

Enterprise and Business Committee
Inquiry into Tourism

Evidence from Wales Tourism Alliance

Consultation Response to the:
Enterprise and Business Committee - Inquiry into Tourism
May 2014

Wales Tourism Alliance

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1. Industry Representation

The Wales Tourism Alliance

1.1 The Wales Tourism Alliance (WTA) is the recognised over-arching representative organisation for the tourism industry in Wales, liaising with and coordinating the views of all concerned and informing and working with Government at Westminster, Cardiff and at Local Authority levels.

1.2 The WTA also acts as an intermediary between Government and all involved in tourism, disseminating information to the industry via our member organisations and we work with colleagues in organisations in other parts of the UK.

1.3 The membership of the WTA includes sectoral, national, regional and local representative bodies comprising accommodation (hotels, guest houses, bed and breakfast establishments, holiday home parks, touring caravan and camping sites, hostels and self-catering cottages), attractions, activities, training and skills, tourism guides and transport.

1.4 The Wales Tourism Alliance is a pan-Wales umbrella group with 22 member organisations resting within its general membership. This amounts to around 7,000 working operators and means WTA contacts and representatives are now found in every part of Wales. In 2013/14 our members are:

British Home & Holiday Park Assoc
British Hospitality Association
Brecon Beacons Tourism
The Camping & Caravanning Club
The Caravan Club
Cardiff & Co
Federation of Small Businesses
Farmstay UK
Institute of Hospitality (Wales)
Mid Wales Tourism
National Caravan Council
North Wales Tourism
Pembrokeshire Tourism
Small serviced sector Forum
SE Wales Tourism Forum
Snowdonia Active
Tourism Swansea Bay
Visit Wales
Wales Official Tourist Guides
Association
Wales Activity Tourism Operators
Wales Association of Self Catering
Wales Association of Visitor Attractions

1.5 The WTA therefore works on behalf of operators ranging from major industry players from across the UK to the numerous micro-businesses that make up so much of the tourism industry.

1.6 To achieve this the Wales Tourism Alliance brings together the most powerful private and public sector partnership of tourism industry interests in Wales, including some of the biggest industry members in the United Kingdom who add their voice to ours in Westminster as well as in Cardiff. In that capacity the WTA remains committed to 'working together' with partners on an honest broker basis, only possible due to our trusted status and unique way in which we are supported. The tourism sector in Wales will not achieve its potential if Government, Local Authorities and the private sector are all working independently with a low level of communication and understanding of each other. The Wales Tourism Alliance provides the mechanism to make a reality of the partnership concept.

2. Our Response to the Inquiry

We note the inquiry focuses on three main areas:

- **To assess progress made by the Welsh Government towards achieving its Programme for Government commitments relating to tourism, as well as the suitability of these aims;**
- **To assess the ambition and deliverability of the Welsh Government's aim to grow tourism earnings by 10 per cent by 2020, as well as progress made towards this aim;**
- **To assess the suitability and effectiveness of the structures and support the Welsh Government has in place for the tourism industry in Wales, and its future plans for regional support.**

Point 1: Firstly, it is extremely difficult to give an assessment as to the Welsh Government's progress in relation to the relatively new current strategy for the development of the Tourism Industry, 'Partnership for Growth. The Welsh Government Strategy for Tourism 2013-2029' has only been in operation for less than a year!

Secondly, there is a completely new team heading up Visit Wales, so it is only fair that they be given a chance to acclimatise, move beyond their own re-organisation and implement the new strategy.

The inquiry also assumes that there is sufficient 'intelligence' gathering from research sources that can be analysed to answer this question objectively. It also assumes that the research would need to be able to isolate factors affecting the progress of the industry that were or were not related to Welsh Government activity in order to arrive at a realistic evaluation of progress made. With the current programme of research this is simply not possible.

For example, in terms of domestic visitors we have seen an improvement in the fortunes of the industry for 2013/14 (from a relatively low base) on previous years. However the new strategy was launched last year so it is difficult to see how this has any bearing on growth in 13/14. Even if this were not the case it would be difficult to attribute that progress to any one party.

Whilst there is research in the form of the GB Tourism Survey the information and data gleaned only provides top level figures. Therefore the first observation must be that resources are allocated to ensure that there will be intelligence available that allows objective factual analysis to take place as to the WG progress in the future.

We note that the Committee “also want to know how effective Wales’s tourism ‘brand’ is, and... will be examining the performance of Visit Wales including its marketing of Welsh tourism in the UK and overseas”.

With regard to the Wales brand, Mike Ashton Associates was commissioned to undertake a brand evaluation exercise. We believe that the final report produced as a result of this ambitious two year commission by the Welsh Government will not be made publicly available in its entirety but that we will however see a briefing report shortly, but again it is too soon to be able to comment on this work.

We would expect the following to be developed:

- A refreshed brand (as opposed to the current one on the Visit Wales (VW) website), with detailed sub-brands for tourism businesses to engage with and which the audiences being targeted can identify.
- A way of addressing of the prime barrier ‘there is not enough to do in Wales’. We still struggle to identify icons as strong as our competitors.
- Specific reasons to come to Wales showing product that people can relate to which will encourage them to book and visit. There is a need to present a selection of reasons to come to Wales. This can only be done via engagement with the industry and their representatives.
- A way to back up our brand with experiences and a range of existing events or activities that reflect excellence. This could help to change perceptions and encourage visits.

A cohesive approach is needed. Again this has to be done in partnership with the industry and with a detailed knowledge of the structure of our micro-business dominated industry.

In relation to previous activity and in that regard Visit Britain’s (VB) responsibility, as this is a VB duty, we welcome the fact that Wales is going to have a seconded manager posted to London to work with the Visit Britain team ‘to be embedded at VB London offices with the aim of maximising the opportunities for Wales within VB work’. We are also pleased that VW will be

working with VB to define targets for joint working and on a joint marketing programme, again prioritising Germany and the US initially.

However, it is difficult to see how this situation can be rectified without large investment being made, particularly in the changing world of electronic marketing. In comparison to the private sector's marketing spend, public sector resources on a UK basis are limited.

Content delivery: What is clear is that up to date fresh content needs to be delivered efficiently and effectively to clearly identified targets. This can only be done with clear lines of communication established in a public-private partnership that works. More dialogue is required with the industry.

Mike Ashton Associates pointed to the fact that even our closest market perceives us to be 'a long way away'. Overseas visitors are even more likely to believe this and are less likely to venture away from London. Our **transport infrastructure** needs improving to the point where this is not seen as a barrier and there is a smooth transportation of visitors from or even away from London on a significant scale., We believe this is probably sometime down the road (or railway line) yet.

The GREAT brand and campaign currently dominates and although Wales has a presence and people who see the GREAT brand and promo are more likely to take trips in Britain, again London dominates. VB and partners are using the GREAT logo on all their campaigns.

GREAT should be open source, there are significant rules that partners need to follow to be able to engage, partly due to big sponsors (of which Wales possesses few). What is required is continuous messaging to sustain changes in perception pan Wales. This can only be done via engagement with our businesses large, SME or micro. Potential overseas visitors need to be given reasons to visit.

Point 2: To assess the ambition and deliverability of the Welsh Government's aim to grow tourism earnings by 10 per cent by 2020, as well as progress made towards this aim.

We stand by our original response to the Strategy Consultation.

- We agree with the Vision and Ambition - it is clear and unambiguous, with the recognition that the returning visitor is as important as finding the new one. The six Ps again are clear and can be easily supported (although we do wonder whether the adherence to the letter P maybe a little constraining)!
- We agree with the aspiration in the document that builds on teamwork, if it can take into account of the above whilst recognising that there will still be competition between suppliers.

- With regard to the target of 10% by 2020 or in real terms 28% by 2020, given the slightly improving economic conditions juxtaposed with the huge public and private debt burden this is probably in the right ball park, although we hope to see this target broken before the deadline!

Point 3: To assess the suitability and effectiveness of the structures and support the Welsh Government has in place for the tourism industry in Wales, and its future plans for regional support.

We are not sure why this question is being asked. The changes have been made; there is a new strategy; a new team and more recently it was announced that the Regional Tourism Partnerships are to be closed and replaced by regional teams. The major decisions have been made for this term of government and under the current Minister for Economy, Science and Transport. We have to question why this inquiry is being held now? At best it appears somewhat premature, at worst it is too late.

3. Future involvement of the tourism industry in Wales in this process

The WTA would like to be part of any future consultation/advisory process affecting policy. Please place us on your mailing list in future so that the potential impact on tourism can be properly evaluated.

Adrian D. Greason-Walker
Wales Tourism Alliance

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