



Llywodraeth Cymru  
Welsh Government

## WELSH GOVERNMENT EVIDENCE TO - ENTERPRISE & BUSINESS COMMITTEE: INQUIRY INTO TOURISM

### 1. Tourism Strategy – *Partnership for Growth 2013-2020*

1.1 Tourism makes a vital contribution to the economic and social wellbeing of Wales. In 2012 the sector directly employed 117,400 or 9.3% of the workforce. Using the methodology developed by Deloitte's 2013 study to encompass jobs supported both directly and indirectly by the tourism economy in Wales, job totals reach 206,000 or 14.9% of total employment in Wales. As part of the Welsh Government's commitment to supporting and developing the tourism sector, the Tourism Advisory Board was tasked with developing proposals for a new Tourism Strategy for Wales. The tourism strategy *Partnership for Growth 2013-2020* was launched in June last year providing an overall vision for growing tourism by 10% by 2020.

1.2 This is a challenging target as real growth of 10% (after inflation) would equate to a growth of around 28% in total visitor spend by 2020 (including inflation at 2% per annum). However, the first year of the strategy has seen a rate of growth above that needed to achieve our ambition, with an increase in volume and value of trips supporting thousands of additional jobs.

### 2. Measuring Progress

2.1 The Welsh Government has identified a number of Strategic Indicators to monitor progress of the strategy against a range of key outcomes including visitor volume and earnings, market share, visitor satisfaction and employment in tourism.

2.2 These are supported by a separate set of Key Performance Indicators that measure the contribution that the Welsh Government is making via its activities to strategic outcomes including the following two Programme for Government (PfG) indicators:

*PfG – “Additional Spend in Wales generated by Tourism Marketing Campaigns.”*

The spend generated by all tourism marketing activities and campaigns in 2013 increased to £180m, largely driven by an increase in enquirers contacting the Welsh Government; including a 56% increase in traffic to the new website launched in June 2013 (year-on-year figures for 12 months before and after launch of the new website) and strong conversion of these enquiries to visits taken in Wales.

*PfG – “Proportion of UK population aware of Visit Wales marketing”*

The proportion of UK population aware of Welsh Government marketing was an average of 26% in 2013. This is in line with the average in 2012; but Wales has strengthened awareness of its marketing activity in its key UK market since 2009.

2.3 In summary, since the launch of the tourism strategy Welsh Government has:

- Reassessed its marketing activities and campaigns and launched the new visitwales.com website, which is delivering higher traffic than ever before.
- Relunched its travel trade work and refocused its PR programme on key markets, achieving high-profile coverage on TV and radio, in print and online.
- Aligned its capital grant programme to support the development of new and exciting products and drive up the overall quality and range of our tourism offer.
- Reviewed its investment in major events to deliver significant economic impact and raise Wales' international profile and reputation.
- Reviewed its governance and regional engagement structures.

2.4 In 2013 we saw growth in trips and spend from staying visitors from both GB and International markets to Wales. Overall trips by GB residents to Wales increased by 3.4% and expenditure from these visitors by 6.8%; holiday trips by GB residents to Wales increased by 3% and spend by 11.5%.

2.5 Trips to Wales by international visitors increased by 3.5 % in 2013, with expenditure on these visits up 2%. Holiday trips by international visitors increased by 14% and associated spend by 27% over 2012.

2.6 Early results for the first half of 2014 show continued growth. Provisional results from the Great Britain Tourism Survey for the first five months of 2014 show that total trips to Wales (3.47 million) were 14.6% up in comparison with the first five months of 2013, while the GB total was 2.9% down. Associated expenditure in Wales (£564 million) was up by 9.9% while spend in Britain as a whole was 2.9% down.

2.7 Holiday/leisure visits were up by 19.7% for Wales (to 2.07 million) compared with the first five months of 2013, while the GB total was 2.6% up. Expenditure on Holiday/Leisure trips to Wales was up 11.1%, while that for GB as a whole was up by 6.4%.

2.8 The GB Day Visits Survey results for the first six months of 2014 show that some 48 million day visits were made to destinations in Wales, some 19% up on the corresponding period in 2013 (40 million trips). Associated expenditure was 3% up. These figures also compare favourably with those for GB as a whole, for which trips were down by 1% and expenditure down 5%.

2.9 Visit Wales' Tourism Business Survey following the August Bank Holiday 2014 confirmed that the high season had been positive, with some 82% of tourism businesses in Wales received increased or similar levels of guests compared with August 2013, itself an

excellent month. The survey showed that 45% of all businesses had received more guests/visitors in August 2014 compared to August 2013, while some 37% of businesses experienced a similar level of business. This general pattern was replicated across all regions and sectors. Most businesses (76%) were confident about the upcoming Autumn season with 24% Very confident and 52% fairly confident.

2.10 In the 2013-14 financial year the following jobs and investment were generated from across all elements of tourism activities - including capital projects, cruise development and major events.

- 256 jobs created.
- 101 jobs safeguarded.
- 5,543 indirect jobs supported.
- £251m investment induced.

2.11 A detailed update (and overview) on first year progress against the tourism strategy and its related framework action plan is on the Welsh Government website <http://wales.gov.uk/topics/tourism/abouttourism/stratdevreports/?lang=en>

### **3. Wales Tourism Brand**

3.1 Over the last 18 months, the Welsh Government has invested in work to evolve a brand strategy and marketing narrative for Wales, embracing not only tourism but also foreign investment. Stakeholder meetings and presentations contributed to this process and the work has already delivered high-profile brand communication campaigns for Wales including the *Have you packed for Wales?* tourism campaign; refreshed marketing at Cardiff Airport; and *Just Ask Wales* - Wales's first major FDI campaign in a number of years.

3.2 All our marketing activity builds on the key principles which have been established:

- To place our high-quality products and destinations front and centre, helping to make our marketing credible and distinctive (this is a departure from the more generic approach of the past, and the approach of some of our competitors);
- To develop a brand that is consistently visible through sustained, targeted promotion and that is also highly credible, by showcasing our achievements and delivery in areas of core strength;
- To consistently challenge pre-conceived images of Wales and concerns that deter potential visitors from selecting Wales as a holiday destination: weather, warmth of welcome, ease of travel and product experience;

- To show that Wales is different from its competitors in ways that are relevant to diverse target markets with distinctive brand campaigns; and
- To focus on a core proposition that promotes Wales as an exciting place to visit, where there's always something fresh to discover, see and do.

3.3 The current strategy focuses on the overarching Wales brand. Our in-depth delivery strategy for Wales tourism marketing is currently undergoing further development. The aim is to realign our resources behind new and more integrated ways of working.

#### **4. Marketing**

4.1 Additional spend generated by visitors who were directly influenced to come to Wales due to all elements of our marketing activity was £180 million for 2013.

4.2 The GB domestic market remains the primary market for Wales. The main origin for holiday and other trips to Wales are from Wales itself and the adjacent regions of North West and West Midlands, which account for more than half of all domestic trips and spend to Wales.

4.3 On St David's Day 2014, the new £4 million "Have you Packed for Wales?" multi-media campaign was launched, including TV, radio, print, outdoor adverts/posters, digital and social media, targeting the UK and Republic of Ireland. The campaign was part-funded by the European Regional Development Fund under the umbrella Environment for Growth Programme, and has been delivered in partnership with Cadw, Natural Resources Wales and the Valleys Regional Park.

4.4 The campaign was devised by a leading Wales-based creative agency, and the creative sector in Wales has played a central role in its development. The main television advertisement was directed by Marc Evans, an award-winning Welsh film and television director, whilst the advertisement's soundtrack is a traditional Welsh song, sung by Cerys Matthews.

4.5 The campaign was developed to target our core audiences in the Midlands and North West England, as well as potential new markets for Wales in South East England and London. It has been used in the Republic of Ireland and was also shown on TV within Wales. The campaign aims to encourage Wales's target markets to reevaluate their perception of Wales by showcasing specific product and destination experiences in line with the strategy's focus on developing a product-led marketing approach for Wales.

4.6 Marketing activity targeting the UK consumer continued over the summer months with joint activity with The Telegraph to highlight the Dylan Thomas Centenary; and with The Guardian to promote the Wales Coast Path.

4.7 Visit Wales's Autumn UK & Ireland marketing activity will begin during September 2014, and will showcase Wales's food offering in the context of quality autumn breaks. The

campaign will include direct marketing contact with over 800,000 previous campaign respondents, online advertising and content development, and joint-activity with Aer Lingus Regional to promote the Dublin – Cardiff connection.

4.8 Planning for spring 2015 campaign activity in the UK, Ireland and Germany is currently in progress. Visit Wales will again be promoting Wales as a tourism destination on UK television screens during spring 2015.

### *Digital Marketing*

4.9 In addition to the targeted multi-channel campaigns, digital marketing achieves global reach. This includes the main [www.visitwales.com](http://www.visitwales.com) global website plus specific market websites for Germany, North America, France, Netherlands and Spain.

4.10 In 2013, our evaluation survey of UK visitors to the visitwales.com shows that 68% of web visitors took or were planning to take a trip to Wales. Approximately, 550,000 visitors were definitely influenced by the site and Welsh Government marketing contributed £140 million in additional visitor spend (from the total £163 million additional spend influenced from UK/Ireland market).

4.11 The new web site – visitwales.com reached its first birthday in June this year. If you make a comparison of our old site (including visitwales.co.uk) for the 12 months previous to launching the new site;

- We are circa 45% up in terms of unique users (from 1,852K to 2,686K)
- We are circa 56% up in terms of individual visits / sessions (from 2,245K to 3,496K)

We had over 14 million pages of content views on visitwales.com over the last 12 months (up from just over 9 million).

4.12 In addition to the main visitwales.com website, we also undertake social media activity – and have over 450,000 followers on Facebook and Twitter, and are also active on other platforms. We are increasingly innovating with digital advertising and content marketing activity - recent activity includes a mini-campaign of coastal drone films, produced by a leading Instagrammer from Wales and a Spotify promotion.

4.13 Work on a new German website to support marketing programmes in this market in 2014 is underway. There are also plans to further develop content for the US market and to refresh Wales's other 'brochure sites' for our established European markets in order to sustain a digital presence in these markets.

4.14 All tourism digital platforms are promoted by campaigns, search engine marketing and also via partner sites including VisitBritain. They provide a free to use opportunity for the large number of individual product and accommodation providers in Wales to promote themselves to a global audience. With information and direct links to the extensive range of

tourism products available in Wales the [www.visitwales.com](http://www.visitwales.com) website is a key one stop point of information for overseas visitors planning and booking a trip to Wales.

#### *Overseas Marketing Campaigns*

4.15 In overseas territories, Wales now targets marketing investment in a smaller number of key markets to build on our current strengths. The decision was taken after analysis of markets worldwide on the basis not only of current strength, but also potential for growth.

4.16 Market factors considered included value, seasonal spread, yield, potential to generate repeat business, product fit, accessibility, competitiveness intensity, costs of market penetration, general consumer awareness of Wales, economic forecasts and political influences.

4.17 The Welsh Government now focusses on Ireland, Germany and USA with some ongoing travel trade and PR activity in other European markets. The Welsh Government also works with VisitBritain to deliver further PR, campaign and travel trade activity in these key markets and takes advantage of any significant opportunities that arise beyond these regions. For example, a series of tactical campaigns have been undertaken in wider international markets including activity to capitalise on new route development achieved by Cardiff Wales Airport. A secondee from the Tourism and Marketing team now works within VisitBritain to support closer co-operation.

#### *Consumer Campaigns*

4.18 A major campaign to target the German market will be launched in early 2015. The campaigns team are currently in discussions with a number of potential partners including DFDS Seaways, KLM Germany, P&O Ferries and Dertour in regards to joint activity. They are also working with a media agency to identify opportunities for Wales's destination campaign activity. Campaign plans will be developed over the coming months and the campaign will launch in early January 2015 supported by the new website.

#### *PR & Media Relations*

4.19 The Welsh Government undertakes an annual programme of PR and Media relations activity with the objective to increase media coverage of Wales in priority markets to improve its reputation as an appealing destination for tourism visits. Although our current approach is delivering results, the shift to digital and social media marketing has led to a realigning of our approach to PR to take even greater advantage of new opportunities.

4.20 This programme includes proactive targeting of key media in the priority international markets and building these relationships by arranging press and blogger visits; and providing regular news and information to travel, lifestyle and social media providers to secure positive coverage for Wales.

4.21 PR and Media Relations teams hosted 300 media visits in 2013 with bespoke itineraries for journalists, film crews and radio journalists around Wales. The programme

generated £35m of advertising value equivalent (what it would have cost to pay for these adverts).

4.22 The PR team also works closely with VisitBritain and the First Minister's team in relation to overseas marketing and trade missions to provide relevant marketing information on Wales to generate positive travel and lifestyle stories for Wales as a tourist destination.

#### *Travel Trade*

4.23 The travel trade activities were re-launched in 2013 through two industry workshops held in conjunction with VisitBritain followed by one-to-one sessions and contact. An enhanced travel trade programme has been delivered, including a range of platforms for business development.

4.24 The Welsh Government is exhibiting at World Travel Market 2014, ITB Berlin 2015 and Best of Britain & Ireland 2015 - providing platforms for more than 30 Wales suppliers. The Welsh Government is also attending a series of 'Meet the Buyer' style workshops, alongside Wales suppliers. The workshops include Explore GB, a major new travel trade event organised by VisitBritain bringing over 200 tour operators from their key markets worldwide. We will also have appointments with travel trade buyers through our wider global events programme including the established March Marketplace European Tour Operator Association (ETOA) event.

4.25 Additionally, the Welsh Government is sponsoring a range of activities and events at VisitBritain, UK Inbound and ETOA travel trade events to promote the Wales brand and highlight Wales-based tourism businesses.

4.26 Grant support for eligible businesses to attend overseas travel trade events is being made available through UKTI and the Welsh Government Tourism Overseas Business Development Visits scheme.

4.27 Familiarisation trips are being arranged during the financial year 2014/15 for key tour operators and travel agents considered to be 'best prospects' for further business. Trips since April 2014 most notably include travel agents and groups leaders from North America in association with CIE Tours, Tenon Tours and DH Tours; Japanese operators (JTB World Vacations and Miki Travel) following up the Welsh Government hosted Japan Operators Lunch; and Chinese operators CITS and Caissa. In February/March 2015 we will host groups of tour operators from priority markets – U.S.A and Germany, as well as Netherlands and Russia.

4.28 A new global Wales online destination training tool has gone live with a dedicated Wales module on VisitBritain's BritAgent online training programme, available across 30 markets in more than 10 languages to the travel trade to learn about Wales and how to sell it to their clients.

4.29 The Wales business-to-business travel trade website has delivered 25,030 unique visitors in 2014 and our e-newsletter programme to our global travel trade contact database is generating an average click to open rate (CTOR) of 39%.

## **5. Capital and Business Support**

5.1 On capital development work, we have aligned investment and partnership work more closely with the new focus on iconic, high quality, reputation-changing products and events

5.2 In 2013/2014 the Tourism Investment Support Scheme (TISS) assisted 34 businesses with just over £2 million of financial support. Against TISS spend in the same year some 119 jobs were created and 98 safeguarded (217 in total). This support induced total investment of £8.68m.

5.3 In line with the strategy, additional support has been provided from central ES&T funds for some innovative products which we are confident will make a visit to Wales even more compelling for visitors. Zip World and Bounce Below at the Llechwedd Slate Caverns, Blaenau Ffestiniog, for example, and Surf Snowdonia (Dolgarrog), are both high profile and high impact projects already attracting significant attention.

5.4 Several significant pipeline projects are also being discussed that complement the Tourism Strategy for Wales 'Partnership for Growth' including hotel and spa development, and all year round, all weather, attractions.

### *Tourism Business Support & Quality Grading & Promotion*

5.5 A priority of the Partnership for Growth Tourism Strategy is to improve the quality of the tourism product in Wales. One of the most effective ways of doing this is through the quality assurance grading scheme. Welsh Government's Quality Advisors will continue to advise business on how they can improve their grading and to refer the business to the Tourism Investment Support Scheme which provides grants to make improvements to achieve a higher grade. The quality assurance scheme enables businesses to maintain and improve standards in line with changing consumer needs and expectations.

5.6 Following the recent change to the regional engagement structure, the Quality Advisors now play a key role as an extension of the regional team. In addition to their grading role, they are also able to provide advice to the business and to signpost to an array of services/specialists in order to encourage and stimulate improvements in growth and quality.

### *EU Funding*

5.7 The Welsh Government has been working with partners to oversee the delivery of a number of EU funded projects under the Environment for Growth Programme. The programme totalled some £35 million and has delivered seven tourism centres of excellence via the coastal and sustainable tourism projects. The projects have recently delivered a



number of new iconic tourism products that are already helping to raise the profile and perception of Wales as a holiday destination. Developments include:

- A new visitor centre in Aberdaron called Porth y Swnt; Gethin Bike Park;
- a new international Mountain Bike Centre at Merthyr Tydfil;
- a new coastal watersports centre at Saundersfoot; and
- a new marina at Porthcawl.

5.8 The Digital Tourism Business Framework programme (DTBF) has been recognised by the EU as one of only 20 Cases of Innovation and Good Practice which enhance the Competitiveness of Tourism in the EU. The ICT Diagnostic Service element of the DTBF has been provided to 738 tourism businesses.

5.9 The Sharewales website, developed two years ago to assist tourism businesses to better engage in digital technologies has received 19,442 visit sessions. The site is to be mainstreamed with a move to the Tourism Zone on the wider Welsh Government business support website.

5.10 The financial commitment to the development of Innovative Projects now totals £3.1 million. By the programme's end on 31 December 2014 over 40 different organisations will have been assisted to develop a range of new tourism related digital products eg. digital trails around Laugharne, in this the Centenary year for Dylan Thomas; and an exciting augmented reality based digital tour around Llandudno, which brings to life the connection the town has always had with Lewis Carroll's Alice in Wonderland stories.

5.11 The Welsh Government is currently developing two EU structural fund (2014-2020) proposals which will help deliver on the ambitions of the tourism strategy. The proposals focus on accessing finance for the private sector to continue to deliver new and improved strategic tourism products; and funding to deliver a small number of tourism infrastructure projects that can deliver perception changing products.

## **6. Tourism Skills**

6.1 Developing people is a key strategic aim, as is increasing the profitability of the industry. This includes working in partnership with stakeholders to extend the season and support higher yield so that salaries improve over time.

6.2 As the Department for Education and Skills has the remit and funding budget to deliver training in the tourism industry it is a vital that Department for the Economy, Science and Transport work closely with them – and the education and training sector – to ensure that the right training and qualifications structures are in place to develop the performance of the sector and achieve the ambitions in the Tourism Strategy.

6.3 The Deputy Minister for Skills met with the Tourism Advisory Board in June 2014 and introduced his new plan for skills which was subsequently published in July 2014. Visit Wales will work closely with DfES to support the effective implementation of the plan in the Tourism sector.

6.4 Key actions on skills will now see the development of an evidence based skills framework to address the future challenges of successfully servicing new markets and developing more prestigious and highly paid employment opportunities. Key industry representatives have been invited to a workshop to participate in deciding how to take forward the action plan.

6.5 Other actions include the development of networks of excellence to offer wide-ranging skills development opportunities; further piloting and promoting the use of qualifications in the outdoor sector and improving the provision of direct support for business by analysing the skills needs of individual businesses and offering more integrated solutions.

6.6 The Welsh Government and tourism partners will exhibit at Skills Cymru careers events for the first time this year, and have been looking at the potential development of hospitality schools - led by the private sector - to help address training issues, qualifications and standards that will elevate tourism as a career and put in place career progression.

## **7. Major Events**

7.1 Since Welsh Government launched the major events strategy in 2010 we have made big strides in building Wales's position in the global events industry. Working with partners across Wales and the UK, we have built strong and effective relationships with international event owners, gaining their trust and confidence in Wales's event hosting capability.

7.2 As part of the grant funding conditions each event is required to undertake an impact assessment. It is estimated that the Welsh Government supported programme of 39 major sporting and cultural events in 2013/14 generated a direct economic impact of £61 million.

### *Events in Wales 2013 and 2014*

7.3 In 2013, Wales achieved two more 'firsts' - hosting an edition of WOMEX, the world's foremost professional event for folk, roots, ethnic and traditional music; and the first hosting within Europe of World Stage Design, an exhibition of international performance design, from the global industries of opera, theatre and dance. Wales again hosted the Wales GB Rally Championships, successfully moving it from South Wales to North Wales; and Red Bull Cliff Diving Series attracting competitors and spectators from all over the world. We also co-hosted (with England) the Rugby League World Cup with the Opening ceremony staged at the Millennium Stadium.

7.4 Other highlights among the 39 events supported by the MEU in 2013 included an equal split of music/culture events such as Wakestock (Gwynedd), Festival No6, (Gwynedd - winner of NME Best New Festival Award 2013), Swn (Cardiff - NME Best New Festival 2014) and Green Man Festivals; and sporting events including the Ironman Triathlon (Pembrokeshire), one and a half stages of the Tour of Britain cycle race (North and Mid Wales); and a leg of the Extreme Sailing World Series (Cardiff Bay).

7.5 In 2014 the Welsh Government is leading, in partnership with the Arts Council of Wales and local authority partners, a year-long festival to celebrate the centenary of the birth of Dylan Thomas.

7.6 We have also successfully hosted the Senior Open Championship at Royal Porthcawl - the first time one of golf's 'Majors' has been staged in Wales; the Amlin and Heineken Cup finals; the UEFA Supercup Final; and the International Paralympic Committee Athletics European Championships at Swansea University.

#### *Future Events/Projects*

7.7 Looking ahead to 2015, Glamorgan Cricket will further build its position among the world's leading international cricket venues by hosting the first match in the Ashes series; and the Millennium Stadium will host 8 matches of the Rugby World Cup, including two quarter finals.

7.8 We have also been successful in securing bids to host the 2016 World Half Marathon Championship, a consequence of the recognised success of hosting the annual Cardiff Half Marathon; and a stop-over leg of the Volvo Ocean Race in 2018 - the first return of this premier round-the-world sailing race to the UK in over a decade and the first visit ever to Wales. In April, Wales launched its bid to part host Euro 2020 football championships. UEFA will announce its decision on 19 September.

7.9 Going forward we are also continuing to support a thriving portfolio of arts and cultural events including Machynlleth Comedy Festival, Beyond the Border Storytelling Festival, Iris Festival Prize; Hay Festival and Festival No6.

## **8. NATO**

8.1 The successful delivery of the NATO Wales Summit 2014 has created a wider platform from which Wales's profile on the world stage can be strengthened. Welsh Government took full advantage of opportunities before and during the summit. Arguably, one of the key moments from the summit, in terms of promoting Wales came from President Barack Obama's remarks that he will encourage people in the United States to visit Wales. He praised the country's "extraordinary beauty, wonderful people and great hospitality".

8.2 Post summit, Welsh Government will use this, the wider visibility that has been generated by the summit and the relationships that have been developed to position Wales as a confident, capable and creative nation; and a world-class place for business, investment and tourism.

8.3 In advance of the summit Welsh Government worked with HM Government's Foreign and Commonwealth Office and VisitBritain through its GREAT marketing campaign and associated partners to improve the way Wales is positioned and promoted in GREAT marketing and branding activity.

8.4 We also produced distinctive brand messaging and materials to promote Wales as a business and tourism destination in its own right at and around the Summit. "Wales Made" could be seen at key destinations such as Newport and Cardiff train stations as well as the NATO village at Cardiff airport. This was used alongside GREAT Campaign branding where appropriate and new marketing materials including 2 films and a set of postcards for all delegates.

8.5 Working with Hoteliers, we also placed a range of materials into NATO delegate hotels to promote Wales as world-class place for business, investment and tourism and offered a "welcome host" staff training scheme for Hotels across South Wales hosting NATO related delegations, media etc.

8.6 In his written statement of 5 September 2014 the First Minister committed to publishing "an account of what the Welsh Government invested around the Wales NATO summit and an indication of the benefits to the Welsh economy." That account will be published in due course but some of the activity undertaken included:

- Working with the FCO Berlin to deliver a press visit for German Journalists from leading titles. The visit included trips to the Dylan Thomas Boat House and Welsh Whiskey, which has resulted in positive coverage.
- A PR visit around other business sectors that were directly related to the summit such as aerospace and defence. Some positive coverage has already come out of this visit.
- Working in partnership with the FCO and the Wales Office, we collaborated on an event at the Locarno suite in London. The event was an opportunity to raise the profile of Wales using a week before the summit. The event brought together existing and potential investors, diaspora and journalists. GREAT branded adverts carrying Welsh messaging was used throughout the event, showcasing Welsh strengths across a range of sectors.
- Destination information about Wales was featured on the NATO Wales 2014 drop box providing easy access to a range of ready content relating to tourism, business and food.

8.7 Moving forward, opportunities to use the successful delivery of the summit to generate further PR interest in Wales as a business tourism and leisure destination in our key markets of Germany and the USA are being developed.

## **9. Regional Work**

9.1 It was announced earlier this year that Welsh Government funding for the four Regional Tourism Partnerships will cease after September 2014.

9.2 This decision followed on from a consultation process with tourism businesses and stakeholders in Wales on future support for the regions. The outcome saw a clear call for closer, direct working relations with Welsh Government and reduced complexity in tourism support structures.

9.3 In response to this a Regional Engagement Team has been established within the Department of Economy, Science and Transport. The regional officers are based at the Government offices in Aberystwyth, Llandudno Junction, Treforest Estate and Penllergaer.

9.4 The regional engagement with the industry operates at three levels:

- At Local level, each region has two officers within the Department of Economy, Science and Transport who are responsible for working with businesses; local authorities; destination partnerships and trade associations on a one-to-one basis.
- At Regional level, an informal Forum is being established for each of the four regions. This Forum will take a wider, strategic view across the region and will consist of both public and private sector representation.
- At National level, a representative of each region is being appointed onto the Welsh Government Tourism Advisory Board.

9.5 Budget has been allocated to each region to deliver a variety of activities from PR to product development. This work is being carried out by a range of individual contractors, tourism associations and sectoral bodies, as relevant to each region.

## **10. VisitBritain**

10.1 We work closely with VisitBritain and have recently recruited a representative to work on behalf of the Welsh Government within the VisitBritain team in London. This individual will provide strategic leadership on projects, ensuring a joined-up approach, maximising on relevant opportunities for Wales and providing direct assistance with content and campaigns as required. The Chairman of the Minister's Tourism Advisory Board is also a member of the VisitBritain Board.

10.2 We are also feeding into the UK Government's GREAT campaign in terms of providing information on the products and experiences Wales has to offer visitors.

10.3 We are working with VisitBritain to strengthen the way it represents Wales overseas; and to identify clear VisitBritain roles and targets for Wales in terms of PR coverage, digital reach and campaign leads. Discussions are ongoing with other UK tourism authorities

about how VisitBritain can improve its strategic support for destinations within the UK, including establishing specific targets in this area.

10.4 This matter was highlighted in a recent Welsh Government Evidence Paper to the Welsh Affairs Committee during its investigation into how well UK bodies promote Wales abroad. We are also contributing to the current Triennial Review of VisitBritain and Visit England.