

# Partnership for Growth: Interim review of 2016 priorities



Llywodraeth Cymru  
Welsh Government



Partnership for Growth: Wales Strategy for Tourism 2013-20 was published in 2012. In 2016 the strategy was reviewed, and in the light of that, [updated priorities for tourism](#) were published on the Welsh Government website. At the end of 2018 we reviewed our progress against those updated 2016 priorities. At the same time, we also looked at the next steps for the period to 2020. Please note that this work was done in 2018, prior to beginning work on the new strategy for 2020 onwards.

## PROMOTING THE BRAND

Promoting the Brand	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<b>Building Wales' Profile (3.4.1)</b> "A strategy for Wales, not just Visit Wales"	Strong brand leadership driving marketing, policy and product improvements	In 2016 we launched a new unified brand to promote Wales as a place in which to invest, work, live, visit and study which has, since 2013, doubled the economic impact of Visit Wales marketing to £350 million per year. As well as a new look and feel, the brand is based on core Wales brand values and a <a href="#">clear narrative</a> . Other elements of the brand work have included the new themed years (see below). Since then the brand has been widely adopted. For example a major new Food & Drink industry quality assurance scheme is founded on the Wales brand values and the Welsh Government Economic Action Plan aligns with the principles of the Brand. The new brand has been welcomed by stakeholders, won international recognition (see below) and made a significant impact.	We are continuing to build the brand by extending it to new sectors and areas – to ensure complete integration of Wales messaging and greater impact in market, strengthening the brand's impact in target markets with an emphasis on digital marketing in particular and embedding the brand's visions in future policy and development programmes, an example of which is to do more to improve the 'sense of place' offered by tourism businesses across Wales. We are putting in place stronger brand evaluation measures.	
	Focusing development on competitive holiday types starting with adventure	Following investment in a range of adventure products, such as Surf Snowdonia, we launched a series of themed years (see below) starting with the Year of Adventure in 2016. As noted, these campaigns have contributed to a £350 million additional spend per year, and have presented a contemporary, compelling and consistent view of our country to consumers for our adventure, culture and landscapes. <a href="http://www.visitwales.com">www.visitwales.com</a>	We are doing more to help tourism businesses improve the quality of the product experience they offer – with a focus on adventure, culture and landscape – but also in other areas such as food and drink. Visit Wales is investing in data analytics to ensure that this work is insight-led. We are working with destinations/regions to hone in on their competitive holiday propositions and to grow strong sub-national brands, reflecting the principles of the <a href="#">Economic Action Plan</a> (see below).	

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	Iconic products and attractions including doing more to maximise key driving transport routes into and within Wales	We introduced " <a href="#">The Wales Way</a> " in 2017 – a new multi-modal tourism route, promoting holidays via different forms of transport from walking, to cycling, train, driving and more. Inspirational travel itineraries are resulting in new travel trade products.	The Wales Way is a 10 year project that aims to attract iconic new products and attractions along the routes. Improving the product provision will be an ongoing process and involving a range of stakeholders including the Wales Coast Path.	
	Key destinations – reviving destination marketing sub-structure	The new Wales Digital Gateway project is our customer facing digital initiative. It includes a stronger focus on showcasing destination marketing content (see below).	We are considering how to work with partners to refine destination-level propositions, with a focus on telling regional and destination-led stories through new content production structures.	
	Distinctive experiences via a renewed sense of place programme	Sense of Place is at the heart of the new Wales brand. It is built on an approach that is inherently Welsh and internationally outstanding. We have produced <a href="#">Sense of Place</a> guidance and video case studies to encourage industry to celebrate a renewed sense of as a key unique selling point (USP) for visitors.	We want to help industry better embed a stronger sense of place. The new industry-facing <a href="#">Brand Hub</a> will enable the industry to ensure that the offering has a strong "sense of place" but is also international in quality standards.	
	An integrated one Wales brand approach underpinned by digital delivery and with international scope	We overlay sector-led campaigns with unifying Wales-level marketing and content, aimed especially at "new" markets. For example, the brand has also been used to successfully recruit GPs to Wales. Digital delivery has been central to the new brand (see Digital First below).	See above. New initiatives include a focus on St David's Day as a way to promote Wales internationally.	
	High profile award winning campaigns	The Wales brand has received numerous awards including Best in Show and Gold at the European Design Awards. It was peer-nominated to feature at the prestigious Beazley Designs of the Year at the Design Museum in London and our marketing campaigns have won several CIM and digital marketing awards.	We are shifting from television-led to cross-media approaches, and from "campaign" periods to always-on in order to continue to deliver high profile campaigns that are effective and have real impact.	

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	Working with a small number of high-impact brand partners for Wales	The quality of the Wales brand has helped secure partnerships with organisations such as Aston Martin, Red Bull, and Qatar Airways. These are part of a much broader ecosystem of relationships that includes in-Wales event partners such as the Hay Festival and in-market media titles such as Brigitte in Germany.	We are working to establish fewer, bigger, better partnerships to maximise our resources and achieve greater reach and impact from our marketing.	
	Embracing digital opportunities	Harnessing social media has been vital to the brand. Our social channels now drive over £150 million of additional spend in the economy each year, and our social media following grew to just over 1 million in 2017 and 1.4 million in 2018. Content engagement has doubled year on year. Visit Wales has just launched on Pinterest reaching around 2 million unique viewers in 2018. Visit Wales is seen as a centre of digital excellence within Welsh Government.	We are investing in other brand social channels such as wales.com on <a href="#">Twitter</a> and <a href="#">YouTube</a> . Content engagement is becoming our lead target – and by 2020 our aim is to significantly boost Wales’s digital visibility via improved content production and distribution, and to evaluate the economic impact of this activity.	
	<a href="#">Thematic Years</a>	The Year of Adventure in 2016 was followed by the Year of Legends in 2017 and Year of the Sea in 2018. The tourism industry welcomed these campaigns as a focal point for product development and exploiting Wales’s key strengths as a tourism destination. Wales is starting to achieve real cut-through as an adventure destination. The approach has created stronger relationships between Visit Wales marketing and development teams, and is improving the product offer across the country.	The 2019 Year of Discovery is underway and the 2020 Year of Outdoors has just been launched. In order to avoid diluting the success of the themes to date, new themes will reinforce the previous themes and the three pillars of adventure, culture and landscapes.	

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	Product led approach to marketing (see below for product investment)	Our marketing has focussed on bookable product to drive consumers to visit Wales. Key initiatives such as <a href="#">The Wales Way</a> are product-led, providing inspirational itineraries for consumers and the travel trade. Industry support grants (see below) have also enabled industry partners to invest in product marketing initiatives, such as the Mountain Bike Wales partnership, the Real Mid Wales marketing campaign and Spirit of Wales.	We continue to focus investment on new high profile products that reinforce the themed years and the three pillars. We will do more to harness insight to engage with the industry to develop new market-led products and to take these products to market more effectively in future. We will also use <a href="#">The Wales Way</a> as a hook for working with communities and businesses on product development, and to enable these partners to promote their products in new ways to international markets in particular.	
<b>Attracting high growth markets (3.4.2)</b>	Maintaining our share of the domestic holiday market and boosting expenditure in the Welsh economy	Following three years of strong growth between 2013-2016, overall trips and spend by GB residents to Wales fell in 2017 however interim results for 2018 suggest spend is growing again. Spend on tourism day visits to Wales increased to £4.3 billion, the highest level since 2012.	Our priority will continue to be high-impact campaigns aimed at new, high-yield audiences in the core, mature domestic market – London and the South East and other key urban centres). In-Wales engagement to drive more local holidays by people living in Wales will also be a priority.	
	Refocussing marketing activity on new high yield markets e.g. cruise, business events	<a href="#">Cruise</a> remains a priority with its own small, dedicated marketing plan and resource allocation.  A new dedicated Business Events approach aims to attract events aligned with Wales's key sectors and the growth regions targeted for inward investment, as well as economic development, and academic, scientific or medical excellence.	Maintaining our position in the cruise market will depend on infrastructure development as well as continued marketing activity. For business events the focus is developing a sustainable delivery model. We will keep other high yield market opportunities under review including, for example, golf.	
	Market Matrix identifying priority markets	The core domestic market has continued to be a priority – targeting new, high-yield audiences with the most growth prospects for Wales. Elsewhere, the focus is on target territories including Ireland, Germany and the USA. The business derived to Wales from the top 100 operators grew by 24% in 2017 – promising long-term growth from new international markets. We have also tried to work with VisitBritain in all these markets.	We are reviewing the best use of resources in the light of Brexit, but at present Ireland, Germany and the USA are still important. We are putting more emphasis on cross-market digital partnerships, retargeting markets with an interest in the UK – including via the online travel agents.	

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<b>Become digital first (3.4.3)</b>	Digital Gateway including refresh of visitwales.com	Visit Wales is leading on the cross-Government Digital Gateway project to bring together four international websites – wales.com, visitwales.com, the Study in Wales Portal and Trade and Invest Wales under the unifying <a href="http://wales.com">wales.com</a> website.	The new Digital Gateway will be rolled out in early 2019. Once launched, the priority will be to grow the impact, and distribute content via social networks and other partners.	Y
	Trans-media approach to communications, content hub	The Digital Gateway project is underpinned by an ambitious new content strategy with full integration across digital and social media channels, as part of our move from television-only to multi-media content-led campaigns.	Next steps include embedding a digital/content-led culture at the heart of the department. We are moving to a 'COPE' (Create Once Publish Everywhere) approach to drive greater efficiencies and impact from our stories.	Y
	Content eco-system for Wales enabling stories from across Wales to be collated, repackaged and published across a wide range of outlets quickly	See above. Visit Wales curates, creates and publishes high-quality content from all parts of Wales – but currently tends to lead on the approach from the centre. We also support partners to produce brand-led content through a variety of grant programmes.	By 2020 we will develop destination/regional propositions to underpin the brand and provide a framework for stories across Wales. We will invest in regionally-based content editors/coordinators to help surface, tell and share regional stories through the Gateway structure – taking local content out to a wide range of outlets quickly and digitally. We will also strengthen our approach to working with VisitBritain on content distribution via their networks.	Y
	Continuing to grow our social media communities	Our social media following has grown significantly. Those social followers are highly engaged. Social content on our channels directly influence visits to Wales and contribute towards our annual additional spend figures. Our strategy has shifted from driving traffic to the website to also recognising our social channels as primary channels in their own right – with associated Key Performance Indicators (KPIs) linking to our overall objectives and additional spend targets.	As noted above, we are continuing to grow reach and engagement, investing in new platforms such as Pinterest and YouTube as appropriate, based on market trends and analysis. Our targets for 2020 are 10 million unique visitors and a 10% growth in spend linked to digital.	G

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	Beta Cymru attitude – Wales as a test bed for digital innovation	“Beta Wales” is a test and learn approach to try different approaches, test ideas, measure success and optimise our plan using audience insight and data to support this process. Since 2016 we have trialled new digital-led innovative campaign approaches, including on social media, and seek to grow the approach with a digitally-led campaign, which includes a wide range of creative assets that we haven’t developed before. The Wales Digital Gateway is part of this, and the platform we’re putting in place for 2019 will have the flexibility to deliver further innovations.	All beta websites are due to be launched by September 2019, and at least one ‘Beta Cymru’ project a year will be delivered as part of the Gateway approach to 2020.	G
<b>Drive spend and profitability (3.4.4)</b>	Further develop business events including International Convention Centre Wales (ICC Wales)	See above. The new Business Events team works with Business and Regions colleagues to align the Business Event strategy with Wales’s regional approach and strengths in areas such as Advanced Materials & Manufacturing, Financial & Professional Services and Energy to deliver pan-Wales economic benefit and to benefit from the momentum provided by ICC Wales. An integrated programme of trade shows, meet the buyer events, media engagement, digital and familiarisation visits are already generating leads and conversions.	Next steps include maximising the benefits of ICC Wales opening in 2019 and the investment in Venue Cymru for broader pan-Wales benefit as well as strengthening and sustaining the business events programme to 2020.	G
	Drive sales through a sharper travel trade approach	A pro-active multi-channel travel trade programme targets domestic, international and inbound tour operators with high growth potential to sell more Wales products. In 2017, Visit Wales influenced £11.2 million based on actual business from a “top 100” group of operators. This represents an increase in business of 24% from £9 million for 2016. £24.6 million of business was generated to Wales in 2017 by 488 operators we have targeted. The dedicated <a href="#">travel trade portal</a> , aimed at the Leisure Travel Trade including tour operators, travel agents, coach operators and destination management companies, provides information to enhance tours already coming to Wales or to introduce Wales into programmes for the first time.	This area of the industry has transformed in recent years, so we need to continue to modernise our approach putting more emphasis on digital channels as the market evolves, especially in a Brexit context. The new Digital Gateway will be serving bookable tours and tour operator products to consumers and providing rich inspiring & practical itinerary and product content to the travel trade.	G

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	Improve product information and content on <a href="http://visitwales.com">visitwales.com</a> and do more to release data and content to third party providers	A new tourism product database is a major pillar of the ongoing Digital Gateway work and will improve things significantly next year. We are working with industry to ensure that the content is of the very best quality and underpins the broader Gateway with really rich data.	The new product database is our major priority.	Y
<b>Support industry to boost revenue</b>	Inspire product innovation to target longer staying visitors	The themed years have provided leadership to the industry on areas of focus for Wales, and The Wales Way has inspired new ideas and projects across the country. These initiatives have been underpinned by our support for product innovation, such as Zip World, Epic Retreats and Spirit of Wales. Best practice has been shared via a range of industry engagement events and activities. As noted, GB overnight visitors are increasing, but the share of higher spending international visitors remains static.	In future we want to do more to share best practice, insights and data with the industry to drive innovation and product improvements. We will also focus more resources on product distribution and visibility, and on getting these experiences and products to market.	Y
	Encourage businesses to improve digital visibility and content offering, working with global providers and booking agents as appropriate	See above (Digital Gateway and new content strategy). The product database is a key aspect of this. We have also invested to help partners and businesses develop the digital visibility of their products through for example digital product promotions for products such as Mountain Bike Wales, the <a href="#">Ffordd Brailsford Way</a> .	The new product database will aid the digital visibility of business products. We will also do more to share insights and guidance with the industry on product visibility and distribution, with an emphasis on digital distribution channels.	Y
	Explore innovative, digital means of improving in-destination information provision	We have supported a number of digital interpretation projects including an I-beacons project in Ceredigion and a Beacon Location App which brings together content and information for all of the activity providers as part of <a href="#">Adventure Map</a> . This is backed up by an in-destination campaign and competition, challenging visitors to experience all 11 adventures linking back to the app and the website.	We are doing more to use best-practice and insight data to inspire industry partners to improve in-destination information, and working with Transport for Wales to provide in-destination information at train stations and transport hubs across Wales.	G

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	Encourage cross-promotion between providers via thematic years approach and release content and data for third party use in Wales	The thematic years have brought the sector together to promote Wales, whilst the Digital Gateway work is creating a rich repository of content for partners to use in future. An API (Application Programming Interface) from the existing Product Database is available to partners.	The Brand Hub will provide partners with easy access to a rich bank of photography, film etc from Wales. An improved product database API will be made available to partners.	G
	Encourage individual businesses to invest more in the local economy via a refreshed Sense of Place programme and a renewed emphasis on celebrating local food, drink, craft and materials	As noted, Sense of Place is at the heart of the Wales brand. <a href="#">Sense of Place</a> , guidance and <a href="#">video case studies</a> encourage industry to celebrate a renewed sense of place through their attractions and experiences as a key USP for visitors. Our teams work with Food and Drink Wales to encourage tourism businesses to embrace local food and drink producers, to provide industry guidance and to support events that have significantly improved the tourism sector's use of local produce.	More will be done to 2020 as part of a tailored industry engagement programme (see above).	G

## PRODUCT DEVELOPMENT

Product development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<b>Product development priorities (4.3)</b>	<b>Flagship attractions</b> Ensure there is a strong pipeline of new high quality attractions and activity products	Since 2013 our different funding streams (in combination with EU funding) have invested over £12.5 million in 229 projects across Wales from flagship attractions to support for tourism infrastructure, marketing and destination management. New perception-changing products include the <a href="#">Rib Ride</a> and the <a href="#">Fforest Coaster</a> and there is a strong pipeline of future projects. We have also supported high quality products such as the Creative Cardigan Lantern Parade and the <a href="#">Cragen</a> monster, the <a href="#">Merthyr Rising</a> and Dinosaurs on the Loose at National Museum Wales. We have also helped regions develop their own offer, such as #RealMidWales – <a href="#">Changing Perceptions</a> .	Our priorities are to ensure that the current pipeline is delivered on time and on budget, and doing more to promote completed projects. We will review the current funding schemes in the light of demand and resources, and seek funding to replace current critical EU resources which have been vital to Welsh tourism.	
	<b>Quality accommodation</b> Develop a strong inward investment offer with a particular focus on high quality branded hotels whilst continuing to support upgrades to quality accommodation	Visit Wales has supported luxury hotels, spa and high quality leisure facilities and 4 and 5 Star products. For example, Neauadd Caer Rhin Hall in Conwy is a 4 Star 72-bedroom country house hotel with spa and leisure complex, whilst there is now a 5 Star B&B in Globe House, Angle, Pembrokeshire. A derelict pub on the High Street of Rhosneigr is now a 5 Star restaurant. Visit Wales partnered with GVA to launch an event bringing leisure developments, hotels and attractions together with potential investors, preceded by a “getting pitch ready” event for local authorities.	Four Star hotels are a priority. There is now appetite in the sector for investing in high quality accommodation, but as noted funding is needed to replace current critical EU resources. Two notable opportunities to develop the hotel product in Wales are the development of a 106-bedroom Hilton Garden Inn Hotel at Surf Snowdonia (as part of its second phase of development), and a 154-bedroom Mercure branded hotel in the centre of Newport, which accords with the creation of the International Convention Centre Wales.	

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	<p><b>Business and Events</b> Invest in products to cater for Business and Events markets including the proposed Wales International Convention Centre at Celtic Manor</p>	<p>The new <a href="#">International Convention Centre</a> Wales due to open in 2019 will cater to the market for world class conventions. The new slate and glass building hold over 5,000 delegates, and offers 2,000 onsite car parking spaces. It is located very close to the M4. We have also invested £1.46 million in <a href="#">Venue Cymru</a> to accommodate more business events and conferences.</p>	<p>See above. Our priority is to develop a more sustainable approach to business events.</p>	<p><b>G</b></p>
	<p><b>Cruise</b> Develop modern cruise infrastructure at key ports to continue to grow the market</p>	<p>There were 103 calls for Wales in 2018, representing 30% growth bringing in 54,000 passengers. Examples of investment include the Isle of Anglesey County Council – North Wales Regional Cruise Project creating a “legendary” welcome and experience for passengers including jetty-side performances and events in Holyhead. The project has created three promotional films for cruise trade shows and for use digital media focusing on Year of the Sea 2018. A new pontoon in Fishguard through the Economy Futures Fund – Tourism Investment Support Scheme (EFF-TISS) investment fund resulted in 34 cruise calls in 2018 and for 2019 the cruise passenger numbers in Fishguard are up by 110%. The investment has allowed Fishguard to attract larger vessels with 2,500 on board.</p>	<p>Continuing growth will depend on investment in port infrastructure for larger cruise ships and to shelter cruise passengers on the dockside from rain and wind while waiting to embark/ disembark. Plans are being considered in Holyhead for a 370 metre multi-user berth.</p> <p>In 2020 we are delivering workshops across Wales bringing businesses and local communities together in order to develop new itineraries and new artisan and food supplier markets dockside to showcase local suppliers to the cruise lines.</p>	<p><b>G</b></p>

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	<p><b>Develop heritage and cultural experiences</b> Work with key stakeholders including Cadw to support investment in the visitor experience and accommodation provision at landmark heritage cultural attractions</p>	<p>At Caernarfon we facilitated investment in new cinema facilities at Galeri, a new terminus building for the Welsh Highland Railway, improvements for visitors at the castle and the Island Site artisan quarter showcasing Welsh Crafts. We have supported heritage sites such as Hay Castle, supporting the development of Hay on Wye as a world class destination, aligned closely to both heritage and cultural themes. We also supported St Cybi's Church and Roman Fort, Holyhead, and the Monmouthshire &amp; Brecon Canal in Torfaen and Caerphilly, new attractions such as the Museum of Speed at Pendine and the new steam engine visitor attraction at Vale of Rheidol terminus Aberystwyth as well as finding new uses for historic buildings such as the new accommodation at Caerhun. We have supported heritage events such as Fire and Sea Festival (Gŵyl Tan a Môr), Literature Wales's Land of Legends – Literary Tourism In Wales and Myths, Folklore &amp; Legends of The Wye Valley.</p>	<p>We will further develop this in the next strategy inline with the Cadw business plan. We will work with Cadw to better integrate heritage into the wider Cymru Wales brand, and with heritage organisations such as the National Trust to increase their Welsh food and drink offer.</p> <p>We have developed a new culture and tourism investment board to ensure alignment between our funding activity.</p>	<p><b>G</b></p>
	<p>The multi-million pound redevelopment of St Fagans National Museum of History</p>	<p><u><a href="#">The new visitor centre and facilities are open and in operation.</a></u> The site has been recognised as an exemplar in terms of Welsh food and drink (see below).</p>	<p>St Fagans been identified as a key site along The Wales Way, potentially linking with wider marketing initiatives.</p>	<p><b>G</b></p>

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	<p><b>Food and Drink</b> Continue to strengthen Wales's growing reputation as a food destination including progressing priorities set out in the <a href="#">Food Tourism Action Plan</a>, (FTAP)</p>	<p>Visit Wales is using marketing and investment to encourage more tourism <a href="#">businesses</a> to source Welsh products, to use them on menus and in recipes, and to make greater use of the Welsh language. As well as investing in destination restaurants and cafes such as <a href="#">Cobbles</a> or <a href="#">Dylan's</a>, we help develop food and drink products, such as Blas Cambrian Taste or the Mid Wales Tourism – #RealMidWales promoting authentic, locally produced food and drink. We also holding supplier-to-buyer events and showcase local food and drink at Visit Wales roadshows and international events such as IBTM in Barcelona and IMEX in Frankfurt in 2018. Businesses have access to a suite of online <a href="#">Food Tourism toolkits</a> and one-to-one support. <a href="#">Wave 2 of the Visit Wales visitor barometer survey in 2017</a> showed that more businesses were using Welsh food and drink than previously, and that they were using their menus, web sites and word of mouth) to promote their Welsh offerings.</p>	<p>The <a href="#">Economic Action Plan</a> identifies both food and tourism as foundation sectors in the Welsh economy so continuing to support businesses and promote the quality of Welsh food and drink will be more important than ever.</p>	<p><b>G</b></p>
	<p><b>Emerging technology</b> Work with the industry to harness new technology to create exciting transformative visitor experiences and improve industry competitiveness</p>	<p>We have invested in digital innovations such as the Sea Wales <a href="#">7D augmented reality</a> for the Wildlife Trusts, I-beacons in Ceredigion and Aberystwyth, Time Travellers goggles at Blaenavon and <a href="#">Storm Centre</a> in Saundersfoot. Future projects include cameras to provide access to high quality images of breeding ospreys at Dŵr Cymru Cyf – Llyn Brenig, Time Travel virtual reality (VR) at Blaenafon, and VR experience for visitors at the Wales Millennium Centre. As noted below, our Quality Advisors signpost tourism businesses to Superfast Wales programme and direct businesses to online digital training.</p>	<p>Priorities are working with the Welsh Government digital team to ensure that there is digital connectivity along The Wales Way, and contracting with Superfast to provide additional training programmes ahead of the launch of the Digital Gateway.</p>	<p><b>Y</b></p>

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<p><b>Quality Assurance (4.4)</b></p> <p>(NB no specific priorities in 2016)</p>	<p><a href="#">Quality Assurance schemes</a></p>	<p>In 2018, 132 accommodation businesses and 26 attractions achieved the Visit Wales Gold Award for excellence in their facilities and customer service. Overall the number of 4 and 5 Star businesses has increased from 69% (2012) to 75% (2018). Tourism businesses are also accessing more services – 533 have registered onto Superfast Business Wales (SFBW), 426 of which have been through the full service. Visit Wales teams also work to raise standards in other areas. 190 activity providers have now signed up with the new joint Wales Activity Tourism Organisation (WATO) approach to <a href="#">accreditation for outdoor activities</a>, which gives visitors a simple way to select safe, high quality activity providers across Wales. Alongside other national tourism organisations, we recognise that Quality Assurance needs to change in light of the new operating environment, but that they continue to be relevant to partners and businesses so are working with others to review the system.</p>	<p>Priorities include rolling out the new brand signage, certificates and logos, continuing to review the criteria for Quality Advice schemes in line with review recommendations, introducing additional Welcome Awards to recognise businesses that cater for visitors with specific needs or interests e.g. anglers, pets, motor-bikers, motorhomes and working with Business Wales to strengthen the business support role of quality process. We will also introduce an online tool for businesses to develop Accessibility Guides (to replace Access Statements) to help potential visitors with accessibility information that will eventually feed into a consumer search function.</p>	<p><b>G</b></p>
<p><b>Improving Connectivity to Wales (4.5)</b></p> <p><b>Road</b></p>	<p>Work with Welsh Government Transport Division to ensure that tourism needs are considered as part of future infrastructure schemes, as well as any discussions on further Severn Bridge Tolls</p>	<p>See below. The Severn Bridge tolls were removed in December.</p>	<p>See above. We continue to liaise closely with transport colleagues.</p>	<p><b>G</b></p>

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	Do more to develop and promote Wales's key tourism routes to visitors in collaboration with Transport Division	The Wales Way is our flagship product to promote key tourism routes (see above). Projects such as the North Wales Coast Light Railway – Great Little Trains for Wales (building on the success of the <a href="#">Big Train Little Train</a> project) will link to The Wales Way to attract visitors arriving by road. We have also supported rural connectivity projects such as the Brecon Beacons National Park Authority – Welcome Points Development and Conwy County Borough Council – Tourist Signage and Maps.	As noted, The Wales Way is the focus of this work, and we will continue to invest in product development along the route, as well as working closely with Transport Division, the Coast Path and others.	G
	Engage with coach operators via travel trade activity to ensure that coach travel to and around Wales grows most effectively	We have provided some support to help local authorities engage with coach operators including helping Ceredigion, Gwynedd, Pembrokeshire & Powys county councils install “Smart” CGI display screens on Traws Cymru T2 & T5 buses. We are also investing in coach parking facilities, toilets etc across Wales to support the coach transport offer.	We will continue to invest in infrastructure that facilitates increased coach groups.	Y
<b>Rail</b>	Work with Welsh Government Transport Division to advise on tourism requirements from future rail franchise agreements	Visit Wales met rail franchise bidders as part of the procurement process to identify marketing opportunities, specific opportunities to collaborate on rail journeys around The Wales Way and to target consumers in Wales to take more local holidays and short-breaks.	We are working with the Transport for Wales franchise to realise the opportunities discussed during the bidding process.	G

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	Build on relationships with key travel companies serving Wales with more marketing activity on the network and at stations linked to the high-speed development over the coming 3-5 years	Visit Wales marketing has a partnership with Great Western Rail and previously with Arriva Trains Wales. As noted above, we have also supported a range of community rail partnerships throughout Wales.	We will continue to build on these types of opportunities with the new Transport for Wales franchise.	G
	Continue to inform the development of the Metro service and the branding/marketing approach to ensure that tourism requirements are met	Transport for Wales has appointed a dedicated marketing lead for the branding and marketing for the Metro project.	Visit Wales Marketing will work closely with Transport for Wales to ensure that this activity aligns with the Wales brand work and meets the tourism requirements.	G
<b>Connectivity – Sea</b>	Continue to lead the work of delivering a strong and sustainable Cruise programme for Wales	In 2013 two cruise vessels arrived at Fishguard; in 2018 Fishguard welcomed 36 cruise ships (see above). We have attracted new lines (NCL and Viking) and continue to attract “explorer” vessels due to our wildlife, flora and fauna offering. We continue to build strong working relationship with all cruise line executives. We have also supported the welcome programme and <a href="#">new promotional videos for North Wales</a> to be used at international cruise exhibitions.	We are continuing to target new lines to call at Welsh ports and to increase turnaround calls. We will continue to exhibit at trade events including Seatrade Europe, Seatrade Med and Cruise Shipping Global in Miami. Our B2B calls will continue in UK, Europe and USA.	G

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	Continue to deliver practical tactical campaigns with sea carriers including DFDS, Seaways, P&O Ferries	Visit Wales operates successful partnership campaigns with sea carriers in Germany and Ireland, which have played a key role in our efforts to focus on more targeted, partnership-led activity in these markets.	With Ireland a continuing focus, we are working with Stena and Irish Ferries on joint marketing partnerships.	G
	Develop more strategic relations with these companies to consider long term route development as well as multi-market promotional opportunities	As part of a new focus on fewer, bigger, better commercial partnerships, Visit Wales will consider existing sea carrier market specific partnerships and broader opportunities that these might present. For example, Wales messaging appears on board ferries.	A close working relationship with strategic partners such as Stena and Irish Ferries enables us to plan mutually beneficial activities.	G
<b>Connectivity – Air</b>	Work with the new Welsh Government Aviation Team as well as VisitBritain, to develop a Route Development Strategy for Wales	Visit Wales has worked with Cardiff Airport and Welsh Government Transport Division on a marketing strategy linked to future route development plans. Key outcomes from this early work include a new joint marketing partnership with Qatar Airways, a new strategic marketing partnership with KLM, dialogue with Flybe over more strategic, joined up annual campaigns, and involvement in a VisitBritain/Marketing Manchester led partnership with Virgin Atlantic (co-promoting North Wales).	In future, we need to work more closely with VisitBritain over aviation related route partnerships.	G
	Working with VisitBritain, ensure that Wales as a destination is represented at World Routes 2016	Visit Wales worked closely with VisitBritain and Cardiff Airport on a presence at World Routes 2016 and 2017.	Visit Wales will continue to support this event annually.	G

Product development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Regular meetings with airport and airline partners to explore strategic new route development priorities	See above.	Ongoing.	G
	Work in partnership with airlines and airports to promote flights to Wales or gateway airports in our key target markets with the aim of delivering a tangible increase in inbound passenger levels	See above.	Ongoing.	Y
<b>Transport hubs</b>		Work with partners at the key transport gateways within Wales, as well as major access points outside Wales, such as Euston and Paddington stations, to improve Wales's visibility and the visitor experience within these hubs.	In 2017 a <a href="#">takeover of Euston Station</a> raised awareness of Wales whilst we have also supported partners such as North Wales Tourism at Manchester Airport (see above). We have also invested in the rebranding of Holyhead Port to make it more welcoming to international visitors (also see above – Cruise).	G

## MAJOR EVENTS

Major events	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<b>Attract more major international sporting and cultural events to Wales in the period 2019-2026 (5.3)</b>	Attract new high profile events drawing high spending visits from outside Wales	In 2017/18 we supported 22 cultural and sporting events across Wales from major events such as the UEFA Champions League final, to creative events such as the Machynlleth Comedy festival. Together, those events attracted over 282,000 visitors to Wales, generating a direct economic impact of £72.5 million and supporting over 1,600 jobs in the tourism economy. We also link events to wider agendas – for example, event companies applying for Welsh Government funding should source Welsh food and drink for their events.	We are working with partners in Wales, the UK and internationally to attract more major international events to Wales, looking at potential opportunities such as the 2030 FIFA World Cup. However, this is a fiercely competitive market, and there are significant challenges in maintaining and building Wales' position. We also want to grow existing events in Wales and create new ones.	
	Support Thematic Years with anchor events already planned for the Year of Adventures, the Year of Legends and the Year of the Sea	In 2017 the UEFA Champions League Final, ICC Champions Trophy and Senior Open Championship successfully delivered a "Summer of Sporting Legends". The Volvo Ocean Race, was hosted in Wales for the first time in the history of the race, and was the focal point for "Year of the Sea". It provided Welsh ministers with a global platform to promote a range of sustainability policies and programmes.	We will continue, wherever possible, to align our investment in events with the thematic years and also The Wales Way and Welsh Government capital investments in tourism facilities.	
	Maximise branding opportunities for each event to provide a distinctive Welsh experience and generate valuable content and free publicity around the world	In 2017 we concentrated on a "Top Deck" of five events that resonated with Wales's marketing priorities as they reflected a thematic year, provided access to target territories or appealed to target audiences. This delivered a new level of collaboration between the supported events portfolio and Wales's marketing objectives which has improved value for money for marketing spend.	Marketing activation for future events will continue to support and reflect Wales brand values of Authentic, Creative and Alive, and provide source for content for use in marketing campaigns around Wales's Thematic years and new tourism products such as The Wales Way.	

Major events	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	<p>Publish a calendar of events taking place in Wales and provide visitor information and promotion via Visit Wales media and campaign platforms to drive opportunities for year round, extended and repeat visits</p>	<p>As noted, Major Events and Visit Wales now work closely together on attracting events, and on marketing events. Visit Wales now publishes a <a href="#">calendar of festivals and major events</a> across Wales. There is some evidence that Visit Wales's marketing is contribution to more shoulder season visits.</p>		<p>G</p>

## PEOPLE DEVELOPMENT

People development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<p><b>Priorities to 2020 (6.3)</b></p> <p>Consensus that Visit Wales remit should not extend beyond the current strategic coordination and influencing role – there is ample training provision in both Further Education (FE) and Higher Education (HE) – the priority is to ensure the industry is aware of and takes advantage of training available</p>	<p>Continue to work with the Department for Education and the education training sector to influence skills training programmes and apprenticeships schemes to ensure they support the tourism sector and remain in step with industry and customer needs</p>	<p>The Tourism Industry is represented on all the <a href="#">Regional skills learning partnerships</a> whose annual reports to Welsh Government influence further education and apprenticeship learning across Wales. We have worked with Careers Wales to create a tourism skills leaflet to inform school pupils of careers opportunities within the tourism and hospitality industry and improve their <a href="#">spotlight on tourism web page</a> for students.</p>	<p>We are continuing to work with the private sector through the regional skills partnerships and with the Welsh Government skills policy team.</p> <p>A pilot project with Careers Wales is encouraging more tourism businesses to engage with local schools and raise awareness of the careers opportunities in the industry.</p>	<p>Y</p>

People development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Drive greater participation by tourism businesses in the Welsh Government Skills Gateway and new Business Online Support Service	The <a href="#">skills page</a> on the sector-facing Tourism Zone has links to skills gateway, the Business Online Support Service and information on apprenticeships. A ten hour free online course in Welsh for tourism businesses is also available.	We are reviewing this to ensure it is easily accessible for businesses.	Y
	Consider the role of Quality Advisors in promoting and signposting skills development and training and feeding back industry needs	See above. As part of the Quality Advisor's visit, advisers discuss skills and training and signpost operators to Business Wales and Tourism Zone skills page as appropriate.	Quality Advisors will continue to discuss and signpost as appropriate.	G
	Fund the co-ordination role for a small number of destinations assisting them to achieve World Host Destination status and to use the learning to develop best practice standards for other destinations across Wales	Although we began work on this initiative with three destinations, this was not completed, in part due to closure of a key partner organisation.		R
	Introduce a National Tourism Award for excellence in customer service in 2017/8	The Tourism Advisory Board decided not to include a customer service specific category in the <a href="#">2018 National Tourism Awards</a> in order to maintain consistency across Wales.	We will consider revisiting this as a category in the 2020 awards.	Y

People development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Investigate with the Department for Education the possibility of developing a customer service element in the Welsh Baccaulaureate	Although it has not been possible to incorporate a customer service element in the Welsh Baccaulaureate, consideration is being given to development of greater “soft skills” across the school curriculum.		Y
	Progress the Learning Journeys project to develop best practice around key strategic priorities and emerging opportunities including business tourism, and to maximise benefits of knowledge transfer to participants and across wider industry	Four successful Learning Journeys were completed, taking key Welsh businesses in the Hotel, Spa, Business Events and Attractions sectors on journeys to learn from premier businesses in the UK .The hotel sector group shared their new insights by hosting their own learning journeys with local Welsh businesses. The Business events learning journey was pivotal in corralling a group of major players in this sector and has been the driver behind the new Visit Wales Business events programme.	To consider a need for any further learning journeys.	G
	Continue to promote and communicate partners initiatives aimed at changing perceptions of careers in tourism	In 2017 the Regional Tourism Forums met regional skills stakeholders including Careers Wales, FE colleges and apprenticeship providers to identify key issues and to explore some of the solutions. The cruise team deliver career days in local colleges and provide opportunities for young people to visit cruise ships to see different departments in action.	A new project is linking tourism businesses with local schools to change perceptions. We are continuing to work with Careers Wales and others to influence young people, and people to consider tourism careers. We are arranging visits for Coleg Ceredigion and Coleg Llandrillo to cruise ships in Holyhead and Fishguard.	G

People development	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Encourage provision of qualified guides and local ambassadors with suitable language skills to meet the demands of international visitors	Visit Wales has worked with Wales Official Tourist Guides Association ( <a href="#">WOTGA</a> ) to confirm accreditation process and supported subsequent funding application to develop best practice in quality guiding. Cruise Wales has trained people living in Wales with German language skills to become ambassadors for cruise passengers.	New training will be delivered in North and South Wales between May and October 2019 ready for the 2020 cruise season.	G
	Potential new hospitality school	Sector representatives have identified the need for specific hospitality schools. As this is outside our remit, we are liaising with skills policy colleagues who have requested evidence from the industry for this view.	Visit Wales are working with the Welsh Government skills policy team to align priorities.	Y

## PLACE BUILDING

Place Building	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<p><b>Priorities to 2020 (7.3)</b></p> <p>A good spread of growth in visitors and high levels of satisfaction but relatively few of the destination brands in Wales are as well known as leading holiday resources and city break destinations</p>	<p>Audit the destination partnership approach to establish how Welsh Government should work with the public/private sector partnerships to support a network of sustainable destinations that are developed and promoted in line with market needs and local priorities</p> <p>Align funding support for product development to destination management priorities</p>	<p>We have strengthened our support for projects that bring partners together. For example, the Gwynedd Ffordd y Môr project promoting products along the Wales Coast Path is a new working partnership between Gwynedd, Ceredigion and Pembrokeshire County Councils, delivering destination priorities whilst being fully aligned with The Wales Way and the Wales brand. Another example of stronger partnership is the Real Mid Wales marketing campaign – a collaboration between Mid Wales Tourism and the destinations of Cambrian Mountains, Ceredigion and Mid/North Powys.</p> <p>In 2016 we launched a new small scale EU <a href="#">infrastructure fund</a> (Tourism Amenity Investment Support [TAIS]) targeted at destination development and today all Welsh Government grant funding for tourism projects must now be linked to Destination Management Plans which identify local priorities, developed by public and private stakeholders. In 2016-18, 29 Regional Tourism Engagement Fun (RTEF) projects linked to local Destination Management Plans. Other examples include the investment in Pont ar Daf, Rhossili and Pont Nedd Fechan.</p>	<p>This issue will be considered in the next plan.</p> <p>We are exploring ways to sustain support for product development in future years.</p>	<p>Y</p> <p>G</p>

Place Building	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Identify destinations with best growth potential and the market strength to be promoted as lead sub-national destination place brands	Visit Wales introduced a “Best Destination” award to the <a href="#">2018 National Tourism Awards</a> – won by Brecon Beacons.	Following the development of the Brand, we are now looking at sub-national regional brands and how best to support them.	Y
	Make the best use of the recently secured EU funds totalling £85 million to deliver strategic tourism infrastructure investments at eleven coastal, historic and adventure destinations across Wales	Visit Wales has secured £27.7 million of EU funding that will deliver a total investment of £62 million to develop eleven “must visit” destinations across Wales. The programme will target investment in established and emerging destinations such as Saundersfoot, Porthcawl, Colwyn Bay Waterfront, Caernarfon, Pendine and Holy Island on Anglesey. Projects are due to be completed by end of 2020.	Expected completion of all projects December 2020.	G
	Promote the new online tool kits to support industry to develop a sustainable approach and distinctive sense of place	See above for Destination Management plans. The <a href="#">Sustainable Tourism toolkit</a> is online here.		G

Place Building	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Provide strategic policy advice on the importance of tourism and the benefits that could be realised from the investment within infrastructure such as the M4 and rail electrification	See above.	Continue to work with transport colleagues in relation to proposed infrastructure.	G

## PROFITABLE PERFORMANCE

Profitable performance	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<p>There is still a strategic challenge to increase visitor yields and occupancy levels that still lag behind other parts of the UK – however competitive perception of offering good value may have been a factor in Wales securing a growing share of the domestic staying visitor market</p>	<p>Monitor competitive perceptions of value for money and advise industry of changing market conditions and price sensitivity of key markets and opportunities for them to upgrade, strengthen and extend their market appeal</p>	<p>Value for money is a strong factor in leisure holiday decisions for both domestic and international visitors. The substantial fall in the value of sterling since 2016 has made the UK better value for money for both domestic holidays and inbound international visitors. Wales is perceived to offer good value for money amongst domestic holiday takers and nearly a quarter of active UK holiday takers say they are likely to take more UK holidays in 2019, with many citing financial reasons and affordability as reasons. However, international visitors are more likely to perceive the UK as expensive and fewer travellers are now stating the fall in the value of the pound will make it more likely they will visit Britain.</p>	<p>It continues to be important for Wales to offer value for money and to continue to monitor and respond to market conditions including any strengthening of sterling. Increasing visitor yields remains a key challenge especially with falling trip lengths.</p>	<p>G</p>

Profitable performance	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	<p>Businesses in Wales to deploy effective yield management and customer marketing to encourage added value visits, longer stays and repeat visits with the aim of growing improved customer experience, occupancy and profitability all year round</p>	<p>Through the Tourism Barometer, tourism businesses consistently report similar or increased visitor levels and profits, although rising costs and tighter market conditions are barriers to performance. Visit Wales shares best practice and signposts the support available through Business Wales and there is a Tourism Association <a href="#">sustainable tool kit</a> to help businesses be more effective.</p>		G
	<p>Target marketing activity at higher yield, year round markets including growing trips from international visitors, business and events, a cultural and activity visits, new first time visitors and a balance of short breaks and longer stays</p>	<p>Whilst the majority of overnight and international trips peak in the summer months, Visit Wales marketing has helped to influence an increase in shoulder seasons. Day visits are more evenly spread. Wales has an increasing share of overnight trips and spend by GB visitors in recent years.</p>		G

Profitable performance	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Target support at businesses and events that can demonstrably grow higher yield visits, year round operation and maximise local spending and employment	As noted above, Visit Wales continues to target high yield markets, notably emerging business markets, and now works closely with the Major Events team. For example, the Fire and Sea Festival in Harlech attracted over 1,000 visitors and helped support local businesses.		G
	Develop Wales brand and marketing messages as a strong value proposition, and promote a more distinctive experience-rich premium brand	See Promoting the Brand above.		G
	Destination Partnerships to encourage secondary spending in the local economy by visitors and businesses providing a distinctive and authentic experience promoting local food and drink, arts, crafts and events and specialist local shopping	As noted, the £12.5 million funding for tourism since 2012 has included distinctive local events, has increased awareness and use of local food and drink and is supporting local jobs. For example, Conwy's "The Tournament" in June 2017 brought the town's medieval history to life attracting visitors during a normally quiet period of the year. All the accommodation in Conwy Town was fully occupied over the event with bed spaces 20% up on the previous year for this weekend.	Continue to support distinctive and authentic experiences.	G

Profitable performance	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Consider impacts of taxation and relevant policy development on costs, competitiveness and sustainability of tourism business and feed into policy leads accordingly	These issues are consistently addressed in internal policy briefings. Visit Wales has also worked closely with industry and with teams across Welsh Government to address these issues.	Ongoing discussions on tourism tax.	G

## PARTNERSHIP

Partnership	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
<p><b>Priorities to 2020 (9.3)</b></p> <p>Facilitate development of the new Regional Fora to increase the private sector's role in their delivery and strengthen communications with Destination Management Partnerships and local tourism associations – develop criteria for support for tourism associations – in light of local authority cuts ensure the benefits of tourism and the implications of any cuts are made clearer to key decision makers</p>	<p>Improve governance mechanisms to ensure flow of information between regional Fora, Destination Management Partnerships and local tourist associations</p>	<p>Marketing and tourism activity within Welsh Government is now overseen by an internal Tourism Management Board. The <a href="#">four regional forums</a> are a vital link between Visit Wales and the sector. Chairs are invited to Tourism Management Board and meet directly with the Deputy Minister for Culture, Sport and Tourism. Forum chairs or members represent tourism on wider regional agendas, through initiatives such as the North West Economic Ambition board, the Growing Mid Wales Partnership, the Swansea City Deal and regional skills forums. In 2017 our first <a href="#">tourism summit</a> brought experts and stakeholders together to explore future industry trends and emerging issues.</p>	<p>The challenge is to encourage better dissemination of information at a local level, from forum members to their own local areas.</p> <p>We are also working with UK counterparts to ensure Wales benefits from any future UK sector deal for tourism.</p>	<p><b>G</b></p>

Partnership	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Review the role of Tourism Associations and how Visit Wales and stakeholders can most effectively support them	Following a review of Tourism Associations, and in light of resource constraints, the decision was taken to focus on providing advice, guidance and online support. The <a href="#">website</a> has been revamped. Visit Wales has also created a <a href="#">specific guide for local associations</a> .	We will continue to disseminate material and provide online support for Tourism Associations and encourage stakeholders to engage through local destinations.	G
	Audit Destination Partnerships structure to refocus funding support, depending on commitment and capability to drive forward the actions in plans linked to wider strategic priorities	See above – note that all funding is now linked to a requirement for Destination Management Plans. Following announcements on Local Authority reorganisation in 2017, we decided that it was premature to review the structure of Destination Management.	As noted above this issue will be considered in any new strategy.	Y

Partnership	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Continue to consult with key industry bodies to help inform strategy, policy and programme delivery	Visit Wales engages directly with the Wales Tourism Association, the UK Hospitality Association a wide range of other bodies through the regional forums. The forums have provided advice on policy development such as the tourism tax, the new National Development Forum, helped decide the award categories and selected regional winners for the National Tourism Awards 2018. The annual roadshows are another opportunity to share information and gain feedback. Attendance doubled between 2014 and 2018, with 90% satisfaction ratings. There are 10,500 subscribers to the Visit Wales industry newsletters with opening rates in the early 30% (above 25% is considered good). Newsletters and bulletins are performing well with a click through rate of 6% (above the 4% "good" rating). Industry feedback has been that engagement with the industry is better than it has ever been.	As well as maintaining the current level of engagement, we are exploring ways to engage the sector more actively in developing the next strategy.	G
	Produce better regional and destination level evidence and communicate this more widely to the industry and decision makers at a local level to ensure budgets are protected and allocated to reflect the benefits, requirements and impacts of the visitor economy	Visit Wales has just produced four regional investment brochures containing regional breakdown of figures <a href="#">North</a> / <a href="#">Mid</a> / <a href="#">South West</a> / <a href="#">South East</a> As noted below, we have helped to make the case for the value and benefits of tourism to local authorities.	The Digital Gateway content strategy will work more effectively with local/regional destination marketing partners on content. We also need to resolve the challenge of providing more timely data.	G

Partnership	2016 updated priority	Progress to end 2018	Next steps to 2020	Met?
	Engage with the Regional Economic bodies to ensure tourism is considered and priorities in their plans and that these integrate with local destination management plans and strategic tourism priorities	We have presented to all of the economic fora and ensured that tourism is represented in the North West Growth Deal. We have also worked with City regions to set up an investment strategy for regions.	Visit Wales teams are continuing to work with Growth Deals as they emerge in order to incorporate tourism requirements. Continue improve the way we provide timely and relevant information to the sector.	G
	Engage better with key decision makers at a Local Authority level	Teams in Visit Wales have had frequent engagement with Local Authority Councillors, CEOs and Leaders over tourism issues. Active regional engagement, including attending scrutiny committee, has contributed to Neath Port Talbot reinstating their tourism function.	We continue to work with local authorities, and will consider more structured engagement as part of the strategy review.	G

