



Llywodraeth Cymru
Welsh Government

Let's Shape the Future. A review of activity. March 2021 – March 2022.

Working in partnership to reconstruct a resilient future for the visitor economy in Wales.

Contents.

Context and introduction	3
Delivering together	3
The past year	4
A responsible approach	5
The eight themes	6
Summary of activity	7



Context and introduction.

When the [recovery plan](#) (*Let's Shape the Future*) was launched in March 2021 it was designed as an additional layer of interventions in response to the direct challenges posed by the COVID-19 pandemic. It would then bridge back to the [Visit Wales action plan](#) (*Welcome to Wales: Priorities for the Visitor Economy 2020-25*). Over the course of the past year, while implementing the former there has also been progress on the latter. For example, the reintroduction of the Brilliant Basics capital grant scheme and the refocussing of marketing campaigns to encourage business in the autumn and winter. In addition, where appropriate “business as usual” (BAU) has continued over the period and other colleagues have moved across divisions to assist e.g. grant support schemes and health communications.

This review should be read using that recovery plan as a reference base; it looks at the framework of themes, around which short to medium-term interventions were suggested for development to support the recovery of the sector and gives examples of just some of the activity delivered.

When the recovery plan was launched, few would have predicted the new and frequent challenges to be posed by the pandemic, with variants such as Delta and Omicron resulting in further restrictions and the need to adapt at pace. In that context, the Welsh Government’s plans have had to adapt and respond in different ways.

Delivering together.

The recovery plan was informed by public, private and third sector stakeholders. Those stakeholders have continued to play an invaluable central role throughout the plan period, not least via implementation of their respective activity and feedback to the Welsh Government that has helped shape many of the shared interventions as they were rolled out.

To underpin governance, the plan proposed an oversight group to guide implementation. In response to the needs of this period, a regular Visitor Economy Forum has been the main approach for sharing information and discussing key issues relating to our collective response to the pandemic.

[Regional Fora](#), whose members shaped the plan in February 2021, have met frequently throughout the period and have played a vital role in ensuring frequent engagement and communication with key stakeholders around delivery, under the umbrella of a fast moving situation that has had public health at its heart i.e. working together to Keep Wales Safe.



The past year.

The visitor economy in Wales has been severely affected by the COVID-19 pandemic with tourism, hospitality and events businesses facing extreme challenges from the start. Restrictions to stop the spread of coronavirus have impacted with losses of both custom and income. Despite extensive Welsh Government and UK Government financial interventions, that negative impact is still being felt by some.

While many were able to return to trading over the summer and autumn of 2021, issues such as maintaining regular cash flow, addressing critical supply chain problems and operating with reduced staff numbers have proved to be further challenges. Within the activity delivered over the period, the opportunity to tackle these and many of the other long-standing challenges for the industry e.g. seasonality and a skills deficit, has been at the forefront of planning alongside the additional issues regarding the impacts of the Omicron variant, that became prevalent over the late autumn of 2021.

A responsible approach.

A careful balance and responsible tourism has been core to activity – guided by destination partners and communities and informed by consumer insights to ensure that the people of Wales and visitors can comfortably coexist.

Even pre-pandemic this approach was clearly set out in the Visit Wales strategic plan (*Welcome to Wales: Priorities for the visitor economy 2020-25*) and that commitment to **“grow tourism for the good of Wales”** provided the direction upon which to deliver the recovery plan.



The eight themes.

The plan was based on a framework of eight themes, around which short to medium-term interventions were suggested for development to support the recovery of the sector. Those themes were built around clear **objectives** and developed in the context of several **assumptions** with regard to how the remainder of 2021 would look; for both businesses and consumers.

1. Supporting business.

2. Valuing people.

3. Reopening safely.

4. Rebuilding consumer confidence.

5. Stimulating and managing demand.

6. Developing local visitor economies.

7. Transforming the sector to be more resilient.

8. Developing tailored recovery plans.

Objectives (as at February 2021).

- Understand the pressures affecting businesses by using key research and insights.
- Ease cash flow challenges affecting the industry through interventions delivered as a result of this plan and consider longer-term financial levers.
- Retain, develop and attract a skilled, committed and diverse workforce.
- Future-proof the sector – including business resilience, sustainability and profitability for the longer-term.
- Rebuild an engaged, sustainable and vibrant sector.
- Promote Wales in the UK and beyond as a distinctive place to visit, launching new products, experiences and events in line with the Cymru Wales brand.
- Improve the wider economic wellbeing of Wales, driving prosperity and sustainability.

Assumptions (as at February 2021).

- COVID-19 will have a cyclical rather than structural impact on consumer behaviour, except at the margins. For example, deciding not to fly or travel to business meetings.
- Domestic tourism is likely to surge as restrictions are eased.
- Tourism in coastal and rural areas across Wales are likely to bounce back stronger than cities – as seen in summer 2020.
- International tourism will take longer to recover and is dependent on many variable factors including the rollout of vaccines.
- Short-haul travel is expected to recover faster than long-haul.

The assumptions above, based on insights available at that time, have proven to be relevant and in context. E.g. in the case of issues such as those associated with international travel, this has recently led to additional challenges for the subsector of inbound visitor reliant businesses and prompted an intervention i.e. a fund specifically designed to address their particular needs.

Summary of activity.

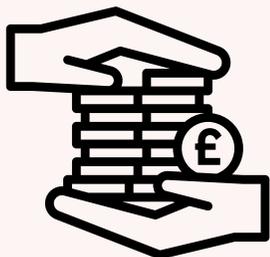
This activity summary should be read using the recovery plan as a reference base; it is based on the framework of eight themes, around which short to medium-term interventions were suggested for development to support the recovery of the sector and gives examples of just some of the activity delivered over March 2021 to February 2022.

The activity examples included are, by necessity, those where Visit Wales has been/ is lead. Stakeholder (public, private and third sector) activity has been essential and extensive however the table that follows cannot accurately reflect the depth and breadth of work by each of those many partners.



1. Supporting business.

Themes



Suggested high level activity/interventions

- Welsh Government compensatory funding
- Welsh Government recovery funding
- UK financial levers
- Equality of support
- Mental health and wellbeing
- Scenario planning
- Communications

While the Welsh Government and its delivery partners facilitated rapid and effective access to COVID-19 financial compensatory support packages throughout the pandemic, additional financial interventions were also required to help particular areas of the sector and businesses most affected by COVID-19 restrictions over a sustained period of time.

Tourism and hospitality businesses in Wales have benefited from £61m from the overall Economic Resilience Fund (ERF) and Cultural Resilience Fund (CRF) and received 100% non-domestic rates relief in 2021-22. This is in addition to the UK Government's Job Retention Scheme and Self-Employment Income Support Scheme (SEIS).

Engagement with the UK Government continues re provision of the necessary funding in order to ensure the healthy recovery of the visitor economy in Wales i.e. influencing the role of the UK Government in supporting the sector remains a key priority.

Activity

- **A further stage of support** was developed for those businesses impacted by the restrictions that came into force on 26 December 2021. This was via the Economic Resilience Fund (ERF) of £120m and the Cultural Resilience Fund (CRF) of £15.4m.
- **The Wales International Inbound Tourism Fund** was specifically designed to ensure that Wales retains and builds on the vital supply chain link with valuable international markets provided by the sub-sector of Destination Management Companies (DMCs)/incoming operators, professional tourist guides and accredited English language schools located and operating in Wales. The £400k fund is intended to support the sector recover, remain resilient and ensure maximum wider visitor economy impact.
- **Industry engagement signposting mental health and wellbeing support** was delivered via Business Wales and information was also quoted and signposted via the [Visit Wales skills and recruitment page](#) as well as industry newsletters and social media. Staffing problems, keeping customers safe and an uncertainty over when trading would resume have all placed unique pressures on tourism, hospitality and events businesses and their staff.
- **Communications** via fora, stakeholder groups and industry engagement were extensive e.g. the latter has included over 200 newsletters/bulletins and [social media messaging throughout the pandemic and all newsletters are archived for easy reference.](#)
- **Toolkits including a specific publication on Scenario planning** have been provided via an enhanced [Visit Wales assets site](#) i.e. industry “kits” made available online, using business examples and market insights in order to support decision making.



2. Valuing people.

Themes



Suggested high level activity/interventions

- Collaboration
- Evidence based decision making
- Staff recruitment
- Staff retention
- Staff training
- Working conditions

As industry opened up there was evidence of staff and skills shortages; the Tourism and Hospitality Skills Partnership, in response, led on a recruitment and skills campaign – ‘*join the experience makers*’ – developed by Visit Wales/the Welsh Government in partnership with Working Wales, the aim of the campaign is to highlight vacancies and raise awareness of the career opportunities in tourism and hospitality.

The activity, with a spend of £200k and driven by industry, was enabled by a collaborative approach i.e. led by the Wales Tourism & Hospitality Skills Partnership including DWP/Job Centre Plus, Careers Wales, National Training Federation Wales, further and higher education training providers and others.

Activity

- **Launched in summer 2021, the Experience Makers campaign is continuing into 2022** and additional case studies and films will be uploaded to the [website](#) alongside media activity promoting the sector.
- **Recruitment assets** were made available to industry as part of a toolkit and dissemination of information on training and recruitment.
- **Signposting to vacancies** is undertaken via the Careers Wales website and the importance of fair working conditions highlighted as an area for continuous review with best practice being curated and shared across industry. The work has provided industry with direct links to colleges and universities prepared to host vacancy information for students and the [Welsh Government has shared vacancy boards with the industry.](#)
- **Liaison in place with other Welsh Government departments** leading on recruitment campaigns with crossover into the tourism sector e.g. coach and bus operators.
- **An evidence base** is being established from research, collated from the Welsh Government and partners, for review by the Skills Partnership i.e. future Skills Partnership activity includes a full review of data on skills and training to identify trends; linking with the new schools curriculum and

sharing best practice on changes in working practices in the industry. E.g. regular questions on this have been included in the Business Barometer (800 businesses pan Wales, across all subsectors) to assess the scale and impacts of this issue.



3. Re-opening safely.

Themes



Suggested high level activity/interventions

- Consultation
- Communications to and between businesses
- Destination management and safety
- Safety mitigations
- Industry collaboration
- Nationally led communications
- Locally led communications
- Cross border communications

As the industry began to re-open it was imperative to support businesses and visitors with activity that assisted a safe return; this was also especially important for the communities within busy destinations, all of whom had felt their own concerns at the prospect of a deluge of additional people visiting their local area.



Activity

- **Funding assistance for destination management via public sector stakeholder access to additional support** was available for local authorities and national park authorities who were able to claim, through the local government hardship fund, for supporting the additional costs of managing increased visitor numbers and re-opening safely. The additional funding was used specifically for revenue costs such as extra marshals/rangers/lifeguards to manage people movement and safety to car parking provision at visitor hot spots, toilet cleaning, litter collections and additional messaging and communications. Funding accessed was circa £3.5m.
- **Visit Wales Safely/Aaddo responsible behaviour communications** were developed and ran throughout the spring and summer with enhanced delivery including; comprehensive media campaigns; assets for all stakeholders to use and cross government working to consolidate messages and complement Keep Wales Safe social media delivery.
- **Keep Wales Safe** communications ran/ are running consistently and the assets for stakeholder use widely shared.
- **The work of destination stakeholders** in their respective areas complemented and added to the level of engagement undertaken by Visit Wales, ensuring that consistent messaging could be achieved for visitors and also industry.
- **Guidance for tourism, events and hospitality businesses** needed to be timely and accessible with comprehensive guidance being available from the Welsh Government throughout the period.. Amended with each regulation/restrictions review, the guidance was also adapted for Reasonable Measures Action Cards for businesses and supplemented with access to assets, from templates to posters that could be used in businesses of all sizes.
- **Stakeholder groups** were communicated with via wide engagement including the Visitor Economy Forum; Regional fora; Local Authority Working Group, Hospitality; Weddings; Travel Trade Stakeholder group; Event Wales Industry Advisory Group, Business Events "Hero" stakeholder group, Domestic Coach & Group Travel re-start group (with coaching associations); and also at virtual meetings of sector bodies when required e.g. Wales Association of Visitor Attractions, Wales Adventure Tourism Organisation.

3. Re-opening safely.

Themes



Suggested high level activity/interventions

- Consultation
- Communications to and between businesses
- Destination management and safety
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- Industry collaboration
- Nationally led communications
- Locally led communications
- Cross border communications

Activity

- **The regional engagement managers played a pivotal role** in answering questions and communicating with stakeholders, particularly around changing regulations/alert levels.
- **Additional industry engagement with a focus on safety took place** including collaboration via a hosted online event that facilitated an advice session from **RNLI and Adventure Smart Wales**. Both bodies elaborated on how to encourage and promote safety when visiting the outdoors and the session was recorded and shared widely via industry communications.
- **Visit Wales worked with VisitBritain** on engagement and marketing activations e.g. the Escape the Everyday campaign, to ensure that content being used was screened for safety and also balanced in terms of geography/product, avoiding areas under pressure from increased visits.
- **Visit Wales ensured that clear advance booking information was provided for the travel trade, alongside guidance to enable attractions to re-open safely for group visits.** This included support to coach operators via stakeholder groups, working to address issues arising. E.g. a Re-opening grid was originated and circulated regularly to key membership organisations. E-newsletters; updated web content; social; industry and operator focussed webinars with Coach Tourism Association (CTA),

Confederation of Passenger Transport (CPT), VisitBritain and others were important ways of spreading the information as widely as possible within relevant audiences.

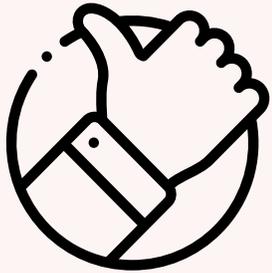
- **The “We’re Good To Go” (“Barod Amdani”) industry standard marque**
 - a self-assessment scheme that was designed in partnership with the four UK tourism organisations (Visit Wales, Tourism Northern Ireland, Visit Scotland and Visit England) was used. The aim of the marque is to provide reassurance for all sectors of the tourism industry, as well as reassurance to visitors, that businesses have clear processes in place and are following industry and government COVID-19 guidance on cleanliness and social distancing. Over 6,100 businesses in Wales have gone through the process. The marque is also recognised by the World Travel and Tourism Council (WTTC) as a means of customer reassurance in an international context.

- **Return to Quality Grading Assessments** – after a suspension in grading visits due to the COVID-19 pandemic, Quality Advisors returned to undertaking quality grading assessments in November 2021. In order to support businesses in the recovery from the COVID-19 pandemic, Visit Wales has agreed that there will be no charge for participation in quality schemes for the foreseeable future.



4. Rebuilding consumer confidence.

Themes



Suggested high level activity/interventions

- Research and insights
- Consumer reassurance
- Positive PR and influencers
- Sense of croeso/welcome
- Public transport
- Destination management and reassurance

Consumers and *communities* needed reassurance that as well as a warm welcome, adequate measures were put in place to support the return of tourism and potential overcrowding of popular destinations across Wales.

Outdoor attractions, the coast and countryside were in high demand when the sector re-opened and it was important to ensure that marketing content (including web and social) ensured that products were visible when encouraging visitors to spend more in Wales, i.e. to spend money in local areas when visiting.

To re-open the sector safely, audiences were encouraged to discover new places and given the anticipated slower recovery of international tourism, there was opportunity to focus on experiences to attract new domestic audiences to Wales – both from the wider UK and crucially from within Wales itself – Pobl Cymru, the people of Wales. This once again took us to delivering parts of the 2020 strategy which made a commitment to encouraging travel within Wales.

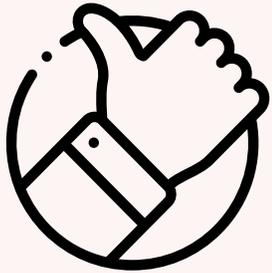
Activity

- **Marketing campaigns (e.g. Addo, the Wales promise) and initiatives such as We're Good to Go** played a role in the rebuilding of consumer confidence and these were informed, in part, by market intelligence.
- **Wider marketing communications and PR work emphasised positive stories from industry** and focussed on a welcome to visitors travelling both within Wales and into Wales. This continued into the autumn with a large scale marketing campaign to boost shoulder season visits, launched with a London lights takeover including Piccadilly Circus (the largest advertising display in Europe).
- **The support, via the hardship fund, for destinations to manage infrastructure and messaging was significant** and this was supplemented by the Welsh Government compensatory funding where relevant e.g. loss of income from car parking, due to initial restrictions, in national parks.

Addo. MAKE YOUR PROMISE TO WALES.

4. Rebuilding consumer confidence.

Themes

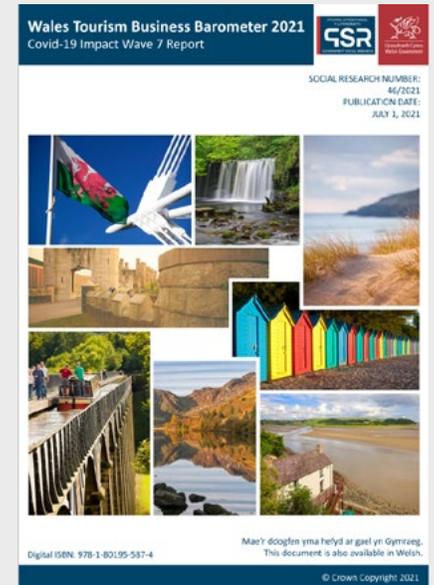


Suggested high level activity/interventions

- Research and insights
- Consumer reassurance
- Positive PR and influencers
- Sense of croeso/welcome
- Public transport
- Destination management and reassurance

Activity

- **The central role that contemporary research and insights has played, and continues to play, in decision making cannot be understated.** Visit Wales has used this flow of insights on a weekly basis, to adapt activity as well as to plan for future activity, and has ensured that it is also available to stakeholders. Research and insights are focussed across four key areas including; Demand and Markets; Supply Side; Visitor Experience and Strategic Trends and Evidence. All public domain and core areas of market intelligence are shared with industry/stakeholders. Supplemented by (internal) digital analytics of users of our websites and social media platforms, population tracker surveys, pop up/intercept surveys (website/social media/partnerships) and follow up conversion research.
 - **COVID-19 Consumer Sentiment Tracking in particular was a vital element to informing insights** and Visit Wales, in conjunction with Visit Britain, has undertaken an extensive programme of consumer tracking since the start of the pandemic. This included regular surveys of the UK market and ad-hoc surveys across a wide number of inbound markets to the UK. These provide invaluable information on consumer sentiment, intentions to take holidays in the UK and the impact of COVID-19 on types of holiday destination and experiences being visited and considered. Reports from the UK tracker are published on VisitBritain's website and a more detailed report of the profile of Wales visitors is published on the Welsh Government website.
 - **A “Re-contact survey” that took place in January and February 2022**, also provides further intelligence on consumers' experiences of Wales during 2021 and assist with demand prediction for 2022. The work included questions on drivers and feelings with regard to sustainable visit options as well as preferences for accommodation and area choice when planning visits for 2022.
- Research results are made available to stakeholders and published regularly online.**



5. Stimulating and managing demand.

Themes



Suggested high level activity/interventions

- Research and insights
- Seasonality, spend and spread
- Cash flow and pricing
- Product offer
- Extending the domestic season
- Marketing recovery
- International markets
- Travel trade

Maintaining the balance of stimulating versus managing demand has never been as important as it became in 2021. Trying to match demand to where there were areas which had capacity and supply was a day to day part of marketing communications, web content development and crucially, social media messaging.

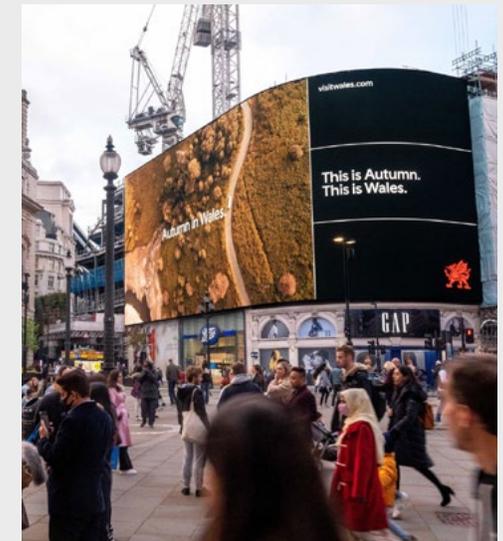
Consideration of the three “S”s (Seasonality, Spend and Spread within the strategic plan) was at the forefront of planning considerations. That planning was also informed by regular stakeholder feedback and insights such as the consumer sentiment research.

The combination of all the above enabled triangulation of data and gave the most accurate "forward look" as possible.

Activity

- **Domestic season extension with an autumn/winter campaign** was prioritised in order to encourage visits to help recoup some of the business lost in the earlier part of 2021. This work also realigned with the strategic plan, i.e. a focus on shoulder season marketing. From September to December many stakeholder briefing sessions took place and a toolkit was developed to ensure that industry could complement direction and feel reassured that work was being undertaken to present Wales as an all year destination both in 2021 and moving forward.
- **Social media** content plan adaptation and also supporting destination stakeholders in their own work to address problem areas became a weekly focus. E.g. promotion of responsible visits, use of park and ride, advance booking for car parking and visits and safety messaging from RNLI and Adventure Smart Wales.
- **Travel trade** activity included 3-weekly stakeholder sessions to assist in communications and recovery and opportunities to build live engagement through trade events was scheduled e.g. Visit Wales and partners exhibiting at the British Travel Trade Show (BTTS) in September; representation at UKinbound Convention (live and virtual; plus providing on-demand content); representation at the reduced scale World Travel Market in

November; representation at Adventure Elevate (Adventure Travel Trade Association event) and at USTOA Annual Conference & Marketplace. Ongoing B2B digital content and communications have also been complemented by destination webinars with CTA, CPT, European Tour Operators Association (ETOA) and others, along with operator-specific product training sessions.



5. Stimulating and managing demand.

Themes



Suggested high level activity/interventions

- Research and insights
- Seasonality, spend and spread
- Cash flow and pricing
- Product offer
- Extending the domestic season
- Marketing recovery
- International markets
- Travel trade

Activity

- **The International Golf Travel Market (IGTM)** originally won by competitive bid in 2019, came to Wales in October 2021 and 13 Wales golf suppliers participated via heavily subsidised rates. Held at ICC Wales, this was the first time the major exhibition has been hosted in the UK and brought with it many international profile raising opportunities.
- **Press and media information** throughout 2021 concentrated on areas with capacity and sought to balance coverage by inclusion of lesser known parts of Wales with a focus on spend and spread capabilities. A latent demand for information and visits had built up and by July 2021 a steady rise in enquiries was being serviced.
- **Tourism Exchange Great Britain (TXGB)** background work was initiated over the last few months of 2021 i.e. to scope the potential of licensing the platform for Wales suppliers. A platform of this type is an important tool for suppliers to manage inventory and product distribution amidst changing consumer trends, and to assist Visit Wales and destinations with visitor dispersal.
- **International business has been, as assumed, much slower than domestic to show signs of recovery** but it has been important to keep Wales, when the climate has been right, front of mind for when those markets fully re-open. So throughout the year a base level of communications has been maintained in Wales' key markets (Germany, US, Netherlands and Belgium). Even when travel to the UK and Wales became possible, this was frequently limited by those markets' ability to travel and navigation of restrictions that were in place, UK wide, for international arrivals.
- **The Cymru Wales brand and destination marketing campaign approach** was deployed to re-build Wales' profile internationally when and where appropriate via activity such as a 4-day Gŵyl Dewi festival in March and work around the Euros in June, all of which provided an important foundation for on-going work to build Wales' reputation as a world-class visitor destination to attract international visitors in the future.
- **Maintaining the relationship with VisitBritain** has also been important in helping to promote Wales as a holiday destination as part of the UK offering. Initially, Visit Wales fed into the Global Travel Taskforce, set up at a UK level to provide recommendations for facilitating the return to international travel (and this included conveying the views of the sector in Wales). In addition, throughout 2021 there was ongoing content provision into VisitBritain campaigns and platforms; evergreen destination representation, via virtual presentations and panels, and also light touch digital/social/travel trade, as well as foundation work in Germany, Netherlands, Belgium and via international Welsh Government offices e.g. Wales in Germany 2021 activity and Japanese Travel Agents Association Expo Virtual. In addition to the above the regular meetings with colleagues in UK Government and other devolved administrations, across a wide range of issues at ministerial and official level, have continued to be an essential part of the last year.

6. Developing local visitor economies.

Themes



Suggested high level activity/interventions

- Destination management and working together
- Destination marketing
- Place making programmes
- Destination management structures

Local-led destination management and integrated place-making are featured as long-term priorities in the strategic plan “Welcome to Wales: Priorities for the Visitor Economy 2020-2025”. Developing refreshed destination management plans will ensure that the work to alleviate the impact of reopening the sector, on local infrastructure and communities, is continued alongside realising opportunities to provide direction and support a healthy visitor economy that is specific to individual regions and destinations.

Some issues in particular have proved a particular challenge to those managing and marketing destinations over the last year, e.g. the growth in campervan usage has seen Wales welcome many additional responsible travellers but has also exacerbated the proliferation of illegal parking and less responsible behaviour.

Activity

– **Fly camping, motorhomes and campervan issues led to a** working group made up of representatives from the Welsh Government, local authorities and national parks established to understand the local issues and what approaches have been and could be used to manage those situations. The group is considering how best, collectively, to manage/embrace the issues moving forward and further work is being undertaken to agree on initiatives at both national and local levels.

– **The Brilliant Basics capital grant scheme**, a priority in the strategic plan, was relaunched in 2021 and the £2.4m capital fund that focusses on basic but essential small-scale tourism infrastructure improvements is supporting 26 projects across Wales in 2021-22.

– **Statutory registration** foundation work began with the appointment of contractors to undertake a scoping exercise with regard to establishing a statutory registration scheme and/or licencing scheme for all holiday accommodation in Wales. As part of this work, the contractors engaged with a wide range of stakeholders. This work will continue and is aligned to wider considerations, such as the proposed tourism levy and the response to address the impact of second home ownership on Wales’ communities.

– **The four regional forums continue to play an essential role in destination management collaboration** and chairs and deputy directors will meet to discuss terms of reference – future direction of the regional fora and destination management related aspects will be an important part of that discussion.



7. Transforming the sector to be more resilient.

Themes



Suggested high level activity/interventions

- Innovation
- Investment in digital capability and capacity
- Digital trends

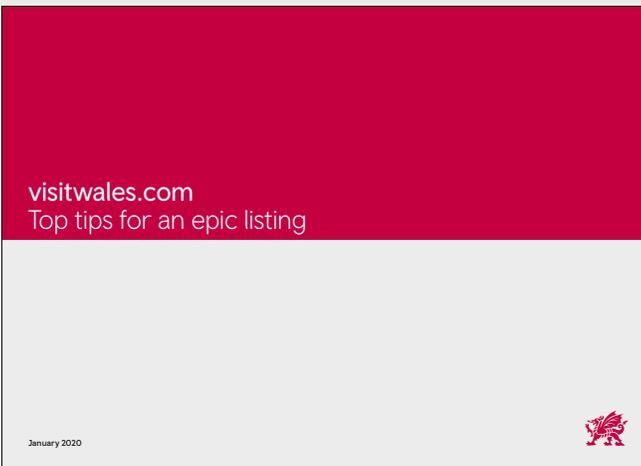
Although the pandemic continues to present industry with stark challenges many have taken the opportunity to adapt the way that they work to help alleviate some of those issues. There have been many examples of businesses evolving to take advantage of new technologies and supply new markets when traditional business models have proven impossible to operate.

Activity

- **Innovation has seen new digital capabilities** e.g. with regard to booking and ecommerce and Quality Advisers continue to signpost businesses to Superfast Business Wales for support and training appropriate to their operations. (**Business Wales/Superfast Business Wales** ([digital training/innovation](#)) [Digital support for Welsh businesses](#) | [Business Wales – Superfast Business Wales](#) ([gov.wales](#)))

The Tourism Product Database (TPD) that features on the Visit Wales website, continues to be enhanced with new features. These ensure that operators can maximise their presence and visibility via listing on the site.

- **Promotion by Visit Wales** via a commitment to showcase the best that the nation has to offer and over 2021 this included promoting virtual tours and compelling stories to attract visitors and make products more visible online.
- **Commitment to reduce Wales' carbon footprint and promote sustainable tourism** has also been clearly shown within parts of the industry e.g. via “responsible tourism” practices, offers and itineraries that have been developed over the last year.



8. Developing tailored recovery plans.

Themes



Suggested high level activity/interventions

- Major events
- Night time economy
- Travel trade
- Cruise

The roll-out of the plan was dependent on the Coronavirus Control Plan and movement between the four alert levels. It was anticipated that there would be longer-term impact on some key sub-sectors, particularly those involving the free movement of large groups of people such as sports, cultural and business events, the night-time economy and the cruise sector.

This also extended to certain types of businesses within the sector such as operators of wedding venues, which not only depend on long lead times for new bookings, but which also support important local supplier ecosystems.

For these high risk sectors, more comprehensive engagement and tailored assistance has been required. Central to this have been the stakeholder/advisory groups with whom each stage of the movement through control plan levels and respective core issues have been discussed. These have been supported by bespoke guidance and action cards for various sub-sectors.

Activity

- **Travel Trade and Business Events**
 - delivery and planning through new stakeholder groups established in response to COVID-19 has meant that recovery communications and discussions have been made easier (e.g. for activity as itemised in themes 1, 3 and 5). Those groups will continue in 2022, helping to design planning and providing a foundation for the operators/businesses/planners to collaborate both with Visit Wales and each other. Business events are projected to be mostly national/domestic for 2022 with international returning in force in 2023 onwards.
- **Cruise** – 2021 cruise season saw a slow start with only domestic UK cruises calling. Total cruise calls for 2021 pan Wales was 40. International cruise calls to restart in April 2022 with COVID-19 protocols in place. Although new itineraries are being developed for all ports alongside facilitated B2B meetings with cruise executives (including the potential attendance at Seatrade global 2022) there are significant challenges to recovery of business e.g. in Holyhead the jetty has been withdrawn for use by cruise ships and a new anchor and tender provision at the marina is operating.

As a result it's expected that at least 50% of the 46 cruise calls in to Holyhead booked for 2022 will be lost due to no dedicated berthing facility. We need to look at new solutions for future cruise calls in to Holyhead moving forward i.e. the provision of a new multi-user berth in order for the cruise sector to recover and achieve continued growth in Wales.



8. Developing tailored recovery plans.

Themes

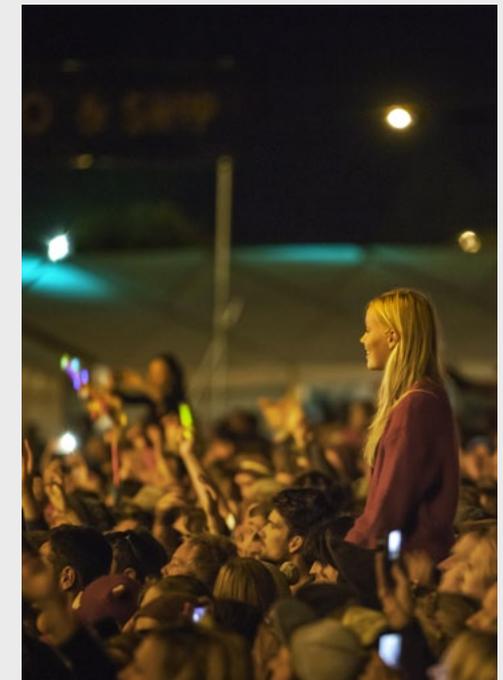


Suggested high level activity/interventions

- Major events
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Activity

- **Events and the night-time economy** – it has been a hugely challenging time for the events industry and the night-time economy, one of the first sectors to close and last to open. Ongoing financial support under CRF was vital to sustain event venues, organisers, suppliers etc. across cultural, sports and business events. Many events were lost, postponed or went online (with mixed results).
- **Working closely with the Event Wales Industry Advisory Group, and its three culture, sport and business sub groups and with individual event organisers** a range of pilot events were delivered in a short period in May and June which informed the safe, gradual and partial re-opening of the sector from July. With events such as Steelhouse, Greenman, Newport Half Marathon, IGTM and the Autumn Internationals successfully and safely taking place and CRF support having helped sustain the sector, the road to recovery had begun. Although there remained major hurdles to overcome including customer confidence and lead in times to replace lost events particularly in the business events sector. The Omicron variant and subsequent restrictions was a massive setback and required a major re-set but previous work means that we know events can return safely when the time is right.
- **Beyond COVID-19, work continues to identify opportunities across Wales to support indigenous events and identify international hosting options** across our events portfolio to support the recovery of the sector, the wider visitor economy and the delivery of the tourism action plan e.g through more shoulder season events. Work has also begun to work with stakeholders to develop a new Event strategy for Wales 2022-30 with the aim to launch the strategy in summer 2022.





Wales Coast Path, Ceredigion

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