The Welsh Government Strategy for Tourism 2013 – 2020
Framework Action Plan Year 2

PROMOTION			
Strategic Priorities • **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**			
What do we need to do to take the strategy forward?	**How Do We Do It?/ Planned Actions**	**Achievements/ Progress to Date**	**Timing (year)**
Develop a clear, compelling and credible tourism brand for Wales that is based on our real strengths and unique characteristics as a nation and is aligned to the wider Wales brand.	Deliver brand engagement communications to internal and external stakeholders.	• Extensive internal brand engagement communications activity was undertaken in 2014 and marketing-specific industry roadshows were introduced in 2014 in order to deliver brand engagement communications to external stakeholders. A content plan for the year was also shared with stakeholders in January 2015. • Regional Forum events have also focused on Marketing/Brand communications and this continues to be a standing agenda item at Regional meetings. • A programme of stakeholder communications linked to the 2016 "Year of Adventure" marketing theme is already underway.	**Ongoing**

	Tourism brand narrative to be incorporated into Visit Wales/stakeholder marketing and creative executions.	• A coherent tourism brand narrative based on the refreshed brand strategy for Wales and the 'Have you packed for Wales?' campaign theme has been incorporated into all Tourism and Marketing activity across all markets and programmes in 2014/15. This approach has delivered £238m of additional spend in the Welsh economy, supporting 5,455 jobs. • This brand narrative has informed all activity, including innovative digital content-led campaigns, such as the Autumn food campaign, which saw Welsh Government partnering with Jamie Oliver's FoodTube network and the Spring family video-blogging campaign. • The tourism brand narrative has been embedded into other Wales brand communications work – including business and Foreign Direct Investment campaigns.	**Ongoing**
Develop and implement an iconic product-led brand strategy, to form a key part of how Wales promotes itself as a fresh and exciting tourism destination.	Build agreed iconic product led approach within marketing plans.	• All tourism marketing activity – including flagship campaigns and tactical/day-to-day activity (PR, digital content) has been product-led. • The product-led approach has been tailored to appeal to different target markets - eg attractions in Wales; food in the UK/Ireland; the Wales Coast Path promoted in Germany; and luxury in the US. • The introduction of a thematic marketing year approach will provide a much sharper focus in future, starting with the "Year of Adventure" theme in 2016. • The Welsh Government also supported the development/promotion of specific products such as Golf, Cruise, and Mountain Biking.	**Ongoing**

	Implement iconic product development and marketing.	• Over 100 Wales tourism products were featured in the "Have you packed for Wales?" campaign. • Wales Business to Business marketing delivered £4.5m of additional spend - this work was sharply focused on specific products and operators. • The thematic years approach has been designed to align product development and marketing strategies – providing a focus for investment in and the promotion of iconic products. • A new Tourism & Marketing team structure has been put in place to enable greater strategic working between Marketing/Product Development.	
Grow the value of tourism from priority geographic and product markets.	Agree and deliver integrated UK/Ireland marketing plan, to reflect revised targeting priorities and new branding/product led approach.	• An integrated, multi-market, multi-channel marketing plan, based on the "Have you Packed for Wales?" theme was rolled out in Wales, across the UK and in the Republic of Ireland during 2014/15. The campaign delivered 265,098 responses against an initial target of 120,000. • Our marketing continues to drive traffic to visitwales.com – delivering a year on year increase in unique users of 33%. During the first quarter of 2015 this lift was particularly significant. Comparing Jan – March 2015 with Jan – March 2014 we saw an increase in unique users 77%. This can be attributed to the integrated digital and campaign activity we were running during the period. • As part of this approach, marketing activity targeting the Welsh consumer began in March 2014 with television, radio and online promotions. • Evaluation of marketing for the 2014 calendar year showed that customer-facing activity in the UK/Ireland generated an additional spend of £229 million of the total additional spend generated. • UK Media Relations activity generated coverage with an Advertising Value Equivalent (what it would have cost to pay	**Ongoing**

		for articles/features in magazines/papers etc) of more than £17 million during 2014/15.	
	Agree and deliver integrated Germany marketing plan.	• A focused and integrated Germany marketing plan was delivered. • The German-language website was re-launched in 2014; a German-language social media presence has been established. • A multi-channel, multi-platform marketing campaign was launched in Germany in January 2015, and will run through into the summer. The campaign was built around partnerships established with key brands with a strong presence in the German market – including Flybe, P&O Ferries, Hotels.com and DFDS Seaways. • Initial digital paid search campaigns have developed an understanding of the market, with additional digital campaigns planned for 2015 to include Google and other in-market preferential digital channels. • The German campaign also included significant business-to-business marketing, and featured a Wales presence at the prestigious ITB Berlin tourism exhibition in March 2015. • German Media Relations activity generated coverage with an Advertising Value Equivalent (what it would have cost to pay for articles/features in magazines/papers etc) of more than £7m in 2014/15.	**2 – 3**
2 – 3	Agree and deliver enhanced, integrated US marketing plan.	• North American activity in 2014/15 focused on travel trade/business to business activity and PR. • North American Media Relations activity generated coverage	**2 – 3**

		with an Advertising Value Equivalent of more than £20m. Targeted marketing campaigns were also delivered in partnership with other organisations –including joint marketing activity with London & Partners, Marketing Manchester and American Airlines. • The London & Partners joint campaign activity delivered 2.85 million global views of an exclusive online Wales film.	
	Implement agreed Golf marketing plan. Define way forward for Golf beyond 2014/15.	• The Golf Tourism Monitor 2014 showed the value of golf in 2014 was £37.9 million. Golf visitors to Wales in 2014 totalled 218,000 - an 11% increase on 2013. • The 2014 programme of golf tourism consumer activity generated 19,000 responses. Across all marketing activity, an additional 50,000 contacts were added to the golf consumer database. • In the light of the return of the Senior Open Championship to Royal Porthcawl in 2017, agreement was reached to continue the golf marketing plan until 2017/18. • The 2015 programme of golf consumer marketing activity includes - golf tournament and consumer show attendance in UK, Europe and USA; partnerships with leading UK golf publications and with europeantour.com; an electronic Customer Relationship Management programme to the golf consumer database; and publication of a new edition of the Wales Golf guide. Travel trade activity included golf tour operator familiarisation visits and joint marketing activity with best prospect golf operators in key markets.	**1 – 2**

| | | Support Dylan Thomas 100 event 2014. | • Throughout 2014 individuals and organizations across Wales and beyond embraced and reinterpreted Dylan Thomas' work in new and original ways. In particular, successful joint working with the Welsh Government's Department for Education & Skills regarding the Dylan Thomas 100 Education Programme resulted in 'Dylanwad' reaching 12,000 children and young people via creative writing and cross-art form workshops, creative writing/poetry competitions and 'Dylan Live' travelling performances.
• Hundreds of events have taken place to commemorate and explore the life, words and landscapes of the great Welsh poet while also introducing his work to new and younger audiences. There have been festivals; newly commissioned TV and radio programmes; competitions; marathon celebrity readings; commemorative coins; theatre and dance productions; lectures; exhibitions; literary tours taken on foot, by boat, and on horseback; and even a Dylan Thomas app in the shape of a Walking Tour of Greenwich Village in New York.
• The collaborative approach of joint working established with Dylan Thomas 100 is an important 'lessons learnt' for future projects and a final report documenting the Centenary activities which evaluates the outputs from Dylan Thomas 100 is planned for Dylan Thomas' birthday - 27 October 2015. | **1 – 2** |
| | | Develop action plans to support the development of priority products that meet consumer needs. | • A thematic marketing year approach provides a focus for product development needs. A "Year of Adventure" theme plan in now in place, underpinned by destination-level projects supported via the Regional Tourism Engagement Fund.
• Launched the Food Tourism Action Plan.
• Delivered the second year activity related to the faith tourism action plan. | **2 – 3** |

Increase media coverage of Wales in priority markets, to improve its reputation as an appealing destination for tourism visits.	Deliver a pro-active media relations programme that targets priority markets of UK, Ireland, Germany and US and focuses on agreed priority products and destinations.	• Coverage worth over £45m in Advertising Value Equivalent (what it would have cost to pay for articles/features in magazines/papers etc) was achieved in 2014/15 – including over £20m of coverage in North America. • Journalists from around the world were welcomed to Wales as a result of Tourism & Marketing and VisitBritain-led activities. International coverage highlights included a feature on Dylan Thomas 100 in the Washington Post; coverage of the Wales Coast Path in The New York Times; and a feature on Zip World and adventure in Wales in De Zeit.	**Ongoing**
	Implement outcome of research and analysis into the in-Wales market through a media relations/marketing programme to target in-Wales market.	• The In-Wales Market Plan was finalised in 2014 and resourced for delivery in 2014/15. • Extensive in-Wales Marketing activity undertaken in 2014 and early 2015 including - TV advertising; radio campaigns; and digital/content activity. A new Welsh language website will be launched during the summer, 2015.	**2 – 3**
	Support VisitBritain with PR requests from their international offices in wider markets.	• A joint marketing campaign with VisitBritain and London & Partners is now live. • A joint marketing campaign with VisitBritain, Marketing Manchester and American Airways is also now live.	**Ongoing**
	Develop an online media centre to support better sharing of information with media.	• This project is in development.	**2**

	Encourage sharing of relevant travel news, stories, information and events from industry and stakeholders (including for agreed priority product areas and destinations).	- A central email address has been widely publicised and is used by the industry to provide Welsh Government with product news for use in multiple channels and sharing with a global circulation of key contacts including PR agency teams and VisitBritain: productnews@wales.gsi.gov.uk. - Tourism and Marketing and VisitBritain PR teams took part in Industry Roadshows in late 2014 with the aim of encouraging the industry to share news and stories more proactively with both organisations.	**Ongoing**
Grow the sales of Wales holidays through the leisure travel trade and other key intermediaries.	Ireland, Germany, North America: Proactive approach including: travel trade exhibitions/ events; key account management and marketing campaigns (with best 40 prospects); familiarisation trips; e-news; training, and; maximising VisitBritain opportunities.	- Headline results from 2014 research show a 15% growth in volume and 23% growth in value from some of the of top 100 operators to Wales. Tourism and Marketing has also influenced at least £4.5 million of business from this group and there has been a 65% increase in volume from the 'best prospects' group of target tour operators for Wales. - A full programme of activity has been delivered including significant events with high profile Wales branding and in many cases strong Wales supplier engagement at - ITB Berlin; Destination Britain North America; United States Tour Operators Association (USTOA); and Educational Travel Community Conference (and other events – see Global section below). - Group familiarisation trips for key operators from Germany and North America were also held, along with trips for North American travel agents and operators. - An ongoing e-newsletter programme has been delivered which can be accessed through VisitBritain channels with Wales products and content.	**Ongoing**

	Rest of Europe and Australasia: Limited key account management, marketing campaigns and limited familiarisation trips with 10 best prospects, including route development opportunities.	• Some targeted activities have been undertaken in these markets, where specific opportunities have been identified for development. Dutch, Swiss, Austrian and Russian key tour operators have taken part in group familiarisation trips. Activities have also included key account management through events and direct communications.	**Ongoing**
	Global and emerging markets: Digital marketing approach, work with Welsh Government offices, leverage VisitBritain & Welsh Government offices (China, India, Japan) based on an agreed and limited approach, focusing on a small number of leading tour operators.	• A strong and successful Wales branded presence was organised with partners at World Travel Market, Best of Britain & Ireland, Explore GB and March Marketplace. • Also participated in Destination Britain APMEA (Asia Pacific, Middle East and Africa), UKinbound Convention and Japan Wales Tourism Seminar event (delivered in conjunction with Welsh Government Tokyo Office) – all resulting in strong interest and follow-ups. • The global Welsh Government integrated business-to-business website has been maintained and a quarterly global e-news programme undertaken. • A targeted approach has been delivered with best prospects including key account management and familiarisation trips for 3 Japan operators and 2 Chinese companies.	**Ongoing**
Develop the use of multiple on-line marketing channels, to effectively promote Wales in key target markets. Distribute relevant and useful content that inspires visitors to choose specific product experiences in Wales.	Develop digital/content marketing plans for key target markets, reflecting revised branding, iconic product priorities and specific market requirements.	• A comprehensive content plan for 2015 has been developed and shared with the industry. The plan reflects the current branding and market/product priorities. The "Year of Adventure" themed marketing plan for 2016 is in development and will be published on the Visit Wales website shortly. • Several innovative digital/content-led campaigns were implemented in 2014 including a highly-successful food-themed campaign, delivered in partnership with the Jamie Oliver Food Tube platform in the Autumn. • The Tourism & Marketing digital team won The Digitals award for Multi-Channel Marketing for the 2014 Spring campaign,	**2 – 3**

	and was a finalist in the integrated marketing category of The Drum Search Awards for the Autumn campaign.	

Work with partners and content network to create, share and distribute content that presents clear reasons to visit Wales and is presented in ways that make it easier to discover and access specific products, packages and offers.	• A wide variety of rich Wales content was created, shared and distributed in 2014 across a wide range of platforms with the aim of inspiring visitors to consider Wales, and driving customers to specific products. Content highlight for 2014/15 included:
	  o Celebrity film produced for the NATO Summit.
	  o 5 Jamie Oliver films produced at food locations across Wales. Ranging from Bodnant food to Cardiff Castle. Total viewing including YouTube advertising 795,384 views.
	  o 8 Family Blogger films produced with influential family travel bloggers from across the UK, featuring Bear Grylls Adventure, Conwy Castle, Dr Who Experience, Folly Farm and Llancaiach Fawr. Total viewing including YouTube advertising of 1,882,821 views.
	  o Over 150 new web articles
	
	• Visit Wales has a total following of circa 600,000 across social media platforms.
		Ongoing

	Implement a multi-channel approach to the ongoing distribution of digital content for priority markets including: the use of search engine marketing; social media; online PR and email.	• Multiple online channels are used to effectively promote Wales in key target markets. Central to this has been the distribution of relevant and useful content that inspires visitors and helps them choose specific experiences in Wales.
		• Specifically this involved:
		  o Maintaining and developing the visitwales.com platform;
		  o Hosting that platform and the associated development environment; and
		  o Creating digital content to place on our own digital media and distribute more widely via online PR and paid media.
			Ongoing

	Re-launch websites for US and German markets providing tailored content and incorporating new iconic product led and branding approaches. Re- launch Welsh language website in line with needs assessment.	• The German language website was launched in December 2014. • A new version of the US site is being developed aimed at tailoring visitwales.com content for that market.	**2**
	Support content development and digital marketing requirements for any agreed separate marketing for priority product markets.	• A detailed content plan for 2015, with a focus on the UK/Ireland Market - but including high-level plans for other markets - was shared with the industry. • A German content lead has now been appointed to deliver rich German content for this Market. • Content for the North American market has been delivered in partnership with Visit Britain and London & Partners. • A new Product Database search to support the North American market is being developed to underpin activity.	**Ongoing**

	Support the industry in realising the opportunities for digital marketing.	• Industry roadshow events were held late in 2014 and focused on digital development/opportunities. A content plan was shared early in 2015, with the aim of providing stakeholders with a clearer indication of opportunities to collaborate. Further digital leadership for the industry is planned for 2015. • The EU Digital Tourism Framework Programme has now closed and an evaluation report has been published.	**1 – 3**
Provide VisitBritain with relevant content and products for Wales, to provide distinctive reasons to visit Wales in our priority markets, and other key markets where VW does not have resource to deliver directly.	Establish stronger working links with VisitBritain at all levels. Explore potential to recruit VisitBritain partnership officer and/or to embed member of staff in VisitBritain.	• A secondee from Welsh Government now works within VisitBritain to support closer co-operation, provided strategic leadership on projects, ensure a joined-up approach, maximise relevant opportunities for Wales and provide direct assistance with content for campaigns and initiatives as required. • Tourism and Marketing delivery teams worked in close collaboration with operational teams at VisitBritain to feature Wales in all activity – Wales featured prominently as part of the Countryside Campaign launch in Manhattan for example.	**Ongoing**
	Influence VisitBritain strategies for individual markets.	• In the process of discussing high-level Key Performance Indicators for VisitBritain in 2015/16 with VisitBritain and the Department for Culture, Media and Sport. • In 2014 collaborated closely to influence VisitBritain's strategies in Germany and the US as well as their strategies for a thematic Countryside Campaign. • Also influencing VisitBritain's activities across a wide range of other Markets, especially in terms of PR and Travel Trade work. • Currently influencing VisitBritain's market-specific and thematic campaign plans for 2015/16: Countryside, Culture and Luxury.	**Ongoing**

	Develop iconic product experiences to feed into VisitBritain marketing campaigns and programmes.	• Feeding information and content into all VisitBritain activity via a Welsh Government secondee in VisitBritain, and ongoing relations between operational teams.	**1 – 3**
Grow the meetings, conferences, events and exhibitions market, through investing in new facilities and new marketing approaches.	Implement digital marketing to existing Visit Wales business tourism database, help event organisers, and support tactical opportunities offered by regional convention bureaux e.g. familiarisation trips.	• Integrated web content (travel trade/cruise/golf/business events) provides information and contacts for the travel trade and meetings/events/conference organisers. Dedicated business events content - including a venue search – is now available on www.businessevents.visitwales.com. A bi-annual business events e-newsletter has also been distributed. • A high profile campaign was delivered in 2014 utilising the NATO Wales Summit to showcase Wales as a business events destination. • A Wales branded stand presence was supported to provide an effective platform for Wales suppliers at The Meetings Show 2015 at Olympia.	**Ongoing**
	Evaluate market opportunity in the light of expected product developments, Economy, Science and Transport sector strategy and Major Events strategy and prepare plan for Year 2 activity.	• Monitoring progress on discussions about a new convention centre. A Scoping Study is planned to research the current/future potential market for business events to Wales and develop a new Business Tourism Strategy for Wales, taking account of potential planned developments. • The development of a conference centre and arena will further develop the conference and events product base in Wales and further increase Wales's ability to host events.	**1 – 2**
Encourage previous visitors, and other key groups with connections to Wales, to become strong advocates for Wales and to make return visits.	Direct Marketing to existing Visit Wales enquirers to continue as part of market plans.	• Almost 4 million communications were sent out to previous campaign enquirers in target markets. 70% of these messages were e-mail communications and 30% were printed direct mail pieces. • During both the Autumn 2014 and Spring 2015 campaigns new brand partnerships were developed to carry the Wales	**Ongoing**

		message to already-engaged audiences. Working with a range of partners including BBC Good Food, Blacks (the outdoor equipment store) and Jamie Oliver. Direct marketing to partner contacts generated over 40,000 new responses. • Communications with existing contacts using Facebook and Twitter are ongoing. Between April 2014 and March 2015, the Visit Wales Facebook community grew by 19%. • During the same period the number of Visit Wales Twitter followers increased by 135%, from 39,817 to 93,564.	

Realise the tourism opportunities arising from the wider work of the Welsh Government, to promote Wales across international markets, especially where they align with the tourism market priorities.	Coordinate marketing activity and plans to identify opportunities for coordinating marketing and other activity across Welsh Government departments.
	
	Visit Wales is responding to additional marketing requests and tactical marketing activities.
		• Support was provided for the following additional marketing opportunities:
		  o Coastal destinations following the floods of early 2014 – impacting the market into the summer 2014;
		  o NATO Wales Summit 2014;
		  o Advertising around Wales Rally GB and other events;
		  o Renewal of Swansea City Sponsorship agreement; and
		  o Support for Cardiff Airport routes.
			Ongoing

	Raising profile of Wales via broadcast programming and film exposure.	• Dylan Thomas 100 provided a hook for broadcast and film exposure for Wales in a range of Markets. • Maximised the global distribution of the TV programme "Hinterland" for PR coverage across a range of markets. Further Hinterland activity is planned around the launch of Series 2 in 2015. • Welsh Government continues to support television/film productions made in Wales with several flagship broadcasts in the pipeline and planned for transmission in 2015.	**1 – 3**

Increase the volume and value of cruise visits to Wales.	Work in partnership to: • Enhance the branding of Wales as a cruise destination • Promote the cruise ports through targeted sales missions • Encourage investment in port facilities, where necessary, to provide efficient berthing and a distinctive welcome to Wales • Encourage the development of shore based itineraries for cruise excursions that are attractively packaged and provide a distinctive and differentiating Welsh	• In 2015 46 cruise ships are scheduled to visit Wales – a 94% increase year on year and a 155% increase overall from 1st Jan 2013. • It is estimated that there will be 22,500 passengers – an increase of 14% year on year with an economic impact of £2.9 million. • £30,000 was invested in Holyhead with IOACC for cruise welcome activities. • A new stand was designed for Seatrade Europe to raise Wales brand awareness on a global basis.	**Ongoing**
	Implement agreed Cruise marketing plan.	• A familiarisation visit for cruise executives was arranged. • A familiarisation visit was hosted for the Vice President of Seabourn Cruises who visited all ports on 30th May 2015. • There is 1 vessel booked for Milford Haven in 2016 and 2 vessels booked for 2017 in Fishguard and Holyhead. • A familiarisation visit by Intercruises was hosted to showcase industrial heritage in Rhondda Cynon Taff and Torfaen. • In February, itinerary planning workshops were held PAN Wales with local attractions and providers. • A recruitment day took place in Coleg Menai in Bangor in collaboration with Viking Recruitment for Seabourn cruise Line.	**Ongoing**

Grow the value of overseas visitors to Wales arriving via near airports.	Work in partnership to raise awareness of Wales, and provide new reasons to visit both within the airports (Cardiff, Manchester, Liverpool John Lennon, Birmingham and Bristol) and target source markets.	• Welsh Government has undertaken a series of tactical campaigns in wider international markets including activity to capitalise on new route development achieved by Cardiff Wales Airport.	**2 – 3**

PRODUCT DEVELOPMENT

Strategic Priorities
- **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**

What do we need to do to take the strategy forward?	How do we do it? /Planned Actions	Achievements/ Progress to Date	Timing (year)
Improve the quality of the visitor experience across the industry including serviced and self catering accommodation, caravan and camping, attractions and activities.	Increase the overall level of funding available to stimulate investment in tourism.	From April 1 to 31 March 2015 the Tourism Investment Support Scheme (TISS) has: • Created and safeguarded a total of 311 jobs (against a target of 200 (for the year). • Induced £13.9m of investment against an £8m annual target, including strategic investments additional to TISS at Surf Snowdonia, Zipworld (Llecwedd), Kinmel Manor Hotel (Abergele), and Dylans (Criccieth). • Tourism and Marketing has been leading two strategic European projects under the Environment for Growth programme totalling over £37 million since 2010 developing 7 iconic Centres of Excellence in Wales as well as coastal improvements along our beaches. • The Coastal tourism project was extended to include additional developments at Saundersfoot Harbour. Both the coastal and sustainable tourism projects have now been completed.	**Ongoing**

		- Ongoing discussion with partners and Welsh European Funding Office (WEFO) in developing a tourism infrastructure project. - The tourism sector has also benefited from access to the Wales Economic Growth Fund (WEGF) in 2014 which is a wider jobs/growth fund administered via the Welsh Government's Economy, Science and Transport Department, examples of successful tourism projects include - the Cliff hotel in Gwbert and the Mansion House in Llansteffan. - A Coastal Communities Fund (CCF) funded by the UK government has been made available across the UK. Tourism and Marketing officials worked closely with the CCF team to maximise the benefits for Wales. In year three of the programme which ran this year £4.6m was awarded to projects that improved the visitor experience in Wales. - Projects included £300,000 to make significant improvements to Aberystwyth harbour and marina; and Gwynedd County Council is set to receive £280,205 for a two year project to develop 13 identified linear or circular routes which link communities to the Wales Coast Path - maximising the economic benefit of the path in Gwynedd.	**Ongoing**

		• 25 projects were delivered via the new Welsh Government Regional Tourism Engagement Fund in 2014/15 totalling £426k. Projects were led by Destination Partnerships and included activities such as - marketing, destination development, skills activities, database management, engagement and partnership support.	**Ongoing**

		• £1m has been agreed for the Regional Tourism Engagement Fund for 2015/16. 12 projects were delivered in 2014/2015 via the Partnership for Growth Scheme Fund including:
		  o Gower Sustainable Beach development.
		  o Sustainable Charter for Coastal Events in Protected Areas: Pilot Pembrokeshire.
		  o Offa's Dyke development.
		  o Pontcysyllte World Heritage Site.
		  o Sustrans – Celtic Tales.
			Ongoing

	Support the industry to improve the overall product offer through a range of services including: Quality Assurance and business advice and support.	• A revised Quality Scheme with a greater emphasis on quality scoring was introduced for Tourist Attractions. • A new approach to accreditation for outdoor activity providers was introduced in January 2015 in order to provide visitors with a way of selecting activity providers based on their ability to deliver safe and effective industry practice. • On-going biennial grading assessments undertaken across all accommodation sectors including signposting businesses to further advice and support where appropriate • 72% of graded businesses have now achieved either 4 or 5 stars.	**Ongoing**

	Support the industry in improving the overall accessibility of the tourism product in Wales for all including: families, older people, and those with disabilities.	• On-going advice and support is being provided to tourism businesses in terms of improving their accessibility. • A number of key infrastructure improvements have also been developed via the EU Environment for Growth Coastal and Green Sea programmes, improving beach access and visitor access along the coastline and visitor facilities.	**Ongoing**
Stimulate capital investment in "best in class" products which exceed customer expectations at all product levels, and which have the capacity to extend the season, in particular:		• Capital support of up to £500,000 is available for eligible tourism capital investment projects through the Tourism Infrastructure Support Scheme (TISS). Larger scale projects may also be supported from other Welsh Government resources on a case by case basis.	**Ongoing**
• more luxury and branded hotels	Identify key development sites across Wales. Develop relationships with branded products and potential inward investors.	• Discussions are progressing with a number of potential inward investment proposals.	**1 – 3** **2 – 3**
• more well-being facilities such as spas and wellness centres	Improve industry awareness of spa and well- being design and best practice. Provide enhanced intervention rate for capital support towards spa/wellness facilities.	• The Tourism Investment Support Scheme is able to support proposed spa developments across Wales. This includes the recent development of a spa at Kinmel Manor, Abergele, and ongoing negotiations with other providers.	**2** **2**

• more heritage hotels that utilise historic and distinctive buildings	Identify key development sites across Wales. Research and identify additional funding sources to support investment.	• Currently identifying and researching development site opportunities in Wales, for example the development at Harlech Castle, which includes a new bridge, apartments, a visitor centre, tearooms and audio visual experience. This project is part of the £19m Heritage Tourism Project, part-funded by the ERDF.	**2**

• more all year round visitor attractions, activities and cultural/heritage experiences that can increase the appeal and reputation of Wales	Deliver industry workshop/learning journey to:
	  • Explore future market needs
	  • Share best practice
	  • Understand innovative opportunities: e.g. integrated ticketing, state of the art interpretation – digital and first person, all weather facilities, realise potential as film/TV locations
	  • Explore funding solutions.
	
	Provide enhanced intervention rate for capital support towards all weather facilities.
		• Working with the industry to promote Wales as a high quality destination, helping to extend the tourist season, improving infrastructure and supporting investment in training to support quality products and enhance the visitor experience.
		• Innovative development at Zipworld and Surf Snowdonia will be followed by other UK and world first products as the move to change reputation gathers pace.
		• Discussions are taking place with Cadw and the National Trust around sharing the benefits of each organisation's membership schemes. A number of proposals are being explored including reciprocal arrangements for allowing each organisation's members into the other's sites at free or discounted rates.
		• Operations which are less dependent on variations in weather are taken account of positively within grant appraisal processes.
			2

• More innovative, unusual and distinctive products that can enhance positive associations with Wales.	Provide 'tiger team' support for innovative projects with enhanced intervention rate for capital support.	• A 'Tiger Team' has been established and can be called upon to respond to key strategic development proposals.	**1 – 3**

Increase participation in the national quality assurance schemes, to help raise quality standards and to provide customer assurance.	Introduce and implement changes to improve efficiency and increase scheme numbers.	• 5,736 businesses currently participate in the Quality Scheme, a figure which is on par with last year. • A report to conclude Phase 1 of a review of the Visitor Accommodation Quality Assurance Schemes was produced and its findings and recommendations are being considered by Welsh Government and other National Tourism organisations. This will include assessing what businesses, including those not currently part of the scheme, expect and need from an independent graded tourist accommodation quality scheme; what businesses expect from National Tourism Organisations and what barriers are there to participation in such schemes.	**2**
Increase Wales' reputation as a high quality food destination.	Develop a food tourism action plan to provide a coordinated programme of activity to: • Improve the overall quality and range of the food offer • Raise awareness of the quality of the food offer to visitors • Encourage the use of locally sourced produce.	• The Food Tourism Action Plan was launched on 30 April. It can be downloaded from www.gov.wales • Work is continuing to deliver against the actions in the plan and discussions with stakeholders are taking place regarding partnership working on food tourism - for example, potentially working with the Further Education sector to promote use of Welsh/local produce to catering and hospitality students. • There is a pilot project to provide support for businesses to develop their food tourism offer. • Welsh government has supported a number of new high quality food establishments via Tourism Investment Support Scheme including - Dylan's Restaurant, Shel Restaurant and Sea Shanty Restaurant.	**Ongoing**
Increase the number, range and quality of Major and growth potential Events.	Review and refresh the Major Events strategy – publish strategic action plan.	• A review of the major events strategy was completed in 2012/13 and new assessment criteria has been published. • A review is now underway on strategic priorities for 2019/20 and beyond.	**Ongoing**

	Implement Major Events strategy/action plan.	• In 2014/15 39 sporting and cultural events were supported. Highlights included the Senior Open Championship; the IPC European Athletics Championships; Machynlleth Comedy Festival; the Hay Festival and Beyond the Border International Storytelling Festival; and the UEFA Super Cup Final. • The full programme of supported events in 2014/15 delivered the following results: o 350,000+ UK and international visitors; o £62 million direct economic impact; and o 1,400 FTE jobs supported. • The 2015/16 programme is underway. To date 34 events have been confirmed including: o Machynlleth Comedy Festival; o Hay Festival; o UCI Velothon Wales; o Extreme Sailing Series; o Ashes Test; o Festival No6; o Rugby World Cup; and o Conwy Feast Rugby World Cup.	**Ongoing**
	Provide strategic guidance and support for Major Events industry.	• A new major events website is currently in development. When completed, this will act as online resource for the events industry.	**Ongoing**
	Work with partners to develop a comprehensive calendar of events in Wales.	• A calendar of events is available via the following link: http://www.visitwales.com/things-to-do/whats-on	**Ongoing**
Enable the visitor to identify and book all elements of their trip easily.	Support the iconic product-led marketing approach through development support for iconic products.	• Continue to support innovative investment proposals which support the tourism strategy product led approach.	**1 – 3**

	Encourage the industry to work collaboratively to highlight what is available to the visitor.	• Supporting the provision of high quality information to visitors through the Tourist Information Network Group (TING) and helping them establish themselves as a Social Enterprise non profit making co-operative. • Working with Destination Partnerships and stakeholders around Wales to support the development of visitor information and interpretation on and offsite. Projects for visitor transport interpretation in Swansea, Pembrokeshire, Offa Dyke, World Heritage Sites in Blaenavon and Pontcysyllte.	**1 – 3**
Increase the usage of technology, to aid business efficiency, marketing reach and enhance the visitor experience.	Demonstrating best practice and encouraging the uptake of digital solutions	• The diagnostic element of the EU Digital Tourism Business Framework (DTBF) was developed to address concerns regarding ICT in small tourism businesses. This programme has now finished and an evaluation report has been published. The European Commission's Directorate-General for Regional and Urban Policy has selected the project as a RegioStars 2015 finalist for Innovative projects in the SMART GROWTH category: Unleashing SME growth potential for a digital economy. • A legacy ICT self assessment tool has been developed for tourism businesses http://business.wales.gov.uk/ict-tool.	**Ongoing**
Encourage the development of an International Conference Centre/Arena within the Capital Region.	Provide potential developers with research intelligence, land and property advice and appropriate funding support to stimulate investment.	• The Celtic Manor Resort has received outline planning permission for a new International Convention Centre for Wales; subject to full planning, the opening is scheduled for summer 2018.	**Ongoing**

PEOPLE			

Strategic Priorities
- 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 career choice

What do we need to do to take the strategy forward?	How do we do it? /Planned Actions	Achievements/ Progress to Date	Timing (year)
Improve overall skill levels, to meet the current and future needs of the tourism and hospitality sector.	Introduce a national skills framework outlining industry needs, skills gaps and skills shortages and actions required to meet shortfalls.	• The Welsh Government's Department for Education and Skills has primary responsibility on the national skills framework. • Tourism and Marketing will work with the Regional Skills Partnerships to review plans for employment and skills in the tourism sector. • The industry will be consulted (via the Regional Forums) on how Welsh Government can work in partnership with People 1st and other bodies to address the identified skills needs.	2
	Where appropriate, develop appropriate solutions (qualifications, flexible learning and apprenticeships) that address specific skills gaps and/or skills shortages, and help improve the visitor welcome and experience.	• Partnership working with the Department for Education and Skills (DfES) will help to ensure a strategic approach, for example businesses are referred to the DfES Skills Gateway for advice and support. • Specific solutions to identifying and addressing skills gaps are being considered as well as looking at how businesses can be supported with flexible online learning.	1 – 3

	Creation of a Network of hotel schools/centres of excellence, comprising organisations that offer excellent training and development opportunities and aspire to international accreditation where appropriate.	• This is a Department for Education and Skills led action and initial discussions are underway regarding the potential development of a hospitality centre of excellence. Work to explore with partners potential opportunities for a network of hospitality schools is continuing.	**1 – 3**
	Support the development and piloting of a new Outdoor Programmes Apprenticeship, to ensure it fully reflects the needs of the outdoor sector in Wales.	• Welsh Government was involved in the development of a new Level 3 Outdoor Programmes apprenticeship through partnership work with the Wales Activity Tourism Organisation (WATO). • A Level 4 apprenticeship is now under development.	**1 – 3**
Improve perceptions of the career opportunities that exist within the tourism and hospitality sector.	Develop a plan to support and co-ordinate the activities of organisations across Wales, that can promote and/or provide information on: • the fun and flexible job roles and career progression opportunities available • work experience opportunities • the qualifications and learning programmes that industry considers fit for purpose • the learning providers that can support individuals in their career progression • utilises the skills and experience of industry professionals • develop the Ambassador programme approach.	• A plan has been developed to improve perceptions of careers in tourism and hospitality. Discussions with People 1st, and other partners including the British Hospitality Association on how to achieve this are ongoing. • A small pilot took place during Tourism Week 2015 where hospitality businesses invited school students in to experience the variety of career opportunities available. • There was a tourism stand at Skills Cymru 2014 and another is planned for 2015.	**2**

Support the delivery of appropriate customer service training within the industry.	Prepare a plan to: • increase the awareness of the importance of customer service • recognise excellence in the delivery of customer service • increase the number of customer facing staff in the Wales tourism industry that have been trained in a recognised customer service programme • share best practice.	• The People 1st skills gaps report, which has identified the need for Customer Service skills in the sector, will be reviewed and opportunities to work with the industry to address this need will be explored.	**2**

PROFITABLE PERFORMANCE

Strategic Priorities
- 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

What do we need to do to take the strategy forward?	How do we do it? /Planned Actions	Achievements/ Progress to Date	Timing (year)
Encourage Welsh hospitality businesses to source more local food, goods and services.	Develop online industry information/toolkit to promote the benefits of using locally sourced goods and services.	• Following the launch of the Food and Drink Action Plan, a toolkit has been produced through a Business Support Pilot Project and will be available on the Destination Management Wales website during 2015.	**2**
	Support initiatives that strengthen links between hospitality businesses and local suppliers of goods and services.	• Three successful "Meet the Producer" events have taken place across Wales with the Tourism and Hospitality sector across Wales - helping farmers, producers, suppliers, restaurateurs and hoteliers to engage with each other and the tourism industry to improve food information available to visitors. • All events were well attended by tourism and hospitality businesses and Welsh food and drink producers and we will evaluate the sales/new contracts resulting from the events.	**Ongoing**

Encourage higher levels of profitability, yield, competitiveness, innovation and entrepreneurship in the industry.	Develop on and offline industry support, toolkits, awards, events and tailored advice to; demonstrate best practice; provide performance benchmarking information, and promote innovation.	• An on line ICT self diagnostic toolkit has been developed and is accessible via the Business Wales website.The Tourism Awards showcased best practise across the industry and award winners led sessions at a number of Welsh Government regional tourism roadshows to share their knowledge and experience.	**1 – 2** **2**
	Introduce industry mentoring service, using 'best in class' exemplars. Provide tailored business advice to support higher levels of profitability and competitiveness.		
	Examine the feasibility of introducing a Fund for Innovation in Tourism to provide flexible, time- limited support for business innovation.	• A skills plan is currently being developed which will be taken forward over the life of the tourism strategy.	**2 – 3**
	Promote a business clusters approach, to encourage joint working and business benefits.	• Businesses signposted to the Business Wales web-site. Work is continuing.	**Ongoing**

Encourage participation by businesses in schemes/ activities, which deliver enhanced environmental and business benefits.	Provide business advice to encourage better waste/water management, energy efficiency and sustainable energy use.	- Currently reviewing all partnership structures to strengthen private sector representation and refocus efforts in line with strategic tourism priorities. - The Food Tourism Action Plan includes a link to advice from the Waste Charity – "Waste and Resource Action Programme" (WRAP). - The Sustainable Tourism Toolkit hosted on the Destination Management Wales website has been designed to assist businesses in improving their sustainability. It will also help many to become low carbon businesses - reducing overheads and enhancing the tourism product along the way.	**Ongoing**
		- Welsh Government is working with WRAP Cymru to deliver a range of support packages for the tourism industry to help minimize costs and manage their waste more sustainability. - Welsh Government is also continuing to work jointly with the Environment and Sustainable Development Department in developing and providing tourism businesses with advice and support in becoming more sustainable.	**Ongoing**

Highlight the inward investment opportunities Wales offers.	Tourism sector to be included in the Welsh Government inward investment marketing offer. Provide potential developers with research and intelligence and appropriate funding to stimulate investment.	• Last year the tourism sector was included within a Foreign Direct Investment campaign for the first time. To improve the tourism experience/offer. • The tourism sector will continue to be included within the wider business "Just Ask Wales" campaign and will target specific industry related conferences and media for a more targeted approach.	**Ongoing**

| Increase the profile of the visitor economy and the breadth of parties involved at a community, regional and national level. | Deliver consistent messages on the role Tourism plays in the economy.

Ensure a joined up approach to ensure consistency between initiatives.

Facilitate the opportunity for local networking. | Tourism makes a significant contribution to the Welsh economy both directly and indirectly in terms of jobs and expenditure generated. Welsh Government Priority Sector statistics (2012) set Tourism's contribution at £2.354 billion, which equates to 5.4% of Gross Value Added for the Welsh Economy. Welsh Government continues to support the development of destination partnerships and delivery of Destination Management plans throughout Wales. Following the discontinuation of support for the four Regional Tourism Partnerships the new regional engagement team established within Welsh Government has a key role to support destination partnerships and provide funding to deliver destination management plans. In 2014 four Regional Fora were established to facilitate direct communication with the industry in Wales and to help deliver the tourism strategy at the regional level. Dedicated revenue funding to support regional activities was launched in October 2014 awarding over £426,000 to 25 projects. | **Ongoing** |

| Improve the quality and reliability of market research information that measures consumer trends, attitudes and behaviour. | Deliver an integrated research programme that provides regular and timely information and communication on: benchmarking tourism performance; market trends and drivers of demand; supply led drivers of demand, and visitor satisfaction. | • The following research projects have been undertaken successfully over the past year:
  o Great Britain Tourism Survey
  o Great Britain Day Visits Survey
  o International Passenger Survey
  o UK Occupancy Survey
  o Accommodation Occupancy Survey
  o Survey of Visitor Attractions
  o Survey of Tourism Businesses
  o Golf Tourism Monitor
  o Brand tracking/Evaluation project
  o Accommodation Bedstock Surveys

• A Task and Finish group review and report of Tourism research and Insights was endorsed by the Tourism Advisory Board in January 2015.
• The report underlined the value of the current research programme, and regards the Research and Insights function as a central, strategic role, informing Tourism Marketing and Development activity.
• The report acknowledged that two-thirds of the current research programme is 'statutory' in nature (including three Official Statistics outputs monthly and reporting to Eurostat.
• The report also recommended the development of an enhanced programme of industry-facing research; a series of interpretive reports based on the main surveys; and partnership with industry and academic partners on insights work. | **Ongoing** |

Improve the reputation of Wales as a destination that provides a diversity of distinctive experiences including: heritage; music; arts; food; contemporary culture; ancestry, and events.	Deliver programme of activity outlined within the action plan.	- New Faith Tourism content is now available on the Visit Wales website and more updates planned for 2015: http://www.visitwales.com/explore/faith-tourism - Working to develop training materials, case studies and guidance to encourage more chapels to open to visitors; and also funding improvements to the Cistercian Way website. - Key projects funded this year include: - Cistercian way: website redesign and route development pilot work in South East Wales (route surveys, mapping and downloadable leaflets) - Chapel tourism toolkit: case studies, toolkit, and 4 workshops to be held to trial the toolkit with congregations in chapels that are not open to visitors. - The four main heritage bodies in met January 2014 (Cadw, National Museum of Wales, National Library and National trust) to explore opportunities for joint working on the heritage offer. - A funding contribution of £20,000 has been agreed to support revenue funded product development and a cross promotional campaign to promote Wales' key heritage attractions to visitors during Summer 2015.	**2 – 3**

		o Marketing managers of the four organisations have met and agreed to work together on a joint promotional campaign for summer 2015. The group also agreed to work more closely to coordinate events. o In addition to the strong portfolio of international sporting events secured for Wales, the Major Events Unit supported a diverse range of arts and cultural events such as Artes Mundi; Iris Prize; Hay Festival; Machynlleth Comedy Festival; and Festival No.6.	
Maximise the tourism potential of the Wales coast.	Deliver programme of activity outlined within the Coastal Tourism Action Plan.	• As part of the EU Environment for Growth projects, Welsh Government has capitalised on the promotion of the coast in Wales via a marketing campaign which included Wales Coast Path and recent new product investment. • Welsh Government is working both internally and with external stakeholders to help shape policy, priorities, development and investment for the coast; including marine planning, coastal management and the UK Government's Coastal Communities Fund - which provides investment support for the coast with tourism a key component for funding. • Welsh Government has developed a number of collaborative activities working with Natural Resources Wales on programmes in order to improve both the	**2 – 3**

		quality of the coastal waters and management around the coast.
		• Following the formation of the four tourism Regional Fora, Welsh Government undertook a review of the existing external partnership structures with a view to rationalising and prioritising the resources and more closely aligning regional activities with the tourism strategy.
		• As part of this review, a number of bodies/partnerships will see their role incorporated into the Fora.
		• The Cruise Wales partnership will continue to be a standalone group which feeds into the Fora and Tourism Advisory Board as well as a newly merged Joint Heritage group which will replace the Cultural and Faith partnerships.
		• All other group priorities will now be addressed via the new tourism regional engagement structure.

PLACE BUILDING			
Strategic Priorities • 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 do we need to do to take the strategy forward?	**How do we do it? /Planned Actions**	**Achievements/ Progress to Date**	**Timing (year)**
Support the development of distinctive places, destinations and environments which are meaningful to a visitor and are attractive, interesting and fun.	Develop and implement a destination and product management approach across Wales, learning from best practice examples in the UK and Overseas. To encourage all destinations in Wales to have effective destination partnerships in place. Each destination to have a management plan by March 2014	• All 26 key destinations now have Destination management Plans in place and are progressing with their implementation. • As part of this development, Tourism & Marketing has provided key presentations to Destination Management partnerships to help shape and inform their action plan development and implementation. • A new refreshed Destination Management Wales website www.dmwales.com has been launched with more detailed advice and information for partners in delivering destination plans. A series of product support tool maps have also been developed to further assist partners. • Tourism & Marketing continues to support Destination Partnership development and Destination Management plan delivery. The Regional Fora will oversee regional delivery of the tourism strategy and help co-ordinate the destination partnerships at a regional level. • The new Welsh Government Regional Tourism Engagement Fund will support the partnerships further in the delivery of their plans and encourage regional collaboration.	**Ongoing**

	Support the delivery of quality tourist information, and promote the uptake of digital solutions where they add value.	• The new Visit Wales website encourages the sharing of content via digital means to generate the rich quality of information required to inspire customers to visit Wales. • The Digital Tourism Business programme has developed the "Sharewales" website to inform the sector on trends and best practice. http://www.sharewales.com/	**Ongoing**
	Undertake regular visitor surveys to measure visitor satisfaction, product strengths and weaknesses and value for money.	• The Wales Visitor Survey is undertaken every two or three years. The 2013 survey continued into the off peak period between October 2013 - March 2014, in order to make comparisons with levels of visitor satisfaction in peak season. • Following the recommendations of a Research Task and Finish Group, the next survey of this type is scheduled for 2016.	**Ongoing**
	Investigate opportunities to use the social enterprise model, to support partnership working at the destination level.	• The Tourism Information Network Group (TING) has now been established as a Social Enterprise Company Limited by Guarantee. • The group has produced a business plan and meets quarterly to discuss tourism information.	**2**
Encourage more businesses and destinations to deliver a distinctive sense of place to visitors that utilise the best of our culture, heritage and language.	Provide business advice and case studies to support higher levels of Sense of Place and ways to bring the place to life.	• Advice and guidance is now available via the "Sense of Place" section of the DMWales website. http://business.wales.gov.uk/dmwales/sense-place • It offers: o Access to copyright free articles that relate to the "Sense of Place" of each region that	**Ongoing**

		businesses can use in their own marketing material or bedroom browsers; o A free online "Sense of Place" training programme; and o Signposting to other related training including Ambassador training courses	
Improve the experience of car /coach/motorcycle based visitors to Wales.	Investigate new digital solutions to enhance the quality of tourist information and to improve traffic management, particularly at peak periods.	• The grant element of the Digital Tourism Business programme assisted the development of over 40 new digital "products" aimed at improving the visitor experience.	**2**
	Improve the coach-based infrastructure at key destinations.	• Welsh Government continues to work with local authorities and other strategic partners to identify areas that require coach infrastructure improvements. • Welsh Government supported Wrexham County Council with £72,000 to develop the coach parking Pontcysyllte. Aqueduct.	**Ongoing**

Increase the use of public transport for journeys to and within Wales.	Work with transport operators, destinations, attractions and accommodation providers to:
	• enhance the range and relevance of information on public transport;
	• promote higher levels of public transport use;
	• develop and promote 'real time' timetable information, integrated ticketing and daily/ weekly touring passes.
		• Through the Welsh Government's Sustainable Transport and Tourism Working Group a review of existing external partnership structures was carried out with a view to rationalising and prioritising the resources and more closely aligning with the strategy.
		• Transport will be a key area for the new regional teams and Fora to review and progress.
		• At a National level, Welsh Government is continuing to work through its Transport department with key stakeholders such as - Arriva Trains Wales; First Great Western; and Scenic Wales/transport community groups on regional and national projects.
		• Recently funded projects include:
		  o developing tailored traffic free itineraries on the Heart of Wales Line and Cambrian line;
		  o business and transport engagement in Mid Wales and Brecon Beacons;
		  o public transport series linked to annual events such as Hay Festival, Laugharne and Swansea cultural events;
		  o wildlife and train itineraries; and
		  o improved website connectivity and regional press and PR.
			Ongoing

Improve the reputation of, highlight, and promote Wales as a sustainable tourism destination.	Deliver programme of activity outlined within the action plan.	• Through the Sustainable Tourism Forum significant progress has been made in terms of collaborative joint working and project development between stakeholders and private sector.	**2 – 3**

| | | In line with the review of the long standing partnerships, sustainable tourism development will be overseen by the four Regional Fora working directly with the local destination partnerships. In 2014/15 a number of sustainable projects were approved via the Partnership for Growth fund and the Regional Tourism Engagement Fund to further improve the sustainable tourism agenda including: A Coasteering Concordat working with National Trust; Keep Wales Tidy Coastal Tourism App; Dyfi Biosphere Tourism Development; Offa's Dyke development; North Wales Protected Landscapes; Pontcysyllte WHS ; Brecon Beacons Sustainable Tourism – Waterfalls; Sustrans – Celtic Tales – Sustainable Transport; and North Wales Wildlife Trust Promotion. | |

Continue to develop the visitor potential of the Cardiff City region.	Work in partnership to deliver and promote the Cardiff offer.	• Welsh Government commissioned a feasibility study on Cardiff's Cultural Tourism offer to look at how it can be better packaged and promoted to attract more visitors to the city.
		• The report's recommendations have been approved and the following activities are currently underway:
		  o Roald Dahl trail scoping study;
		  o Digital Training for cultural organisations;
		  o Development of cultural itineraries;and
		  o A concierge training programme.
		• A small steering group has been set up for the preparation of the study. This group will be facilitated by Cardiff council.
			Ongoing

Support the extension of the incoming route network, passenger numbers and attractiveness of Cardiff Airport, and maximise the potential of the ports and near airports in England.	Support the strategy for attracting more incoming flights and passenger numbers, to realise the full economic impact of the airport.	• Promotional campaign concluded at the end of April. • Welsh Government has undertaken a series of tactical campaigns in wider international markets including activity to capitalise on new route development achieved by Cardiff Wales Airport.	**1 – 3**

OVERALL PERFORMANCE SUMMARY 2014

GB Tourism Survey 2014 - Year-end results

Published year-end results for Wales from the 2014 GB Tourism Survey (the Official Statistics survey which covers overnight visits by GB residents to all destinations in GB) were the best since the survey was set up in its present form. This is against a backdrop of decreases in GB as a whole.

- In 2014 the total volume of trips to Wales reached a record 10 million (up 0.7% from 2013, itself an excellent year) with related expenditure at £1.735 billion (up 2.3%).

- The Wales figures are even more significant in that the total volume of domestic trips within GB fell by 7% in 2014 and related expenditure was 2.6% down.

- Holiday/leisure trips made up 64% of all overnight trips to Wales during 2014. The volume of holiday trips increased by 4.4 % and expenditure on these holiday trips increased by 7.7% compared with 2013. Wales' market share of domestic holiday trips in GB rose to 12% cent in 2014 compared with 10.7% in 2013 and 10.3% in 2012.

International Tourism Survey 2014 – Year-end results

Published end-year results for Wales from the International Passenger Survey show visitor numbers were up and related spend up.

- In 2014 Wales welcomed 933,000 visits from overseas, 7.3% up on 2013.

- This represents around 2.7% of all overseas visits to the UK.

- The Wales visits generated spend of £368m in 2014, an increase of 4.5% on 2013.

- Of the 933,000 overseas visits to wales around 70.5% came from Europe – with the vast majority from the EU. Some 12.6% of Wales's visits originated in North America and 16.7% from the Rest of the World.

Welsh Government 2014 - Additional Spend and Jobs Generated by Tourism and Marketing Activities

Additional expenditure attributable to the full range of Tourism and Marketing activity is calculated annually and this figure then related to jobs created, safeguarded and assisted. Activities include consumer marketing, events support, Tourism Investment Support Scheme (TISS) Cruise and Travel Trade work. Consumer marketing activity delivers about three-quarters of all additional expenditure attributable to our activities.

Total additional expenditure attributable to all forms of Tourism and Marketing activity in 2014 was some **£314.11 million**. This is some 25% above the target of £251.34 million. The total is made up of:

- **£238.39m** from campaigns and consumer marketing activity
- **£2.60m** from Cruise-related activities (to be confirmed when final figures are available)
- **£4.50m** from Travel Trade activity
- **£13.97m** from TISS
- **£54.65m** from Events Support

Jobs created directly in these activities totalled **248** those safeguarded **84** and those supported **6,868**. Of the jobs supported, **5,455** are attributable to consumer marketing and campaigns activity.