

Wales Brand Marketing: Update

Decision sought

A strengthened brand marketing strategy for Wales has been developed. The refreshed strategy is simple and unifying and is designed to be applied to all campaigns and activities to promote Wales as a destination. As such, the approach requires the support of the Cabinet of Welsh Government.

Cabinet is asked to consider this paper in conjunction with a detailed presentation (to be provided at Cabinet) and is invited to:

- i. **Endorse the gradual implementation of the Wales brand marketing strategy across all aspects of Wales destination marketing.**

The Issues

“Wales celebrates its ‘Year of Adventure’ in 2016, and there’s no better time to explore one of the finest natural playgrounds in Europe. Many still underestimate this small country, often overshadowed by its neighbours. But these are exciting times for Wales...” Wales: Top 10 Places to Visit, Rough Guides, 2016.

1. Wales’s appeal is growing: the number of overnight visits to Wales by GB residents in 2014 hit 10m for the first time since records began in their current form, a trend that continued into 2015. There has also been a 16.5% increase in expenditure by international visitors between 2013-2015. More broadly, the last three years have seen the strongest inward investment on record and events such as The NATO Summit and the Rugby World Cup have provided opportunities to boost Wales’s profile on the world stage. Recent campaigns have also performed well – Visit Wales’s marketing influenced £306m of additional spend in Wales in 2015, compared with £238m in 2014 and £180m in 2013.
2. As resources become tighter, as competition intensifies, and in the face of market and media fragmentation there is a need to work together – across Government and with outside partners - to maintain this success. Ever-greater unity, coherence and discipline are required to boost Wales’s profile, change perceptions of our country, and facilitate further economic growth.
3. ESNR Marketing (as the department that delivers the vast majority of high-profile campaigns for Wales internationally) has been working with colleagues across Welsh Government to review and update the current Wales brand, and a revised brand marketing strategy for the future has been developed. The proposed approach is an umbrella, Wales-wide strategy, with the potential to be gradually deployed across a broad range of sectors and markets. The strategy includes:
 - A simple and unifying brand vision
 - A refreshed identity toolkit to provide cohesion
 - A proposed revised digital structure for promoting Wales
 - A framework for bringing the brand to life through policy initiatives and projects (e.g. Year of Adventure.)

Beyond tourism/business the two areas most affected by the change are EEAD and the Food Division. Both teams have been consulted on the proposed approach.
4. The draft strategy was initially presented to Cabinet in January 2016. Some important issues were raised at that point, most notably relating to timing the deployment and the need to carefully manage the risks involved. In this context, Cabinet agreed that the brand should be first applied to Year of Adventure tourism materials, prior to be used elsewhere on a case-

by-case basis. It is too early to have definitive data but initial insights have been gathered, as well as feedback from partners. These will be discussed as part of the presentation.

5. Some further work has also been invested to hone the approach further – by developing the business brand for example - and there is now an opportunity, pending Cabinet approval, to start utilising the brand beyond tourism with immediate effect, as new campaigns and opportunities emerge, enabling greater impact, coherence and unity across our portfolio of websites and campaigns. The brand will be reviewed on an ongoing basis with the guidelines tested prior to being rolled-out in specific sectors and markets – the approach is flexible, but consistent.
6. Clearly, fully introducing the brand will take time and has cost implications. The full but gradual introduction of the new approach is recommended to maximise public value for money. In the long-term the new brand presents an opportunity to achieve greater impact with fewer resources, and to drive significant cost-efficiencies.
7. A high-level delivery timetable is outlined below, subject to Ministerial approval of detailed campaign/activity plans within each area/sector. This activity can be delivered in the new brand style within existing budgets.

Tourism	<ul style="list-style-type: none"> — Finalise roll-out of existing materials during 2016 — Update quality grading materials from late 2016 — Refreshed website in place for 2017
Business	<ul style="list-style-type: none"> — Launch of a new campaign and website in late 2016
EEAD	<ul style="list-style-type: none"> — Gradual replacement of materials to begin immediately — Refreshed website in place for 2017
Study	<ul style="list-style-type: none"> — Discussions to align brands to begin immediately
Food	<ul style="list-style-type: none"> — First use at from summer 2016
Other	Early discussions on how the new approach could be used in other areas (such as Health/Science) are also already underway.

8. Cabinet is also asked to note that an extensive stakeholder engagement programme has been undertaken over the last twelve months and the proposed brand has been very well received and welcomed. Most stakeholders agree that it's crucially important that the approach isn't just seen as a tourism brand, but a country brand.

Recommendation

9. Destinations around the globe are investing in developing outstanding and defining national brands, to enable them to stand out on the world stage. Countries such as New Zealand, Sweden and Iceland have transformed their global reputation in recent years thanks, in part, to bold and contemporary branding and outstanding creative campaigns.
10. As a small country, Wales is in a position to be one of the few countries to successfully develop a truly holistic national brand approach - one that is unifying and can be applied to the breadth of Welsh life. This will enable Wales to achieve greater impact with limited resources and to boost campaign performance with mutually reinforcing messaging across sectors and organisations.
11. The refreshed Wales brand strategy represents a significant opportunity to unify and modernise Wales's identity, as the climax of a sustained period of marketing success for Wales. The approach has already been applied to tourism Year of Adventure materials, and is now in a position to be used in other sectors – as part of a 'one Wales' approach.

12. Cabinet is asked to consider this paper in conjunction with a detailed presentation on the proposed approach (to take place on 14 June 2016) and is invited to:

- i. **Endorse the gradual implementation of the Wales brand marketing strategy across all aspects of Wales destination marketing.**

13. A nation's reputation is of course, shaped by much more than a logo and fresh creative materials. However, strong and coherent branding does provide a platform for unifying and galvanising partners, and the vision is that the new brand will inspire confident on-brand investments and projects in the long-term.

14. In order to deliver this vision, it is also recommended that a more coordinated cross-Government brand marketing management and planning approach is adopted – to ensure the joined-up delivery of brand campaigns in key markets.

Impact

15. Welsh Government has set out its commitment to delivering more and better jobs for Wales, through a stronger, fairer economy - and to working together to build a united, connected and sustainable country. The simple, unifying brand strategy proposed is designed to draw together the departments, organisations and businesses of Wales to drive greater impact, improve the performance of marketing, and help grow the economy. It also provides a platform for showcasing the best of Wales, including ways in which the Welsh economy is innovating and strengthening.

16. The Well Being of Future Generations (Wales) Act 2015: the proposed brand strategy is designed to reflect the ambitions and fulfil the goals of the Act – most notably the goal to develop a prosperous Wales. Furthermore 'The Wales We Want' report (completed as part of the development of the Well Being of Future Generations (Wales) Bill) recognises the importance of strengthening our national identity as a key aspect of future sustainable development.

17. Partnership for Growth Tourism Strategy: 'Promoting the Brand' is identified as a cornerstone of the Wales tourism strategy to 2020, which states that 'promoting and marketing a distinctive and reinforcing brand for Wales' is a key strategic priority. An independent review of Visit Wales's Public Relations programme, carried out in 2014, also recommended the need to 'position the brand as one central, single entity...'

18. Specialist Policy Advice: Specialist policy advice is not applicable and therefore no advice has been sought from policy professionals employed by the Welsh Government.

19. United Nations Convention on the Rights of the Child (UNCRC): There are no issues relating to children's rights.

20. Welsh Language Standards: This Submission raises no issues regarding the Welsh Language Standards and as such guidance has not been sought from the Welsh Language Unit.

21. Tackling Poverty Agenda: There are no direct implications relating to the Tackling Poverty Agenda. However, the purpose of this activity is to promote Wales as a destination, providing opportunities for tourism businesses and thereby safeguarding and/or creating jobs.

22. Legal: Versions of the brand marque (featuring the marque and the words Cymru/Wales) have been successfully registered with the Intellectual Property Office. This was undertaken with input from an approved legal firm and in consultation with CLS.

23. As there are no issues of regularity or propriety, nor are the proposals novel or contentious, this submission does not need prior approval by the Corporate Governance Unit (CGU). In accordance with FN 01/2015 this advice has been copied to the CGU and SB mailboxes for monitoring purposes.

Finance Requirements and Governance Implications

24. There are no new financial implications in relation to this paper. Financial clearance has been secured for the costs incurred on brand work to date and in 2016/17 for expenditure relating to the introduction of the brand and the roll-out of key materials. Other work is or can be carried out as part of approved, business-as-usual activity with Ministerial approval. Most of these materials would be replaced as part of ongoing campaign work or when depleted, as required. For some of the expenditure, VAT is recoverable, and for other elements the VAT is inclusive.

25. Strategic Budgeting has considered and cleared this paper SB0001/5. E and I Operations Team has seen the covering MA and its content - clearance number. EST/CF/16/090. The paper has also been cleared by E and I Audit and Compliance.

Research and / or Statistics

26. This paper does not contain any information needing to be cleared by Knowledge and Analytical Services.

Communications and publication

27. It is strongly recommended that the brand strategy is gradually delivered and that the focus falls on the substance of the marketing programme, not branding. The process will be tightly managed in close association with the Corporate Communications team.

Recommendation:

Cabinet is asked to consider this paper in conjunction with a detailed presentation on the proposed approach (to take place on 14 June 2016) and is invited to:

- i. **Endorse the gradual implementation of the Wales brand marketing strategy across all aspects of Wales destination marketing.**

Joined up Working

28. List all Ministers and Departments that have been consulted and have agreed to the contents of the paper.

Ministers:

First Minister

Cabinet Secretary, Economy & Infrastructure

Welsh Government:

ESNR including Food Division

EEAD

Corporate Communications

CABINET

CAB (16-17)03

**The Rt Hon Carwyn Jones AM
First Minister
June 2016**