Wales Digital Gateway Project

Decision sought

A project for transforming the Wales Digital Gateway to improve the way in which Wales is promoted as a place to invest, do business, visit, study, and to live has been developed by the E&I Marketing team in collaboration with Welsh Government’s Communications and International Relations departments. We are asking Cabinet to consider this paper and the associated presentation and to support the implementation of the new approach.

The Issues

1. The development of digital technologies has transformed the marketing landscape, enabling a small and creative country like Wales to define ourselves on the world stage - to grow our profile and performance as a place to invest, do business, visit, study, and live.

2. The need to harness digital technologies more effectively to promote Wales globally was identified in the previous Programme for Government, with its stated aim to: “Use digital technologies to take Wales to the world and bring the world to Wales by establishing a web gateway on what Wales can offer – in terms of tourism, investment, educational opportunities and culture – to the outside world.” This statement led to the initial development of this project, and with a new Wales brand now in place, the opportunity to take this work forward in a post-Brexit context is pronounced – especially considering the Government’s stated vision to ‘promote Wales to the world like never before’, and the potential of digital to deliver this vision in a cost-effective but highly impactful and innovative way. The initiative can also contribute to the delivery of all four pillar strategies of the current Programme for Government, Taking Wales Forward; and support the objectives of the Well-being of Future Generations (Wales) Act.

3. Over the last twelve months a confident, integrated new brand for Wales has been developed and applied to a wide-range of cross-sector campaigns. The approach has been positively received by stakeholders and consumers and initial results suggest that the joined-up approach is working: it is anticipated that Year of Adventure marketing helped to drive more than £300m additional spend in the
economy; a number of tangible leads have already been secured as a result of the targeted Trade & Invest campaign; and there was a 16% increase in the number of GP training places filled following the recent GP Recruitment communications programme.

4. However, whilst these campaigns represent a major step forward in the way we promote Wales in a coherent and unified way to our markets we now need to invest in the market-leading digital infrastructure required to underpin the brand and take these campaigns to our audiences in a more cost-effective and impactful way again. In this sense, this project reflects another step-change in delivering truly joined-up cross-Government, cross-Sector working to promote Wales more effectively to the world.

5. At present, Welsh Government directly manages or funds a handful of international websites to promote Wales – collectively providing a ‘digital gateway’ to Wales for a variety of key target markets. These include:
   - The main national gateway, Wales.com;
   - Our flagship tourism website, VisitWales.com;
   - A new Trade and Invest Wales for inward investors, trade and export markets; and
   - A Study in Wales portal, which is part-funded by Welsh Government.

6. The portfolio of websites has recently been streamlined as a result of some initial work in this area carried out as a result of the last Programme for Government. Each website has also seen improvements in terms of design quality and performance in recent years (unique visitor numbers to VisitWales.com website for example have more than doubled from 2m to 5m between 2013-2016). All – apart from the Study in Wales website - have also been updated to reflect the new and holistic Wales brand design launched last year.

7. However, there is still scope to grow, iterate and improve the general gateway network, as well as each component website over the coming years in order to make Wales as competitive as possible in this area:
   - Although the websites have been redeveloped on a basic level, they remain very static in terms of structure and content largely due to skills and
resourcing issues. The content approach in particular is reactive and text-led when there is increasingly a need to serve up more regular, richer materials (news, articles, blogs, features, photographs, short films etc) to drive search engine visibility and attract new audiences.

- We still produce and publish content in silos for very specific platforms and audiences in isolation as teams are split across departments. This leads to some duplication of effort and diluted messaging. It also means that we’re missing opportunities to make a collective impact, by working together to develop and produce outstanding and consistent content at the centre that can then be adapted and tailored for each individual platform (e.g. when Surf Snowdonia opened in 2015, a single tourism film produced was shared over 3m times on Visit Wales and partner websites).

- However, there was scope to do more to also produce business-related innovation content around the same time or a HE-related film, linking tourism growth to study opportunities in the region. This gap becomes clearer around major and unexpected ‘national’ events such as the Euros – where we achieved a great deal, but simply didn’t have the pace of infrastructure to create and disseminate enough content about Wales to respond to the demand for information from a wide range of trade/tourism/general markets that we were seeing on search engines.

- There is also more that can be done to reflect and support broader cross-Government priorities – such as GP Recruitment campaigns – if a ‘team Wales’ culture is adopted and applied. There is a need for a more joined-up approach to content planning and co-commissioning via an integrated in-house structure in order to achieve a more consistent narrative and resource efficiencies.

- Our current focus is to publish to our own websites and there is scope to reach more people quickly and purposefully by supporting these sites with an infrastructure of social media channels, distribution partnerships and media brand associations.

- We know that targeted digital and search marketing is delivering returns in the tourism sphere but these learnings haven’t been fully applied to the other sites/markets, which rely on consumers finding them.
— Finally, there is a need for greater monitoring of impact across the portfolio, both to inform day-to-day content commissioning decisions and the long-term strategy.

8. Through the Wales Digital Gateway we therefore propose to:
   — strengthen the Wales Digital Gateway portfolio of websites in a platform-agnostic way;
   — put in place a much more joined-up and efficient content production structure across Government aimed at driving search visibility, cost-efficiencies, as well as an improved on-site experience;
   — underpin these websites with a strategic and carefully managed network of social media channels;
   — improve our content distribution via third-party platforms such as those of major media brands;
   — develop a more sophisticated digital marketing approach aimed at growing users across and between the portfolio of websites; and
   — introduce a new evaluation framework to provide a regular flow of data to inform tactical and strategic decision-making.

9. Our proposal centres on a fluid and flexible approach to digital: like all leading contemporary digital approaches, the digital and content infrastructure will be iterative and not based on traditional static, brochure-style website-led solutions. This means that the approach is fully future-proofed to inform (via data insight) and reflect emerging Government priorities, as well as marketing and consumer trends. In the short-term, it means that we will be fully able to adapt our approach to align with emerging destination/regional/city-region led opportunities. We will be able to:
   — reflect destination/regional structures and content in a simple and compelling way across our own digital inventory;
   — work with regional-partners to improve the interface between national/regional/destination digital provision – structurally and in terms of content production and distribution:
     — by reviewing and simplifying the sub-national destination/regional digital infrastructure or ecosystem across Wales long-term in order
to consolidate the number of competing sites in the marketplace, and take customers on a much clearer journey from Wales-level messaging to very specific community or business-related information;

— **by improving content production and distribution planning** so that content is distributed from our communities to the world as quickly as possible via an integrated ecosystem of channels;

— support regional partners by **bringing destination/regional messages and content to new markets**, not just via own networks but also through partner sites and third-party distribution when appropriate – e.g. by surfacing North Wales content for tourism in Manchester/Liverpool in the ramp-up to a bank holiday period.

10. The proposals have been informed by research to look at best practice in destination digital marketing by countries such as New Zealand, Denmark, Sweden and Scotland. The Swedish example is particularly interesting: the national site Sweden.se drives fifteen times the level of traffic of that of our national site and it is both a net driver of traffic to the wider Swedish network of sites and a platform for defining stories and content about Sweden. Each of these countries also has a strong but streamlined network of flagship market-focused sites underpinning their main national gateway. Moreover, their platforms are supported with innovative content production and distribution strategies, and outstanding social media channels.

11. The proposals are also informed by our direct experience of delivering digital marketing within a Welsh Government context and Visit Wales’ efforts in particular: over the last three years the tourism team has brought digital marketing to the centre of the strategy, investing in VisitWales.com as platform, digital campaigns, social media marketing, and high-quality content from Wales. The revamped VisitWales.com was launched in June 2013 and this has played a significant role in the increase we have seen in the additional revenue driven through our tourism marketing activity in the period from 2012 to 2016 – from circa £163 million to over £300m in recent years. There has also been a growth in Visit Wales’ social media following to 1m, and initial research suggests that this is a highly-engaged audience that has been directly influenced to visit Wales.
as a result of our content communications with them, accounting for around £30m of the forecast additional spend generated in 2016.

12. The proposals include leveraging our existing social media channels (not developing new channels) and ensuring that a much more joined-up and efficient approach is put in place to planning consistent and reinforcing messages distributed through these channels. They all already and will continue to fully adhere with Welsh Government Social Media Policy. A close interrelationship is and will also continue to be maintained with Welsh Government Central Communications Division to ensure accuracy and sensitivity at all times surrounding messaging distributed through these Wales brand led communications channels.

Recommendation

13. An ambitious vision for harnessing digital to further boost Wales’ profile and performance has been developed.

14. The full programme includes:

— Investing in improving a core network of core gateway sites for Wales including:
  o further developing Wales.com and TradeAndInvest.Wales and refreshing VisitWales.com, which is now over 3 years old;
  o launching a media/stakeholder brand-hub of downloadable content and assets;
  o looking into developing new Study and Live and Work websites – subject to further research and partner discussions.

— Underpinning this investment by putting in place:
  — a market-leading approach to integrated, creative and efficient content development and commissioning;
  — a joined-up social, paid-for and distribution strategy to get our content out to the market quickly and effectively; and
  — a new evaluation framework to monitor growth and impact.

Impact
15. These proposals will make a significant contribution to building equity in the Wales brand and to boosting Wales’ profile and reputation in key markets (including markets where we have limited budgets and resources) in a cost-effective and innovative way. We are also confident that such an approach will boost our results from a marketing perspective, as well as the economic performance of the country – the evidence in tourism clearly shows the tangible benefits (in driving over £300m additional spend in the economy in a single year) of taking digital seriously.

16. Furthermore, due to the lack of media plurality and portrayal of Wales there is an opportunity to become a trusted source of content from Wales and to tell and share our own story and view of the country within Wales and in-market. The Surf Snowdonia content example (viewed 3m+ times) shows that we can now take our own story directly to consumers with the right creativity and ideas.

17. Long-term, there is scope to drive greater efficiencies by simplifying regional/community level delivery and aligning the work of partners more effectively with Wales-level activity, consolidating web-build, content-production and digital marketing expenditure across Wales.

18. There is also scope to deliver other long-term efficiencies and cost-savings. A proposed integrated digital structure, content strategy – and support team – will reduce duplication, focus efforts and concentrate funding on the strongest stories, and also deliver greater market impact with a more coherent narrative.

Research and / or Statistics

19. The research and statistics contained in the paper have been approved by Knowledge & Analytical Services.

Communications and publication

20. It is recommended that this project is implemented as part of our ongoing marketing programmes and the outcomes and impact attributable to those marketing programmes.
21. There are no immediate press opportunities relating to this decision although once the project is progressing and key elements of it are delivered we will alert Ministers to press and media opportunities arising, consulting fully with the Strategic/Corporate Communications function at every step of the process.

Recommendation:
We recommend that Cabinet endorse the implementation of this project as described in this paper and the associated presentation.

Joined up Working
22. This proposal has been developed by Marketing, Communications and International Relations teams across Welsh Government. The funding will be met from the Economy & Infrastructure MEG.

Ken Skates AM
Cabinet Secretary for Economy and Infrastructure
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