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The Welsh Government Strategy for Tourism 2013 – 2020

Partnership for Growth

Festival, Cyfarthfa Park

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Cover image: Harlech beach (towards Snowdonia)

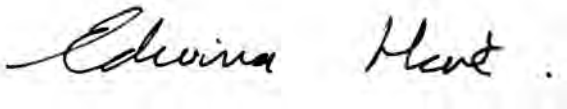
Ministerial Foreword

Tourism has a lot to offer our communities in Wales. That is why I added Tourism to my portfolio of key sectors of the economy and gave my Tourism Sector Panel the essential task of leading the preparation of a new strategy for tourism that would drive sustainable growth in the sector up to 2020. I am confident that growth in tourism will stimulate additional output and employment expansion in the economy overall.

Tourism is a global industry and is highly competitive but Wales can compete with the best. We can offer a rich culture and heritage, a landscape of high scenic quality, a unique coastline and a diversity of experiences to our visitors. We may be a small country in terms of size but our ambitions and ability to work with agility and a sense of purpose will help to set us apart from our competitors.

This strategy provides the basis for the Welsh Government, the tourism industry and other organisations to focus on the priorities that will deliver a more prosperous and competitive sector. The visitor economy touches every community in Wales and there are opportunities to position Wales more prominently to UK and overseas markets, taking advantage of our ability to provide thrilling cultural and sporting experiences at a world-class level. Research shows that Wales constantly surprises and delights visitors. This strategy shows how we will communicate that better, whilst at the same time continuing to invest with confidence – in our product and in our people – to improve quality and choice for the consumer.

I recommend this new strategy to you and fully endorse its call for a new unity of purpose that will bring added dynamism and focus to tourism in Wales.



Edwina Hart MBE CStJ AM
Minister for Economy, Science and Transport

Hafod Eryri Visitors Centre, Summit of Snowdon, Snowdonia

Introduction

A Tourism Strategy for Wales

The Minister for Economy, Science and Transport established a Tourism Sector Panel in September 2011 and asked them to lead the development of a new strategy and direction for the sector. This strategy represents the results of their work which has involved a process of research and analysis, evaluation of options and engagement with the tourism industry.

This is a strategy for tourism overall in Wales rather than one for the Welsh Government alone. Tourism touches many parts of Government policy including skills and employment, planning, regeneration, heritage and culture; it also benefits many other sectors of the economy including transport, retail and agriculture. It is right, therefore, for the strategy to consider the wider influences of tourism and to identify a coherent set of responses to the strategic challenges that are likely to face the sector during the period 2013 – 2020.

This strategy will be accompanied by an annual action plan which sets out priority projects and programmes of work. It will also clarify who is best placed to deliver them. The challenges that face the tourism sector in Wales need sustained and focussed responses over a prolonged period if they are to be overcome but, as a small country, we have many advantages over our competitors. We can work with agility, we can form close partnerships and we can measure how well we are delivering our priorities. Tourism is well placed to benefit from these competitive advantages and to focus resources where they will drive successful outcomes for the economy.

The time is now right to set a new direction for tourism that will support sustainable growth in the sector during the coming years and which reflects the changing internal and external influences that impact upon it. Partnership is at the heart of this strategy as success cannot be delivered without a unity of purpose and a team approach from Government, the private sector and other stakeholder organisations. This strategy, therefore, invites the industry and other local, regional and national public sector bodies, to align themselves with its goals and to work together to achieve them.

This strategy has been based on detailed research and analysis of the many factors that are likely to affect the future performance of tourism in Wales. It seeks to drive higher tourism earnings to deliver maximum value for the Welsh economy and to support the delivery of the following priorities for tourism defined in the Welsh Government's Programme for Government:

- Develop tourism activity and specialist markets and secure maximum benefit from major events in our high profile venues.
- Promote Wales as a destination by making a high quality tourism offer.
- Work to extend the tourism season and associated benefits.
- Identify funding opportunities to improve the visitor infrastructure and product in Wales.
- Support investment in staff training and management to support a high quality tourism industry.

Good progress has been made in taking forward the priorities and actions identified in the previous 2006 – 2013 national tourism strategy, *Achieving our Potential*. The situation is, however, not static and new opportunities arise, whether in relation to infrastructure development, sporting success or trends in consumer behaviour. It must also be acknowledged that many of the strategic challenges identified in that document are still current, often because of global factors. Addressing these will take a combination of persistent, focussed effort on the one hand and, on the other, new ways of thinking and working.

Tourism makes a major contribution to the Welsh economy and the prospects for further sustainable growth are good. The competition, however, is also increasing and it will be those tourist destinations that can best satisfy and exceed the needs of their customers that will stand out and perform best in a crowded marketplace. If we do nothing new or fail to make the most of the opportunities that will arise, we will go backwards against our competitors.

Our country is rich in cultural and environmental assets and we have a heritage of nurturing extraordinary talent and innovative thinking. Continuous improvement is a prerequisite for further success, embracing innovation in all aspects of tourism from product development and service delivery to communications and partnerships.

Governance

Visit Wales/Croeso Cymru is part of the Department for Economy, Science and Transport in acknowledgment of the fact that the tourism sector makes a vital contribution to the economic and social well-being of Wales in terms of both job creation and wealth generation.

A number of the key components of this strategy, in particular those which focus on a skilled workforce and effective infrastructure, are primarily the responsibility of other parts of Government or the private sector. This has not inhibited their inclusion as important parts of a comprehensive strategy for tourism in Wales. While many organisations will have a role in delivering different elements of this strategy, the main responsibility for delivering the Government's support for

Tourism will remain with Visit Wales/Croeso Cymru, the department of Government that is responsible for the marketing and development of the sector.

Importantly, the Minister for Economy, Science and Transport has agreed to reconstitute the Tourism Sector Panel as a permanent advisory Board for Visit Wales, tasked with advising the Minister on the delivery of this strategy for tourism. The Board will monitor Visit Wales's accountability to the Minister and promote synergies across Government, whilst at the same time increasing its visibility to external stakeholders in line with comparable tourism organisations worldwide.

Organisational structures in Visit Wales will also be re-aligned in 2013 to facilitate more robust partnership working and support more effective delivery of programmes and projects. Our small country dynamics are an advantage and should allow us to minimise duplication of representation, resources and effort and re-energise the sector with a fresh collaborative approach.

Context

Tourism is a rapidly changing global industry, with ever more countries presenting themselves as viable and attractive tourism destinations. Our key UK competitors – Visit England (+51% growth in tourism spending), Visit Scotland (+18%) and the Northern Ireland Tourist Board (+86%) – have all set ambitious growth targets for the period 2013 – 2020. Visit Britain has forecast an increase in international visitor spend of 38% compared with 2010 – an increase of £5.1bn, supporting an additional 130,000 jobs throughout the UK.

The World Tourism Organisation (UNWTO) *Tourism Towards 2030* forecasts that the number of international arrivals worldwide is expected to increase by 3.3% a year from 2010 to 2030. This growth would result in an increase to 1.4 billion arrivals by 2020 and 1.8 billion by 2030. Western Europe is anticipated to show lower than average growth rates 2.3% per annum but will maintain the highest share of world arrivals.

Importance of Tourism

The Wales Tourism Satellite Account (TSA) estimates total tourism spending in 2011 of £4.5bn, representing a Tourism Gross Value Added (GVA) of £1.8bn – around 4.4% of total direct GVA for the Welsh economy. Emerging research suggests that when indirect impacts are added, the Tourism GVA increases to £2.5bn, which represents 6% of the whole economy. In 2011, the TSA estimated that 8.3% (88,300) of all full time equivalent jobs in Wales were directly supported by tourism spending. With indirect (supply chain) added, this total FTE employment rises to over 100,000, which is equivalent to around 9.5% of all Welsh FTE jobs.

If we look further than the tourism sector impact to include the wider hospitality sector (hotel, restaurants and catering), Oxford Economics in 2012 indicated that the hospitality industry in Wales employed 9.2% (126,000) of the workforce.

Tourism touches all parts of Wales and the geographical spread of employment generated by the tourism sector is one of its key strengths when compared to other sectors in the economy. In 2011, the TSA estimated that tourism related employment in some areas, (Pembrokeshire and Conwy), accounted for nearly 1 in every 5 jobs.

Tourism supply chain links bring benefits to many small, indigenous businesses in Wales. Income from tourism is often the difference between success and failure for many micro businesses. Tourism businesses are rooted in the communities that they serve and are here to stay.

Tourism has a key role to play in reinforcing a distinctive and compelling national identity for Wales in the UK and Internationally as a place to visit, invest in and as a place to do business. It can help to reflect our true culture and character and the staging of major events such as the Ryder Cup, Ashes and WOMEX 2013 help to strengthen the global reputation of Wales. Perceptions of Wales are influenced by a complex mix of factors. Not all of these can be overcome easily but consistent and reinforcing branding can help to overcome weak associations with Wales and develop positive attitudes.

Tourism is committed to sustainable growth and is a sector that fully acknowledges that those qualities that attract visitors to Wales such as the landscape, culture, language and heritage need to be safeguarded for future generations, creating long term value and jobs for all our communities.

Tourism is an export industry with over 80% of visitor spending being non – Welsh in origin which constitutes an important source of export earnings for the Welsh economy.

Vision and Ambition

The strategy has the following **vision** for tourism:

Wales will provide the warmest of welcomes, outstanding quality, excellent value for money and memorable, authentic experiences to every visitor.

The **goal** is for:

Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales.

The **ambition** is to:

Grow tourism earnings in Wales by 10% or more by 2020.

To achieve real growth in tourism earnings of 10% will not be achieved easily. If achieved, it will represent growth in numerical terms of at least 28% and will require not only an increase in performance compared to recent years, but also the allocation of realistic resources comparable to those of Wales's key competitors.

Some parts of the industry will be better placed than others to withstand competitive influences and disruptive events. Growth will not necessarily be experienced equally in all geographic areas, reflecting the fact that Wales does not offer a single uniform product across all its regions and some businesses will be better placed to appeal to the changing needs of the market. However, given a unity of purpose between the Welsh Government, the tourism industry and other stakeholders, delivery of this strategy will result in a general improvement in tourism performance overall that will in due course contribute even more significantly to local communities across Wales.

An approach to delivery that facilitates strong and productive partnerships is a necessity for success. Visit Wales will work with the industry to help develop and present their product in a way that is more in line with market needs and to create platforms for businesses to promote themselves.

This change in emphasis will mean **focussing** on:

Promoting the Brand:

- promoting and marketing a distinctive and reinforcing brand for Wales;
- driving a product-led approach that identifies compelling reasons to visit Wales;
- targeting existing and new markets with most growth prospects;
- selling excellence through the Wales offer – coastal and rural environment, culture, activities, events and distinctive destinations;

Product Development:

- stimulating investment in high quality, reputation-changing products and events;
- working with partners who have both a track record of success and growth potential;
- strategic prioritisation of Government investment;

People Development:

- training our people so that they can thrive in the tourism sector;
- applying those skills to improve customer satisfaction and overall experience;
- changing perceptions of tourism as a quality career choice;

Profitable Performance:

- building the capacity of the industry to utilise the latest technology to reach and influence potential customers;
- supporting higher profitability in tourism businesses through tools such as yield management;

Place building:

- developing destinations that people want to visit and recommend;
- providing opportunities for local communities to deliver memorable visitor experiences;
- promoting improved transport links by air, sea, road, and rail.

What will Tourism look like in 2020?

Industry	• The number of jobs supported by tourism has grown from 88,300 in 2011 to 97,130, with tourism contributing 4.8% of direct GVA (compared to 4.4% in 2011). • Partnership working is an overarching theme. Effective and well-understood relationships between all involved in the tourism sector, ensuring that teamwork is the accepted modus operandi for delivery, based on clear objectives, accountabilities and responsibilities. • Environmental sustainability is also embedded in the way we work, building on Wales's strong reputation for leadership in this field.
Product	• A range of quality accommodation including luxury destination Hotels. • A reputation for quality local food and drink and excellent, recognised dining experiences. • Vibrant year round entertainment, attractions, festivals and events. • Well recognised and easily booked destination experiences. • Leading utilisation by business of emerging technology. • An established international conference and convention centre.
Promotion	• Improved awareness of Wales as a visitor destination – high brand recognition. • Improved perception of Wales as a place to visit. • Improved preference to visit Wales over competitor destinations.
People	• A skilled and customer focussed workforce attracting the ambitious and talented. • A regional network of internationally recognised centres for hospitality, tourism and leisure skills. • Well defined standards in service delivery: a distinctive service style that puts people at the heart of our brand along with language skills to serve a global tourism market.
Performance	• Improved business yield. • Increased levels of investment in the industry. • A range and variety of opportunities across the sector offering attractive career paths at many levels. • High growth potential and quality businesses are fostered. • An environment exists that encourages entrepreneurs and developers.
Place	• Well managed places people want to visit. • Clearly understood networks to support destination delivery. • Cardiff internationally recognised as a short break Capital City. • Improved physical and technological connectivity, including a thriving international airport and improved links to near airports in England.

Pontcysyllte Aqueduct, Llangollen Canal

Tourism In Context

The Tourism Experience

Tourism is a highly competitive global industry. It is imperative not only to develop a dynamic customer focus, but also articulate clearly what makes Wales unique. Wales is well placed to compete with the best and can offer a rich culture and heritage, a landscape of high scenic quality, a unique coastline and a diversity of experiences contributing to our visitors' mental and physical well-being. It will be the experiences that differentiate Wales from other destinations that will resonate most memorably with our visitors. Specifically, Wales can offer five areas of competitive advantage:

- **Natural Environment:** A central reason why visitors choose to holiday in Wales is the quality and accessibility of the natural environment. We have three National Parks of distinctive character, five areas of outstanding natural beauty and, since 2012, a 870 mile long Wales Coast Path, the only one of its kind anywhere in the world. We need to take full account of the major asset represented by Wales's natural environment and consider how to use its characteristics for growing tourism sustainably;
- **Heritage and Culture:** The welcoming character and diversity of our people, with our two living languages, provide the essence of Wales's distinct cultural identity. In addition, many historic features remain in the landscape, including three World Heritage Sites. They tell a unique story of our past as a testament to our rich heritage and bring it alive to visitors and communities alike;
- **Activities and Adventure:** Wales is a world class activity tourism destination. Our mountains, coastline, beaches, rivers and lakes provide an unrivalled backdrop to support a wide range of activities including walking, sailing, caving, kayaking, mountaineering, coasteering, fishing , horse riding, cycling, mountain biking and golf. Properly packaged and promoted the adventure and activity product will provide strong reasons for new and repeat visits;
- **Events and Festivals:** As well as a well-populated calendar of significant cultural festivals, Wales has hosted a range of major sporting events in recent years including the Ryder Cup and the Ashes. With two Welsh football clubs now members of the Premier League, opportunities exist to build on the success already achieved and to support other cultural and sporting events at community, regional and national levels to boost tourism performance throughout the year;
- **Distinctive Destinations:** Our destinations are often the main stimulus for the visitor to choose Wales. From the coastal resorts of Tenby and Llandudno, to the character destinations of Hay and Portmeirion and the dynamic cities of Cardiff and Swansea, Wales can offer a range of places to stay and visit and things to do that appeal to a wide market.

The Tourism Market

- **Domestic market:** The GB domestic market is the primary market for Wales and will remain the main focus for marketing activity during this strategic period. It accounts for 92% of all staying visitor trips and 84% of staying visitor spend. Within this, the domestic holiday segment is by far the most important and valuable visitor segment for Wales with nearly 6 million trips and £1.1 billion visitor spend in 2012.

  Wales is holding its position in its core market of domestic holiday visitors but is under increasing competition. Future prospects for growth for Wales will need to come from gaining market share from competitor destinations. There will be a need to strike a balance between targeting repeat visitors and new markets with most growth potential.

  The main regions of origin for holiday and other trips to Wales continue to be 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. Within the constraints of proximity, we appear to have significant scope to grow share of holiday visitors from London and the South-East, East Midlands, Yorkshire and the South West. Accordingly, marketing activity funded by Visit Wales will focus on these geographical markets as the strategy is taken forward.

- **Overseas market:** International visitors are a relatively high spending market but historically have been of lower importance for Wales, accounting for just 8% of all staying trips and 16% of all staying visitor expenditure. Scotland, Ireland and the English regions attract significantly more international visitors than Wales. As a result, Wales' market share of all international trips has been gradually falling from 3.6% to 2.7% and share of spending from 2.15% to 1.86% between 2002 and 2012.

  Wales should benefit from the forecast growth in international visitors to the UK. However, there are still significant barriers constraining growth including low visibility and lack of awareness amongst consumers, media and the travel trade of the Wales brand and tourism offering, limited connectivity and air capacity and lack of priority by the tourism industry and travel trade in promoting Wales in international markets.

  It is essential to target marketing investment carefully at a small number of territories where we are building on current strengths and have identified strong potential for growth. Accordingly, marketing activity funded by Visit Wales will focus on three main international markets (Ireland, Germany and USA/Canada) as the strategy is taken forward.

This does not mean that other parts of the world will be abandoned. Digital marketing will have global reach and we will work closely with Visit Britain to deliver strong results for Wales through its international network of offices. We will also make allowance within staff and resource allocations to react swiftly to specific commercial opportunities such as a new direct flight that may arise from time to time.

Coasteering, Pembrokeshire

Ambitions For Growth

We believe that it should be possible to achieve growth in tourism earnings in Wales by 10% or more by 2020.

This level of increase will depend upon the ability of Wales' tourism industry to attract and retain visitors within an increasingly competitive and dynamic marketplace. Increasing visitor yields during difficult economic conditions and a price sensitive market will be challenging. So, in the short term, the principle route for Wales to sustainably grow earnings will be to increase the overall number and value of trips by attracting new higher yield visitors whilst retaining levels of visits and spending from current visitors.

Visit Britain has forecast that the number of inbound visitors may increase to 40mn a year by 2020. These growth projections have been used as the basis for forecasting potential trips and spend for Wales from international markets.

In its evaluation of various growth options for tourism during the period 2013 – 2020, the Tourism Sector Panel considered that a targeted growth option would be most realistic and achievable for Wales. This was also the most favoured option identified through the feedback received from the industry and from key stakeholders. The aim is to grow our share of the GB holiday market, with a greater focus on marketing within Wales and SE England.

The aim is also to achieve above average growth in international visitors to Wales. This would include a growth in trips from a wide range of international markets plus significant growth in trips and spend resulting from our increased market share in the selected markets of Germany, USA/Canada and Ireland.

Our ability to significantly increase our share of the key UK holiday market (including within Wales) supported by growth in share from selected international markets (specifically Ireland, Germany and the USA/Canada), will require enhanced marketing resources to support proactive activity in selected international markets and leveraging Visit Britain's opportunities fully. The ability to convert the resulting increase in demand by improving access, by investing in the tourism product to meet new market needs and effective marketing by the tourism industry would be key dependencies for achieving selective growth.

In targeting markets with real growth potential, Wales will need to focus on extending the tourism season. Between October – March, the industry operates well below capacity and a longer tourism season would, therefore, provide important economic benefits to Wales by generating additional spend and income and increasing the number of full time job opportunities.

The Strategic Framework

Taff Trail, Castell Coch

Focus: Promotion

Developing a distinctive and unique national identity can drive measurable economic, social and cultural benefits. In this context, destination branding has become an increasingly sophisticated means of differentiating destinations by promoting their distinct characteristics and personalities. The tourism brand for Wales will need to reinforce and reflect the wider brand positioning for Wales.

The focus for promoting the tourism brand for Wales will be:

- **Brand positioning**

The aim will be to develop a clear, compelling tourism brand for Wales that is based on our authentic strengths and unique characteristics as a nation. We want Wales to be seen as a place which is pleased to welcome others to share its heritage, culture, natural beauty, food and genuine hospitality.

- **Brand narrative**

There is value to be gained through repeating and reinforcing clear messages that seek to build a positive reputation for Wales. It will be important, therefore, to prepare a brand narrative to sit behind the creative execution and endorse it to all involved in promoting a distinct tourism identity for Wales. The co-operation of partners in industry will be essential in amplifying this narrative by their own adoption and use of it, for example in the use of marketing material, logos, signage and flags.

- **Product-led strategy**

Change will be achieved by driving a product-led strategy that creates compelling reasons to visit and discover Wales. The approach will be phased and initially will seek to exploit existing products that can differentiate Wales through more effective packaging. Later stages will involve developing best in class product experiences with stakeholders and linking their promotion with booking and delivery to consumers. Visit Wales will, for example, seek ways to create and promote a platform whereby businesses investing in Wales, whether small or large, can find it easier to reach markets and develop strong brands of their own.

- **Brand innovation**

Ensuring that the tourism brand has wider reach and resonance with consumers will require the application of a range of innovative approaches. This could include using high profile Welsh personalities to promote the Wales brand experience and the promotion of Wales as a world leading location for film/TV production. Digital platforms and social media in this new world are not just the work of a discrete team, but a cross-cutting imperative that will be built into the heart of our promotional work.

Focus: Product Development

If Wales is to attract more business from new markets and achieve the 10% growth target, we will need work with the private sector to develop, market and manage areas of competitive advantage wisely and effectively over this strategy period. Focussed investment will be required to improve the overall tourism experience if the sector is to grow with confidence. There will need to be a greater emphasis on working with those businesses and stakeholders that have achieved success through investment and are ambitious for further growth. More focus on strategic areas of growth will be required and market insight will become more important when it comes to specialist sectors such as the cruise and golf markets. Visit Wales will make sure that no commercial opportunities are lost, within the framework of State Aid rules.

The focus for investment in the tourism product will be:

- **Product quality and range**

Providing an excellent experience at every level of business activity is vital for Wales to improve its competitive position. Value for money is as important as ever, but there is no reason why Wales cannot aspire to provide best in class provision across the spectrum. There is clear evidence to show that investment in better quality visitor facilities, particularly accommodation, supports higher performance and drives profitability. While the quality of the tourism product in Wales has never been higher, there are still important gaps that need to be filled if the vision of delivering excellence is to be achieved.

There are, for example, too few luxury, high-end and reputation changing hotels which can create new demand. There are also issues of scale, with a lack of quality accommodation in some areas to meet the needs and expectations of larger tour parties. Opportunities exist to promote higher quality and facility provision in our caravan and self catering sectors and to accelerate the encouraging investment that has taken place in recent years.

In addition, although Wales is well served by a diverse range of visitor attractions, there is a need for more iconic, flagship, all-weather attractions that are distinctive to Wales and reflect its culture and personality.

The emphasis, therefore, is not just on best in class quality but also on projects that potentially can change perceptions and realise additional economic growth, jobs and wealth. This will be evident both directly in the businesses concerned and indirectly through supply chain and multiplier benefits that deliver jobs in the community.

- **Heritage and Culture**

Wales is extraordinarily rich in cultural assets both tangible and intangible, not least the Welsh language itself. These can help to tell an informative and entertaining story about Wales that sets us apart from others. Opportunities exist to enhance the experience of visitors to our heritage attractions, museums and cultural venues to sustain their long term viability. Indeed colleagues from other departments and organisations such as Cadw, the National Trust, Local Authorities and National Museum Wales are already engaging actively with Visit Wales to address this point.

There are hundreds of buildings of historic interest and character which add value and distinctiveness to our towns and villages; many have the potential for conversion for holiday accommodation or leisure and cultural uses. The Welsh Government could play a vital role in creating the right climate and conditions for private investment in these opportunities.

Our vibrant culture manifests itself in particularly strong creative industries and there are opportunities here to capitalise on investment by a range of partners to maximise tourism potential. Through film and television, for example, images of Wales reach millions, offering significant scope to reinforce positive and often unexpected impressions.

There is scope for exploiting the appeal of internationally known stories that have their roots in Wales, such as the Arthurian legend, but also the drama, scale and authentic stories embodied in Welsh heritage icons and World Heritage Sites. Genealogy and family history too are areas that deserve further investigation as a means of promoting an interest in Wales.

- **Activity and wellbeing**

Our countryside and coast, mountains and inland waters provide outstanding environments for a range of outdoor activities. The recent developments of our outdoor activity product, such as the Wales Coast Path, will not only allow us to promote this as a unique part of the overall tourism offer but contribute to wider Welsh Government interventions to improve the well-being and health of the nation. Working closely with partners in the National Parks, Local Authorities, the National Trust and Natural Resource Wales will be essential to realise the economic and wider benefits of Wales' built and natural environments.

Our wealth of gardens, supported by an increasingly successful season of festivals, is a promising theme to explore, as is walking as an activity (including infrastructure such as baggage transfer), where a range of options exist to cater for adventurers of every degree.

- **Food and Drink**

Wales possesses some of the world's best producers of food and drink, complemented by world class chefs. High quality local ingredients, distinctive food and drink and interesting places to eat are increasingly important to visitors. Our best hospitality businesses are earning a reputation for excellence but there is more that needs to be done to increase the number of world-class food destinations and to promote and deliver quality Welsh food and drink as part of the overall visitor experience. Not only will this help to distinguish Wales from its competitors but it will bring more direct economic benefits by strengthening local supply chains between producers and tourism businesses.

- **Major events and festivals**

Events and festivals are very important to tourism in Wales, as essential ingredients of the visitor experience providing a showcase for our heritage and culture. They facilitate community involvement and offer an experience that is distinctively Welsh. Opportunities exist to selectively support new events that can enhance the reputation of Wales, but it is also important to put weight behind existing events which have the potential to grow and are helping to change perceptions of Wales.

By establishing and publicising a calendar of such events sufficiently in advance, there are opportunities for the industry to respond positively to associated opportunities and enhance the visitor experience.

At a local level too, there should be opportunities to harness the skills and talents available in communities to create attractive programmes of events that can augment the visitor experience significantly.

- **Business Travel**

The meetings, conferences and events market is relatively high spending and non-seasonal, offering potential to target business customers with leisure opportunities, but we are currently underperforming in Wales in attracting sufficient volume and value. The development of an international conference and events facility in the Capital Region would stimulate demand from this market which can help to reinforce a stronger city destination brand for Wales as well as encouraging Wales-wide business-to-business activity.

- **Accessibility**

If tourism is to grow in Wales we need to ensure that visitors are able to travel to and within the country without unnecessary restriction. It is important that we make it easier for visitors to get to and to move around Wales by car, public transport and cycle. Opportunities exist to develop stronger connectivity with international markets by air, sea, rail and road. We will need to make provision to cater for the needs of all

visitors, including elderly travellers and consumers with healthcare and mobility needs. The imposition of tolls on the Severn Bridges is clearly a disadvantage in tourism terms and there will be opportunities to review current arrangements when the operating contract comes to an end in 2018.

Visit Wales will also investigate the feasibility of promoting joint ticketing schemes so that visitors can enjoy convenient and simple means of gaining entry to a variety of attractions and transport systems.

Digital accessibility is another vitally important consideration. The Welsh Government's campaign to roll out broadband to all areas in Wales is an essential step to ensure that Wales is not disadvantaged compared with competing destinations. In addition, the digital age will create opportunities for fresh and innovative partnership approaches that seek to realise the full potential of new technology.

Focus: People

A mediocre visitor experience will reduce the likelihood that visitors will return or recommend us to others. Wales needs a tourism workforce that can help make every visitor experience an exceptional one. If the visitor economy is to grow, investment in the people that work in the industry is crucial. They must be supported, developed and equipped with the skills to deliver the best possible experience for visitors. We must also better understand the attitudes to tourism in the wider community that have an impact on the visitor experience.

The focus for people development will be:

- **Customer care**

Skills and professionalism are critical to creating profitable businesses and satisfied customers. Every visitor interaction, whether at a port, airport, restaurant, hotel, attraction or event has an impact on the visitor's overall experience. A culture of service and hospitality is crucial to the competitiveness of the sector. We need to compete on quality, consistency of service and sense of place.

- **Demand-led skills**

We need to align skills support with industry requirements. Many different organisations are involved in the provision of training and the qualification system is often confusing to employers. We need to find ways of simplifying this system. The development of a 'national skills framework' offers opportunity for further exploitation. Tourism skills development needs to account for the breadth of the sector, the range of skills providers and the variety of learning methods.

- **Specialist skills**

If the tourism sector is to grow, we need to increase the professionalism of those working in the industry, focussing on areas such as chef skills, tour guiding, management and leadership, outdoor instruction and front facing roles to meet future visitor demand. Language skills are also important to meet the demands of international markets. It will be important to focus on ensuring that the qualifications and flexible learning opportunities are fit for purpose and tackle areas of need.

- **Changing perceptions of tourism as a career**

There is a perception that tourism does not offer a viable career option providing long term stability and progression. This traditional perception of the industry can result in a lack of high quality candidates entering the industry, which in turn can affect the level of professionalism within the tourism sector. It will be important to promote the real career opportunities that exist in the tourism and hospitality sectors more actively. The profile and status of the sector could also be improved through the creation of more centres of excellence for learning, skills development and research in hospitality.

Focus: Profitable Performance

A sustainable approach to tourism growth sits at the heart of this strategy. We want to see an economically prosperous tourism industry that generates long-term and lasting local benefit which is welcomed by and supports local communities. Occasionally, difficult decisions have to be made balancing the needs of development and environmental management in sensitive areas, but Wales can point to many examples of tourism projects enhancing the local environment.

As a small country Wales can lead the way in achieving real and measurable sustainable benefits through tourism by improving the viability and competitiveness of tourism enterprises, maximising the proportion of income retained locally through supply chains and improving the quality of tourism jobs.

The focus for profitable performance will be:

- **Building capacity**

The most successful businesses are those that respond effectively to market needs, adjusting their product and the way they communicate with their customers. In this context, there are opportunities for Welsh tourism businesses to be more innovative and embrace digital technologies to distribute and market their offer to a global audience. But innovation goes wider than the digital environment. It means standing out from the crowd and taking risks – things that are best delivered through the private sector. Government can help foster an innovation culture through leadership by example and by

communicating examples of good practice.

A new Innovation Fund will be piloted that will offer time limited financial support to projects that can demonstrate that they fit with strategic priorities and have a sustainable future. Opportunities exist to offer a flexible mix of capital and revenue support as well as mentoring and advice, where necessary, to ensure that projects have the best chance of success.

- **Yield management**

The average expenditure from overnight visitors to Wales is lower than competing destinations. In part, this is due to the composition of the visitor mix – Wales attracts a relatively high number of leisure visitors and a low proportion of business visitors. There are opportunities to market Wales to higher spending visitors and also to develop more professional approaches to yield management in the industry. Providing visitors with more reasons to spend and encouraging longer stays will be important if we are to achieve our ambitions for growth. We must always focus on meeting the changing needs of the customer and on ensuring that we are able to be best in class and provide best value at every level of the tourism offer.

Focus: Place Building

Successful tourism destinations are those that provide a high quality environment for the visitor. Facilities for visitors will also be used by the communities in which they are located and will help to generate local income and jobs. In this way, tourism can also play a role in contributing to spatially focussed regeneration programmes throughout Wales. Increasingly visitors are seeking authentic experiences in their choice of things to see and do. A planned approach to destination management in Wales allows local tourism communities to decide what is most important to put in place to maximise visitor satisfaction and to stimulate local support for tourism.

The focus for place building will be:

- **Destination management**

It will be important to improve the visitor appeal of tourism destinations throughout Wales. Destination Management is a simple concept which involves a partnership approach to managing places. Tourism infrastructure such as way-marking, signposting, car parking, beach management, toilets, tourist information and litter collection are often only noticed when they are sub-standard but they can often be the difference between a satisfied and an alienated visitor. Our major destinations, cities and hub towns will require a particularly focussed approach bringing stakeholders together to fully exploit opportunities to maximise economic growth. In addition, there are opportunities

to promote more flexibility in the planning system to ensure that appropriate development is in line with local needs and can support future prosperity in the tourism industry.

- **Prioritisation**

In addition to this vital grass-roots work, Visit Wales will need to work according to an agreed set of criteria to identify iconic strategic priorities for promotion. Successful tourism destinations worldwide have demonstrated the benefits of building on acknowledged strengths as an initial step to attracting visitors who know nothing or very little about their countries. Over time, the benefits of this approach can significantly outweigh a strategy of disseminating investment resource more generally and thinly.

- **Regeneration**

While tourism will not be the panacea to the long standing economic and social problems that may exist in some parts of Wales, it can help support a mixed, diverse and sustainable economy. Regeneration schemes that can promote associations with local culture can help to support tourism and also instil local pride and identity.

- **Authentic experiences**

We need to provide a distinctive sense of place experience through identifying the qualities that make each destination special. By recognising and valuing these qualities, destinations can promote themselves as being distinctive and unique – something that visitors find appealing. It will be important to involve local communities closely in this process and to ensure that the visitor welcome is genuinely warm and memorable.

- **Sustainable ways of working**

As an overarching principle, it will be important to support and raise awareness of new and innovative ways to improve the sustainability of the industry. Sustainable tourism means choosing to develop the type of tourism that makes the greatest contribution to Wales' social and economic development. This requires a balance to be struck between the environmental impact of tourism and its contribution to host communities' social and economic development. Concern for the environment has rapidly become a major concern for both consumers and Government. People are increasingly expressing a desire to minimise their carbon footprint in their everyday lives and travel choices. Government targets to address climate change add force to this global imperative.

Invitation

Street Market, Abergavenny Food Festival

This strategy sets out ambitious growth targets for tourism in Wales for the period 2013 – 2020. It is, by definition, a high level document that provides a strategic focus for partnership working that will help to strengthen our competitive position and improve the performance of the tourism sector in Wales.

A more detailed action plan supporting this strategy identifies immediate next steps and clarifies who should be responsible for delivering them. None of this, however, will be possible without a unity of purpose across Government, the industry and from those who have a wider interest in tourism. As a small country, we are ideally suited to working together as a team to drive success for Wales.

This strategy, based as it is on sound research and consultation, invites those who want to see tourism succeed and prosper be part of the team to deliver a higher performing tourism sector that is making an increasing contribution to the economic, social and environmental well-being of Wales. There is every reason to be optimistic about the prospects for growth and success, building on the solid progress made in recent years. Working together for tourism in a Partnership for Growth is what this strategy is setting out to do. We invite you to be part of that opportunity and look forward to our working together to deliver for Wales.

Coast Path with Newgale beach in distance,
St Bride's Bay, Pembrokeshire