



Llywodraeth Cymru
Welsh Government

Welcome to Wales:

Priorities for the visitor economy
2020 – 2025.



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Welsh Government.

This Welsh Government is on the side of people in Wales. We are striving for a more prosperous, equal and greener nation.

A more prosperous Wales means creating a thriving, socially-just economy, which benefits everyone fairly and tackles the causes of poverty.

An equal Wales means delivering better public services, helping everyone who needs them, when they need them, where they need them.

A greener Wales means creating a truly sustainable nation, where resources are managed for the common good, and protected for the future. It means harnessing the power of Wales' natural environment and exploiting the potential of new technologies.

We will use all of our devolved powers to make our nation flourish. And we will unleash the talents of everyone in Wales so that we thrive together. This government will make decisions in the interests of all people, in all parts of Wales, for this and for future generations.

Rydym yn adeiladu Cymru fel gwlad hyderus ac agored, gyda diwylliant cryf, dwyieithog a chroesawgar.

We will use every day we have, and every lever we have, to make Wales a more equal, fair and just society.

Croeso.



As someone who has lived his life around Snowdonia, I spend many weekends trail-running in the mountains above Betws-y-Coed. My way of life, and our culture here in Wales, are shaped by our landscapes, which are alive with so much creativity and adventure. The paths I follow are busy with visitors from all parts of the world – but they are owned by our community too, and we share the journey together.

From the start, I wanted our plan to embrace the opportunity tourism provides to not only contribute to the whole of the Welsh economy – but also to enhance the wellbeing of our guests and host communities alike. Tourism connects our country with people from across the world. It makes a positive contribution to all aspects of Welsh life: creating prosperity, confidence, employment, cultural regeneration, environmental appreciation, health benefits, and fun. The future of our industry goes hand in hand with the future of our communities; what is good for visitors can be good for locals. And so the aim is to ensure that tourism plays a key role in strengthening Wales' economic, cultural and environmental vitality, and helps to create a healthier, happier Wales. This plan shows how we will do that.

The planning process began with a conversation with the sector. Diolch – thank you – for your thoughtful responses. What emerged was a view that tourism in Wales is

in a strong position, and that a buoyant but sustainable tourism sector is good for Wales. And so this plan is an evolution not a revolution, building on the broad direction we set six years ago.

But this plan is also built on our ambition to strive for a more prosperous, equal and greener nation.

We are ambitious – we want to help grow the sector. But I want to deliver that economic growth with a renewed sense of purpose, recognising the fundamental importance of protecting and enhancing our environment, culture and languages, and places for future generations. The industry is clear that this is both important in its own right, and because the long-term growth of the sector relies on caring for the very things that attract visitors here in the first place. It is also what future markets will expect. We believe that an ambitious economic agenda - balanced with consideration for future wellbeing – will ultimately enhance everyone's experience of tourism.

This is your industry; I very much see this plan as a platform for enabling the sector and our partners to grow commercially, by enhancing people's lives.

On a practical level, we intend to build on the strong foundations that are now in place – the inspiring Wales Brand, the pipeline of iconic capital projects and events coming

through, our good working links with the industry and our digital approach – without giving up on some persistent challenges such as the very seasonal nature of tourism in Wales or helping small businesses to become more profitable. The biggest differences in this plan are a greater emphasis on the basic infrastructure that underpins the sector, a refocused effort on niche products, direct investment in our own accommodation provision and a more prominent role for Visit Wales in developing skills across the sector.

Over the coming years we will continue to listen closely to our industry, our visitors and local people to ensure that what we're delivering is sustainable, good growth for everyone, based on a strong evidence base and shaped by broader Welsh Government wellbeing ambitions.

Let's take the best of Wales and make it better; enhancing the quality of life for all those involved, whether they are here for study, to take a holiday, or to run in the mountains.

Diolch.

A handwritten signature in black ink, appearing to read 'D. Elis-Thomas'.

Lord Dafydd Elis-Thomas AM
Deputy Minister for Culture, Sport and Tourism

Introduction.

The tourism industry in Wales is in a strong position.

Over the last five years Wales has welcomed record numbers of UK visitors. The value of domestic overnight visitors grew by 14% last year, and we are on track to meet the 10% growth target by 2020. Whilst international growth remains a stubborn challenge, the business community is consistently reporting that performance is positive, and although they are concerned about rising costs, they are confident about the future.

More than 9% of the workforce in Wales is now employed in tourism. It is one of the country's fastest growing sectors, and benefits many rural areas as the main driver of the economy and source of employment.

Over the past few years, tourism in Wales has been transformed; our outstanding natural landscapes are now alive with high-quality, inspiring experiences – attracting media attention in titles from The Sunday Times to National Geographic.

We are a place of:

innovative adventures, from the best mountain biking in Britain to the first inland surf lagoon in the world

world and Welsh heritage, providing fresh opportunities to encounter the past

outstanding natural landscapes, teeming with wildlife and opportunities to lead an active lifestyle

a thriving cultural scene that is full of vitality at galleries, theatres and festivals

accommodation that is also an experience, offering sweeping country views or an escape in the canopy of trees

locally sourced food and drink at pop-up events and excellent restaurants

destinations with a sense of place, where rich pasts combine with a contemporary edge

a calendar packed with enriching local and global events – music, literature, lifestyle.

But in the face of local and global concerns around over-tourism and climate emergency we face new challenges.

Our tourism industry is mature and experienced and still has the capacity to grow. But our industry also told us that growth must serve to sustain – not threaten – the things that matter most. That we need to work together in a way that supports the wellbeing of the strengths that bring people here in the first place – our landscapes, culture and adventure.

A tourism that is good for our industry must also be good for Wales.

It is exactly what future visitors will demand.

Our future direction is about harnessing the visitor economy for wider gain.

This plan will outline how we aim to get there.

About this plan.

Whilst this plan outlines our vision for the future, and provides clarity on the priorities for Visit Wales, we are just one of a number of partners with a part to play in delivering these goals.

Visit Wales is the team within Welsh Government that is responsible for the development and promotion of the visitor economy in Wales. We see our role as that of an enabler and partner – providing the investment, support and marketing required to grow the sector and the sector's contribution to wider Welsh life. We are not a membership organisation; we are here to listen to the views of, and to represent the interests of, the industry across Wales and to take an evidence-based approach.

We work closely with other parts of Welsh Government – such as Cadw, Transport, Health and Education – to ensure that the needs of the sector are recognised and reflected in cross-government policy and intervention programmes. And we work with the wider visitor economy: public sector organisations, private sector bodies and individuals involved in tourism from accommodation, events and experience providers to local authorities, natural and cultural organisations, transport bodies and many others.

As a result, we have not developed this plan in isolation. It has been informed by a wide-ranging conversation with the industry and stakeholders. Their broad consensus was that we needed a shift towards sustainable economic development, with a focus on delivering wider wellbeing goals alongside commercial growth. They wanted a renewed emphasis on developing distinctively Welsh – but international-quality – visitor experiences that are good for visitors as well as our own communities.

The plan has been informed by long-term trends shaping tourism globally, from how visitor expectations are changing, to the big factors that shape the way people travel. Crucially, it is also based on in-depth analysis of the current performance of the Welsh visitor economy and its future growth prospects and potential in particular.

Brexit.

Whilst Brexit presents opportunities and challenges for tourism to Wales, the core role of Visit Wales is to build a positive view of Wales as a welcoming, open country. Our business-as-usual is to encourage UK visitors to experience high-quality staycations here, and to ensure that international visitors discover and choose Wales.

Whilst we will need to be especially flexible and agile in the coming years, we believe that the best strategic response to Brexit is to continue with our core business – to recognise tourism's ongoing potential to act as a bedrock for the Welsh economy in projecting a positive message from Wales. The focus of this plan is on enabling the industry to do what it already does well even better – as a response to Brexit and beyond – improving the quality of Wales' welcome, supporting local supply chains, making our offer fit for international audiences and continuing to market Wales with a confident and distinctive brand in the UK and abroad as a key part of the Welsh Government's new *International Strategy*.

Delivering together.

As mentioned above, although this plan sets out the priorities for Visit Wales, we are just one of many partners in the wider visitor economy for Wales. In order to deliver the plan, we invite you all to join us to meet the challenges ahead.

Tourism is a wholly devolved area. VisitBritain has retained responsibility for marketing Great Britain on the international stage. UK Government is also responsible for many areas that impact tourism's success in Wales, from pan-UK connectivity to border control and Air Passenger Duty. We call on VisitBritain and UK Government to partner with us in full to deliver this plan – and to enable Wales to achieve an increased share of international visitors to the UK.

We invite our Welsh national and regional organisations to continue to find bold and creative ways to enhance the visitor experience we offer to all our guests – from Transport for Wales to the National Museum Wales and our designated landscape management bodies including the National Parks Authorities.

The importance of local authorities as part of the fabric of the Welsh visitor economy cannot be underestimated; they do so much to support the visitor economy across Wales, from the basics of the visitor experience to facilitating investment in iconic attractions and events, or delivering stunning localised marketing campaigns in support of brand Wales. In the face of challenging budgetary conditions, let's innovate to harness new destination management solutions that ensure that tourism enriches the lives of local people across Wales so that our funding goes further and delivers wellbeing for all.

Our most important partners in all of this are the tourism businesses of Wales. Tourism is a hugely competitive global sector and our future success is wholly reliant on ongoing investment, innovation and collaboration by the private sector. This plan outlines how we will help you to make that happen, and we ask the industry to support our priorities for the future.

This plan provides a direction that will help us move forward together but our sector is dynamic and we need to be able to flex our priorities accordingly.

So as the context in which we operate, our industry and our markets evolve, so too will this plan, in constant conversation with our partners, taking into account the evidence base and by actively listening to our visitors, industry and wider stakeholders.



Plan on a page.

Ambition			
To grow tourism for the good of Wales			
Goals			
Economic growth that delivers benefits to people and places	Environmental sustainability	Social and cultural enrichment	Health benefits
Listen to residents, visitors and businesses			
Approach			
High-quality, year-round experiences that are good for visitors and host communities			
Inherently Welsh — with a global outlook			
Bro — Welsh and local		Byd — international	
Wales' core offer			
Outstanding natural landscapes	Creative culture	Epic adventure	
Croeso: a warm welcome, unique accommodation and local food and drink			
The Wales Way			
Brand objectives			
Elevate our status	Surprise and inspire	Change perceptions	Do good things Be unmistakably Wales
Our visitors			
Seasonality	Spend	Spread	
New staycation markets in the UK	International visitors — new to Wales	The people of Wales	
Types of visitor			
General visitors	Business travellers	Special interest visitors	
Trade and operators			
Key priorities for Visit Wales			
Great products and places Visit Wales-led projects Industry-led capital investment Integrated place-making International and home-grown events, including business events	Quality visitor experiences Brilliant basics Great hospitality through grading Food tourism Skilled people Product-led teams	An innovative Cymru Wales brand A stronger nation brand Adaptive marketing with an off-peak focus One campaign, two themed years Digital-first industry Visit Wales 'Centre of Excellence'	An engaged and vibrant sector Effective industry engagement through a collective industry voice Improved data and insights based on industry need Stronger strategy and policy function An agile and responsive Visit Wales
Commercial priorities			
Improved routes to market	A focus on special interest products	Commercial partnerships	
Implementation			
Restructured internal team	Refreshed governance structures	Streamlined business support	
Review of delivery at local level		New approach to partnership delivery	

Ambition and goals.

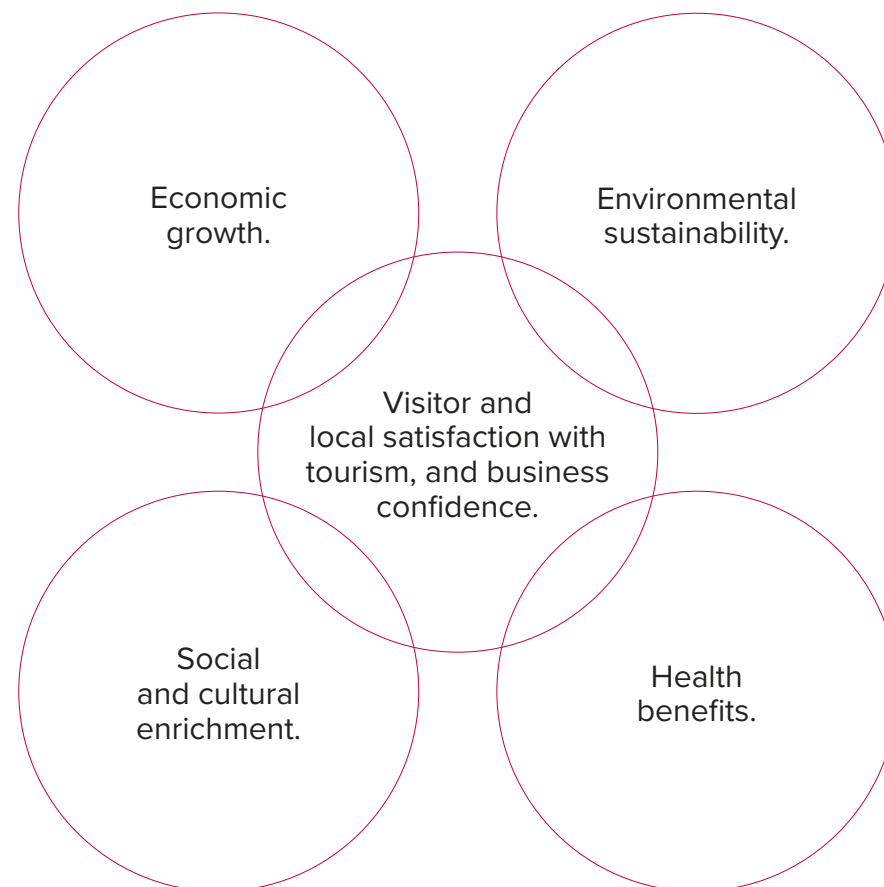
Our ambition is to grow tourism for the good of Wales. This means economic growth that delivers benefits for people and places, including environmental sustainability, social and cultural enrichment and health benefits.

This plan takes as its basis Wales' distinctive Wellbeing of Future Generations (Wales) Act 2015, and 'mainstreams' its vision through everything we do. This reflects the clear view of industry that we need to strike the right balance between economic growth and our wider wellbeing as a country.

The primary goal will be to harness the potential for tourism to improve the wider economic wellbeing of Wales. Tourism is a rare sector that takes jobs to all places. We want our sector to grow purposefully throughout the year, helping to stimulate prosperity in urban and rural areas. Our main aim is a sustained level of growth with a focus on off-peak periods – and to contribute more, through tourism, to Wales' general GVA. We will monitor the growth of the sector and its contribution to Wales' wider economic performance. We also believe that economic prosperity is the key to delivering other wellbeing goals.

In-line with industry feedback however, we will implement an 'economy plus' approach. **Our goals now include growing tourism in a way that also delivers benefits for people and places including environmental sustainability, social and cultural enrichment, and health benefits** (see below). Doing this will only serve to underpin the integrity and economic success of our sector in the long-term. We know this is not simple. It will mean working and thinking differently, making some difficult choices, and doing more to understand the impact of our decisions.

Ultimately, all of this work is about **making a difference to people's lives**, be they visitors, local stakeholders or business owners. This plan will ensure that economic growth and wider wellbeing benefits ultimately enhance the quality of life of everyone we engage with, whether they are here for a day, for a week, or for a lifetime. This brings people to the very centre of our proposals.



Approach.

In order to deliver this ambition to delight visitors and locals in equal measure, this plan makes **improving the quality of the visitor experience across Wales in a way that also benefits our local people**, our central strategic mission.

This is market-facing; we know visitors of the future are looking for authentic, unique experiences and the experience economy is growing, as consumers actively seek out value-for-time as well as value-for-money. This also aligns directly with our ambition to deliver wellbeing benefits for all through tourism.

There was broad industry agreement on this through our conversation. Therefore over the course of the life of this plan we will be looking to inspire, develop and promote enriching, distinctive and high-quality experiences that are good for visitors and locals across all parts of Wales.

This includes stand-alone iconic experiences, accommodation, attractions and events, as well as destination-wide experiences – where every aspect of the customer journey adds up to create one fantastic experience for all.

Further details about the nature and structure of the experiences we want to focus on developing and delivering are included on the next page.

As more and more visitors seek out authentic and meaningful experiences on a holiday or visit, what makes us different will define us: the special places that are unique to Wales, the provenance of our food and drink, our rich local cultures and events, our dramatic heritage, and our spirit of adventure. These elements stand alone and interweave to create an experience that is distinctive to Wales, and enables us to stand out in a very competitive marketplace.

But in order to compete, we also need to ensure that the way we bring these experiences to life is innovative, modern and ahead of our competitors – we must interpret Wales in a fresh, relevant and contemporary way to ourselves, to retain existing visitors and to attract new and future audiences.

In summary, this means being inherently Welsh, with a global outlook – and balancing two elements:

Bro – meaning local community, a sense of purpose and place, and

Byd – meaning international levels of quality standards and ambition.

Some of our very best experiences here in Wales – boutique hotels, local inns, epic adventures, family attractions, quality camping and caravanning – do this well already. They are rooted in place, giving them better market relevance and appeal.

Bro.

Meaning local community,
a sense of purpose and place.

Local impact:

- Experiences with a Welsh sense of place.
- Friendly, welcoming communities.
- A showcase for Welsh food and drink.
- Clean, green destinations.
- Driving local economies and supply-chains.
- Accessible and inclusive, delivering value for money.
- Open year-round, across all parts of Wales.
- Growing home-grown businesses.
- Celebrating the Welsh language.

Byd.

Meaning international
levels of quality standards
and ambition.

International relevance:

- A respected destination brand.
- Attracting new international business.
- Driving value over volume.
- World-class experiences and events.
- Better connectivity including a globally-connected Cardiff Airport.
- Meeting international quality standards.
- Relevant, innovative and contemporary.
- Harnessing data and insight for decisions.
- Multi-lingual and culturally aware.
- Minimising environmental impact.

Wales' core offer.

Whilst we're always open to new ideas, we will focus our general, brand-building marketing activity on a small number of priority product areas that we believe will make our country, and its destinations, stand-out from other places – products that future visitors will be looking for.

Over the last four years, Visit Wales has taken a themed approach to promoting and developing Wales. Based on the positive feedback from the sector, we will continue to focus on the three pillars of our core offer – landscape, culture and adventure – as a basis for prioritising development and marketing resources.

We will continue to promote these themes in our investment and marketing, and actively seek opportunities to develop market-facing bookable landscape/cultural/adventure products for the future – taking these to new audiences digitally and at events with fresh energy and collaboration.

These three product themes also align directly with our vision to deliver and promote environmental, social and cultural, and health and wellbeing benefits across Wales – we are promoting our strengths in order to celebrate and sustain them.

We will continue to project a strong sense of Welsh welcome and ensure that food and drink is always part of our core approach. We will also invest in the network of three routes that make up The Wales Way as a signature initiative, designed to act as a national product for Wales – which everyone can support.

We will also work with the sector on a small set of special interest products set out in the Commercial priorities section below.

Wales' core offer

Outstanding landscapes, protected and cared for

Accessible, protected natural landscapes – offering meaningful, high-quality and contemporary wellbeing experiences.

Vibrant communities and a creative culture

An authentic but highly creative and contemporary urban and rural culture and heritage offering, co-created with locals and valued by visitors.

Epic adventures and activities for everyone

Innovative, world-leading adventures, events and activities – that bring our post-industrial and natural landscapes to life and promote healthy living for all.

A unique Welsh welcome

We will also do more to develop and promote a unique Welsh welcome – based on promoting characterful places to stay and local food and drink experiences across Wales.

National experiences such as The Wales Way



Defining destinations.

Whilst some products are destinations in their own right, in general our success is wholly reliant on joining the dots between individual, stand-alone products and experiences – attractions, sites, events – to create truly memorable, high-quality destinations that visitors remember, talk about and return to in future. People visit places first.

Over the next five years we will grow the destination experience across all parts of Wales. We also focus on a handful of key places, bringing all parts of government together within these areas to co-invest in tourism for the benefit of the wider wellbeing agenda, set out in the Priorities section below.

Brand objectives.

All Visit Wales marketing falls under the Cymru Wales brand, which is now consistently used to promote Wales in the UK and beyond as a place to visit, invest, work and study.

With a strong emphasis on projecting Wales as a distinctive place to visit through landscape, culture and adventure, the brand is brought to life with creative and compelling campaigns, such as Year of Outdoors in tourism. The award-winning brand identity is striking – and features the familiar Draig logo, an iconic font, and a strong photography style.

And whilst the brand is in part about the way we present Wales to the world, it also aims to inspire new products, experiences and events across the country.

Like this plan, the brand is rooted in the concept of ‘Bro a Byd’ – that we can excel in Wales when the local meets the global in a way that feels authentic, creative and alive; and we want that idea to be reflected not just in marketing campaigns, but on the ground across the country.

The brand is also underpinned by five core objectives – which almost serve as a checklist for new ideas, products, and campaigns. In future, we will use these objectives to help shape our activity, within Visit Wales and across the industry as we seek to ensure that our work serves to:

- **Elevate our status**
- **Surprise and inspire**
- **Change perceptions**
- **Do good things**
- **Be unmistakably Wales.**

Through this plan we want to embed this way of thinking in our approach not just to tourism marketing – but also to the future development of our sector.



Our visitors.

We attract around 11 million overnight visitors to Wales a year – around three visitors to every resident in Wales – and whilst it can get very busy in hotspot areas during the peak summer months, there is still scope to grow the overall number of visitors that come to Wales across the year.

In order to develop sustainably we need to address three key challenges over the course of the next five years:

Seasonality

The evidence indicates that certain areas of Wales are busy in peak-season and we need to do more to grow off-peak tourism. This will inform our product and place-development work, as well as our marketing. Visit Wales' own UK marketing will now concentrate on driving new visitors to come to Wales during off-peak periods.

Spend

Our fundamental challenge is encouraging visitors to spend longer and spend more in Wales. We will focus on the quality of the tourism offer, making our products more visible and bookable, and ensure that there are plenty of experiences available in our cities and villages for visitors to spend money on throughout the year. We will do this whilst ensuring that our industry isn't elitist or exclusive.

Spread

Whilst we will need to continue to promote the most iconic parts of Wales to new audiences – we will do more to encourage UK and Welsh visitors in particular, to discover new tourism-ready areas of Wales. We will work with regional partners on clever ways to retarget repeat visitors to established destinations with information about new, similar parts of Wales to visit next.



Our increasing focus is therefore on the sustainable growth challenge – quality over quantity; value over volume. In the future we will focus on the following target markets:

New staycation markets.

Any growth in staycation holidays provides a significant opportunity for Wales to attract new, high-value visitors from across Britain to come to Wales, to stay longer and spend more in our communities. This is a highly lucrative market and the competition for UK tourists is global so our offer has got to be international in ambition and quality.

Given the nature of our offer and the market on our doorstep, there are major opportunities, and a need, for Wales to appeal to markets across the age-spectrum. We will work with the industry to develop an offer that serves the changing requirements of future generations with a range of passionate interests, seeking value-for-time over value-for-money from high-quality experiences.

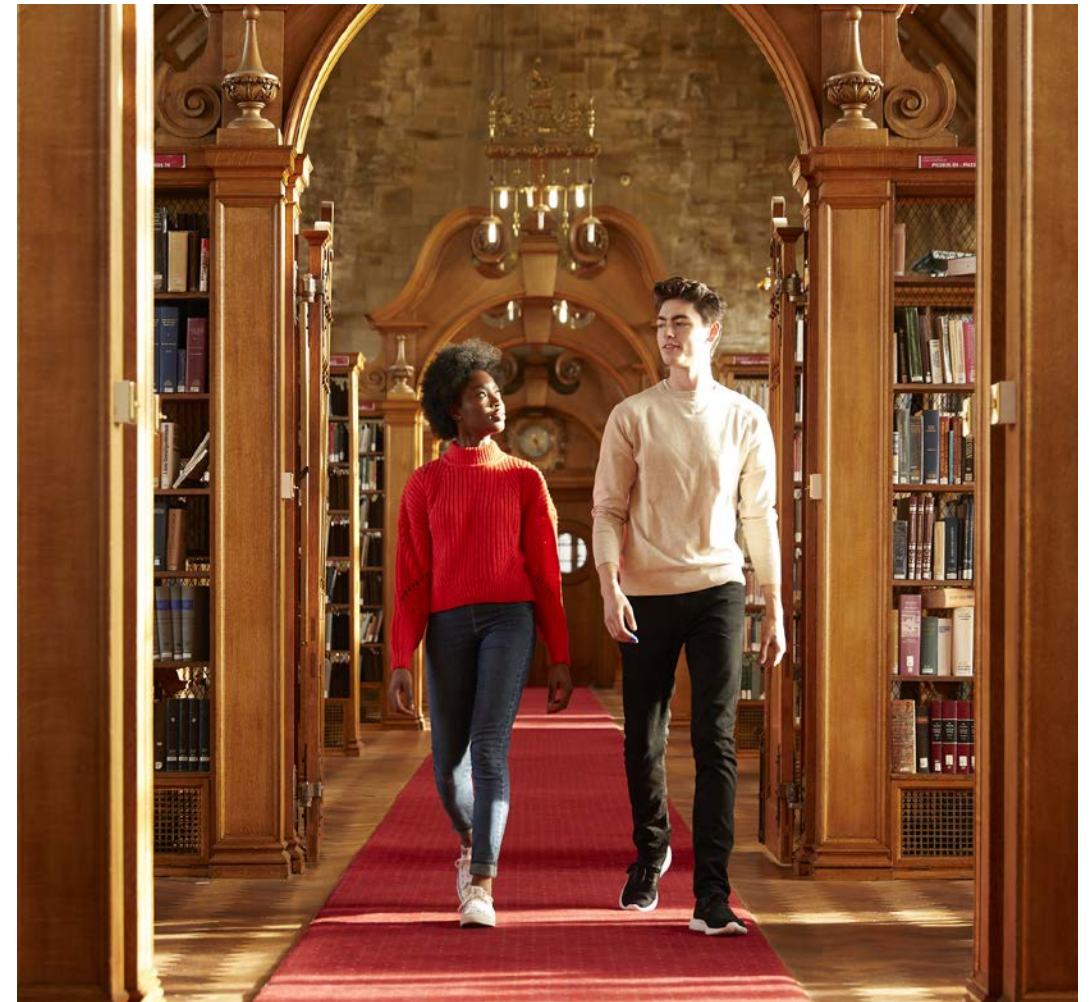
International visitors that are new to Wales.

Building Wales' international profile is a long and ongoing process; it is central to our work to build an integrated brand for Wales and to the Welsh Government's *International Strategy*. We know that there are challenges when it comes to international tourism to Wales; Wales is not attracting a large enough share of international visitors to the UK. Addressing this – in a way that is sensitive to environmental issues – is crucial to our economic future.

Our ability to directly grow international demand and visitor value is determined by our level of resources, although we are making best use of new and more efficient digital marketing and social media opportunities. If resources remain at current levels we will continue to focus our development and marketing on core growth international markets – Ireland, Germany and near European countries and the USA, bringing the industry with us. We will also continue to harness tactical opportunities as they arise – major events, new transport routes – to take Wales beyond these markets where appropriate. In this regard, our market categorisation remains unchanged from the previous strategy, *Partnership for Growth*. However, we need to do more to target international visitors that are considering Britain, harnessing digital partnerships to get Wales in front of those already searching for UK holidays. We will also continue to work with VisitBritain to build Wales' position on the international stage.

The people of Wales.

Welsh people are important to our tourism economy too, and promoting tourism within Wales creates confidence, cohesion and opportunities at grass-roots level. The people of Wales are also the best advocates for our own country. In future, we will do more to encourage the people of Wales to understand and discover new parts of our country, especially during the shoulder seasons.



Lifetime relations.

An individual's relationship with a place evolves with time – and there is scope for Wales to do more research to understand its 'total' market of guests, students, business visitors, holiday-makers, friends and relatives in a more holistic way, in order to nurture lifetime relationships with our consumers, establishing a community of advocates for Wales, as well as passionate return visitors.

Types of visitor.

As well as general leisure visitors, we will target:

Business travellers.

Business travellers are a high-value market who return for future visits. We are investing in world-class convention facilities and business events as a sector (see below). However, we also need to reflect the needs of business travellers in investment decisions, partnership campaigns and content marketing, especially in certain destinations such as Cardiff and Llandudno, where this offers significant growth potential.

Special interest visitors.

Whilst Wales appeals to visitors looking for traditional holiday experiences, special interests such as golf or food tourism have the potential to drive high-value tourism, especially out-of-season. Consumers are increasingly searching for passion points online; focusing on specific products can help define a country or destination's image as being good for certain things. We will support special interest products for Wales that drive searches, have the best economic growth potential, are on-brand and also enhance the wellbeing of our own resident communities.

Trade and operators.

Working with the travel trade and operators to reach all of these markets continues to be core to our future approach – further details can be found in the Commercial priorities section of this document.



The international challenge.

Tourism is core to our new Welsh Government *International Strategy*. We believe that growing and attracting high-spend visitors to Wales – in a way that is sensitive to environmental issues – is fundamental to our sector and to the short and longer-term future of the wider economy of Wales.

Internationalising our tourism offer and events portfolio is central to this plan, and is needed even to appeal to the highly-competitive UK marketplace. But our ambition would be to build a new level of demand for Wales internationally in support of this, driving international visitation levels beyond one million visitors a year.

Key priorities for Visit Wales.

Over the next five years, we will work with the industry to build on the strong foundations that are in place, with an increasing emphasis on sustainable tourism that delivers improved results now whilst also building for a better future. We will concentrate on four priorities:

Great products and places



Outstanding visitor experiences



An innovative Cymru Wales brand



An engaged and vibrant sector



Great products and places.

Actions

Visit Wales-led projects

Industry-led capital investment

Integrated place-making

International and home-grown events

In order to maintain our position in a competitive market, we will continue to invest in tourism products and events that deliver both local benefits to communities in Wales (Bro), and also put Wales on the world stage (Byd).

In line with the Welsh Government's *Economic Action Plan* and our own ambitions and goals, we will take an 'Economy plus' approach to investing – making sure that funding delivers against our core economic ambitions, but also does so in a way that delivers wider social, environmental, cultural and health benefits.

We will increasingly look to lead on developing Visit Wales-led projects, where we are in a unique position to deliver, and where there is market failure in Wales.

We will also continue to support private sector led initiatives, ensuring that all businesses that receive capital financial support meet the requirements of the Welsh Government's Economic Contract, demonstrating a commitment to growth, fair work, employee health and skills, and reducing their carbon footprint; reflecting the kind of business behaviours we need for a sustainable tourism industry in Wales. We will also look to those we fund to support our wider ambitions, for example through attending international trade shows or the development of bookable product.

But we can't do that alone. Large-scale, strategic tourism investment proposals – from world-class events to major tourism infrastructure projects – involve many partners across the public and private sector. We will work across Welsh Government and beyond to maximise the work that we do, whilst also proactively looking for significant private investment.

We will continue to work with UK Government to ensure tourism in Wales achieves the best possible results from, for example, UK Sector Deal opportunities or future UK Shared Prosperity funding, to build on the positive impact that previous European Union funding has had on the tourism sector in Wales.

Visit Wales-led projects.

A new aspect of this plan will see us lead on a small number of public sector direct investments in projects or events that have the potential to promote Wales internationally and which bring the best of Wales together into a single offer for visitors.

The first project to be considered will develop accommodation along the lines of the 'Paradores' model in Spain. We will start small, potentially investing in one project over the life of this plan. The project will showcase the best of Welsh hospitality, accommodation and food and drink. We are conscious of not encroaching into private sector territory, so we will work with the sector to identify and develop a project in an area seeking regeneration, taking account of any existing competing offer and the return on investment. Further projects will be scoped that support our economic and wider wellbeing goals.

We also recognise the opportunity to transform and showcase our world-class culture and heritage sector offer, replicating what has been achieved in the adventure sector over the last decade and more. The public sector has a great deal of influence in this space, and we will work closely with Cadw and National Museum Wales to develop new international quality visitor experiences. This includes ensuring that investment in a new dispersed Contemporary Arts Museum reflects our vision of an experience that is unmistakably rooted in Wales' communities – but also has the potential to achieve global recognition.



Industry-led capital investment.

We will continue to support innovators in the industry who come forward with high quality, reputation-changing products.

Our primary product gap is high-quality accommodation in many parts of Wales, so in line with our move to value over volume, we will work with current businesses to increase their occupancy levels and yield. We are looking for more than a basic bedroom – a place to stay should be a memorable and distinctive experience too.

We will also continue to focus on year-round products that help create the conditions for attracting and retaining a skilled workforce.

As well as expecting projects to deliver clear economic benefits, we will also expect them to contribute to sustainability and wellbeing by, for example, building in energy efficiency and accessible design from the outset.

The recently launched £50 million Wales Tourism Investment Fund (WTIF) – delivered in partnership with the Development Bank of Wales – will help finance capital investment in tourism projects which grow the sector and have a positive impact on the Welsh economy. We already have a pipeline of applications and will work with the industry to grow this further.

We will also take a more strategic and internationalist approach, seeking to attract additional funds and investment to support our sector, positioning Wales as a quality location to grow a brand or business through the appropriate channels.

Not all iconic projects will be large in scale, and our support is not limited to serviced accommodation and attractions; we are looking for quality across all price-points and sectors. This includes the caravan and camping sector – an area of wide popular appeal that is rapidly diversifying in response to market changes, and is core to the market position of Wales, especially in the UK.

We will take into account the context of every project, recognising that some schemes have the potential to act as catalysts for change within a community, starting a journey that leads to a step-change in the profile and performance of a place.

We will also continue to deliver support to micro and small tourism businesses in Wales through our Micro and Small Business Fund under our Rural Development Funding programme.

Finally, it is crucial that our signature capital schemes meet international design standards, and we will consider how we might provide greater guidance to developers and investors to ensure that projects are on-brand and world-class in future.

Integrated place-making.

Tourism can help bring places to life, sustaining the attractions, shops, restaurants and markets that all of us use throughout the year.

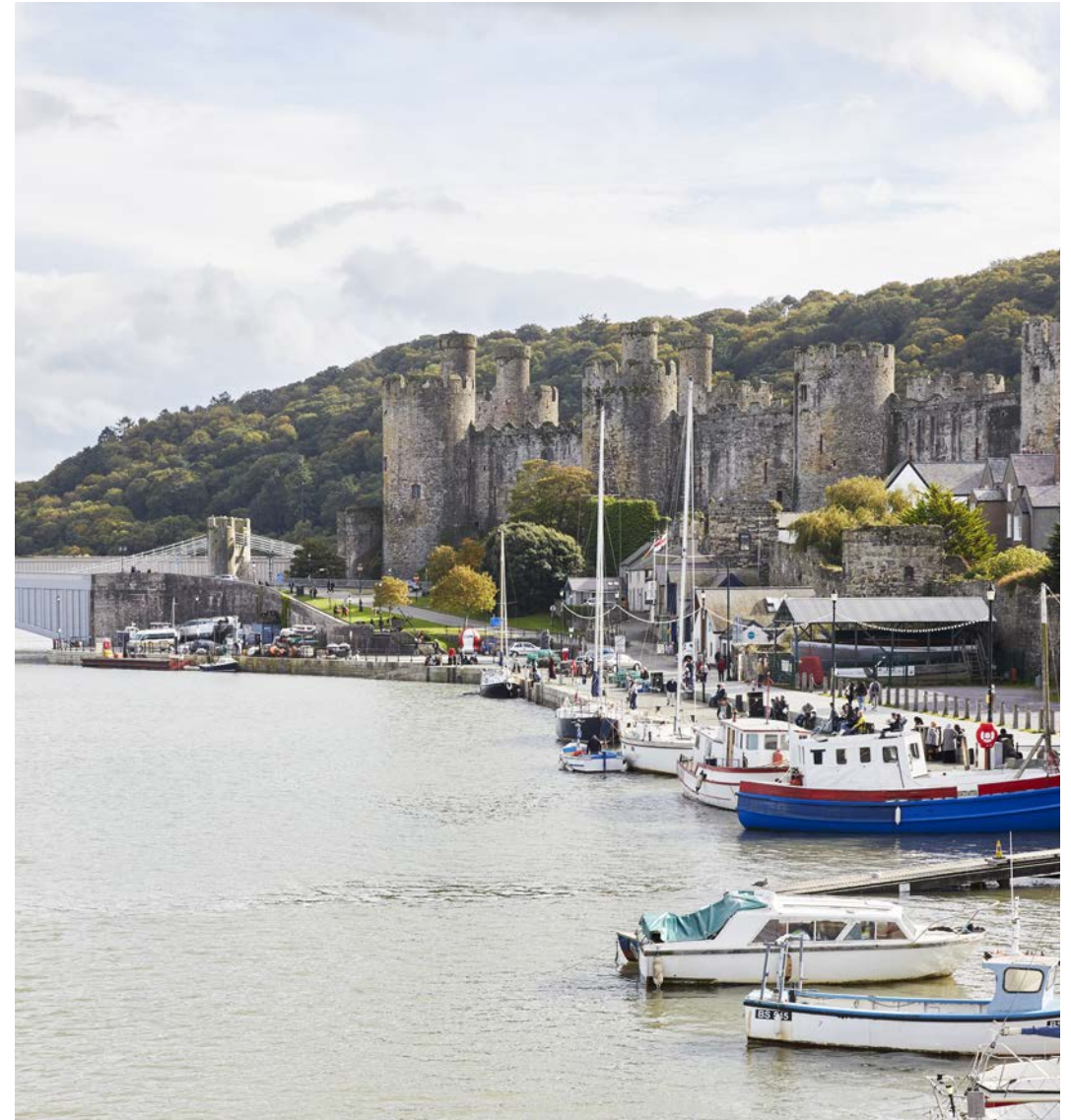
The development of iconic products must align directly with a purposeful place-making approach, to create destinations that reflect the distinctive character of places and provide the attractions, facilities and basic infrastructure that visitors look for.

Given that visitors still tend to visit destinations first, we will introduce a strategic approach to place-development in Wales, channelling public efforts and finances towards a small number of destinations. We will work with our regional colleagues and the emerging regional frameworks to potentially identify one destination in each of the four tourism regions that showcase our best and most iconic products of the future; that demonstrate a clear public/private commitment to future growth; and have the backing of the resident community.

Visit Wales will lead on driving forward integrated place-making programmes in these destinations where tourism is either the main or a key economic sector. We will continue to work across Welsh Government and with outside partners to develop truly joined-up Place-Making and Visitor Experience Masterplans, ensuring that the investment and interest of a wide range of interventions is brought to bear within each community in a focused and coordinated way, from transport, heritage and regeneration to public health.

We will of course do this whilst also continuing to support improved destination management across Wales via a reinvigorated Destination Management Partnership approach, with a greater emphasis on true public/private working and on cross-organisational delivery to get the basics right. We will hold a Destination Management Conference to design this in practice.

From a marketing perspective, we will explore contemporary ways to promote the regions and destinations of Wales – in a market-facing way – to new audiences. We will work with partners to develop stronger propositions for the different places and stories that strengthen Wales' identity from the perspective of a potential visitor; procuring this work from others according to our clear briefs.



International and home-grown events.

Events play a vital role in attracting people to Wales: they can help create vibrant localities and raise our global profile.

We have had great success in both developing and growing indigenous events and attracting international events and in establishing Wales as a major player in the global events industry.

We have recently worked with our stakeholders to review our criteria and approach to events. Whilst they were happy with our overall approach, they felt that we could take more account of the social impacts and benefits of our amazing events.

Our success in attracting major events also means that there is less awareness of the significant support we give each year identifying, supporting and growing local Welsh events.

In order to tackle this, we will reposition our Major Events Unit as 'Event Wales' and continue to review our approach including our objectives in terms of, for example, equality and diversity.

'Event Wales' will continue to identify and pursue marquee international cultural, sporting and business events that align fully with our values and direction as an outward-looking nation – and we will also redouble our efforts to support the development of indigenous events to international standards in order to ensure a strong and sustainable events industry.

We will explore the potential for a festival that will bring the best of Welsh creativity and culture together: a festival of festivals. This concept will be fully scoped in 2020.

This is an opportunity to grow our valuable business events market, and so 'Event Wales' will also incorporate business events. Overnight business visitors to Wales spend £213 million but this is still a relatively small share of the UK business events industry worth £8.9 billion per annum. The opening of ICC Wales – Wales' first International Convention Centre – and our investment in Venue Cymru, are catalysts for Wales to play a bigger role in this lucrative market. 'Event Wales' will present Wales as a destination for meetings, incentives, conferences and business events, targeting associations, corporates, agencies and incentive planners and buyers from the UK and beyond. We will capitalise on our current and new infrastructure developments, as well as unique Welsh visitor experiences, in order to support lead areas such as the Technology, Life Sciences and Creative sectors, as well as Higher and Further Education sectors.

An 'Event Wales' conference in the 2020 will be an opportunity to engage further with the sector, in order to help shape the future.



Outstanding visitor experiences.

Actions

Brilliant basics

Great hospitality through grading

Food tourism

Skilled people

Product-led teams

Stand-alone products are not enough; every visitor to Wales should also have a positive, memorable experience at individual attractions and throughout their stay.

Visitors expect a lot from our sector – high standards of accommodation, accessible facilities and good customer service.

Our focus on getting the basics right, and on quality and on skills, will ensure that Wales is in the best possible position to offer a high-quality welcome in the future.

Revenue funds for partners.

Over the past five years, we have delivered over £7 million to projects to develop and promote destination and product experiences across Wales through the Regional Tourism Engagement Fund (RTEF) and the Tourism Product Innovation Fund (TPIF).

Whilst these projects have had impact we believe a different approach is now required. In future, rather than invite bids, we will proactively identify the projects and activity required to deliver on our ambitions and procure these projects directly.

Brilliant basics.

Our conversation with the industry told us that we need to continue to invest in the basic tourism infrastructure around Wales, as well as in high quality visitor experiences. We also firmly believe this and so will build on the projects we have supported through the Tourism Amenity Investment Scheme (TAIS) by launching a significant new round of funding. Brilliant Basics is a new Wales wide fund that will support public, third sector and not for profit organisations to deliver basic small-scale tourism infrastructure improvements, and ensure that all visitors to Wales have a positive and memorable experience throughout their stay.

It will focus on the infrastructure needed to ensure that everyone feels welcome – from fully accessible ‘Changing Places’ to wider access improvements. We will also consider further ideas, working with local partners to build on the distinctive identity and character of market towns and coastal villages. We will explore closer collaboration with partners to ensure that amazing experiences such as The Wales Way, the Wales Coast Path, the Offa’s Dyke Path and our other national trails are maintained, accessible and play a core role in our wider adventure offer. We will also consider better ways to signpost attractions in Wales, either through digital technology or more strategic approaches to signage.



Great hospitality through grading.

The growth of online booking systems mean that visitors are less reliant on traditional grading schemes, and there are polarised views from the sector on the retention of the current scheme.

However we believe our grading scheme reassures visitors that they will find the quality of services and facilities that they expect, and also provides a vital grassroots touchpoint for us to both understand the views and concerns of the sector, and promote key initiatives (for example around accessibility or environmental sustainability). In that context, our grading advisers work with businesses across Wales, helping them to grow by signposting them to services such as Business Wales, Welsh Government broadband support and investment opportunities.

The scheme also informs our investment decisions by, for example, providing a benchmark for measuring shifts in quality from 3* to 4*, and enables us to reassure event organisers looking for rooms before deciding whether to bring an event to Wales that their quality expectations can be met.

Perhaps, most importantly, the sector value the business support service that the scheme offers – particularly new owners.

Although we still believe that grading is important, the service must evolve in view of the opposing views and the decline in grading participants in Wales, which is mirrored across the UK. We are therefore exploring the possibility of moving towards a free grading system, which would provide advice and support for businesses to help them grow and become more profitable. This would retain our ability to engage with local businesses at the grassroots level, embedding the principles of the economic contract and continuing to provide the business and the consumer, with a recognised independent grading system.

The scheme would also put more emphasis on a uniquely Welsh quality of hospitality, and enriching the sense of place experiences that our businesses offer, whilst ensuring that they meet international quality standards.



Food tourism.

Food and drink is a defining part of the Welsh tourism offer. Combine quality seasonal food and local ingredients, interesting places to eat and stay, and some of the world's best chefs, and you help define the hospitality sector in Wales with its deserved reputation for excellence.

Food tourism draws together the strengths of a local destination by building the relationships between the hospitality/catering industry and local food and drink producers.

Over the last few years we have worked particularly closely with the food and drink sector to improve visitor access to, and awareness of, Welsh food and drink, to encourage Welsh hospitality businesses to source more local food and drink, and to increase the prevalence of Welsh food and drink on menus and retail offerings. We have also highlighted the importance of skills in knowledge, sourcing and preparation of local food and drink, and created a much stronger relationship between the tourism marketing brand for Wales and the brand used to promote food and drink from Wales internationally.

We will continue to work with food and drink leaders, Destination Management Partnerships and food industry clusters to help improve the food tourism offer in Wales, and spread the word so that visitors can uncover our local culinary gems.

We will also continue to encourage Welsh tourism and hospitality businesses, including visitor attractions, to use more Welsh food and drink on menus and to tell the story of the food to visitors.

Following the launch of this plan, we will develop a new joint Food Tourism Action Plan to align with the new *Food and Drink Strategic Plan*, to ensure that the food and tourism sectors continue to work closely together.



Skilled people.

The Tourism and Hospitality sectors are vital to local economies across Wales, employing people across the country, including many young people. Yet despite a breadth of opportunity, we are constantly told that there are pervasive skills shortages in key areas such as chefs. Whilst training may be one issue behind this, there are also other more complex factors, such as the seasonal nature of many businesses, or indeed the way young people see tourism as a future career.

Solving the skills challenge is not easy. Many businesses have taken a lead, finding new ways to create and retain skilled staff, but this involves both working in partnership with training providers and a commitment from businesses.

These challenges, which are common across the UK, can only be met by working together, so we will take a more prominent role, continuing to work with the industry to establish, by the spring of 2020, a formal Tourism Skills Partnership to bring together the sector, Regional Skills Partnerships, Further Education, Higher Education and others.

The partnership will coordinate action on skills and address critical issues such as perceptions of careers in the tourism and hospitality industry, specific skills shortages and the need to ensure that schools and Higher Education are aware of the opportunities that the sector can offer. It will identify best practice, and the levers available to the public and private sector that can be used to take forward the skills agenda.

We will also address other factors that contribute to skills shortages – such as seasonality – through our marketing and investment, and explore creative ways to raise status of the sector to future generations of workers and entrepreneurs, in order to retain talent within our communities.

The intention is not to work in isolation, but to work with the Partnership to harness existing and emerging initiatives, such as current best practice, the industry commitment in the UK Sector Deal or the proposed hospitality school included in the North Wales Growth Deal.

We will also explore opportunities to work with similar-sized regions and nations on youth exchange schemes that provide seasonal work and travel opportunities so that 18-25 year olds can develop their skills and enjoy Wales for the first time.

As part of developing the industry through knowledge we will explore opportunities for action-focused Learning Journeys led by the industry, if a strong business case can be made.



Product-led teams.

As part of our move to an experience-based approach, we will strengthen our focus on products, creating product-led teams to deliver priority products based on our core offer. We cover this in more detail later.

An innovative Cymru Wales brand.

Actions

A stronger nation brand

Adaptive marketing with an off-peak focus

One campaign, two themed years

A digital-first industry

A Visit Wales Centre of Excellence

We will continue to deliver a bold and integrated brand for Wales, harnessing tourism's potential to act as a defining sector for our country on the world stage, presenting Wales to the world as a welcoming, vibrant destination.

Our emphasis will be on promoting a 'quality of life' message across all sectors, showing that Wales is simply a great place to be, whether you are a student, investor, resident or visitor.

A stronger nation brand.

Over the next three years we will strengthen the Cymru Wales brand through a bigger, integrated brand marketing team. We will continue to work across sectors to promote Wales in as tight and a coherent way as possible.

We want the brand to be understood and used by individual businesses in all spheres and underpinned by excellent digital and social media marketing that everyone can plug into, support and share.

Visit Wales will of course continue to maintain a strong marketing function, driving forward a refreshed approach that continues to maximise the digital medium and delivering a series of brand-related projects such as 'Cnwd Cymru Wales Made' showcasing the best Welsh products, produce and services across a wide range of sectors, shining a light on exceptional talents, skills and creativity in Wales and inspiring our next generation of designers and makers.



Adaptive marketing with an off-peak focus.

We will continue to develop the defining tourism brand for our country as part of the Cymru Wales message: promoting a positive, inclusive and welcoming view of our country in the UK and internationally.

In light of digital marketing trends we will take an increasingly adaptive – or agile – approach to delivery, placing an increased emphasis on value over volume, and attracting new visitors from other parts of the UK, working to ensure that they consider and choose Wales. Our international approach will concentrate on attracting travellers that are new to Wales – but are already familiar with the wider UK and Ireland offer – encouraging them to consider and choose our country.

In line with the wider vision to truly deliver sustainable tourism to Wales, growing year-round and Wales-wide spend, we will focus more on off-peak periods, and working harder to showcase new parts of the country.

Over the summer months we will encourage people in Wales and visitors to share their stories with the world on social media, using User Generated Content (UGC) to enable peer-to-peer marketing.

We will underpin national brand-building activity with more emphasis on also driving bookings and sales as set out in the Commercial priorities section below.

Repeat visitors are also crucial to Wales' ongoing tourism performance, and whilst most of our efforts focus on new visitors to Wales, we will continue to maintain relations with our core audiences via social and database marketing platforms, thinking beyond 'tourism' opportunities, to developing lifetime relations with those that engage with Wales in the round, so that students become visitors, and visitors become investors.

VisitBritain has a clear role to play in growing international visitor spend in Wales. We will work closely with them to ensure that current targets for Wales are exceeded, whilst working with the UK Government to review and increase future targets. Our aim is to agree to a VisitBritain/Visit Wales Three Year Partnership Marketing Plan by the end of 2020.

One campaign, two themed years.

Based on industry feedback, we will continue to promote Wales under the banner of defining themes – but shifting to a two year cycle from 2020.

Our aim now is to bring more consistency to our marketing, and to provide greater marketing leadership for the tourism sector by co-creating in 2020 our ‘big marketing idea’ for the next three to five years, working with industry partners. Like #FindYourEpic, this will act as the creative glue that will hold all of our activity and themes together to 2025 – giving our approach campaign consistency, as well as variety.

Under this campaign banner, we will unveil the next two themed years – for 2022 and 2024 – at the end of 2020 to allow the industry plenty of time to develop experiences and campaign ideas that maximise opportunities around each theme, and support the national approach. The themes will continue to play on Wales' defining strengths as a place for environmental/landscape, cultural and adventure experiences, allowing us to return to previous messages and continually reinforce a coherent brand for Wales on the world stage. A Creative Curator will coordinate each year's programme of activities, to bring as much impact and imagination as possible to each theme.



A digital-first industry.

Crucially, we will continue to embrace digital developments to drive forward a 'Beta Cymru' approach to marketing the brand, and to guide Visit Wales' own tourism communications. We want Wales to develop a reputation for having one of the most creative and agile digital destination marketing teams in Europe, and collaboration with industry will be integral to this. To achieve this we will continually work with visitors and industry to improve our own digital platforms through qualitative, user-led research as well as solid data, making use of 'big data' to match the desires, habits and preferences of tourists with the proposed products.

As part of achieving that goal we will invest significantly in social media talent and platforms over the next three to five years, with a view to establishing an innovative digital community for Welsh tourism; a place for locals and visitors to share ideas, inspiration and tips, and for industry to engage directly with audiences the world over, turning our best influencers – the people of Wales – into our main brand advocates. We will also establish a new community journalism approach to capturing local stories and voices, and put in place a rapid means of taking this content out to international markets quickly, linking Bro and Byd through digital technology.

We will continue to rebalance traditional media budgets such as TV spend in favour of digital, and insource some currently outsourced activity in order to significantly grow our in-house digital team.

We will also do much more to encourage the industry itself to develop digital skills, especially in the area of product distribution and bookability. As part of this, we will work with partners within and outside government to consider the potential of using the latest digital technology to enhance the whole customer journey.

A Visit Wales Centre of Excellence.

We will establish a Visit Wales Centre of Excellence, acting as a physical hub for the brand, and serving as a co-location and creation space for professionals in our sector to work together in a flexible and agile way to promote Wales to the world, using digital innovation. Working in partnership with the private sector and Wales' best creative talent, the team will become more visible, providing greater leadership and support to new sectors and individual businesses via a hub workshop area and through digital webinars.

This will include strengthening our support for businesses to improve their own digital marketing, and will also consider ways of becoming more commercial in our approach to our brand and marketing, within the boundaries of state aid regulation.



An engaged and vibrant sector.

Actions

Effective industry engagement and a collective industry voice

Improved data and insights based on industry need

Stronger strategy and policy function

An agile and responsive Visit Wales

The tourism industry impacts on every part of Wales.

It is Visit Wales' role – as part of Welsh Government – to recognise, coordinate and harness the contribution of a wide range of partners to growing Wales' visitor economy, and to realise tourism's own potential to underpin the economic, social, cultural and environmental wellbeing of all kinds of communities across Wales.

At the same time, as part of the foundational economy, we need to continue to work closely with the Regional Economic Delivery teams to ensure that our focus, and our investments, are aligned to deliver benefits for the whole of Wales.



Effective industry engagement and a collective industry voice.

It is important that the sector comes together to identify common issues and find innovative but practical solutions to operating challenges.

We value the input and feedback from all of the members of our Regional Tourism Forums; in recognition of this and in line with industry feedback, we will retain the four-region approach to tourism engagement – continuing to support our active Regional Tourism Forums whilst looking to strengthen their private sector involvement. We will expand one meeting in each region annually to take on board wider community and local considerations.

Over the next two years we will also work with partners to explore ways of bringing the private sector together so that the industry has an effective collective voice representing a wide range of interests – standing up for the sector in Wales.

Wales Tourism Week is a great opportunity to showcase the value of tourism. We will work with the whole industry to grow Wales Tourism Week.

The enhancement and protection of our natural environment was a clear message that emerged from our conversation and therefore is central to this plan. As our previous brand work identified this as one of our unique selling points, we now need to develop a forum where industry stakeholders can meet to explore shared issues and opportunities; we will establish a ‘tourism and the natural environment’ working group in 2020/21.

Tourism Associations play a critical role in achieving all of the above, and whilst we cannot fund them, where feasible we will work with them to ensure communications between the different layers can be as strong as possible, involving them in the Forums and ensuring that there is feedback from the Forums to local groups. We will also take a more proactive approach to engaging with wider communities and localities that sustain our sector through revitalised Destination Management structures.

We fully appreciate that the above will only impact on how we engage with a small percentage of the industry, therefore we intend to boost our wider ability to engage with industry, using social media tools to create the best impact. All of this will be underpinned by an enhanced approach to industry engagement and leadership from Visit Wales and its partners.

We will continue to undertake a biennial approach to our National Tourism Awards and Tourism Summit, using the next National Tourism Awards in May 2020 to present our new regional approach to awards. We are committed to taking these showcase events around Wales and will hold the next Tourism Summit in 2021 in North Wales, giving the industry an opportunity to explore new product ideas over a two day programme that will include, for the first time, a youth summit looking to harness the enthusiasm of our younger generation in delivering a sustainable tourism industry.



Improved data and insights based on industry need.

To function effectively – including being able to make good investment decisions – our sector needs access to the latest data. This is a world rich in data, but our challenge is to harness this data, and the facts and figures at our disposal to provide meaningful and long-term leadership for the wider sector, as well as partners across the country and beyond. There is also so much that can be done to learn about our own communities and places, including what they have to offer or are concerned about, and from other countries and destinations in order to drive our industry forward in new and outward-facing ways.

Over the next five years, we will need to be more proactive in providing timely insights for industry, and better communicating research. We will aim to be more of a hub; a central point for producing, collating and communicating market intelligence in partnership with the industry and local stakeholders.



Stronger strategy and policy function.

Tourism does not work in isolation – visitors also need good transport connections, vibrant destinations that are open for business and well-managed natural and cultural resources. We want to do more to influence other government and wider public-sector programmes and priorities, including health and regeneration, through a stronger strategy and policy function.

For example, the industry told us that infrastructure and transport were major factors affecting the future of tourism in Wales. In response, we will work with Transport and Infrastructure bodies, Transport for Wales and Cardiff Airport as well as other gateway airports that serve Wales to focus on route development as well as wider transport connectivity priorities – and digital connectivity of course – to ensure that major infrastructure programmes are delivered with our sector front in mind. We will also partner on more creative collaborations of benefit to all – such as The Wales Way.

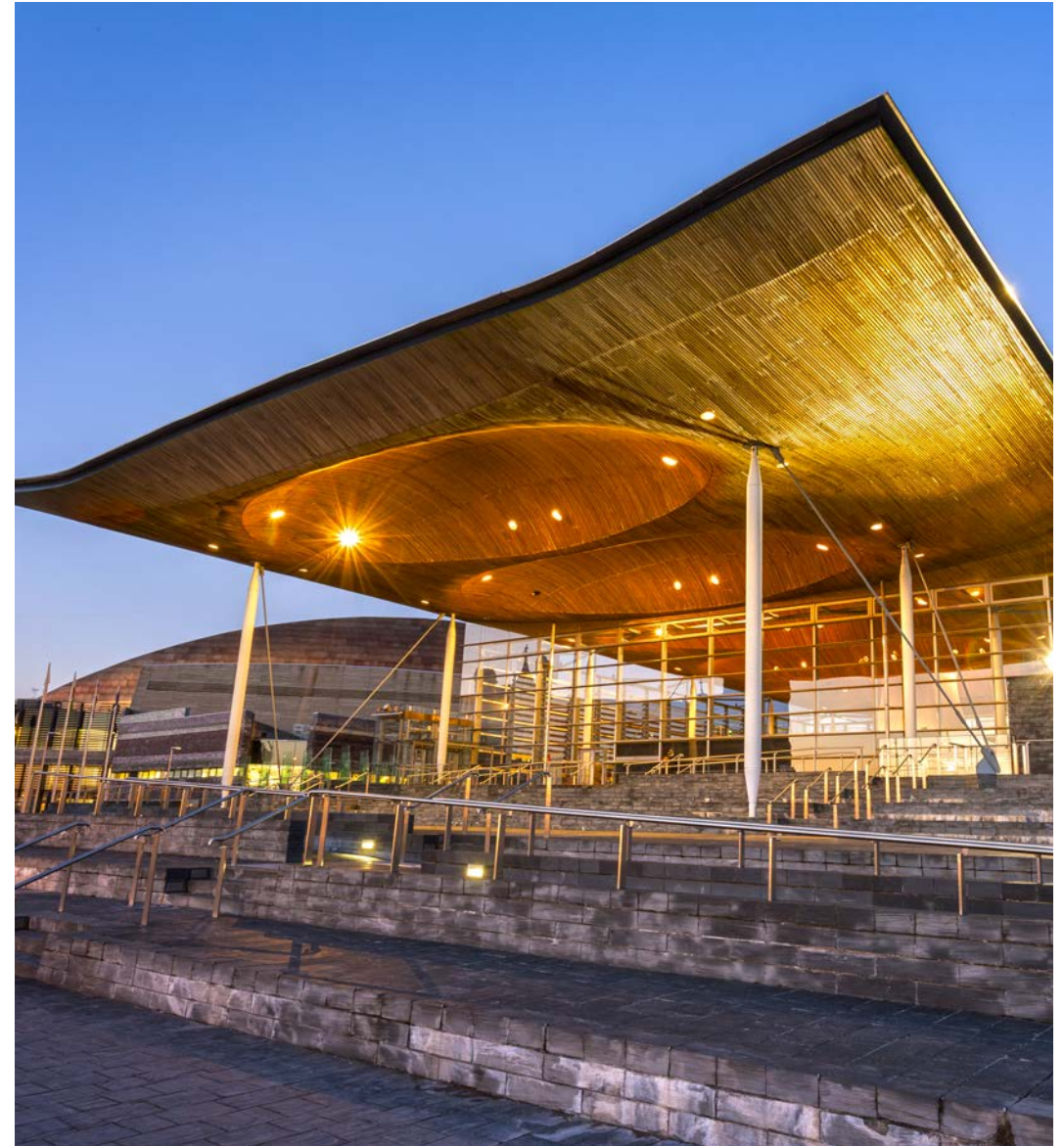
The Welsh Government has committed to exploring the merits of a potential tourism tax. Our conversation identified some concerns with this and we will work on a call for evidence in 2020, seeking to understand the opportunities, challenges and implications of a potential tax. This will include a focus on assessing the likely impact on the sector as a whole, on the wider business community, and on the places most affected by tourism. The call for evidence aligns to the Welsh Government's commitment to transparency in the development of tax policy in Wales, and to raising awareness and involving our stakeholders in the process. Any future decisions on a tourism tax proposal will be for a future Welsh Government administration to consider following the Assembly election in May 2021.

Finally, we will look to update the Technical Advice Note (TAN) that sets the framework for tourism in the planning process, to reflect changes in the wider planning system as well as sector feedback.

An agile and responsive Visit Wales.

As part of Welsh Government, Visit Wales has the advantage of being able to work with other departments to link tourism with wider government priorities, but it does mean that we operate in a way that is different to other equivalent UK tourism bodies. As a result, not everyone is clear about how Visit Wales operates, or the sheer diversity of things that our hugely committed teams deliver, from front-line support to micro-businesses to partnerships with major airlines, or from trade events in Japan to a comedy festival in Machynlleth. To help the sector and our other partners, we will issue a simple guide to the work of Visit Wales setting out what we do and how we operate.

A short overview of our plans to restructure Visit Wales to deliver this plan are included in the Implementation section below.



Commercial priorities.

This plan is rooted in our aim to deliver broad 'Economy plus' benefits through tourism. This isn't just a good thing to do for its own sake – we believe that Wales' current and future economic success relies on embracing new trends towards responsible tourism and authentic visitor experiences.

As such, our plan is intended to be market-facing. We want to put Wales in a strong competitive position for the future. Over the coming years, we need to sharpen our commercial focus and our ability to support the profitability of the industry.



Improved routes to market.

Wales already has a strong product base, but it can be hard for visitors to discover these experiences or to buy them. There is also significant potential to create new experiences for future visitors building on what we already have, and to take these out to the market with renewed vigour, as individual players and as destination teams.

This is clearly a cyclical process where the product is informed by distributors, and where sales shape the nature of our offering. Data and insights are key to success. Over the next five years, we will make significant changes to our marketing delivery programme to enable us to work more closely with the industry to create an end-to-end approach to developing and promoting products that have a strong market-fit. The work will be led by a business-to-business team in Marketing and new priorities will include:

Working with the industry to grow our understanding of the distribution landscape including reviewing the in-Wales Destination Management Company structure

Developing a new product distribution approach, aligned with the commercial partnership models outlined below

Refreshing our B2B programme, including securing a stand-alone presence at key events and structured approach to working with the trade

Raising the profile of in-Wales operators to the wider market.



Focus on special interest products.

There is strong evidence that identifying a small sub-set of special interest products with tangible future growth potential to sit beneath the core offer can help define our country's image and encourage new visitors to consider and come to a country, especially in the shoulder seasons.

We will work with the industry and with partners such as Creative Wales, Cadw and Natural Resources Wales to develop specific, sellable products that fit with our core offer and align with our brand vision to make Wales famous for its natural landscapes, its culture and heritage and its adventure/activity offering.

The initial products are outlined below and we will continually review this list, based on their brand-fit, industry backing, economic potential and contribution to the wider wellbeing agenda.

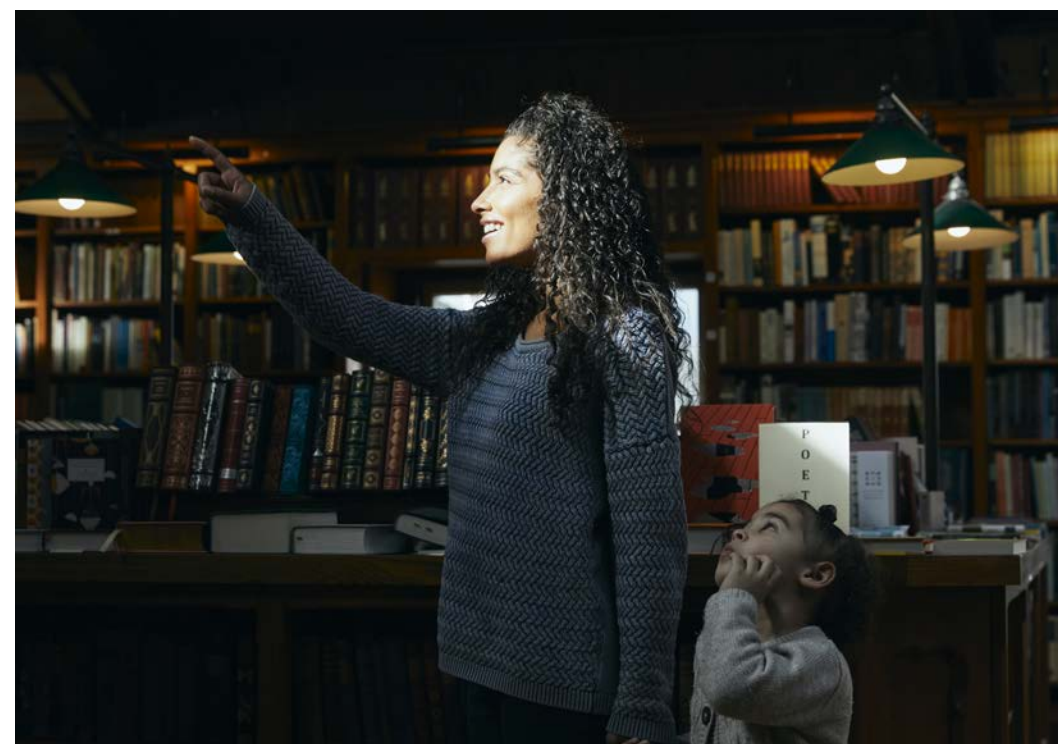
We will also continue to invest in specialist growth markets such as Cruise and Marine tourism, evaluating the economic versus environmental impact of this programme to ensure a sustainable approach that, carefully managed, delivers broad wellbeing benefits.

Wales' core offer		
<p>Outstanding natural landscapes</p> <p>Accessible, protected natural landscapes – offering meaningful, high-quality and contemporary wellbeing experiences.</p>	<p>Creative culture</p> <p>An authentic but highly creative and contemporary urban and rural culture and heritage offering, co-created with locals and valued by visitors.</p>	<p>Epic adventures</p> <p>Innovative, world-leading adventures, events and activities – that bring our post-industrial and natural landscapes to life and promote healthy living for all.</p>
Croeso: unique accommodation and local food and drink		
The Wales Way		
Specific products		
<p>The Wales Coast Path, Offa's Dyke Path & National Trails Golf</p>	<p>Heritage tourism Film and Television</p>	<p>Mountain biking and cycling</p>
Cruise and Marine tourism		

Commercial partnerships.

We work with a wide range of partners including airlines, media outlets, visitor attractions, major sporting organisations, travel operators and many others. Working with the right partners builds our expertise, boosts our budgets, achieves greater impact and helps us to work more efficiently and with greater authority than we could do on our own. And as well as extending the impact of our communications, good partnerships ensure that Wales' tourism products are easier to find and book.

As part of this plan, we will refocus and build our ability to work in partnership. Choosing the right partnerships will enable us to amplify, extend and add value to our marketing and tourism product distribution efforts. This will feed into the work we'll be doing to improve routes to market, as previously outlined. We need to develop fewer, bigger, better partnerships and ensure that there is both a clear understanding of what each side is being asked to deliver, and clarity on criteria and what success looks like.



Wellbeing priorities.

Our core ambition is to grow tourism for the good of Wales. But how do we do that?

Wales is the first country in the world to put forward legislation that mandates wellbeing. This means that when public bodies make decisions, they need to take into account the impact they could have on people living their lives in Wales in the future.

We know that by enabling people to enjoy experiences in places across Wales, tourism can contribute to the wellbeing of wider society, enhancing communities and their way of life, and helping them to value and protect the natural and historic environment. But it is clear that tourism and the travel industry need to be carefully managed in order to find ways to reduce some of the potential negative impacts, such as over-tourism and carbon emissions from travel.

Growing tourism for the good of Wales means economic growth that delivers benefits for people and places including environmental sustainability, social and cultural enrichment and health benefits.

This is how we will deliver those wider benefits through the priorities in this plan:

Goals

Economic growth that delivers benefits to people and places including:

Environmental sustainability

- sustaining natural resources
- improving environmental performance
 - encouraging sustainable transport

Social and cultural enrichment

- a warm welcome for everyone
- opportunities for young people
- thriving Welsh language and culture

Health benefits

- new opportunities to enjoy outdoor leisure
- promoting active lifestyles

Listening to residents, visitors and businesses



Environmental sustainability.

Sustaining natural resources.

Our core offer is based on outstanding landscapes cared for by everyone - accessible, protected natural landscapes including our marine environment. Many of the organisations in Wales who care for our natural resources – such as Natural Resources Wales, our National Parks, wildlife and marine conservation organisations, and even organisations such as Welsh Water – are increasingly providing high quality experiences for visitors. Their tourism offer enables more people to enjoy our wonderful natural resources, but also helps to make those organisations more sustainable. We will continue to work with natural heritage, marine and countryside organisations helping them to develop their visitor offer.

Improving environmental performance.

Prosperity for All: A Low Carbon Wales sets the foundations for Wales to transition to a low carbon nation in a way that maximises wider benefits for Wales, ensuring a fairer and healthier society in line with the UK Government's net zero emissions target and the Welsh Government's declaration of a climate emergency.

Tourism is both an opportunity and a challenge in terms of decarbonisation. Transport accounted for 16% of Welsh emissions in 2016. Of this 54% is from cars, 1% is from railways and 1% is from international flights. On the other hand there are opportunities to reduce carbon emissions through the way businesses operate, and also by encouraging more sustainable travel.

In future we will continue to seek ways to improve the environmental performance of tourism businesses, through for example:

- continuing to develop our sustainability toolkit that helps businesses look at energy, waste, water, biodiversity and pollution, reflecting the updated Welsh Government Climate Change Adaptation Business Tool, and
- proactively developing and marketing sustainable travel – especially to UK markets and international visitors travelling to Wales via key transport hubs in England and Ireland.

We will also expect the capital projects we fund to commit to reducing their carbon footprint in-line with the four elements of our Economic Contract and in-line with the policies in *A Low Carbon Wales*.

As part of our grading scheme, we will continue to work with businesses to help them reduce their carbon footprint, and work with key international trade partners to encourage them to operate in a more sustainable way.

Encouraging sustainable transport.

One of the big priorities for the *Low Carbon Action Plan* is to reduce transport sector emissions by 43% from baseline levels by 2030. That plan suggests that the most effective way of doing this in the near term is to replace car journeys with public transport and active transport. The plan also encourages the take-up of electric vehicles, so to help do this, we will explore options for electric charging points as part of tourism infrastructure, including The Wales Way.

Although the contribution that international flights make to transport emissions in Wales is relatively low, and international visitors to Wales use for example Manchester, Birmingham and Liverpool airports as well as Cardiff Airport, we recognise that it is still an issue for Wales. Rather than discouraging international travel – which makes an important long-term contribution to jobs and spend in Wales – we will work with Cardiff Airport and others to investigate new approaches to carbon offsetting that benefit Wales.

Over-tourism is a potential issue in some areas of Wales, so as well as aiming to spread tourism across Wales, we will explore the use of 'Big Data' to track visitor flows at peak periods and in specific areas.

Social and cultural enrichment.

Providing a warm welcome for everyone.

Over the past five years we have delivered more inclusive tourism in Wales through, for example, funding better access to holiday accommodation and visitor attractions. Our grading scheme also asks businesses to ensure that everyone feels welcome.

But accessibility is a growing issue. As we – and our visitors – get older, more and more of us will face challenges in relation to access. Already around one in four of us in Wales is recognised as being disabled – the highest percentage in the UK. A quarter of overnight visits and tourism day trips in Wales by GB residents include someone in the party with an impairment.

As well as being important in their own right, accessible businesses and targeting accessible markets, make good economic sense. Around £5.45 billion is spent by domestic overnight visitors where a member of the party has an impairment, and that share is growing in both volume and value. This represents around £440 million in Wales. Many of these groups also include young people as more and more families enjoy multi-generation holidays.

It is important that the experience of visitors to Wales reflects our commitment to supporting disabled people, and removing the barriers and obstacles which might prevent everyone from enjoying their time here to the maximum. The Welsh Government's *Action on Disability Framework* commits us to implementing the social model of disability – recognising that attitudes and facilities create problems, not individual medical conditions. Tourism can play a key role in promoting this model and putting it into practice, through improving access to facilities and through staff training. This approach aligns closely with the new UK Sector Deal for Tourism commitment to making the UK the most accessible destination in Europe by 2025.

This plan aims to ensure that everyone who travels in Wales can be confident that they will receive a warm welcome. We will do this by ensuring that accessibility and inclusivity cut through everything we do, for example:

- via the new focus on funding for Brilliant Basics which will feature accessibility,
- by expecting all developers to design in excellent access from the start through Universal Design standards,

Opportunities for young people.

Memories of childhood holidays stay with us throughout our lives. We want to help as many children in Wales as possible to take a holiday in Wales and will actively work with the industry to find new opportunities to make this happen.

We will also work with partners and the private sector to establish (possibly as part of Wales Tourism Week) a festival of free/subsidised experiences for children (including young carers) under a ground-breaking kids orientated campaign brand. The aim will be to bring Wales' wide range of experiences to new audiences, whilst growing pride and building our reputation as an inclusive, family-orientated destination that is welcoming to all.

We also believe that everyone's wellbeing is important, and that everyone deserves a break, whatever your circumstances. In line with the Welsh Government's integrated approach to health and social care, we will encourage the sector to work with public, private and third sector services providing access to, or delivery of social care and support, as well as preventative information, advice and support.

Listening to resident, visitors and businesses.

This plan is about people. At the heart of this plan is the idea that what is good for visitors can be good for everyone in Wales.

This means that we need to make sure that local people are benefiting from – and comfortable with – a thriving visitor economy. We need to learn more about how people in Wales feel about tourism. We will listen to the voices of residents, alongside the work we already do with the sector through our business barometer and our regular visitor satisfaction surveys. We want a more rounded view of tourism growth – its positive impacts, and areas of future concern.

We will use the results to inform open regional Tourism Forum sessions once a year in communities facing the greatest pressures, to discuss future policy ideas and improvements that achieve the best possible balance between visitor expectation and local satisfaction.

Through our ongoing annual tourism roadshows, we will also do more to engage with local community groups (including youth groups) alongside traditional industry players.

Thriving Welsh language and culture.

The distinctive culture and living language of Wales are a source of strength to the people of Wales. We want visitors to feel this energy, and for Welsh culture and language to enrich their experiences.

Culture in Wales is many things. It is captured in our amazing monuments, or the towns and landscapes shaped by Welsh history. It is grounded in the stories, myths and traditions of Wales, and in the richness of the Welsh language. And it is continually rediscovered and reinvented by each new generation, through music, literature, film, arts and events.

Tourism, culture and language are closely interlinked. The tourism sector provides the accommodation, facilities and infrastructure that enable our young people to work in their communities, and our guests to learn about, access and enjoy Welsh culture and language.

Heritage is an important part of our culture, and over the past five years tourism has made a significant contribution to heritage in Wales through helping to revitalise historic towns, finding creative new uses for historic buildings, or enabling people to have amazing adventures in former industrial landscapes.

Looking forward, there is more to be done; in line with *Cymraeg 2050 - Welsh Government's national strategy for the Welsh language*, this plan embeds protecting and promoting our sense of place, culture and language in all our future activity through clearer guidance for investment partners, through our work to support indigenous events, by delivering enhanced sense of place programmes, through the new quality assurance scheme and in all our brand marketing work.

We will also look to support initiatives to develop specific Welsh cultural bookable products and experiences – that are both authentic and highly contemporary – to promote at events and online in future.



Health benefits.

Wales is moving from a hospital-based approach to health, to one that also recognises the importance of social factors such as physical exercise or loneliness and isolation, and these are areas where tourism can make a difference.

Taking a break is important, not just to our physical health, but also has long term social benefits, through the time taken to relax, reconnect with friends and family and get away or – for young carers – to just be kids.

There is also research by Public Health Wales which has explored the contribution of outdoor leisure and recreation to good health. But although more than 80% of adults in Wales take part in some type of outdoor recreation at least once a year, only 18% do so regularly. We are a long way away from our targets on growing physical activity in Wales.

A Healthier Wales is the Welsh Government's long-term vision for health and social care. It sees prevention, health improvement and inequality as keys to delivering the wellbeing of future generations in Wales. Tourism can contribute to this cross-government priority in many ways: tourism generally helps to sustain the basic social infrastructure – from parks to public spaces – that enrich the lives of locals as well as visitors.

New activity and wellbeing opportunities.

We will invest in facilities – including flagship investments – that generate pride in Wales' adventure offering and that provide access to a wide range of visitors – including our communities – to new activity and wellbeing opportunities. This will include ensuring that we deliver activity/outdoor facilities near major population hubs, such as, South East Wales and working with partners on initiatives such as the Wales Coast Path. We will also ensure that adventure and activity are core to the Wales brand and our marketing work in Wales.

Promoting active, connected lifestyles.

Ultimately tourism is about experiences and connections – whether it is visiting new places and making new friends, or reconnecting with friends and family and familiar places. Whether taking part in outdoor adventures, or simply exploring new places, often on foot, we tend to be more active on holidays. Our Welsh landscape, culture and adventure offering is for everyone – and we will do more to promote it not just to visitors, but to everyone in Wales.



Implementation.

We need to ensure that Visit Wales is organised, and operates, in a way that will enable us to deliver this plan. This will involve the following actions.

Restructure the internal team

We have a skilled, dedicated and committed Visit Wales team; we will use this plan as the basis for restructuring to ensure we best deliver the objectives within it.

Refresh our governance structures

We will review our governance structures and consider the introduction of non-executives, sitting beside the current Wales VisitBritain representative and regional Tourism Forum chairs. This will ensure that we are able to operate in a way that reflects both our commercial and public sector roles.

Streamline our business support approach

A shift to free grading is part of a wider move to streamline our business support; in future the current grading team will become the first-stop-shop or key account managers for wider advice and backing from our organisation.

Review delivery at local level

We are keen to reinvigorate and focus our approach to destination management. The partnership approach will be reviewed and a Destination Management Conference established, as outlined, to start this process.

A new approach to partnership delivery

A new approach to partnership working will see us moving from a support grant structure (working with partners on revenue development, innovation and marketing programmes) – to a procured approach, in order to ensure that regional and destination-level activity fully aligns with our brand and national agenda.

Measuring success.

Tourism is a people-industry, and the success of our sector ultimately relies on ensuring that everyone that engages with our sector benefits from it: visitors, local residents, and crucially, partners within the sector itself.

This means continuing to grow the economic benefits of tourism, maximising its contribution to prosperity across Wales, through an industry that is performing at its best.

And it means delivering wider wellbeing – doing our best to ensure that tourism is delivering wider environmental, social and cultural, and health benefits to everyone in Wales.

People benefits

We will use Visit Wales surveys and other data to track visitor and resident satisfaction with tourism and business confidence.

Economic benefits and industry performance

- Growth of the sector
- Growth of seasonal spread
- Growth in yield per visitor
- Growth in the sector's contribution to GVA

Wellbeing benefits

**Environmental
sustainability**

**Social and
cultural enrichment**

**Health
benefits**

We will track the contribution of tourism to the relevant national wellbeing measures.



Visit Wales survey

Our future work will be shaped by listening to those that matter most – the people impacted by our industry. Over the period of this plan, we will develop a new Visit Wales survey approach that enables us to report more regularly on how people feel about tourism, looking at areas such as visitor satisfaction, business confidence and the perceptions of local communities. We will ensure that we better understand the way everyone in Wales benefits from, and can contribute to, tourism – including young people and other groups.

Economic benefits and industry performance

We will also continue to monitor our progress against a range of traditional performance metrics for the sector, working with the sector to make sure that we are providing the data they need.

In order to track the performance of the industry as a whole, a quarterly industry ‘health check’ will look at the growth of the sector, seasonal spend and spread through measures such as:

- value and volume of overnight domestic GB trips
- value and volume of domestic GB tourism day visits
- value and volume of international visits
- accommodation occupancy rates and daily rates

We will report annually on a wider range of measures such as:

- overnight visitor spend
- employment in the tourism sector
- the number and turnover of tourism businesses
- contribution to GVA
- the number of new visitors
- brand awareness and interest to visit
- seasonal spread of visitors and spend
- domestic market share
- digital trends such as booking and searching for holidays in Wales

Wellbeing

We also need to understand how tourism is contributing to wellbeing. We will map the national wellbeing indicators to find out where, how, and if, tourism can make a contribution. This will be enhanced by regular evaluations of our investments using ‘Bro’ and ‘Byd’ as a framework.

Together, these measures will help us to track the attractiveness of Wales for residents and visitors, monitor the quality of products and experiences and also look at whether we are using our resources as efficiently and effectively as possible, and in a way that supports the Wellbeing of Future Generations (Wales) Act.

We will also use this and other, data to inform immediate delivery as well as our long-term policies, making this plan a living, evolving document.

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