



Open.

Welcome to Wales:
Priorities for the visitor economy 2020–2025

Your short guide.



Croeso.

This is a summary of our priorities for developing and promoting the visitor economy in Wales over the next five years: our ideas have been shaped by your input. Diolch.

“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... The future of our industry goes hand in hand with the future of our communities; what is good for visitors can also be good for locals.”

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

This guide provides:

- An overview of the vision and direction.
- A summary of Visit Wales' key priorities and actions.
- Stories, interviews and case studies to inspire you to work with us in the future.

You can read the plan in full by visiting:
businesswales.gov.wales/tourism

Working together.

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Visit Wales is the team within Welsh Government that is responsible for the development and promotion of the visitor economy in Wales. Our role is to support and enable our partners to grow our sector for the future. **This plan is for all of us.**

Our partners include:

- Teams across Welsh Government, such as Health and Education.
 - UK-level organisations, including VisitBritain.
 - National organisations, such as Transport for Wales and National Museum Wales.
 - Wales' Local Authorities.
 - Members of our four regional forums.
 - Public and third sector organisations both in tourism and beyond.
 - And — most importantly — private sector tourism operators and businesses in Wales, and across the world.
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Tourism today.

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Tourism to Wales is in a strong position — and there is scope to grow our sector for the future. But in the face of potential over-tourism in some parts of the country and climate emergency there are new challenges ahead. You have told us that growth must also serve to sustain and support the wellbeing of the strengths that bring people here in the first place — our landscapes, culture and localities. It is the right thing to do. And it's also what future visitors will demand. **That is the opportunity at the heart of our plan.**

Our plan.

Here is a snapshot of the plan — in summary.

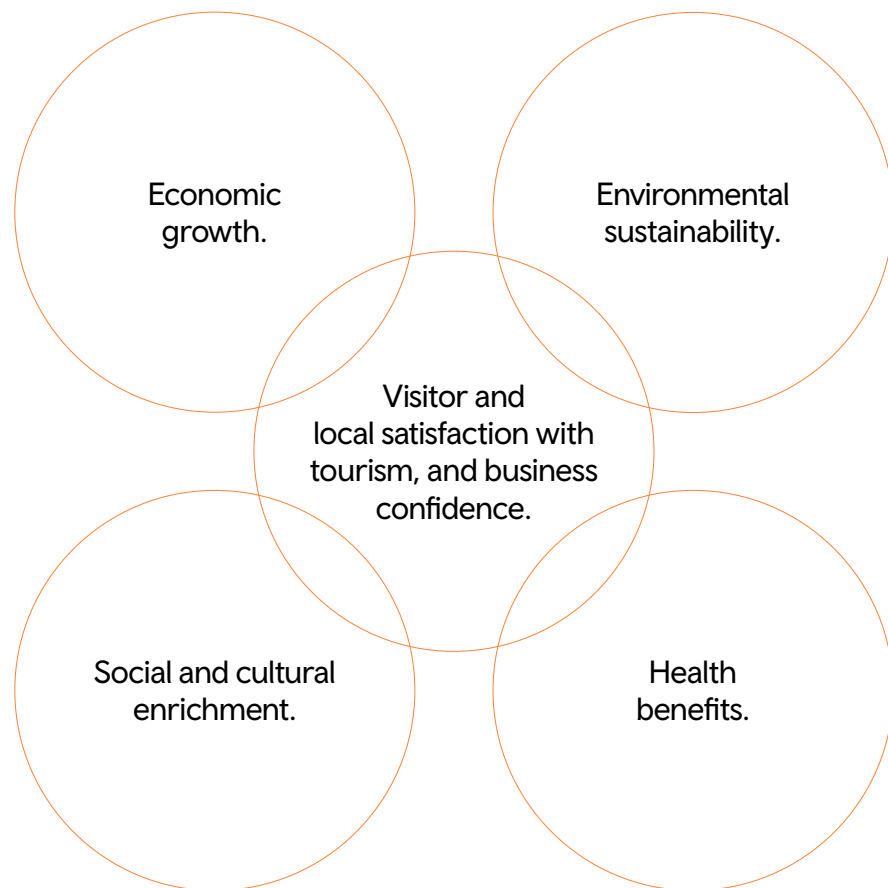
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Ambition				
To grow tourism for the good of Wales				
Goals				
Economic growth that delivers...	Environmental sustainability	Social and cultural enrichment	Health benefits	
Listen to residents, visitors and businesses				
Approach				
High-quality, 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	Quality visitor experiences	An innovative Cymru Wales brand	An engaged and vibrant sector	
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.

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Our ambition is to grow tourism for the good of Wales: generating economic, environmental, cultural and health benefits that enrich the lives of our visitors — and local communities.



Approach.

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Central to our approach is an emphasis on developing outstanding, high-quality, year-round visitor experiences that are good for our guests — and local people. Experiences that strike a balance between:

Bro.

Meaning local community, a sense of purpose and place.

Byð.

Meaning international levels of quality standards and ambition.

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, offering value for money.
- Open year-round, across all parts of Wales.
- Growing home-grown businesses.
- Celebrating the Welsh language.

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.

We want to create and celebrate experiences that reflect Wales’ stand-out strengths as a country, picking up on our recent annual themes.

By 2025 we want Wales to be famous for its:		
Outstanding landscapes: protected and cared for.	Vibrant communities and creative culture.	Epic adventures and activities for everyone.
Unique Welsh welcome.		
National experiences such as The Wales Way.		

Wales attracts around 11 million visitors a year. There is still scope to grow the overall number of visitors to Wales but in order to develop sustainably we need to address three key challenges:

Seasonality Growing off-peak tourism.	Spend Encouraging visitors to spend longer and spend more in Wales.	Spread Inspiring visitors to discover new tourism-ready areas of Wales.
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- Our main focus will be on:
- New staycation markets across the age-spectrum in Wales, the UK and Ireland.
 - International visitors, that are new to Wales that have been or are considering the UK.
 - The people of Wales, inspiring confidence, visits and advocacy.
 - Lifetime visitors, with the aim of turning students into repeat visitors.
 - Business travellers, starting with doing more to attract Business Events to Wales.
 - Special interest visitors, with a passion for specific experiences.
 - Trade and operators, intermediaries that bridge us and our visitors.

“Britain’s most beautiful country punches well above its weight. And in recent years, it has blossomed — with lovely small hotels, flourishing food scenes and audacious activities — without sacrificing the soul that made it so appealing in the first place.”

Audacious.

Epic adventures are the best.
Phil Scott, RibRide.

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Play to your strengths.

The Welsh landscape and coast provide such a strong context for adventure. There's been a lot of investment here, so the outdoors industry has become a hotbed of professionalism that you can both work with and draw on.

Think big.

There's no point doing anything half-measure, so we decided to build the world's fastest commercial RIB experience, RibRide Velocity.

Work together.

We're very friendly with the guys who operate Zip World. Sean Taylor developed a zip wire that's the fastest in the world. So in order to develop a more cohesive draw to North Wales, we asked Sean's permission to use the word 'Velocity' and he very generously said, 'Yes, let's make North Wales a stronger destination.'

Think international.

We are using Welsh expertise and innovation, and using Wales as the proving ground. We're creating a reason to visit, but also exporting the values of Wales further afield. We can take Welsh innovation to the world.

Be the greenest, be the best.

We became the first UK marine operator to achieve Blue Flag status. When we interact with the environment, we protect it as much as possible. It's about our credentials, and earning people's trust. It's important to aspire beyond just driving a boat quickly. That's what we do, fundamentally: we aspire to be as good as we possibly can in every aspect of our operation.



Think big.

“Effective engagement between the private and public sectors is hugely important. Success depends on partnership and collaboration, so we need to forge relationships that make the best possible use of resources. The objectives of any priorities plan will be better achieved if we all collaborate closely. We’re all on the same journey together.

We need to work in a greener and more environmentally efficient way, but sustainability also means sustaining communities. Tourism creates jobs in places that other industries don’t. This sector deserves to be taken seriously. We make a huge economic contribution — £6.2 billion a year to the Welsh economy — and that needs to be recognised.”

Forge relationships.

The social impact of holidays can change lives.

Lowri Jones, Gwersyll yr Urdd, Llangrannog.

Our family holidays grew out of our original ethos.

Traditionally during the school holidays we offer summer camps for children and young people, but we had to look for another source of income on quieter weekends. The natural progression was family holidays for Urdd members, and now many other organisations take advantage of the setting here at Llangrannog and organise their own unique family holiday. We have families that come back year after year, as they feel safe and relaxed. Parents and guardians witness their children gaining confidence as they participate in over 20 different activities.

Around 600 families visit us every year.

The main priority is to spend time together as a family, learning different skills and activities. In the current economic climate it's important that we offer an affordable family holiday.

It goes back to the core values of the Urdd: developing new skills, new experiences, new relationships.

This could be as simple as offering a haven to develop family bonds, creating long lasting memories — and inevitably becoming a better human being and creating stronger communities. It sounds drastic, but it happens.

It helps that we're in a beautiful place.

Our location is a jewel in the Cardigan Bay coastline. We make sure that families can take advantage of the Wales Coast Path or spend a day on the beach. We provide things like buckets and spades, blankets, shuttle bus, and anything else to minimise extra costs to the families. We try and ensure that everybody can enjoy what we have to offer.

We help children who are disadvantaged socially or financially.

In August 2018 we launched a Fund For All to give disadvantaged children the opportunity to enjoy a summer holiday at one of our Centres. We saw the fruits of our labour in 2019 and it was absolutely amazing. Fifty children from around Wales were able to join us for free, and you could see the difference it made to them in front of your eyes. Seeing those children change for the better, it was my proudest moment in 15 years of working for the Urdd. We have an incredible team of staff. When we say we make a difference, we really do. It sounds cheesy. But it's true.

I often think we're a microcosm of the Well-being of Future Generations Act.

We try and source food and energy as locally as possible. We do all those little things that help the local economy. I went to a conference recently where they talked about well-being centres, and I thought, 'Actually, that's what Llangrannog has been doing for decades.' It's not called that. But it's entrenched in everything we do.

Safe...

and relaxed.

To deliver these ambitions, we have identified four key priorities for Visit Wales:

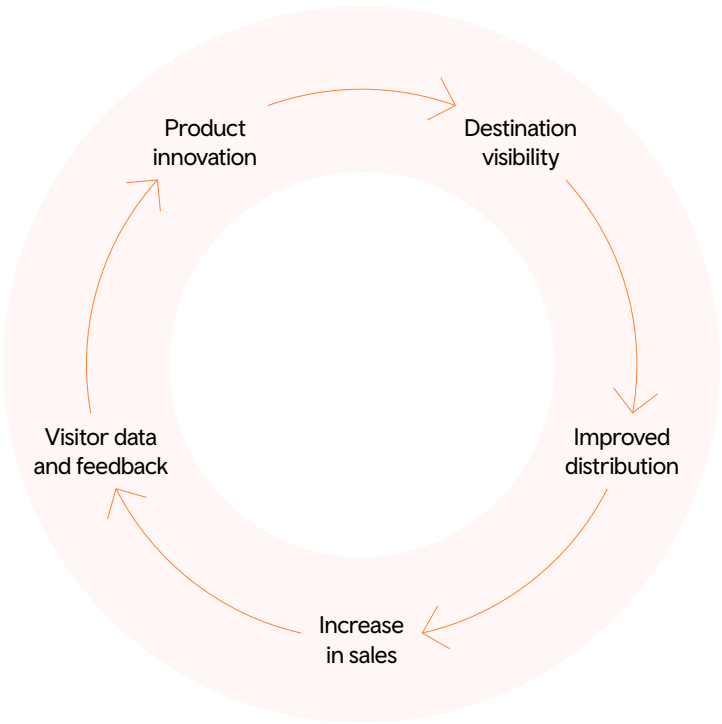
<div>1</div> <p>Great products and places <i>Continued investment in tourism products and events that deliver both local benefits to communities in Wales (Bro), and also put Wales on the world stage (Byd).</i></p>	<div>2</div> <p>Outstanding visitor experiences <i>Stand-alone products are not enough; every visitor to Wales should also have a positive, memorable experience at individual attractions and throughout their stay.</i></p>
<p>Actions:</p>	<p>Actions:</p>
<p>Visit Wales-led projects We will lead on a small number of public sector direct investments in projects that have the potential to promote Wales internationally. The first project to be considered and scoped is based on the ‘Paradores’ model in Spain.</p>	<p>Brilliant basics We will launch a new fund to invest in basic tourism infrastructure around Wales.</p>
<p>Industry-led capital investment We will continue to support innovators in the industry including via the recently launched £50 million Wales Tourism Investment Fund.</p>	<p>A new approach to hospitality We will explore the possibility of moving towards a free grading system, which would provide support for businesses to help them grow.</p>
<p>Integrated place-making We will support destination management across Wales. We will also introduce a strategic approach to place-development, channelling public efforts towards a small number of destinations, potentially one in each of the four tourism regions.</p>	<p>Skilled people We will establish a formal Tourism Skills Partnership and explore a range of ways to raise the status of the sector to future generations of workers.</p>
<p>International and home-grown events We will establish Event Wales to continue to deliver a balanced and sustainable portfolio of events, and to grow the Business Events sector.</p>	<p>Food tourism We will continue to work to help improve the food tourism offer in Wales.</p> <p>Product-led teams We will strengthen our focus on special interest products, creating product teams to deliver priority products based on our core offer.</p>

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<div>3</div> <p>An innovative Cymru Wales brand <i>We will continue to deliver a bold and integrated brand for Wales, harnessing tourism’s potential to present Wales to the world as a welcoming, vibrant destination.</i></p>	<div>4</div> <p>An engaged and vibrant sector <i>We will recognise, coordinate and harness the contribution a wide range of partners can make.</i></p>
<p>Actions:</p>	<p>Actions:</p>
<p>A stronger nation brand We will continue to strengthen the Cymru Wales brand, working across sectors to promote Wales in the UK and beyond.</p>	<p>Effective industry engagement and a collective industry voice We will bring the private sector together and engage with sector partners in creative ways.</p>
<p>Adaptive marketing with an off-peak focus We will promote Wales confidently to new visitors, with an emphasis on off-peak periods and value over volume.</p>	<p>Improved data and insights based on industry need We will provide timely insights for industry and better communicate research findings with our stakeholders.</p>
<p>One campaign, two themed years We will launch a major new campaign for Wales for the next 3–5 years and announce new themed years for 2022 and 2024.</p>	<p>Stronger strategy and policy function We will work across Government to deliver the full benefits of tourism for Wales and to ensure that the sector’s views are taken into account on issues such as Tourism Tax.</p>
<p>A digital-first industry We will harness digital platforms — including social media — to promote Wales and develop the industry.</p>	<p>An agile and responsive Visit Wales We will enable the sector to better understand how Visit Wales works, and operate in a way that is closely aligned to these new priorities.</p>
<p>Visit Wales Centre of Excellence We will establish a Centre of Excellence — a physical, open hub for events and training to help us all work together to promote Wales to the world.</p>	

In order to ensure that Wales is in a stronger competitive position in future we will also work on:

1

Improved routes to market
A stronger business-to-business programme will make it easier for visitors to find and book the best that Wales has to offer.



2

Special interest products
We will develop special interest products and experiences that support and fit with our core product strengths:

Outstanding natural landscapes.	Creative culture.	Epic adventure.
Specific products		
The Wales Coast Path, Offa's Dyke and National Trails. Golf.	Heritage Tourism. Film and television.	Mountain-biking and cycling.
Cruise and marine tourism.		

3

Commercial partnerships
Partnerships amplify, extend and add value to our marketing. In future we will develop fewer, bigger and better commercial partnerships with key brands and operators.

Here are just some examples of how our plans will deliver wider wellbeing:

1

Social and cultural benefits

- We will:
- Do more to survey local residents to understand the local impacts of tourism.
 - Promote a sense of place, culture and language more proactively.
 - Develop product experiences for special interest cultural markets.
 - Improve access to facilities, and project an inclusive view of Wales.
 - Consider an annual festival of accessible events and activities for children and young people.

2

Improving our environmental performance

- We will:
- Encourage sustainable transport via infrastructure such as electric charging points.
 - Encourage tourism businesses to improve environmental management through grading.
 - Explore the use of ‘Big Data’ to track visitor flows at peak periods and in specific areas.

3

Growing our contribution to health

- We will:
- Ensure that adventure and activity are core to the Wales brand and our marketing work.
 - Invest in facilities that enhance Wales’ adventure offering.
 - Enable a wide range of visitors to access and enjoy new wellbeing opportunities.

In line with our ambition and goals, our measures of success are:

People benefits

- 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 measures.
- Social and cultural measures.
- Health measures.

Delivering the plan

- We will:
- Restructure the internal team.
 - Refresh our governance structures.
 - Streamline our business support approach.
 - Review delivery at local level.
 - Establish a new approach to partnership delivery.

Healthy, happy: this amazing landscape belongs to all of us.
Ben Clifford, Surfability.

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Blue space.

“Wales is incredible — all this green and blue space — and if you’re denied access to that because of a disability, it’s such a shame. So it’s important that we make those spaces accessible to everyone. Surfing is great physical exercise, and it really connects you to the world around you and the environment. Being present and focused in the moment, while simultaneously being outdoors in the fresh air and exercising — the benefits are incredible.

The techniques we’ve developed in Wales are becoming part of the worldwide standard. Our own community benefits, too. Our volunteers get the chance to work with people in their community, making it a better place.”

Do good things and the world will love you for it.

James Lynch, Fforest.

'Sense of place' is an approach, not a slogan. We try and embody it in the things that we do. Much of that comes from our staff: lots of young Welsh people who enjoy working for us, and communicate that enjoyment and pleasure to our guests.

My approach to Fforest is based on travelling to other places and seeing how they embrace their localness. New Zealand is a great example. We travelled around for six weeks when our boys were little, and Kiwis are both very welcoming and have a palpable love for their homeland. It's becoming more like that here. It's about the way you express it. The sense of your own worth when you're embracing others is a wonderful thing.

Visitors have always been surprised about what they find here. Recently they're surprised by quality. Our approach is still to embrace the outdoors, but offer higher quality, moving up all the time. That works for us commercially. There is a wealthier sector of tourism coming to Wales now and what they want is for stuff to be really good. They're not interested in 'inexpensive and okay', but they're very happy with 'expensive and great'.

Do not undervalue yourself. If you've got something that's unique, sing about it — and charge for it. Marketing is about getting people here in the first place. Once they're here, getting people to pay for quality isn't a problem.

Cardigan is a collective of many good things. When you get that certain critical mass, that's the point when it becomes sustainable. For any town that has challenges of geography, economy and seasonality, there have to be enough people doing the right things at the right time. I've always believed that the more people doing good things, the better. Good + good = better. It's never competition.

Good + Good = Better

The Wales Way travels deep in the heart of the nation.
Alwyn Griffith, Celticos.

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“Our customers are looking for a taste of the real Wales — our language, culture, heritage and landscape. They want to be taken off the beaten path, as well as to the more iconic spots, and this is what The Wales Way is all about. Businesses like ours can leverage massive benefits from the international marketing opportunity offered by The Wales Way.”

Real Wales.

Iconic products can drive both business and leisure tourism: it's a double win.

Ian Edwards, International Convention Centre Wales.

ICC Wales is a game-changer. Wales is now a major player, across the UK and internationally in Business Events. But we didn't just say, 'This is what we're going to design and build.' We went to the marketplace and asked the people who use these facilities: 'Tell us what's best in class, tell us why, and help us.' And that's what we built: an incredible convention centre that really is world class.

If 2,500 people come to an event at ICC Wales, they all need somewhere to eat, drink and stay. Celtic Manor can't offer all of that — it's already running at 90 per cent occupancy. So it benefits other local bars, hotels, restaurants, taxis, coaches. All that ancillary spend makes a massive difference.

A business tourist generally spends three times as much as a leisure tourist. But over 60 per cent of people who come to an event will return with their family. It's a double win, and a massive opportunity for us to keep pushing the visitor economy both in business and leisure tourism.

In our first two weeks of opening we had several major events.

The immediate local impact was about £4.8 million, which is great, but the important thing is what happens next. People who come to conferences are senior people, and that means that they're decision-makers. They realise how accessible Wales is, and how close to the rest of the UK's population. They could open offices here, or bring in other events.

It's about having audacious goals.

When we first bid to host the Ryder Cup 2010, we were given a one per cent chance of winning. But we worked collaboratively with Welsh Government and together we pulled off an incredible Ryder Cup. We did it again with the 2014 NATO Summit Wales. With the convention centre, we can host major events like this every year. That's where we've got to show the audacity and ambition to drive the business forward. This is a real Team Wales approach.

Game-changer.



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