



## DESTINATION SWANSEA BAY

The destination management plan for  
Swansea Bay, Mumbles and Gower

Phase 2: 2017 – 2020



## > Setting the Scene

Tourism is a vitally important industry to Swansea Bay. It creates and safeguards thousands of jobs, secures investment and generates hundreds of millions of pounds for the local economy.

Destination Swansea Bay 2017-2020 is a continuation of the first phase of the Destination Management Plan which was launched in 2013 and ran for 4 years. The same principles apply to this plan as the previous one, i.e to address the important role tourism plays and continue to set a strategic direction for Swansea Bay as a visitor destination.

### Reasons for developing DMP Phase 2:

- > Welsh Government focus on financially supporting destinations with robust DMPs
- > Destination management fosters effective working partnerships between private and public sectors
- > There are still long term issues, which need to be addressed to improve the destination

# > The Local Picture - Tourism in Swansea Bay

## STEAM (Scarborough Tourism Economic Activity Model)

2014	2015	2016	2017
Value £ <b>394M</b>	Value £ <b>401M</b>	Value £ <b>400M</b>	Value £ <b>417M</b>
Visitors <b>4.4M</b>	Visitors <b>4.5M</b>	Visitors <b>4.6M</b>	Visitors <b>4.6M</b>
Staying Visitors <b>1.5M</b>	Staying Visitors <b>1.5M</b>	Staying Visitors <b>1.5M</b>	Staying Visitors <b>1.6M</b>
Jobs <b>5.5K</b>	Jobs <b>5.7K</b>	Jobs <b>5.6K</b>	Jobs <b>5.7K</b>

## Bedstock - no. of establishments

Serviced 158

Self Catering 384

Caravan & Camping 54

**TOTAL:** 606 establishments  
(April 2018) 32K bedspaces

## 2017 Occupancy figures

Serviced average 70.9%

Self Catering average 59.9%



Wales average 61.2%

Wales average 57.6%



## > The Local Picture - Economic Profile

### Gross Value Added (GVA) in 2012:

**Swansea**  
£4.1 billion  
£16.9K per head  
73% of UK average

**South West Wales**  
£10.5 billion  
£15.3K per head  
66% of UK average

**Wales**  
£52.1 billion  
£16.9K per head  
72.9% of UK average

### Gross Value Added (GVA) in 2016:

**Swansea**  
£4.6 billion  
£18.9K per head  
71.7% of UK average

**South West Wales**  
£12.1 billion  
£17.4K per head  
66% of UK average

**Wales**  
£59.6 billion  
£19.1K per head  
72.7% of UK average

Source:  
Office of National Statistics 2018  
via StatsWales

Employment rate: 68%  
Economic activity rate: 71%



# > A City of Events



**250k**  
attended the  
Wales Airshow  
in 2018

## Highlights 2018

- > BBC Music's Biggest Weekend
- > Clyne in Bloom

## Highlights 2018

- > Headline Concerts: The Killers / Little Mix
- > JCP Swansea Half-Marathon

## Highlights 2018

- > Wales Airshow
- > Swansea International Festival

## Highlights 2018

## Highlights 2018

- > Admiral Swansea Bay 10k
- > Waterfront Winterland



# > Visitor Profile

- > Affluent 'Empty Nesters' aged 45+ years
- > Affluent early retired couples aged 45+ years
- > Younger affluent professionals aged 25 - 45 years
- > Mid income families with children
- > 'Hotel' is the main type of accommodation used
- > The average length of stay for overnight visitors is 4.7 nights
- > Where they come from (UK): Midlands, London, South East, M4 Corridor, West Country and other parts of Wales
- > Main reasons to visit remain the coast/beaches and scenery/landscape
- > Walking continues to be the main activity undertaken by visitors
- > Overnight visitors spend an average of £500 during their stay, day visitors spend an average of £60
- > 97% of visitors would recommend a visit to Swansea Bay

Source: 2015 Visitor Survey

# > The Big Picture

Swansea City Centre will be the focus of major regeneration development and transformation over the coming years. The DMP Partnership must ensure the benefits of these significant projects are spread across the entire destination and not contained to the City Centre alone.

## Swansea Bay City Region Deal

- > £1.3bn of private and public money to be spent over 15 years
- > Four councils taking part - Swansea, Neath Port Talbot, Carmarthenshire and Pembrokeshire
- > Eleven projects including: a “cloud” enterprise zone; using the internet to improve health diagnostics; a steel science centre

## City Centre Regeneration Scheme - ‘Swansea Central’

- > Improved links between the city centre and waterfront
- > A 3,500-seat digital indoor arena for concerts and events
- > A new hotel, shops, cafés and restaurants

## Civic Centre ‘hydro hub’ site

- > Cafés, restaurants and new public space
- > A public aquarium

## Kingsway urban park development

- > Remodelling of The Kingsway vehicular route
- > More green spaces for residents, workers and visitors

## River Tawe Corridor

- > Hafod Morfa Copperworks
- > Penderyn Distillery

## Skyline Development

- > Major tourist attraction on Kilvey Hill
- > Cable car ride, toboggan ride, zip wire rides and restaurant

## Tidal Lagoon

- > Swansea Bay Tidal Lagoon will be the world’s first tidal lagoon power plant
- > A tourism and recreation hub with the potential to attract circa 100,000 visitors per year
- > A playground, beach and rockpools, art installations and an Offshore Visitor Centre

## Evening & Night Time Economy Strategy

- > Retention of Swansea’s Purple Flag status, the only area in Wales to have this accolade
- > Achievement of Best Bar None accreditation for multiple venues
- > Enhanced branding, marketing and safeguarding measures





## DMP successfully delivered a number of projects since 2013 including:

- > Successful major shift to digital marketing
- > P4G funding secured to develop a Beaches Management Plan and Group for Swansea Bay's Blue Flag beaches
- > Road Signage audit of Gower and recommendation report
- > Successful delivery of the RDP Rural Accommodation Grant Scheme (held up as an exemplar project in the RDP Business Plan 2 Review)
- > Introduction of the Visitor Information Point (VIP) scheme - working in partnership with local operators to offer a complete visitor provision experience
- > Visit Wales funding secured to complete several DMP projects e.g. welcome panel at Swansea Bus Station, targeted marketing campaigns in Bristol and Reading, and the Swansea Bay Surfari Bus Summer Tour
- > Improved Trade Engagement through training and development workshops, Annual Stakeholder Day, Swansea Bay Tourism Awards, Swansea Bay Food Tourism Conference





## > The DMP successfully establishes an effective working partnership between public and private sectors

Over 100 representatives so far have attended Delivery Group meetings during the course of the DMP delivery process.

Over 40 organisations and Council departments have been involved:

- > Swansea Council
- > Tourism Swansea Bay
- > Visit Wales / Welsh Government
- > The National Trust
- > Swansea University / University of Wales Trinity Saint David
- > Community Development Trusts
- > Swansea BID and City Centre Management
- > Natural Resources Wales
- > Local Tourism Operators

The Delivery Groups were identified as an element that should remain as part of future DMP delivery

## > The DMP helps to propel tourism to the top of the local political agenda, reinforcing its importance as a sustainable and viable industry for Swansea Bay

Key lessons learnt from DMP (Phase 1):

- > Avoid vague and generic action points with no prospect of being delivered
- > Identify funding for projects to ensure delivery
- > Think outside the box – consult far and wide, look what's being done elsewhere





# > The Way Forward...2017 - 2020



## Our Vision

“Create a world class tourism destination, which delivers a high-quality visitor experience in a pleasant, clean and well-maintained environment.

This will be achieved by building on the existing working partnership that will, in turn, drive improved tourism provision, effective management and high-quality promotion of Swansea Bay, Mumbles and Gower as a destination”.

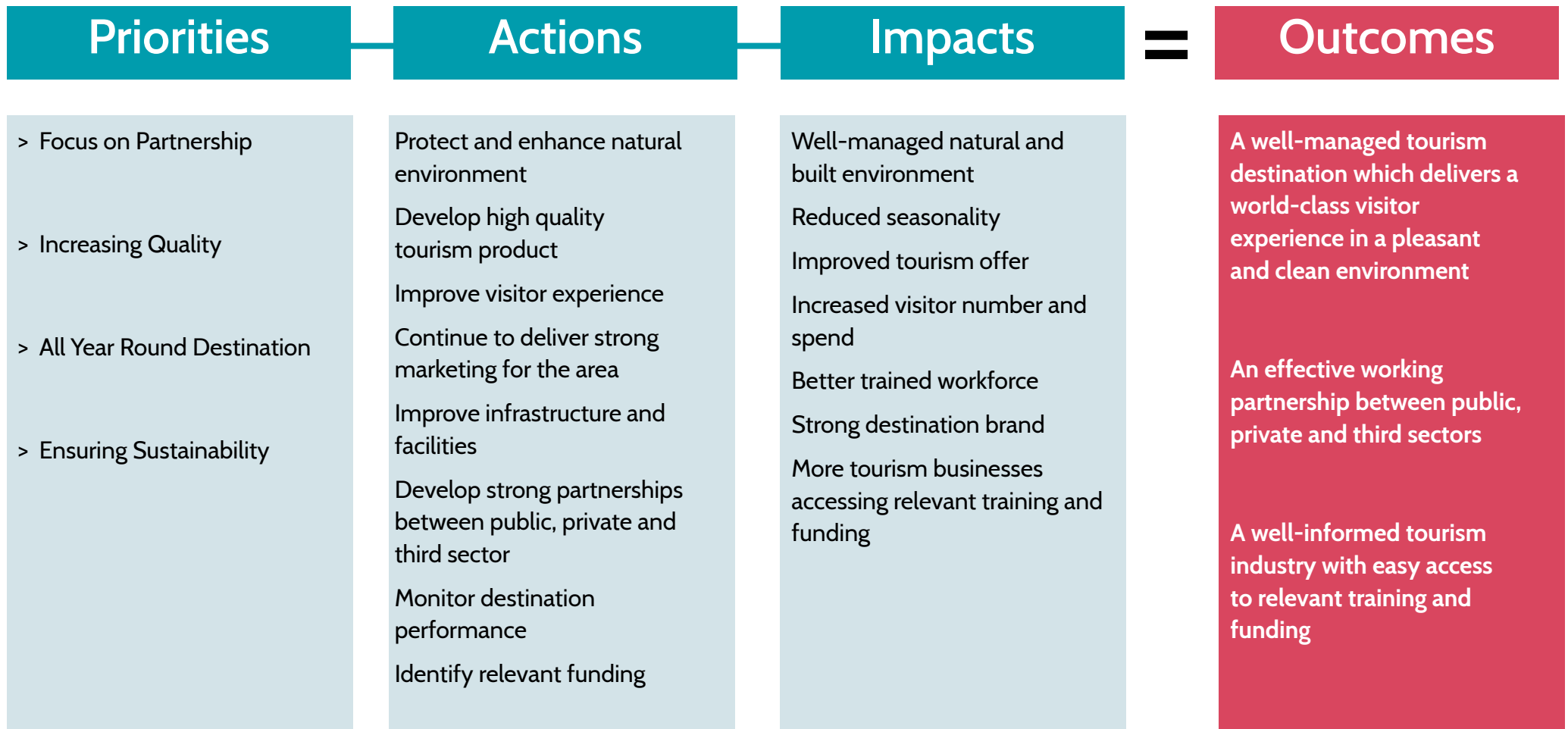




## > The Strategy

This DMP must ensure that tourism continues to be a significant contributor to the Swansea Bay economy

The main focus of this DMP will be a streamlined Action Plan only including actions that show strong potential for delivery and link to the 4 strategic themes of partnership working, quality, seasonality and sustainability.





## > Strategic Fit

The DMP will continue to work to meet the priorities set out on a local and national level.

Swansea Council's corporate priorities are:

- > Safeguard people
- > Improve education and skills
- > Transform our economy and infrastructure
- > Tackle poverty
- > Maintain and enhance Swansea's natural resources and biodiversity
- > Transformation and future Council development

Visit Wales continues to implement the 'Partnership for Growth' tourism strategy 2013-2020 and the recent review highlighted that tourism in Wales is performing strongly.

The refreshed VW strategy has set out the following priority actions:

- > Promoting the brand
- > Product development
- > Major events
- > People development
- > Place building
- > Profitable performance
- > Partnership



The DMP will work towards the 7 goals identified in the Well-being of Future Generations (Wales) Act 2015.

**A Prosperous Wales**

A key action of the DMP is for the tourism industry to be in a position to employ local people throughout the year.

**A Resilient Wales**

Managing and preserving our natural environment, which is a key reason to visit, versus the need for development, will continue to be a tough ask.

**A healthier Wales**

Investing in and maintaining our walking / cycling infrastructure, beaches, parks and promenade provide local people and visitors free and direct access to facilities, which can help improve their physical and mental well-being.

**A more equal Wales**

Many international students work in the sector to improve their linguistic skills, whilst the free movement of labour over the last decade has seen the sector employ people into roles, which have often proved difficult to fill.

**A Wales of vibrant culture and thriving Welsh language**

This is at the heart of what makes the destination unique and our commitment to promoting and encouraging our residents and visitors to participate in the Arts, Sport and Recreation.

**A Wales of cohesive communities**

The DMP aims to create attractive, viable, safe and well-connected communities for residents and visitors alike.

**A globally responsible Wales**

The DMP recognises the principles of sustainable development and how tourism impacts upon the built and natural environments. When doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being and future generations.



# Well-being of Future Generations (Wales) Act 2015



A large, dark, rounded rock formation, possibly a natural shelter or a natural rock shelter, sits in a grassy field. The background shows a sunset over a landscape with rolling hills and a body of water. The sky is a mix of orange, yellow, and blue.

## > Measuring Success

## DMP indicators include:

- > Visitor spend
- > No. of visitors
- > No. of staying visitors
- > Jobs safeguarded
- > No. of private sector operators accessing grant funding
- > Sector GVA growth
- > Visitor satisfaction rates
- > Private sector satisfaction rates

### Measured by:

- > Visitor Survey
- > Trade Survey
- > STEAM data (annual report)
- > Occupancy Survey (annual report)
- > Bedstock Survey (on-going)
- > Online conversion research (annual report)





## DESTINATION SWANSEA BAY

If you would like this information in another format or language please contact:

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