



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

### Scrutiny Programme Committee - 17 August 2021

## Tourism

<b>Purpose:</b>	To brief/update the Scrutiny Programme Committee
<b>Content:</b>	An overview of the work of the Tourism and Marketing Team and its performance during the pandemic and how it is supporting the sector as part of the Council's Economic Plan. The Report (via Appendix A) also updates the Action Plan that was developed from a previous Tourism Scrutiny Working Group.
<b>Councillors are being asked to:</b>	Consider the information provided and to forward views to the Cabinet Member via a letter from the Chair.
<b>Lead Councillor:</b>	Councillor Robert Francis-Davies, Cabinet Member for Investment, Regeneration and Tourism
<b>Lead Officer &amp; Report Author:</b>	Frances Jenkins, Strategic Manager - Tourism, Marketing & Events / Steve Hopkins, Tourism & Marketing Manager
<b>Legal Officer:</b>	Debbie Smith
<b>Finance Officer:</b>	Ben Smith

### 1. Background

The scrutiny report on the work of the tourism team was submitted to Cabinet on the 18<sup>th</sup> July 2019 after the Scrutiny Working Group completed a detailed inquiry.

The recommendations from the action plan have been updated in Appendix A - Scrutiny Working Group on Tourism – Cabinet Member Response and Action Plan (November 2019, revisited July 2021).

This report is to allow for greater discussion of the work of the team during the pandemic and covers the strategic aims and actions for tourism's contribution towards the Council's Economic Recovery Plan as agreed in consultation with the Cabinet Member for Investment Regeneration and Tourism.

The report will demonstrate how the team have (both during the pandemic and into recovery):

- Supported the private sector with advice and information.
- Continued to remain in touch with our customers with targeted communications.
- Worked with Visit Wales and partners throughout, including researching the market and marketing behaviours in readiness for reopening.

The main focus of the report was shared with our tourism stakeholders as part of our online tourism stakeholder event in May 2021, where the Cabinet Member also highlighted some of the wider business support interventions the tourism sector has received from across the Place Directorate and as part of the Council’s Economic Recovery Plan.

**2. Role of the Tourism Team**

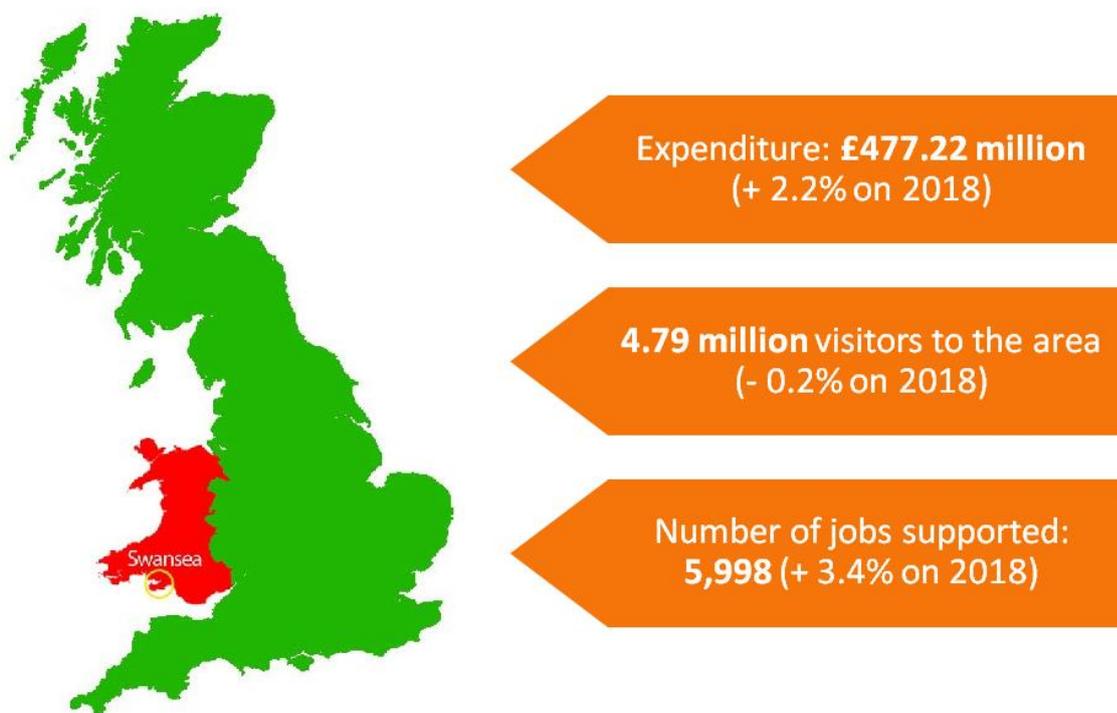
The tourism team, part of Cultural Services, within the Place Directorate, is responsible for marketing Swansea Bay, Mumbles and Gower as a visitor destination, primarily to the key UK markets of the South West of England, Midlands, North West of England and the M4 corridor.

In addition, the in-Wales market continues to grow, in part due to the pandemic (e.g. national lockdowns) and marketing to Welsh audiences has become an integral part of the campaigns (however, some of the activity featured in this report will only have been published outside of Wales and may not have been seen by members of this Committee).

The team actively support sustainable destination development through the Council’s Destination Management Plan (DMP), in partnership with Visit Wales/Welsh Government and Tourism Swansea Bay, the local tourism association. This has been increasingly important and has proved a successful vehicle for collaborating and consulting with the industry groups represented in the steering group, which the cabinet member chairs.

**3. The value of Tourism to the Local Economy**

Value of Tourism to the Local Economy (2019)



**Fig 1:** 2019 data highlighting the value of tourism to Swansea (Swansea, Mumbles and Gower) in terms of expenditure, number of visitors and number of jobs supported

#### **4. The Impact of Covid-19 on the Tourism Industry**

The tourism, leisure and hospitality sector was one of the worst affected sectors of the economy and included businesses associated with accommodation, attractions, food & drink and events.

Key impacts on the industry included:

- UK government intervention began in March 2020 – at the very start of the tourism season.
- The first sector to close and the last one to re-open (at the time of writing this report, the Events sector in Wales is still to properly re-open).
- Travel restrictions and lockdowns continued throughout 2020 and into the first eight months of 2021 (to date).
- The impacts of the pandemic resulted in staff redundancies, cancellations and refunds to customers.
- Phased re-opening and changing restrictions brought additional challenges and extra costs for instigating Covid protocols.
- Recruitment challenges on re-opening continue to be an issue.

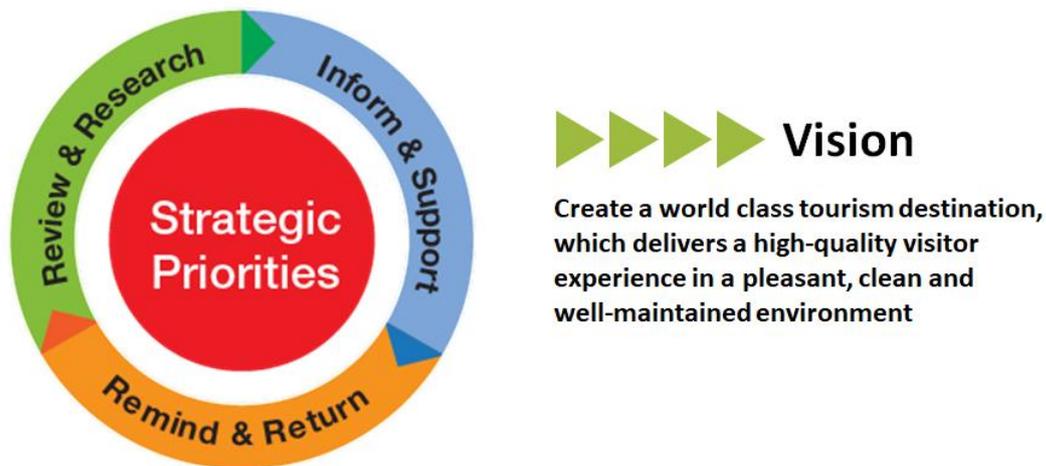
#### **5. Integration of tourism priorities into the Economic Recovery Plan for Swansea**

The Tourism Recovery Action Plan (TRAP) was developed as part of the recovery strategy for the sector and forms an integral part of Swansea Council's wider Economic Recovery Plan (approved 18<sup>th</sup> March 2021). Its development was also timely for the following reasons:

- The Council's second Destination Management Plan (2017-2020) had expired.
- Covid-19 presented an opportunity to revisit strategic priorities for recovery, testing how the market was adapting and how our marketing was evolving to anticipate this new marketplace.
- A medium-term interim plan was developed, focussing on 2021/22, to support the industry during re-opening and into a post-Covid recovery.

It was essential that we linked our support for the sector with the wider Economic Recovery Plan, further raising the profile of the sector and its contribution towards the local economy. The Tourism Recovery Plan has since been approved and assimilated into the Council's over-arching Economic Recovery Plan for Swansea.

## Tourism Recovery Action Plan



**Fig 2:** Graphic demonstrating the main focus of the Tourism Recovery Action Plan

The development of the Tourism Recovery Action Plan refocused the immediate priorities of the proposed new Destination Management Plan. Urgent interim measures were required to accommodate the unusual circumstances caused by the pandemic.

This interim plan has three Strategic Priorities aimed at supporting the recovery of the local economy in 2021/22 as outlined below.

### **6. Strategic Priority 1 - Review and Research**

#### **Review: Primary areas of research undertaken**

- To maintain up-to-date information about our visitors.
- Improve market intelligence and identify new trends.
- Undertake bedstock, occupancy and trade surveys.
- Monitor performance and review activity as appropriate.

#### **Research: Current and planned activity – to inform recovery**

- To continue to assess the impact of the tourism industry on the local economy via the STEAM economic model. Assessing the data in a regional and national context. By adding Airbnb bedstock data to this model, we have improved the accuracy of the STEAM input data.
- To continue to track the trend of business recovery by monitoring the Visit Wales and Visit Britain Tourism Business Barometer.
- To continue to track consumer sentiment and intent via the COVID-19 UK Tourism Consumer Tracker Survey.

- Continue to monitor the activity of our competitors, providing useful intelligence to shape campaign plans and inform their implementation.
- A Bedstock Survey has been completed and the final report is being prepared. A new database is being developed to make it easier to interrogate the data and to maintain its accuracy.
- The planned Trade Survey has been postponed partly due to the businesses being fully engaged in re-opening and managing their demand. In addition, a number of other tourism trade surveys have been ongoing and we anticipated a poor response due to 'survey fatigue'. This has been postponed to early in 2022.
- To continue to monitor the performance of all marketing activity to determine the most cost effective way to maximise customer engagement and therefore bookings for our tourism business partners.

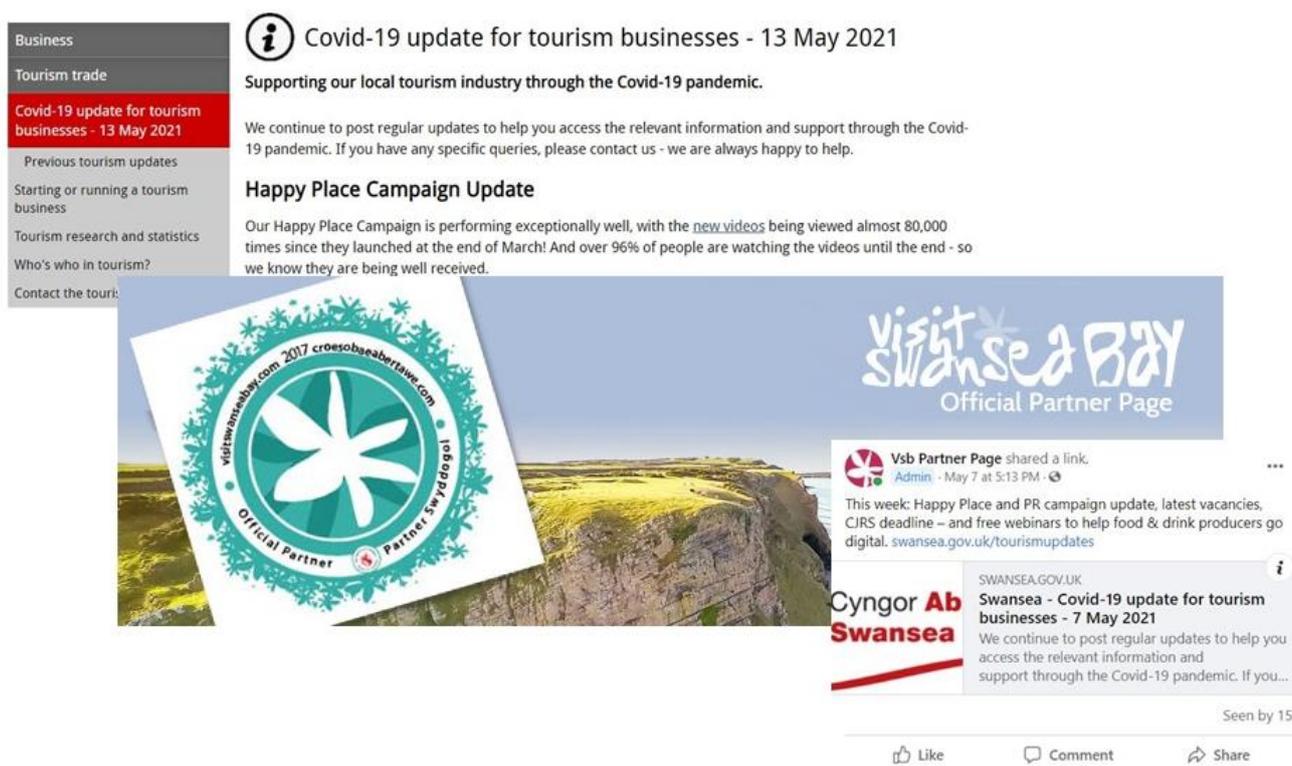
### **7. Strategic Priority 2 - Inform and Support**

#### **Inform: Specialised business support during the pandemic**

- Hundreds of business enquiries have been dealt with since the beginning of the pandemic.
- Businesses have received support in accessing grants from both the Council and Visit Wales/Welsh Government.
- Assistance has been given to businesses in interpreting the Welsh Government guidelines and legal requirements (as applied to a specific business operation or sector).
- A weekly online tourism trade newsletter supplying the latest information on grants, funding, changes to the restrictions and forthcoming marketing opportunities has received over 86,000 page views and been praised by the tourism business community for its invaluable help during the ongoing health crisis.

#### **Inform: Current and planned activity – business support**

- Local tourism businesses continue to require the support outlined above, as re-opening safely with adherence to Welsh Government guidance presents a new set of challenges.
- As does the issue of recruitment, as many tourism and hospitality vacancies remain unfilled. The weekly newsletter gives operators another platform to share their vacancies, which are also promoted on the Visit Swansea Bay Partners Facebook page.
- A high level of engagement will continue to be maintained with local tourism operators, to provide business support on a wide range of topics. In addition to assistance relating to the pandemic, support is also offered in relation to road signage, planning, environmental health issues, transport and more – by facilitating the operator to access the relevant Council or Welsh Government department to assist them.



**Fig 3:** Examples of Partner communications – weekly newsletter and Facebook

### **Support: Marketing support during the pandemic**

- Visit Swansea Bay Partner Packages give local operators a cost-effective way of marketing their business to the UK holiday and short-break market. Marketing opportunities are specifically designed to raise the profile of a tourism business (as a Visit Swansea Bay Partner) and direct customers to their own dedicated web page on [visitswanseabay.com](http://visitswanseabay.com).
- Visit Swansea Bay Partner Package costs were refunded back to businesses when the pandemic closed down tourism and hospitality in March 2020. This was part of the Council's #HereForSwansea package of support for the local economy.
- Targeted marketing continued, flexing with the restrictions to maximise windows of opportunity for businesses as they occurred.
- The [visitswanseabay.com](http://visitswanseabay.com) website was also developed to include the wider industry – to extend the types of businesses promoted as part of the campaigns, e.g. local producers.
- Social media campaigns were implemented to maintain customer engagement with the Swansea Bay brand and with the destination, whilst following the Welsh Government guidelines and restrictions in relation to travel and public safety.



Fig 4: Examples of [visitswanseabay.com](https://visitswanseabay.com) web developments designed to raise the profile of partners during 2020

Page	Total Page Likes	From last week	Posts This Week	Engagement This Week
1  I love Cornwall	303.5K	▲100%	2	883
YOU 2  Visit Swansea Bay, Mum...	81.8K	▲100%	14	9.2K
Keep up with the Pages you watch. <a href="#">Get More Likes</a>				
3  Visit Bristol	51.1K	▲100%	11	10.7K
4  Visit Devon	31.7K	▲100%	11	1.8K
5  Hastings, East Sussex	27.5K	▲100%	0	29.8K
6  Visit Cardiff / Croeso Ca...	26.4K	▲100%	10	676
7  Visit Pembrokeshire	21.9K	▲100%	12	5.9K
8  Visit Brecon Beacons	21.5K	▲100%	1	189
9  Visit Isles of Scilly	20.5K	▲100%	5	5.9K
10  Darganfod Sir Gâr - Disc...	16.2K	▲100%	17	950

Fig 5: Example of a Facebook 'leaderboard', which shows Swansea Bay's performance (second in the list above) in terms of 'likes' and engagement in relation to other leading coastal and Welsh destinations

- We have contributed towards benchmarking some key performance indicators against other destinations which demonstrate similar geographic and economic characteristics in terms of location, population and type. The above table (Fig. 5) demonstrates some of those characteristics, including how other Welsh destinations are performing.

**Support: Current and planned activity – marketing support**

- As part of the Tourism Recovery Plan (part of the Council’s wider Economic Recovery Plan) the Visit Swansea Bay Partner Package remains free at entry level. The aim is to encourage as many businesses to participate as possible and benefit from the marketing support as tourism and hospitality resumes.
- Additional paid-for opportunities are also available to enhance the visibility of businesses as tourism and hospitality begin to fully re-open. This gives the tourism team a new income stream to develop, as partners gain confidence and begin to commit budget to marketing their business.
- Website developments continue, to future-proof the online offer, raising the profile of local producers and online sales across the spectrum of tourism businesses.

**8. Strategic Priority 3 - Remind and Return**

**Remind: Engaging with our customers during the pandemic**

- As the first lockdown began in March 2020, all campaign activity was paused and urgently reassessed. A new campaign plan was developed which maximised the existing popularity of our social media platforms to continue to engage with our online audience throughout the pandemic.
- The new campaign needed to constantly adapt to the changing restrictions and their national boundaries, often having to promote a different message to different areas of the UK (with national, regional and local lockdowns). (More detail on the campaign follows below, with examples of content in Fig. 7 on p11)
- The aim was to keep our existing customers engaged with uplifting imagery and appropriate, responsible messaging; whilst also reaching a new audience who may not have considered Swansea Bay in the past – but who may be looking for a new staycation destination in the UK once travel restrictions were lifted.
- As the first lockdown began in March, consumer messaging immediately changed to support the UK and Welsh Government ‘#StayHome’ message. In synergy with ‘Visit Wales. Later’, all customer communications were seeded with ‘Visit Swansea Bay. Later.’
- In local lockdowns residents were encouraged to support local businesses with online sales, click & collect and take-away purchases, using the caption #LoveBeingLocal.
- UK and Welsh Government initiatives such as the ‘We’re Good to Go’ Covid safe accreditation scheme were promoted and partners were encouraged to participate and receive recognition of their accreditation on [visitswanseabay.com](https://visitswanseabay.com). The ‘Eat Out

to Help Out’ scheme was similarly supported with social media campaigns and website banners to encourage customer support.

- As restrictions eased customers were asked ‘[What’s on your Wishlist](#)’ and encouraged to share what they were missing most about Swansea Bay. This campaign recommended that customers plan their visit in advance of travel.
- Once travel restrictions into Wales were lifted, a positive ‘Welcome Back’ campaign demonstrated to customers how much our businesses were looking forward to welcoming them back. While the ‘Plan-Book-Travel’ message encouraged visitors to make all their bookings prior to travelling to avoid disappointment (due to social distancing and reduced capacity).
- Underlying all the messaging, once restrictions began to ease, was to ‘Visit Swansea Bay. Responsibly.’ which superseded the visit ‘Later’ message. This has continued into 2021 and is complementary to Visit Wales’ ‘Addo’ (‘Promise’) campaign which encourages safe, respectful and sustainable travel.
- All campaign activity was online and therefore, it was imperative to keep the content engaging and fresh. Existing video footage was used to create new videos (see Fig. 6 and links to videos on p10) and when restrictions allowed, new photography was commissioned that showed businesses and customers complying with restrictions.
- Social media was key and played a significant role in keeping our existing customers interested in the destination, whilst introducing new customers to Swansea Bay.
- The destination website, [visitswanseabay.com](http://visitswanseabay.com), continually evolved to keep pace with the changes in messaging, with new content and new website listings to bring the tourism businesses to the forefront of all marketing activity. For example, ‘Gift Ideas’, ‘takeaway’ listings, ‘outdoor eating’ and ‘outdoor activities’; complementing the restrictions at the time and highlighting the fact that we have plenty of outdoor spaces and fresh air.

Facebook	<ul style="list-style-type: none"> <li>• Our audience grew to just under <b>80k</b></li> <li>• An increase of over <b>+2,705</b> during the pandemic (in 2020) (2019 saw an increase of +874)</li> <li>• Audience engagement improved from 2.8% (2019) to <b>3.6%</b>, which is considered ‘excellent’ by industry standards (+2% is considered ‘good’ performance).</li> </ul>
Twitter	<ul style="list-style-type: none"> <li>• Followers increased by +433 to over <b>16.5k</b></li> <li>• Audience engagement rose from 2.4% to <b>2.9%</b></li> </ul>
Instagram	<ul style="list-style-type: none"> <li>• Followers increased from 874 (in 2019) to <b>4,754</b></li> <li>• Audience engagement rose <b>from 0.4% to 3.8%</b></li> </ul>
Campaign video views 4 x videos	<ul style="list-style-type: none"> <li>• A total of <b>970,989</b> views on YouTube and Facebook</li> <li>• <b>87.5%</b> (average) of each video viewed (before the viewer navigates away to other content)</li> <li>• A total of <b>219,615</b> reactions, shares and comments</li> </ul>

Table 2: <a href="https://visitswanseabay.com">visitswanseabay.com</a> performance during the pandemic (2020)	
Full year results	<ul style="list-style-type: none"> <li>• <b>1.4 million</b> page views – down 18.2% on 2019</li> <li>• Unique visitors to the website – down 22% on 2019</li> <li>• This included extended periods of UK, national and local lockdowns when the public were required to stay home or travel was restricted, i.e. 23 March to 6 July and 27 September to end December (in 2020).</li> </ul>
Summer results (self-contained accommodation could re-open from 11 <sup>th</sup> July 2020)	<ul style="list-style-type: none"> <li>• Page views increased by <b>26%</b> on same period in 2019</li> <li>• And unique visitors increased by <b>12.5%</b></li> <li>• Partner Food &amp; Drink webpages saw an increase of <b>92%</b> on 2019</li> <li>• Blog page views increased by <b>48%</b></li> <li>• #LoveBeingLocal and Enjoy campaigns saw local audiences rising. Including Swansea <b>88%</b> and Cardiff <b>86%</b></li> </ul>

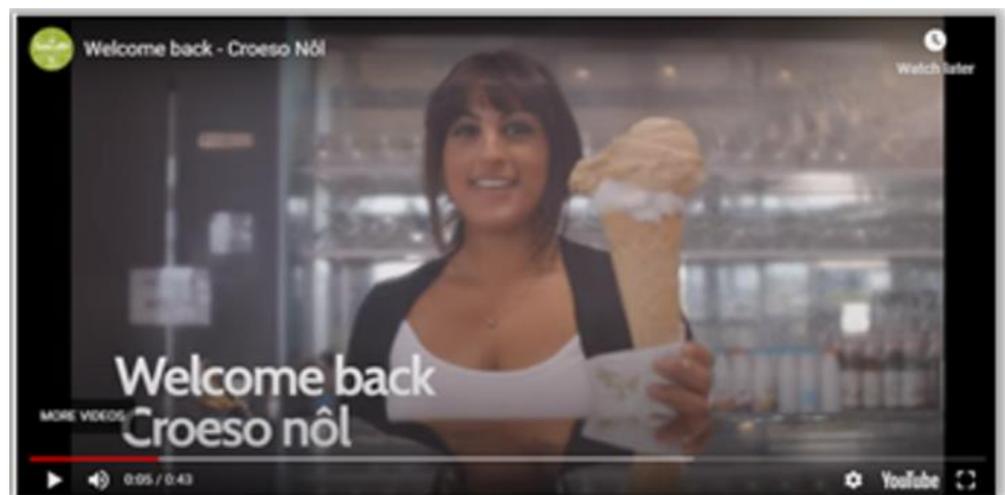


Fig 6: Welcome back video – opening frame

Links to campaign videos: [‘What’s on your Wishlist](#)  
[‘Welcome Back’](#)

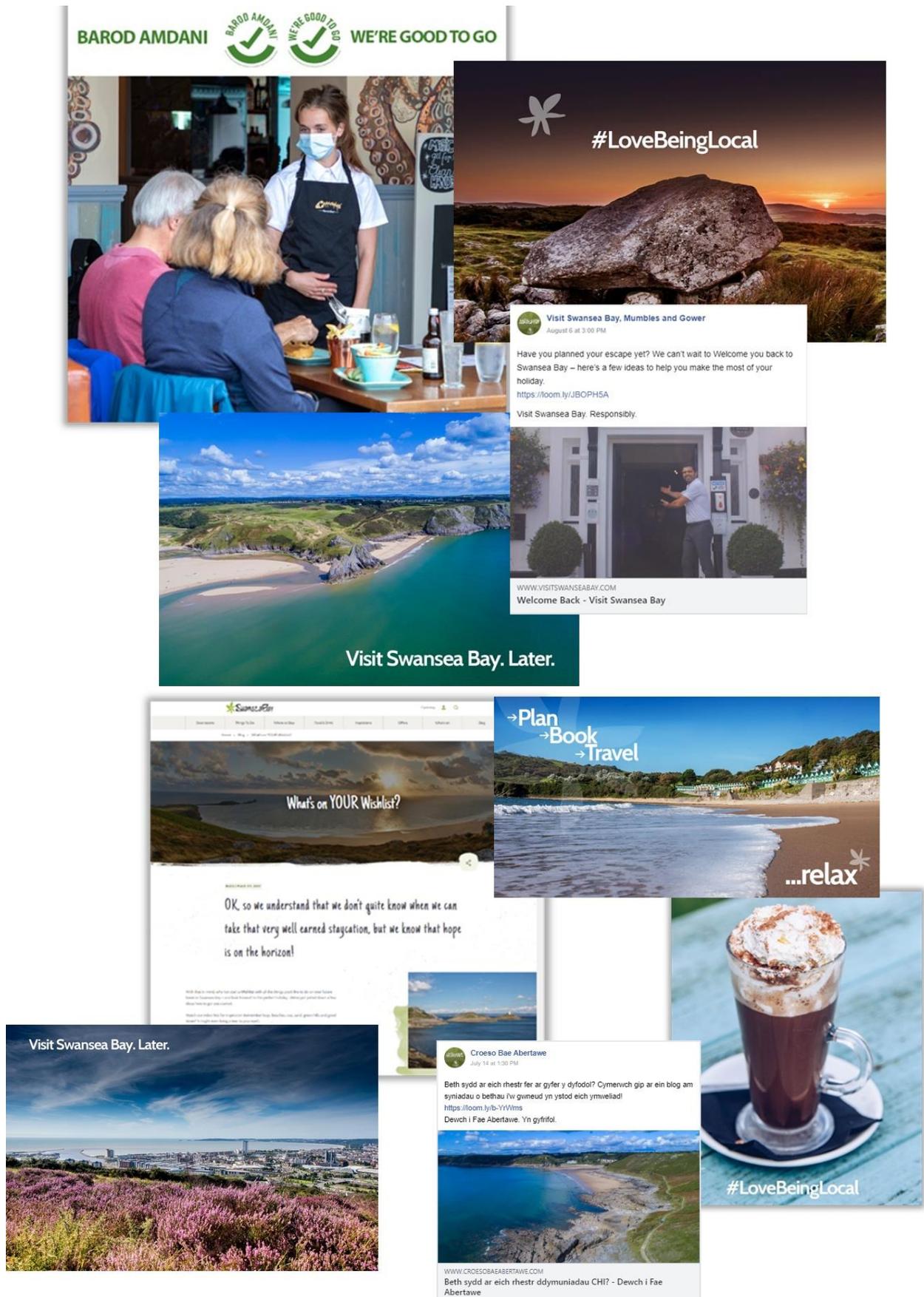


Fig 7: Examples of campaign content during 2020

## 8. Strategic Priority 3 – continued

### Return: Current and planned activity – 2021 marketing campaigns

- At the beginning of 2021 the team planned for the gradual easing of restrictions with a series of campaigns designed to promote those areas of the local tourism economy as they were allowed to open. Specifically targeting only those parts of the UK that were accessible (due to the differing restrictions across the UK nations).
- It was imperative to have campaigns ready to launch as all UK destinations would be eager to benefit from the increased number of potential visitors looking for a staycation at home (as international travel regulations continued, and still continue, to fluctuate). This presented an opportunity to introduce a whole new audience to Swansea Bay and our tourism businesses – and the growth in our online audience demonstrated that this audience was already engaged (see Table 1).
- A series of marketing campaigns, outlined below, were launched in line with the above strategy (please see Fig. 8, pgs 14 & 15 for examples of content).
- In response to the lockdown at the beginning of the year, the ‘Visit Swansea Bay. Later’ message was supplemented by further developing the online sales section of the website ([Gift Ideas](#)) to promote ‘Valentine’s Day’ and ‘Mother’s Day’ gifts etc – and vouchers to redeem later (post-lockdown) to support businesses during the closures.
- As restrictions eased, a safe return to responsible travel was encouraged by promoting advanced planning and responsible customer behaviour with ‘[Visit Swansea Bay. Responsibly](#)’ messaging.
- As tourism businesses began a phased re-opening, a fresh, new 2021 campaign was launched with a positive and uplifting message – ‘Make Swansea Bay your Happy Place in 2021’.
- This campaign was designed to celebrate all the different facets of Swansea Bay that staycaters have been (and will be) looking for in a post-lockdown holiday – primarily, open spaces, fresh air, coast and countryside (as informed by the consumer research and social media engagement). As well as holiday operators who can demonstrate that they are ‘Covid safe’ and have all the necessary protocols in place to keep customers safe.
- The aim is to foster customer confidence and rise above our close competitors in reaching a new UK staycation market – in addition to welcoming back our existing customers.
- The campaign encourages audience engagement by asking ‘where is your Happy Place in Swansea Bay’, using our popular social media platforms linking through to [visitswanseabay.com](#), which features [new web pages](#) and [blogs](#). Two new videos were produced to launch the campaign (see Fig. 9 and links to the videos on page 15).
- All activity links through to the destination website, which features our partners (tourism businesses) to facilitate bookings. In addition, partners have been

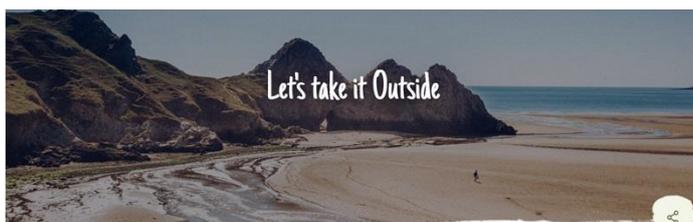
encouraged to get involved to help raise their profile with customers. Partner content has been shared on social media, with operators introducing customers to their own 'Happy Place'.

- A sister campaign promoting Swansea Bay as a destination for 'dog-friendly holidays', recognises that many UK families introduced a new pet into their home during lockdown. 'Dog-friendly' partners are participating and are [supplying content](https://visitswanseabay.com) for [visitswanseabay.com](https://visitswanseabay.com).
- In addition, associated seasonal campaigns promoting outdoor activities, walking and city cultural breaks are also planned. Together with promoting events as they resume and preparing for the opening of the Arena.
- New videos, photography and supporting content is in production, to roll out as the 'Happy Place' campaign progresses throughout 2021/22.

<b>Table 3: Social media performance 2021 (to end of July)</b>	
Facebook	<ul style="list-style-type: none"> <li>• <b>4.3M</b> impressions (number of times a post is displayed) on VSB Facebook alone</li> <li>• <b>162,800</b> engagements (shares, reactions etc)</li> <li>• <b>19,700</b> clicks through to the website from Facebook</li> <li>• Net increase in Followers/Page likes = <b>3,636</b> growing our audience to <b>81,812</b> Fans</li> <li>• Engagement rate of <b>3.7%</b> (excellent, average is below 1%)</li> </ul>
Twitter	<ul style="list-style-type: none"> <li>• <b>17,240</b> total followers</li> <li>• <b>378,000</b> impressions</li> <li>• <b>12,300</b> engagements</li> <li>• <b>3.3%</b> engagement rate (excellent, average 0.07%)</li> </ul>
Instagram	<ul style="list-style-type: none"> <li>• <b>5,201</b> total followers</li> <li>• <b>8323</b> engagements</li> <li>• Engagement <b>6.5%</b> (Instagram benchmark average is 1.19%)</li> </ul>
'Happy Place' video views (to July 2021) 2 x videos	<ul style="list-style-type: none"> <li>• A total of <b>962,119</b> views on YouTube and Facebook</li> <li>• <b>95.12%</b> (average) of each video viewed (before the viewer navigates away to other content)</li> <li>• Engagements on Facebook to date (shares, reactions etc) <b>153,117</b></li> <li>• Happy Place video #1 is the most viewed video we have ever produced with <b>292,045</b> YouTube views to-date with an average view rate of <b>95.76%</b>.</li> </ul>

**Table 4: [visitswanseabay.com](https://visitswanseabay.com) performance 2021 (to end of July)**

<p>Results to end of July 2021</p>	<ul style="list-style-type: none"> <li>• <b>1.3 million</b> page views – <b>42% higher</b> than the same period in 2019 (pre-Covid)</li> <li>• On course to break 2 million page views by the end of the year</li> <li>• Customers are spending longer on each page – the bounce rate is <b>46%</b> - down from 59.3% in 2019 (the lower the figure the better)</li> <li>• We have added over <b>18,000</b> additional Wales based website visitors</li> <li>• Taking us to <b>88,600</b> visitors so far this year (compared to 70,000 in 2019).</li> </ul>
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**It's Great Outdoors!**

If you don't already know this – then we've got lots of ideas to show you how you can get active, get some fresh air AND have some fun! And when you need to refuel – we've got some tasty places where you can enjoy a meal or a refreshing drink outdoors. Click on the links to find out how, what and where!

But whatever you do always **Play Safe** and remember social distancing and hygiene – so we can all keep enjoying our Great Outdoors!



**Eating Outdoors**  
SEE MORE



**Walking Holidays**  
SEE MORE



**Places to Stay**  
FIND ACCOMMODATION

**Visit Swansea Bay, Mumbles and Gower**  
June 6 at 3:00 PM

Returning to your Happy Place soon or want to discover your new Happy Place? Either way...we can't wait to see you!  
Visit Swansea Bay. Responsibly.



**Visit Swansea Bay, Mumbles and Gower**  
July 6 at 3:00 PM

'My Happy Place is on my horse on Llangerini beach. Getting fresh air and enjoying the open space with 4 miles of sand to enjoy'. (Lara Josin, Director, Kings Head, Gower).



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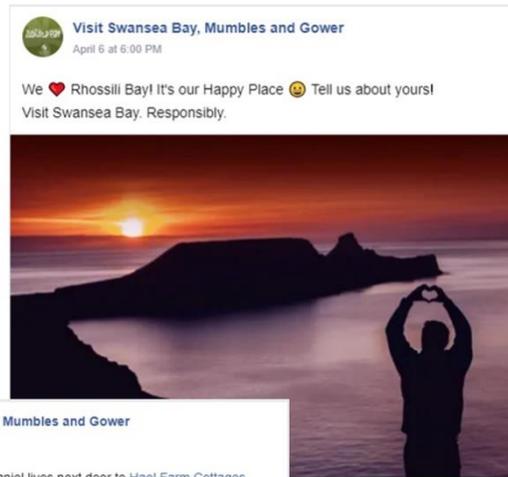
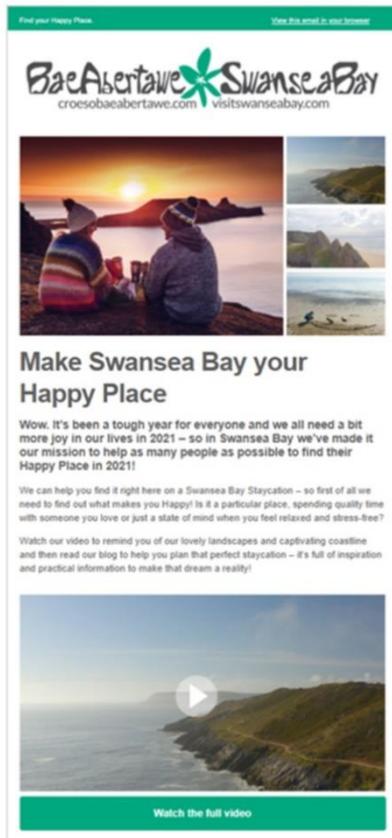


Fig 8: Examples of campaign content from the current 'Happy Place' campaign



Fig 9: 'Happy Place' video still

Links to campaign videos:

[‘Happy Place #1’](#)

[‘Happy Place #2’](#)

- During travel restrictions all media visits were paused and planned journalist and blogger visits were halted.
- As part of the Tourism Recovery Plan an extended PR contract was procured up until the end of March 2022 to maximise press and media opportunities once the travel media began looking for content once more. Targets were set for Advertising Value Equivalent (AVE) and PR Value (Public Relations Value) and the performance is recorded (to date) below in Table 5.
- Journalist visits have now resumed. So far, the destination has hosted a UK travel blogger, 'The Globe Trotter', as well as The Telegraph's Saturday supplement 'Stella' magazine and 'The Guardian' travel pages. Additional journalist/blogger visits are in the planning stages including an international blogger, 'Absolutely Lucy' and 'The Sunday Times'.
- In addition, coverage paused during the pandemic has been published as well as new 2021 coverage, raising the profile of the destination even further. Please see Appendix C for examples of national coverage.

<b>Table 5: PR performance 2021 – value of coverage received (to end July)</b>	
AVE – the equivalent cost to purchasing advertising with the media title	<b>£503,337</b>
PR Value – takes into consideration that the endorsement of a journalist or blogger has more weight than an advertisement and that more than one individual can view each published item	<b>£1,511,313</b>

- Direct customer engagement continues via the customer contact form on [visitswanseabay.com](https://visitswanseabay.com) and via telephone enquiries. Customer queries are dealt with on a number of issues relating to the destination and Covid travel regulations.

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## 9. Tourism Recovery Plan – Outcomes

### Tourism Recovery Action Plan: Outcomes



### ▶▶▶▶▶ Outcomes

- Stronger local tourism and hospitality industry
- Renewed visitor confidence and engagement
- Increased number of bookings and visits
- Recovery, growth and prosperity of and for the local economy

**Fig 10:** Graphic outlining the envisioned outcomes of the Tourism Recovery Plan

As outlined above, the Tourism Recovery Action Plan has been approved and incorporated into the Council's Economic Recovery Action Plan. As detailed above, much of the activity is underway in order to give maximum support to a local industry challenged by months of closure.

Initial indications (from reaching out to operators) are that bookings are high and that accommodation in particular is very busy (official STEAM data will not be available until later in the year). However, capacities are still reduced due to social distancing and other protocols. In addition, recruitment problems and staff self-isolation mean that some businesses still have difficulties in re-opening even though they are permitted to do so.

It is therefore, necessary to ensure that the marketing activity continues into the autumn winter period to extend the season as much as possible. Campaign plans are in place for this and new content is being produced for this activity.

## 10. Tourism Recovery Plan – Resources

The tourism team are currently a small team of 4 FTE's. The demands and raising expectations on the service, resulted in a request for additional resources from the Economic Recovery Fund, which included a temporary increase in hours for two part-time members of staff.

In addition to the above staffing, additional resources for recovery were supported from the Economic Recovery Plan.

- Outdoor media campaign for tourism - £75K. To support the launch of the 2022 spring campaign with additional resources to target new and established platforms in key markets.
- Tourism Accommodation Improvement Grant - £50K. Supporting between 5 and 10 businesses to improve their Visit Wales star grading with specific improvements to their properties.
- Tourism Marketing Partner fees waived - £42K. This will help support the private sector by providing free platforms on which to promote their businesses. This approach has already generated an increase in the number of partners by 63 – with 185 partners in total supported to date (end July 2021).
- Extension to existing PR contract - £25k.

### **11. Conclusion**

The report highlights some of the extreme challenges tourism, its businesses and stakeholders have faced since March 2020, with much of this uncertainty around lost revenues, staffing, future investment and legislative changes.

The Council has continued to support the sector throughout the pandemic, by utilising its existing resources with an innovative and flexible approach to an unprecedented global crisis. This has succeeded in keeping the existing customer base engaged, while also reaching a new audience. Concurrently, tourism business partners have been kept both informed and supported to ensure that they have all the necessary tools to enable those that can, to re-open and plan for recovery.

However, there are still challenges ahead, but with the ongoing major investment taking place across the city and encouraging signs that economic recovery is underway, there are reasons to remain optimistic in the wake of 2020/21. Whilst some tourism businesses have closed as a result of the pandemic, others have diversified and are thriving and will no doubt diversify again as the situation changes. It is imperative that the profile of the tourism sector and its importance to the wealth of the local economy is recognised. It is also critical to note that the success of the sector is not purely down to the marketing of the destination. The customer experience once they arrive here must meet and indeed exceed expectations and it is essential that continued investment is also made in the wider tourism infrastructure.

### **12. Supporting Information**

- **Appendix A: Scrutiny Working Group on Tourism – Cabinet Member Response and Action Plan (November 2019, revisited July 2021)**
- **Appendix B: Tourism Recovery Action Plan 2021/22 (part of Council’s wider Economic Recovery Action Plan)**
- **Appendix C: Examples of PR coverage.**

### **13. Legal Implications**

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

**14. Financial Implications**

There are no financial implications associated with this report.