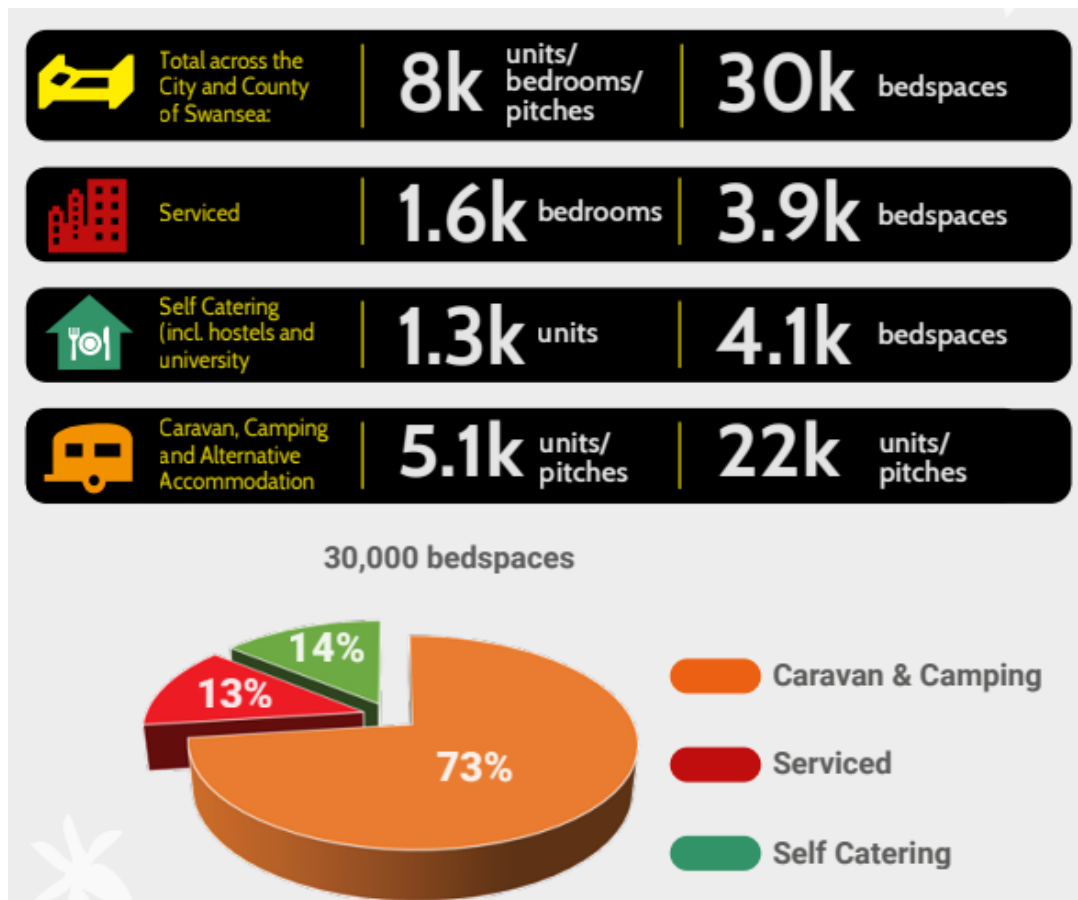
About Swansea



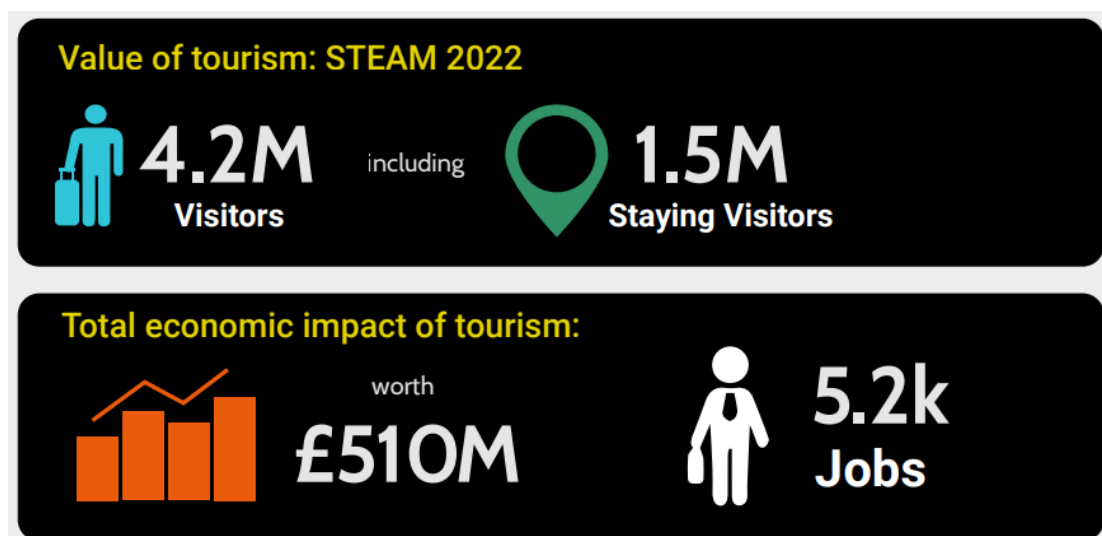
Hotel room occupancy figures (STR %)



Bedstock figures



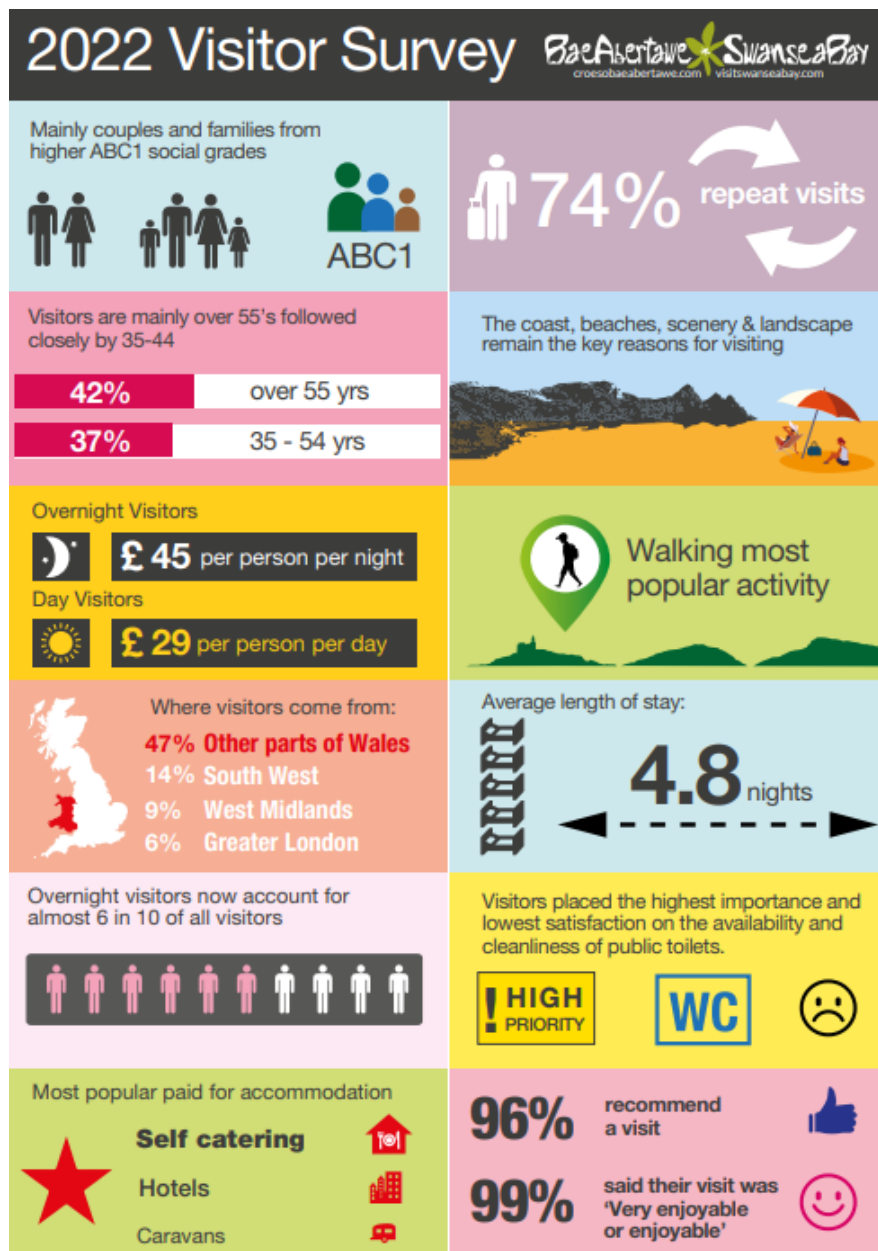
Value of tourism



2.5 Visitor Survey 2022

Key facts about our visitors

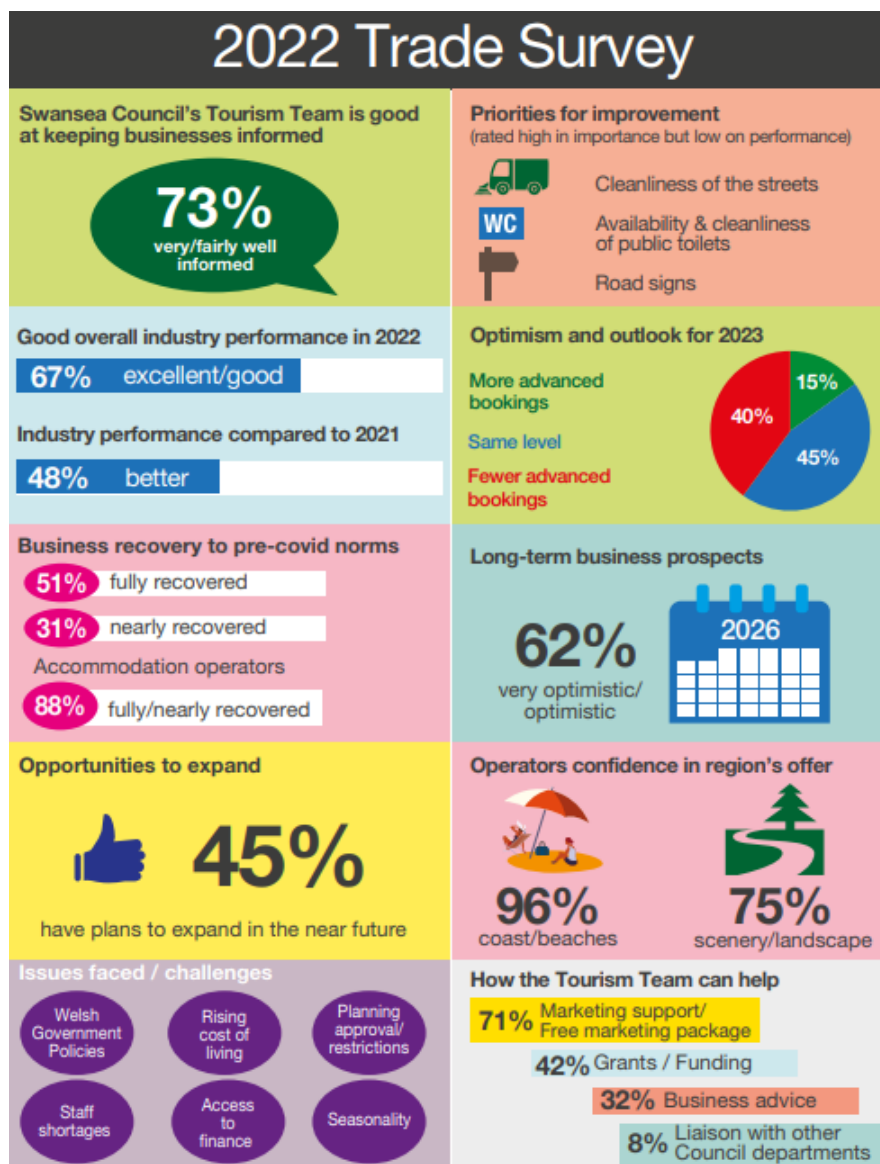
- Mostly from higher ABC1 social grades: affluent 'empty nesters' aged 45+, affluent early retired couples aged 45+ and younger affluent professionals aged 25+
- Mainly from the Midlands, London, Southeast and other parts of Wales.
- Visitors highly complimentary about their visit: 96% would recommend a visit to someone else.
- 99% found their visit enjoyable, two thirds of which found it 'very enjoyable'.
- 57% likely to be staying overnight (+7% since 2015)
- Average spend on the increase since 2019



2.6 Tourism Trade Survey 2022

Key findings

- 73% feel well-informed by Swansea Council's Tourism Team
- Think Swansea Bay's best assets are our coast/beaches (96%) and scenery/landscape (75%)
- 67% reported 'good' or 'excellent' levels of business in 2022
- 48% reported better performance than 2021
- 82% 'nearly' or 'fully' recovered from Covid pandemic (88% for accommodation)
- 45% have plans to expand (increasing capacity, improving quality, diversifying)
- 62% feel optimistic about long-term business prospects
- Major challenges ahead: Welsh Government policies, cost of living, planning restrictions, staff shortages, access to finance and seasonality
- Think Tourism Team can help with marketing support, grants / funding, business advice and liaising with other Council departments



2.7 Swansea City Centre Hotel Demand Study 2022

Key findings and recommendations

- Strong leisure and business demand all year-round
- Extensive regeneration activity is creating new demand
- Hotels performing well in Swansea: occupancy 77.3%, ADR* at £67 and RevPAR** at £52 (£60 for upscale & upper midscale hotels)
- ADR grew significantly in 2022
- Occupancy is high annually and in most months.
- Current supply is a fair mix of accommodation but comparatively low number of rooms per head.
- Supply has not kept pace with a growing demand and market is currently undersupplied: On approximately 35 days per year, an additional 10% of market rooms could be sold again, equating to a smoothed average of around 14 unsatisfied room nights per day or 5,107 room nights annually.
- Forecast future demand and supply balance: an additional 285–355 rooms needed in the market for 2026.
- This suggests potentially 3 hotels of significant inventory.
- A greater number of rooms needed going forward to the medium term (2032).
- Opportunity at midscale and upper midscale / upscale level

*ADR (Average Daily Rate) = Room Revenue/Rooms Sold. ADR is the average rental income brought in by a paid and occupied room during a specific time period

**RevPar (Revenue per Available Room) = Room Revenue/Total Rooms Available. RevPAR represents the revenue generated per available room, whether or not they are occupied

KEY FINDINGS

Hotels performing well in Swansea – high occupancy rates

Focuses on Swansea City Centre / SA1 / Copperworks

Strong leisure and business demand all year-round

Major transformation of city centre

Growing demand – undersupplied market

PERFORMANCE

Average Daily Rates (ADR)

77.3%

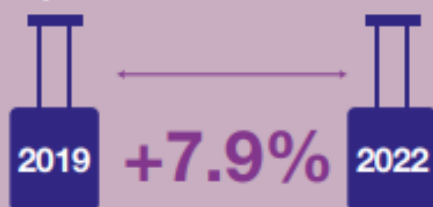
RevPar on average

£52 (£60 for upscale & upper midscale hotel)

TOP 10

Swansea entered the Colliers UK Hotel Market Index 2023

Top 5 RevPar Growth in UK



RECOMMENDATIONS

285 - 355 =

+3
by 2026



more by 2032

Opportunities

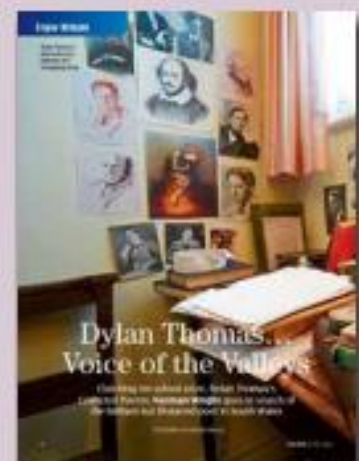
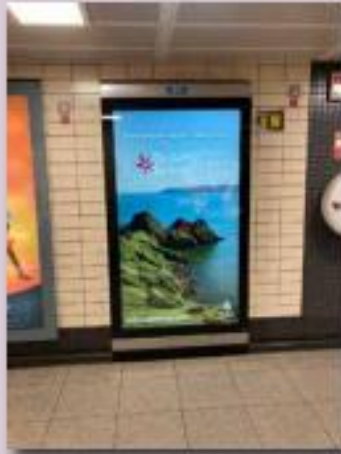


2.8 Destination marketing

Swansea Council promotes the destination as Visit Swansea Bay across UK markets and further afield (in partnership with Visit Wales and Visit Britain).

[Visitswanseabay.com](https://visitswanseabay.com) is the sole platform dedicated to destination marketing and is open to local tourism & hospitality operators. Since 2020, Swansea Council has offered the standard entry-level marketing package to businesses free of charge to support the industry's recovery. As a result, there has been a 70% increase in the number of Visit Swansea Bay Partners.

- Currently 210+ partners supported: accommodation, attractions, activities, retail and hospitality.
- Partners feature on [Visitswanseabay.com](https://visitswanseabay.com) and in marketing campaigns.
- [Visitswanseabay.com](https://visitswanseabay.com) is the call to action for all campaign activity, both on and offline.
- Marketing campaigns are continually evolving to extend the season and create a year-round destination, e.g. 'Christmas Gift Ideas', 'Winter Wellbeing,' 'Dark Skies,' 'Dog Friendly Holidays' and 'Nature & Wildlife'.
- Activity is aligned with Visit Wales thematic years, e.g. 'Llwybrau, Wales by Trails'
- Growing social media audience with good engagement online via Facebook, Instagram, TikTok, Google search and YouTube.
- Digital and static outdoor media campaigns posted in high footfall sites such as London Underground and Video on Demand adverts (e.g. Sky) to reach new customers in shoulder seasons.
- PR campaigns to reach new audience – journalists, bloggers, influencers
- Campaigns are targeted demographically and geographically, in response to visitor and trade research, and consumer/seasonal trends.
- All marketing activity is measured to assess engagement and reach of campaigns.



2.9 Major Events

Events are a great way to stimulate a destination by raising its profile, bringing in extra visitors and supporting the local economy all year-round. They can also attract long-term business investment.

Swansea Council delivers a strong, creative programme of high-profile events all year-round and works closely with event organisers to enable other events to happen across the year.

Some of the major events taking place in Swansea include the popular Wales Airshow, IronMan 70.3, World Triathlon Para Series (WTPS) headliner concerts in Singleton Park, Swansea Half Marathon, Admiral Swansea Bay 10k, Swansea International Jazz festival and Outdoor Theatre at Oystermouth Castle.

Events are measured by their impact - economic impact (visitor spend + organiser spend) but also social, wellbeing and environmental impact.

Major events have a key part to play in the DMP as they impact on all 4 strategic priorities - quality, seasonality, sustainability and partnership working.



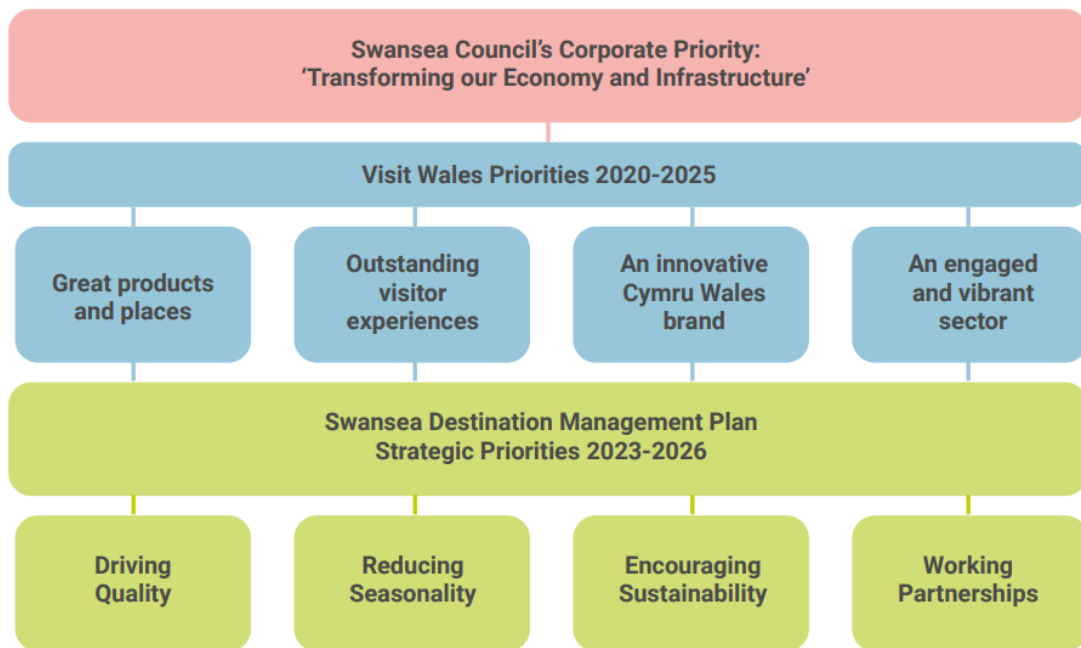
**Airshow: 200k visitors =
£9.7M economic impact (2018)**



**IronMan: 20K spectators =
£2.12M economic impact (2022)**



2.10 – Strategic Fit



The DMP aligns with Swansea Council's Corporate Priority of 'Transforming our Economy and Infrastructure' and Visit Wales' strategic priorities. In turn, the DMP informs and influences a number of Council strategies, plans and working group, including:

- Regeneration Swansea
- Beaches Management Group
- Public Toilet Strategy
- City Centre Operational Working Group

2.11 Governance and Delivery



The DMP Steering Group aims to meet 2/3 times a year with regular delivery groups and industry events held throughout the year. The Tourism Team acts as an administrator and co-ordinates regular communications amongst various stakeholders.



2.12 What success looks like

- Increased visitor spend
- More people in employment
- Higher occupancy figures
- More staying visitors
- High visitor satisfaction rates
- More partners on visitswanseabay.com

2.13 Looking forward to 2026

The ongoing regeneration of Swansea will continue to attract new and boost existing visitor numbers and spend with new reasons to visit as a result of planned developments, including:

- Skyline
- Y Storfa Community Hub
- Palace Theatre and Albert Hall
- Further transformation of City Centre incl. Castle Square, Kingsway, Civic Centre site
- Major hotel developments
- Hafod Morfa Copperworks and River Tawe pontoons
- Improvement of Swansea Amphitheatre
- Major events programme



2.14 What our partners say

Penderyn

The opening of Penderyn's state-of-the-art distillery and visitor centre at the heart of the old Copperworks marks an exciting new chapter in our journey and for Swansea as a destination. This is where heritage and innovation converge to create a unique attraction, which will offer a brand new experience to thousands of visitors every year. These are incredibly exciting times for us as a business and for Swansea as a forward-thinking city.

Plantasia

'We constantly strive for new and innovative experiences for guests. We recently introduced Jungle Escape, which will be the biggest of its kind in the world. Our commitment to continuously improve the visitor experience will give our guests a reason to visit and to return again in the future. Swansea has so much to offer.'

Beach House Oxwich

'We are positioned right on the sands of Oxwich Bay and benefit from mesmerising coastal views. Being surrounded by nature, we are able to take full advantage of local ingredients. We have so much on our doorstep.'

Urban Splash

'We have been really impressed with the ambition and vision of Swansea Council and we are delighted to be working in partnership with this amazing city by the beach, using our experience, capital and resources to strengthen their vision and deliver exceptional living, working and leisure spaces.'

Skyline

'We chose Swansea as our first European site because we truly believe the city has the potential to become a leading leisure destination. Swansea Council has a very clear vision on how they want to make Swansea a thriving place to work and live. That's a vision we believe in and want to be a part of.'

The Cwtsh

'You can see that positive things are happening in Swansea - there's a lot of money going into the area, and that was definitely a factor behind opening up the Cwtsh Hostel. Swansea is certainly going places. There's a good mixture of big developments with small independent businesses, so by working together the city is getting it right.'

3. Legal implications

There are no legal implications associated with this report other than those set out in the body of the report.

4. Finance Implications

There are no financial implications associated with this report.

5. Integrated Impact Assessment Implications

The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Acts.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.
- Deliver better outcomes for those people who experience socio-economic disadvantage.
- Consider opportunities for people to use the Welsh language.
- Treat the Welsh language no less favourably than English.
- Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the 'well-being goals'.

Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also takes into account other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

The DMP has low visibility to the general public and does not require engagement from protected groups. There are no environmental, political, financial or cultural risks associated with it.

The Well-being of Future Generations Act (Wales) 2015 has been fully considered in the development of the DMP, which supports its goals and objectives.

The DMP has a positive impact on the destination as a whole by improving quality and delivering a better visitor experience, while nurturing a more sustainable approach to tourism, both economically and environmentally. This in turn supports the visitor economy and overall prosperity / wellbeing across the City and County of Swansea. By working closely with industry partners, the DMP also has a positive impact on the Council's reputation.

This report has been IIA screened and the outcome is that it does not require a full IIA.

Glossary of terms:

DMP – Destination Management Plan

STR – Smith Travel Research

STEAM - Scarborough Tourism Economic Activity Monitor

ADR – Average Daily Rate (Room Revenue/Rooms Sold). ADR is the average rental income brought in by a paid and occupied room during a specific time period

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IIA – Integrated Impact Assessment

Background papers: None

Appendices:

Appendix A – Swansea DMP 2023-2026 (PDF version)

Appendix B – IIA Screening Form

Appendix A

Swansea Destination
Management Plan
2023-2026

Back on Track



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Foreword

It gives me great pleasure to be able to present our 3rd Destination Management Plan for the period 2023 - 2026.

Unlike many parts of Wales, Swansea offers a strong rural, coastal and city centre product which, combined with a range of high-profile events, attracts millions of visitors every year.

Tourism is now worth over £510M to the local economy and our research shows high levels of satisfaction with many visitors returning year on year to enjoy a holiday in Swansea.

Our city centre is undergoing a multi-billion pound transformation and major investment is being pumped into new hotels and attractions across the city. With yet more exciting developments under way, there is a strong sense of confidence and optimism amongst local businesses. Our recent trade survey highlights that most tourism operators are optimistic and on their way to full recovery, with many continuing to diversify and invest in their businesses.

Our recent Hotel Demand Study suggests city centre occupancy in the serviced accommodation sector is high all year-round and that an additional 3 hotels would be required by end of 2026 to meet growing demand currently generated and predicted over the coming years.

There is no doubt now is the time to visit Swansea and invest in our thriving destination. By working closely with colleagues in the private sector, public and third sectors as well as Visit Wales, Swansea Council is committed to building on this success and play its part to ensure our destination grows and prospers sustainably and offers a high-quality visitor experience for the benefit of all.

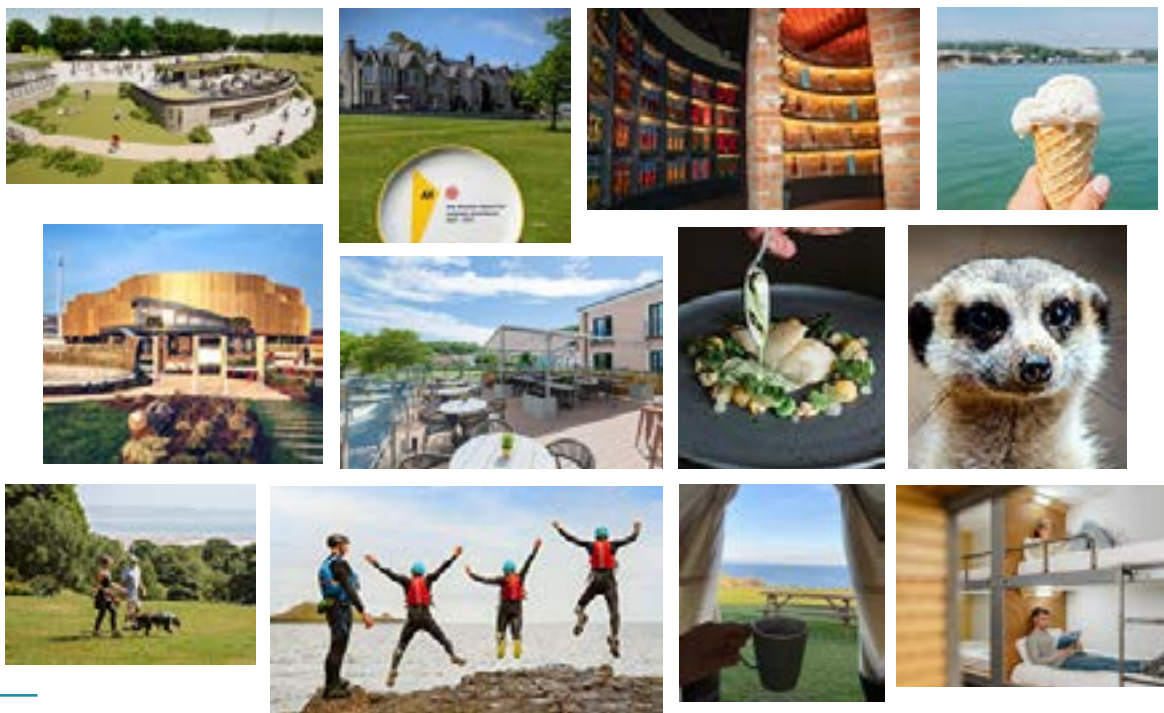
Cllr Robert Francis-Davies
Cabinet Member for Investment, Regeneration, Events & Tourism

What is a Destination Management Plan?

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Throughout the pandemic, we continued to engage with our customers and to support local tourism businesses. In 2022, signs of recovery were evident in terms of consumers’ confidence to return (4.2M visitors), continued inward investment in the destination and optimism amongst tourism operators - despite new economic challenges around rising costs and staff shortages.

This DMP is informed by three strategic pieces of research: a 7-month long visitor survey (1,000 face-to-face interviews), our largest ever survey of local tourism businesses (120+ responses) and a Hotel Demand Study commissioned to assess the current supply and future demand drivers for hotel developments in the city centre.

Strategic Priorities and Outcomes



- **Driving Quality:** to build on success and further enhance the destination in order to deliver a distinctive and high-quality visitor experience.
- **Breaking free of seasonality:** to develop creative, targeted marketing campaigns to enhance the area's appeal to the UK and wider world and build a stronger tourism offer outside the summer months.
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- **Working Partnerships:** to continue to support the private sector directly and work with our public and third sector partners in order to achieve growth and prosperity for the local economy.

Priorities	Actions	Impacts	=	Outcomes
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Encouraging Sustainability:	Improve visitor experience	Reduced seasonality		A more sustainable approach to tourism, both economically and environmentally
Working Partnerships:	Improve infrastructure and facilities	Improved tourism offer		Growth and prosperity for the local economy
	Continue to deliver targeted marketing campaigns	Increased visitor spend		
	Improve infrastructure and facilities	Skilled workforce ready to meet future opportunities in the sector		
	Develop strong partnerships between public, private and third sector	Strong destination brand		
	Identify relevant funding and attract further investment	More tourism businesses accessing relevant training and funding		



The Bigger Picture

Swansea City Centre is undergoing a major transformation into a premier destination to live, work, study and visit.

Completed projects:

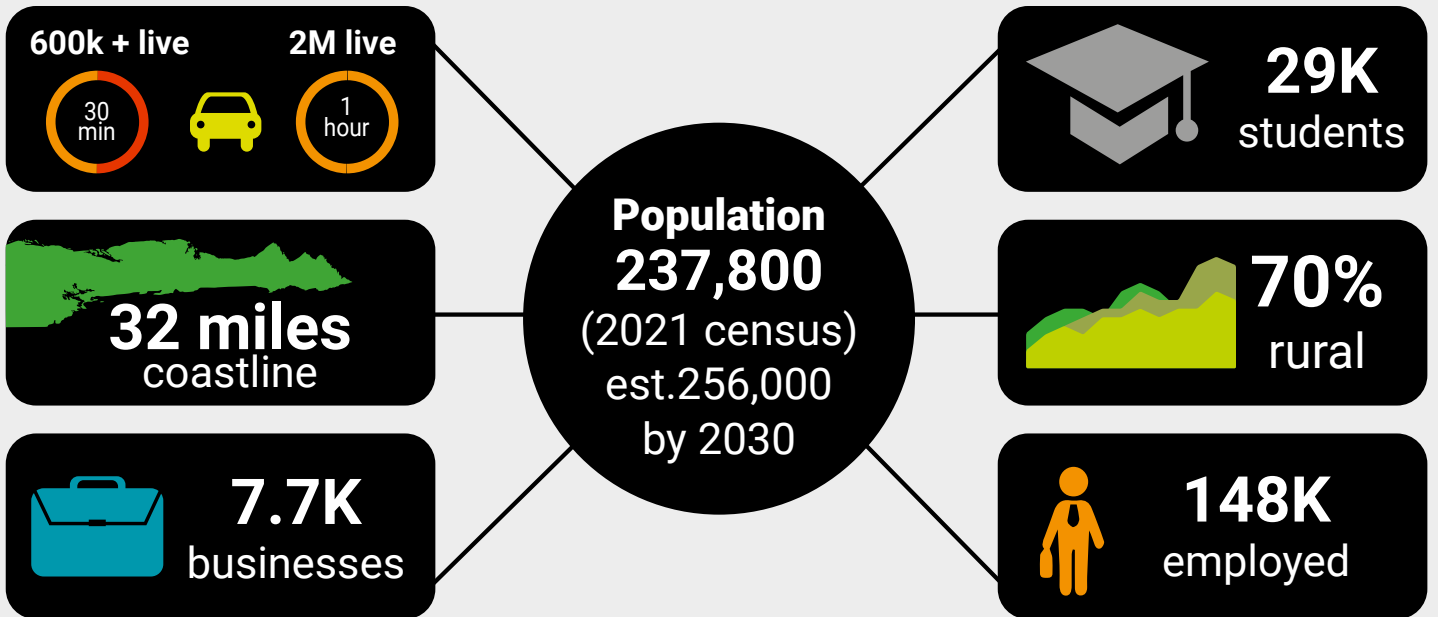
- Swansea Arena in the new Copr Bay district
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- Redesign of the Kingsway with more public spaces, better pedestrian and cycle routes and new high-tech office development at 71/72
- Opening of Penderyn Swansea Copperworks Distillery

In development

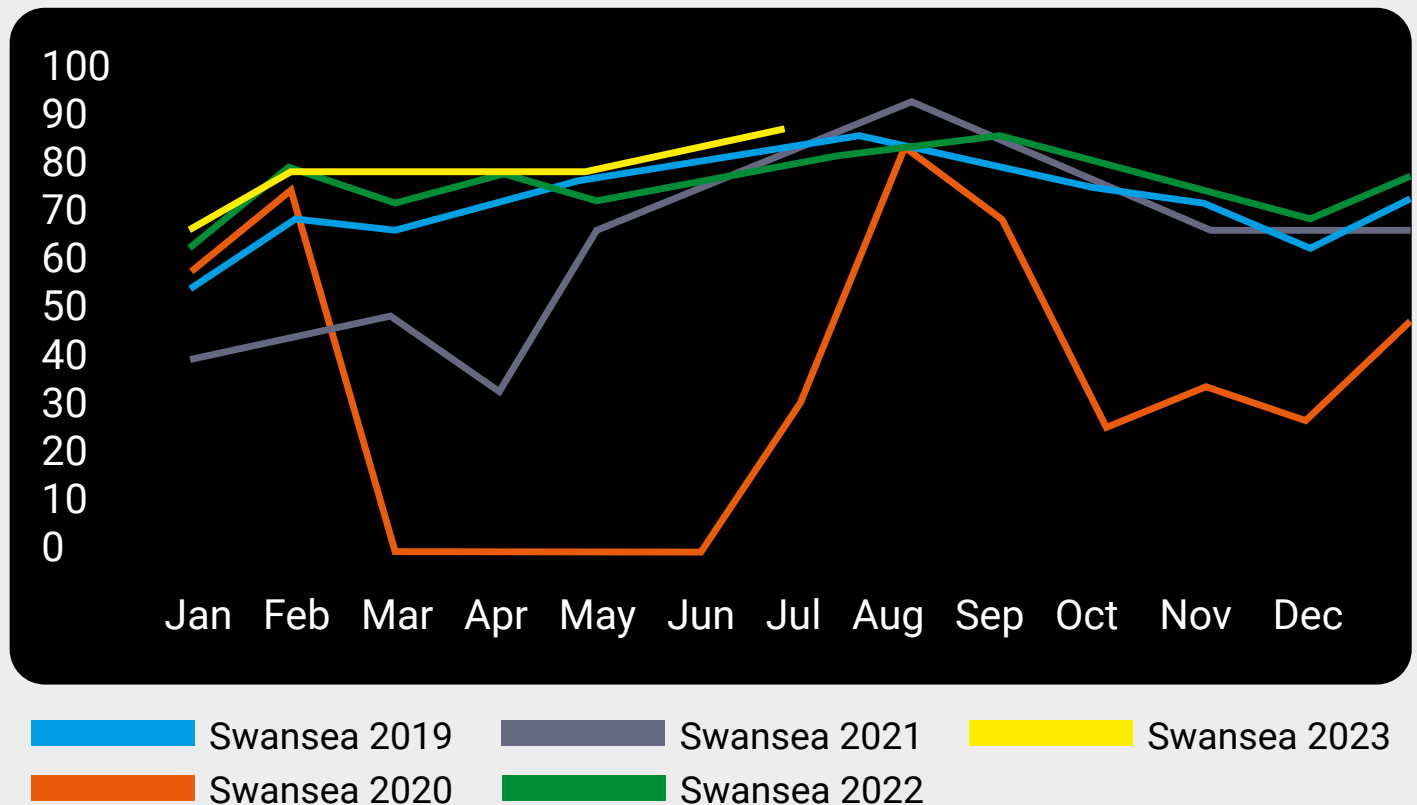
- New public sector hub on Oxford Street – Y Storfa
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- Enhancement of Castle Square and Swansea Amphitheatre
- New entrances to Swansea Market and Quadrant Shopping Centre
- Hafod Morfa Copperworks transformation into a leisure destination with new outdoor attraction Skyline planned for 2025 and floating pontoons
- Partnership with private sector developers Urban Splash for the mixed-use transformation of Civic Centre site and former St David's Shopping Centre
- Major hotel developments
- Early discussions about a visitor attraction and an aquarium for the Civic Centre / Paxton Street development sites
- Major events programme: Swansea is home to the Wales Airshow, IronMan 70.3, World Triathlon Para Series, Swansea Bay 10k and headline concerts in Singleton Park
- A planned programme of projects backed by Shared Prosperity Funding

Visitor Economy in Swansea

About Swansea



Hotel Room Occupancy figures % (STR)



Bedstock – headline figures (July 2023)



Total across the
City and County
of Swansea:

8k units/
bedrooms/
pitches

30k bedspaces



Serviced

1.6k bedrooms

3.9k bedspaces



Self Catering
(incl. hostels and
university)

1.3k units

4.1k bedspaces

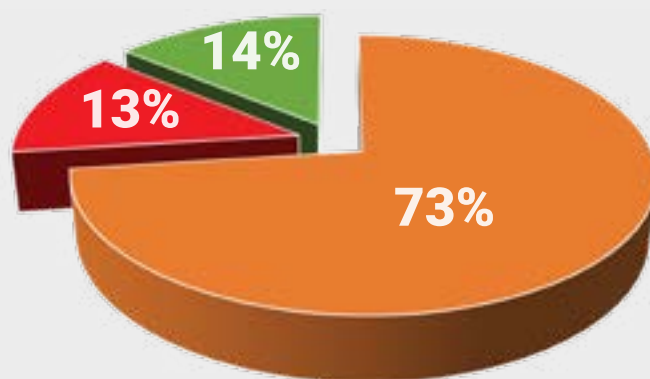


Caravan, Camping
and Alternative
Accommodation

5.1k units/
pitches

22k units/
pitches

30,000 bedspaces



 Caravan & Camping

 Serviced

 Self Catering

Value of tourism: STEAM 2022



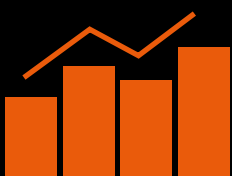
4.2M
Visitors

including



1.5M
Staying Visitors

Total economic impact of tourism:



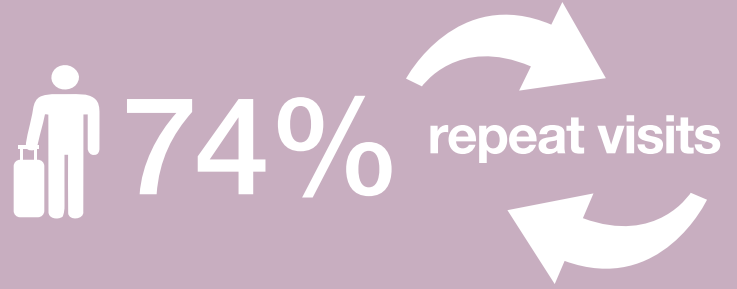
worth
£510M



5.2k
Jobs

Visitor Survey 2022

Mainly couples and families from higher ABC1 social grades



Visitors are mainly over 55's followed closely by 35-44

42% over 55 yrs

37% 35 - 54 yrs

The coast, beaches, scenery & landscape remain the key reasons for visiting



Overnight Visitors

£ 45 per person per night

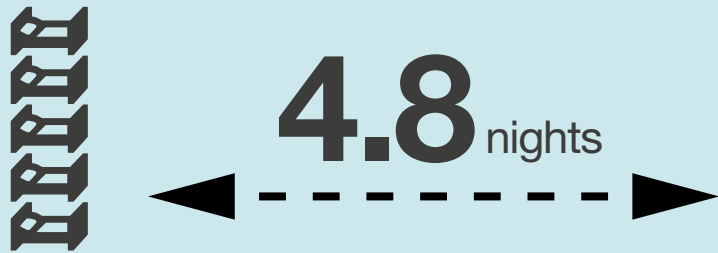
Day Visitors

£ 29 per person per day

Walking most popular activity



Average length of stay:



Overnight visitors now account for almost 6 in 10 of all visitors



Visitors placed the highest importance and lowest satisfaction on the availability and cleanliness of public toilets.

HIGH PRIORITY

WC



Most popular paid for accommodation

★ Self catering



Hotels



Caravans



96%

recommend a visit



99%

said their visit was 'Very enjoyable or enjoyable'





Visitor Survey 2022

Key facts about our visitors

- Mostly from higher ABC1 social grades: affluent 'empty nesters' aged 45+, affluent early retired couples aged 45+ and younger affluent professionals aged 25+
- Mainly from the Midlands, London, Southeast and other parts of Wales
- Visitors highly complimentary about their visit: 96% would recommend a visit to someone else
- 99% found their visit enjoyable, two thirds of which found it 'very' enjoyable
- 57% likely to be staying overnight (+7% since 2015)
- Average spend on the increase since 2019



Swansea Council's Tourism Team is good at keeping businesses informed



Priorities for improvement

(rated high in importance but low on performance)



Cleanliness of the streets



Availability & cleanliness of public toilets



Road signs

Good overall industry performance in 2022

67% excellent/good

Industry performance compared to 2021

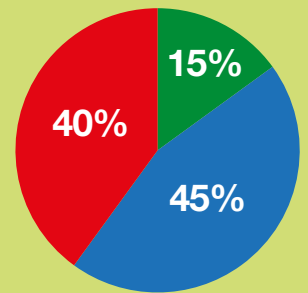
48% better

Optimism and outlook for 2023

More advanced bookings

Same level

Fewer advanced bookings



Business recovery to pre-covid norms

51% fully recovered

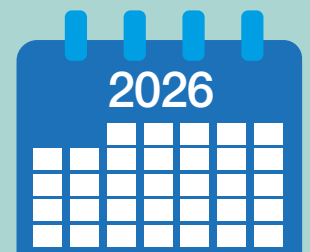
31% nearly recovered

Accommodation operators

88% fully/nearly recovered

Long-term business prospects

62%
very optimistic/
optimistic



Opportunities to expand



45%

have plans to expand in the near future

Operators confidence in region's offer



96%
coast/beaches



75%
scenery/landscape

Issues faced / challenges

Welsh Government Policies

Rising cost of living

Planning approval/restrictions

Staff shortages

Access to finance

Seasonality

How the Tourism Team can help

71% Marketing support/
Free marketing package

42% Grants / Funding

32% Business advice

8% Liaison with other Council departments

Key findings

- 73% feel well-informed by Swansea Council's Tourism Team
- Think Swansea Bay's best assets are our coast/beaches (96%) and scenery/landscape (75%)
- 67% reported 'good' or 'excellent' levels of business in 2022
- 48% reported better performance than 2021
- 82% 'nearly' or 'fully' recovered from Covid pandemic (88% for accommodation)
- 45% have plans to expand (increasing capacity, improving quality, diversifying)
- 62% feel optimistic about long-term business prospects
- Major challenges ahead: Welsh Government policies, cost of living, planning restrictions, staff shortages, access to finance and seasonality
- Think Tourism Team can help with marketing support, grants / funding, business advice and liaising with other Council departments

KEY FINDINGS



City Centre,
SA1 and
Copperworks

Hotels performing well all year round ✓

Strong leisure and business demand ✓

High occupancy rate ✓

Major transformation of city centre ✓

Growing demand ✓

Undersupplied market ✓

PERFORMANCE

Average Daily Rates (ADR)

£67

Average Hotel Occupancy Rate

77.3%

RevPar on average

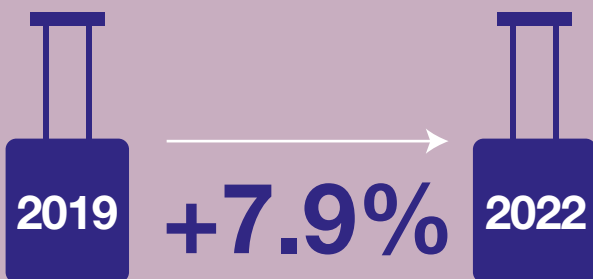
£52

(£60 for upscale & upper midscale hotel)

TOP 10

Swansea entered the Colliers UK Hotel Market Index 2023

Top 5 RevPar Growth in UK

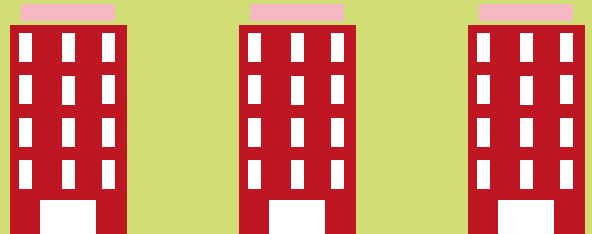


RECOMMENDATIONS

285 - 355 new rooms needed

Equivalent to:

3 new hotels by 2026



+ more rooms by 2032

What Swansea needs more of:



Swansea City Centre Hotel Demand Study 2022

- Strong leisure and business demand all year-round
- Extensive regeneration activity is creating new demand
- Hotels performing well in Swansea: occupancy 77.3%, ADR* at £67 and RevPAR** at £52 (£60 for upscale & upper midscale hotels)
- ADR grew significantly in 2022
- Occupancy is high annually and in most months
- Current supply is a fair mix of accommodation but comparatively low number of rooms per head
- Supply has not kept pace with a growing demand and market is currently undersupplied: On approximately 35 days per year, an additional 10% of rooms could be sold again, equating to a smoothed average of around 14 unsatisfied room nights per day or 5,107 room nights annually
- Forecast future demand and supply balance: an additional 285–355 rooms needed in the market for 2026
- This suggests potentially 3 hotels of significant inventory
- A greater number of rooms needed going forward to the medium term (2032)
- Opportunity at midscale and upper midscale / upscale level

*ADR (Average Daily Rate) = Room Revenue/Rooms Sold. ADR is the average rental income brought in by a paid and occupied room during a specific time period.

**RevPar (Revenue per Available Room) = Room Revenue/Total Rooms Available. RevPAR represents the revenue generated per available room, whether or not they are occupied.

Destination Marketing

Swansea Council promotes the destination as Visit Swansea Bay across UK markets and further afield (in partnership with Visit Wales and Visit Britain).

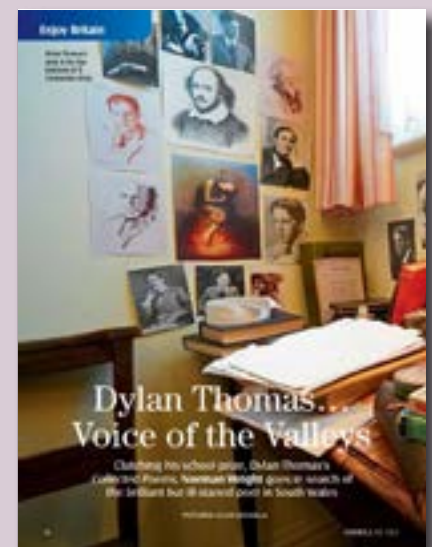
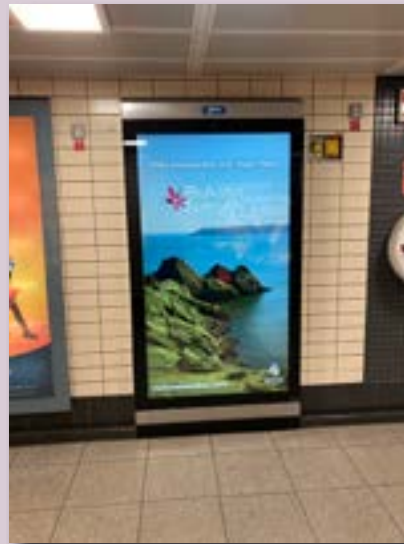
Visitswanseabay.com is the sole platform dedicated to destination marketing and is open to local tourism & hospitality operators.

Since 2020, Swansea Council has offered the standard entry-level marketing package to businesses free of charge to support the industry's recovery. As a result, there has been a 70% increase in the number of Visit Swansea Bay Partners.



- Currently 210+ partners supported: accommodation, attractions, activities, retail and hospitality
- Partners feature on visitswanseabay.com and in marketing campaigns
- visitswanseabay.com is the call to action for all campaign activity, both on and offline
- Marketing campaigns are continually evolving to extend the season and create a year-round destination, e.g. 'Christmas Gift Ideas', 'Winter Wellbeing', 'Dark Skies', 'Dog Friendly Holidays' and 'Nature & Wildlife'
- Activity is aligned with Visit Wales thematic years, e.g. 'Llwybrau, Wales by Trails'
- Growing social media audience with good engagement online via Facebook, Instagram, TikTok, Google search and YouTube
- Digital and static outdoor media campaigns in high footfall sites such as London Underground and Video on Demand adverts (e.g. Sky) to reach new customers in shoulder seasons
- PR campaigns to reach new audience - journalists, bloggers, influencers
- Campaigns are targeted demographically and geographically, in response to visitor and trade research, and consumer/seasonal trends
- All marketing activity is measured to assess engagement and reach of campaigns





Major Events

Events are a great way to stimulate a destination by raising its profile, bringing in extra visitors and supporting the local economy all year-round. They can also attract long-term business investment.

Swansea Council delivers a strong, creative programme of high-profile events all year-round and works closely with event organisers to enable other events to happen across the year.

Some of the major events taking place in Swansea include the popular Wales Airshow, IronMan 70.3, World Triathlon Para Series (WTPS) headliner concerts in Singleton Park, Swansea Half Marathon, Admiral Swansea Bay 10k, Swansea International Jazz festival and Outdoor Theatre at Oystermouth Castle.

Events are measured by their impact - economic impact (visitor spend + organiser spend) but also social, wellbeing and environmental impact.

Major events have a key part to play in the DMP as they impact on all 4 strategic priorities - quality, seasonality, sustainability and partnership working.



**Airshow: 200k visitors =
£9.7M economic impact (2018)**

**IronMan: 20K spectators =
£2.12M economic impact (2022)**



Strategic Fit

Swansea Council's Corporate Priority:
'Transforming our Economy and Infrastructure'

Visit Wales Priorities 2020-2025

Great products
and places

Outstanding
visitor
experiences

An innovative
Cymru Wales
brand

An engaged
and vibrant
sector

Swansea Destination Management Plan
Strategic Priorities 2023-2026

Driving
Quality

Reducing
Seasonality

Encouraging
Sustainability

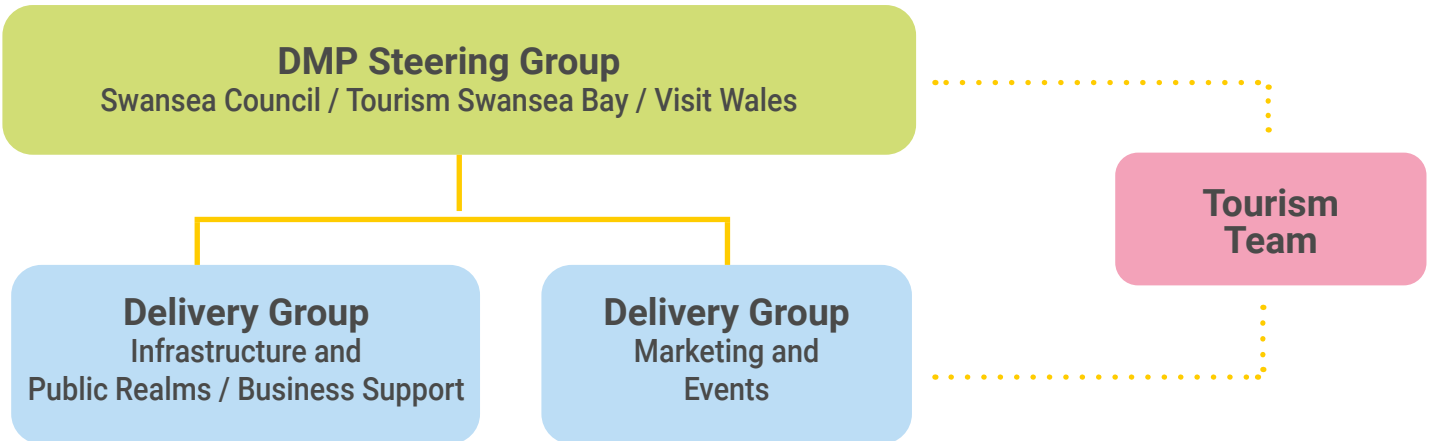
Working
Partnerships

The DMP aligns with Swansea Council's Corporate Priority of 'Transforming our Economy and Infrastructure' and Visit Wales' strategic priorities. In turn, the DMP informs and influences a number of Council strategies, plans and working group, including:

- Regeneration Swansea
- Beaches Management Group
- Public Toilet Strategy
- City Centre Operational Working Group



Governance and Delivery



The DMP Steering Group aims to meet 2/3 times a year with regular delivery groups and industry events held throughout the year. The Tourism Team acts as an administrator and co-ordinates regular communications amongst various stakeholders.



What Success Looks Like

Increased visitor spend

More people in employment

Higher occupancy figures

More staying visitors

High visitor satisfaction rates

More partners on visitswanseabay.com



Looking forward to 2026

The ongoing regeneration of Swansea will continue to attract new and boost existing visitor numbers and spend with new reasons to visit as a result of planned developments, including:

- Skyline
- Y Storfa Community Hub
- Palace Theatre and Albert Hall
- Further transformation of City Centre incl. Castle Square, Kingsway, Civic Centre site
- Major hotel developments
- Hafod Morfa Copperworks and River Tawe pontoons
- Improvement of Swansea Amphitheatre
- Major events programme



What Our Partners Say

Penderyn

'The opening of Penderyn's state-of-the-art distillery and visitor centre at the heart of the old Copperworks marks an exciting new chapter in our journey and for Swansea as a destination. This is where heritage and innovation converge to create a unique attraction, which will offer a brand new experience to thousands of visitors every year. These are incredibly exciting times for us as a business and for Swansea as a forward-thinking city.'



Plantasia

'We constantly strive for new and innovative experiences for guests. We recently introduced Jungle Escape, which will be the biggest of its kind in the world. Our commitment to continuously improve the visitor experience will give our guests a reason to visit and to return again in the future. Swansea has so much to offer.'

Beach House Oxwich

'We are positioned right on the sands of Oxwich Bay and benefit from mesmerising coastal views. Being surrounded by nature, we are able to take full advantage of local ingredients. We have so much on our doorstep.'

Urban Splash

'We have been really impressed with the ambition and vision of Swansea Council and we are delighted to be working in partnership with this amazing city by the beach, using our experience, capital and resources to strengthen their vision and deliver exceptional living, working and leisure spaces.'

Skyline

'We chose Swansea as our first European site because we truly believe the city has the potential to become a leading leisure destination. Swansea Council has a very clear vision on how they want to make Swansea a thriving place to work and live. That's a vision we believe in and want to be a part of.'

The Cwtsh

'You can see that positive things are happening in Swansea - there's a lot of money going into the area, and that was definitely a factor behind opening up the Cwtsh Hostel. Swansea is certainly going places. There's a good mixture of big developments with small independent businesses, so by working together the city is getting it right.'



This DMP and accompanying infographics, along with additional information about tourism in Swansea Bay, can be downloaded from our tourism trade website:

swansea.gov.uk/tourismtrade

or contact:

Swansea Council Tourism Team
Room 136
The Guildhall
Swansea
SA1 4PE

 01792 635214

Email: DMP@swansea.gov.uk



Appendix B - Integrated Impact Assessment Screening Form

Please ensure that you refer to the Screening Form Guidance while completing this form.

Which service area and directorate are you from?

Service Area: Cultural Services

Directorate: Place

Q1 (a) What are you screening for relevance?

- New and revised policies, practices or procedures
- Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
- Efficiency or saving proposals
- Setting budget allocations for new financial year and strategic financial planning
- New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
- Large Scale Public Events
- Local implementation of National Strategy/Plans/Legislation
- Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
- Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
- Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
- Major procurement and commissioning decisions
- Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services
- Other

(b) Please name and fully describe initiative here:

The new Destination Management Plan 2023-2026 is a combined response by the Council and its private/public sector partners and sets out the strategic direction for Swansea Bay as a destination over the next 4 years.

It is based on extensive research and focuses on 4 strategic priorities to address short-term and long-term issues across the destination:

1. **Driving Quality:** to build on success and further enhance the destination in order to deliver a distinctive and high-quality visitor experience.
2. **Breaking free of seasonality:** to develop creative, targeted marketing campaigns to enhance the area's appeal to the UK and wider world and build a stronger tourism offer outside the summer months.
3. **Encouraging Sustainability:** to nurture a more sustainable approach to tourism, both economically and environmentally, to the benefit of the environment and wellbeing of all.
4. **Working Partnerships:** to continue to support the private sector directly and work with our public and third sector partners in order to achieve growth and prosperity for the local economy.

Appendix B - Integrated Impact Assessment Screening Form

Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)

	High Impact		Medium Impact		Low Impact		Needs further Investigation	No Impact
	+	-	+	-	+	-		
Children/young people (0-18)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Older people (50+)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any other age group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future Generations (yet to be born)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Race (including refugees)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asylum seekers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gypsies & travellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religion or (non-)belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gender reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Welsh Language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poverty/social exclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carers (inc. young carers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community cohesion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marriage & civil partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pregnancy and maternity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches? Please provide details below – either of your activities or your reasons for not undertaking involvement

This DMP is informed by three strategic pieces of research:

- 2022 Visitor Survey: a 7-month long survey across the destination which resulted in 1,000 face-to-face interviews with a range of visitors
- 2022 Tourism Trade Survey: our largest ever survey of local tourism businesses (120 interviews)
- 2022 Hotel Demand Study commissioned to assess the current supply and future demand drivers for hotel developments in Swansea city centre.

This project has low visibility to the general public and does not require engagement from the protected groups above.

Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:

a) Overall does the initiative support our Corporate Plan's Well-being Objectives when considered together?

Yes No

b) Does the initiative consider maximising contribution to each of the seven national well-being goals?

Appendix B - Integrated Impact Assessment Screening Form

Yes No

c) Does the initiative apply each of the five ways of working?

Yes No

d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?

Yes No

Q5 What is the potential risk of the initiative? (*Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc...*)

High risk

Medium risk

Low risk

Q6 Will this initiative have an impact (however minor) on any other Council service?

Yes

No

If yes, please provide details below

Q7 Will this initiative result in any changes needed to the external or internal website?

Yes

No

If yes, please provide details below

Q8 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?

(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)

The DMP has a positive impact on the destination as a whole by improving quality and delivering a better visitor experience, while nurturing a more sustainable approach to tourism, both economically and environmentally. This in turn supports the visitor economy and overall prosperity / wellbeing across the City and County of Swansea. By working closely with industry partners, the DMP also has a positive impact on the Council's reputation.

Outcome of Screening

Q9 Please describe the outcome of your screening using the headings below:

- Summary of impacts identified and mitigation needed (Q2)
- Summary of involvement (Q3)
- WFG considerations (Q4)
- Any risks identified (Q5)
- Cumulative impact (Q7)

Appendix B - Integrated Impact Assessment Screening Form

The new Destination Management Plan 2023-2026 is a combined response by the Council and its private/public sector partners and sets out the strategic direction for Swansea Bay as a destination over the next 4 years.

It is based on extensive research and focuses on 4 strategic priorities to address short-term and long-term issues across the destination:

- Driving Quality
- Breaking free of seasonality
- Encouraging Sustainability
- Working Partnerships

The DMP has low visibility to the general public and does not require engagement from protected groups. There are no environmental, political, financial or cultural risks associated with it.

The Well-being of Future Generations Act (Wales) 2015 has been fully considered in the development of the DMP, which supports its goals and objectives.

The DMP has a positive impact on the destination as a whole by improving quality and delivering a better visitor experience, while nurturing a more sustainable approach to tourism, both economically and environmentally. This in turn supports the visitor economy and overall prosperity / wellbeing across the City and County of Swansea. By working closely with industry partners, the DMP also has a positive impact on the Council's reputation.

Full IIA to be completed

Do not complete IIA – please ensure you have provided the relevant information above to support this outcome

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

Screening completed by:
Name: Steve Hopkins
Job title: Tourism and Marketing Manager
Date: 16-08-2023
Approval by Head of Service:
Name: Tracey McNulty
Position: Head of Cultural Services
Date: 06-09-2023

Please return the completed form to accesstoservices@swansea.gov.uk

Agenda Item 5



Report of the Chair

Economy & Infrastructure Service Transformation Committee – 21 September 2023

Work Plan 2023-2024

Date of Meeting	Agenda Item(s) & Format	Lead Officer
8 June 2023	Work Plan Discussion	
20 July 2023	Local Economic Delivery Plan Strategic Framework. Swansea Bay Strategy Status Report	Paul Relf/Clare James Kristy Tillman
21 Sept 2023	Destination Management Plan.	Steve Hopkins
2 Nov 2023	Swansea Bay Strategy Projects. Local Economic Delivery Plan Strategic Framework.	Geoff Bacon Paul Relf/Clare James
14 Dec 2023	Review of the Council's Housing Allocation Policy.	Carol Morgan
18 Jan 2024	Maintenance of Road Infrastructure.	Stuart Davies
29 Feb 2024	More Homes Delivery Programme.	Carol Morgan
11 April 2024	Tawe Riverside Corridor Action Plan.	Gail Evans/Paul Relf