Y Pwyllgor Menter a Busnes

Cynulliad Cenedlaethol Cymru
National Assembly for Wales

Lleoliad:
Ystafell Bwyllgora 3 – y Senedd

Dyddiad:
Dydd Iau, 12 Mehefin 2014

Amser:
09.00

I gael rhagor o wybodaeth, cysylltwch a:
Siân Phipps
Committee Clerk
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Agenda

Cyfarfod preifat cyn y prif gyfarfod (09:00 – 09:15)

Cyfarfod cyhoeddus ffurfiol (09:15 – 10:15)

1 Cyflwyniadau, ymddiheuriadau a dirprwyon

Dogfennau atodol:

2 Ymchwiliad dilynol i Sgiliau Gwyddoniaeth, Technoleg, Peirianneg a Mathemateg (STEM) (sesiwn 8) (09:15 – 10:15) (Tudalennau 1 – 18)

Tystion:

Huw Lewis AC, y Gweinidog Addysg a Sgiliau
Ken Skates AC, y Dirprwy Weinidog Sgiliau a Thechnoleg
Yr Athro Julie Williams, Prif Gynghorydd Gwyddonol
Pat McCarthy, Uwch Datblygwr Polisi a Rheolwr Gweithredu

Dogfennau atodol:
Dogfen briffio gan y Gwasanaethau Ymchwil EBC(4)-15-14 (p1) Llywodraeth Cymru

3 Cynnig o dan Reol Sefydlog 17.42 i benderfynu gwahardd y cyhoedd o'r cyfarfod ar gyfer eitemau 4 a 5 (10:15 - 11:45)

Ôl-drafodaeth breifat

4 Blaenraglen waith (Tudalennau 19 - 27)

Dogfennau atodol:
EBC(4)-15-14 (p2) Blaenraglen waith

5 Trafod adroddiad drafft y Pwyllgor ar gyfleoedd cyllido yr UE ar gyfer 2014-2020 (Tudalennau 28 - 77)

Dogfennau atodol:
EBC(3)-15-14 (p3) Adroddiad drafft (Saesneg yn unig)

Cyfarfod cyhoeddus ffurfiol (13:15 - 14:45)

6 Ymchwiliad i dwristiaeth (sesiwn 1) (13:15 - 14:00) (Tudalennau 78 - 125)

Tyst:

Yr Athro Annette Pritchard, Athro Twristiaeth, Cyfarwyddwraig Canolfan Ymchwil Twristiaeth Cymru, Prifysgol Metropolitan Caerdydd

Dogfennau atodol:
EBC(4)-15-14 (p4) - Professor Annette Pritchard (Saesneg yn unig)

7 Ymchwiliad i dwristiaeth (sesiwn 2) (14:00 - 14:45) (Tudalennau 126 - 131)

Tystion:

Lowri Gwilym, Rheolwr Tim - Ewrop ac Adfywio, Cymdeithas Llywodraeth Leol Cymru
Huw Parsons, Rheolwr Marchnata a Thwristiaeth, Cyngor Sir Caerfyrddin

Dogfennau atodol:

EBC(4)-15-14 (p5) Cymdeithas Llywodraeth Leol Cymru (Saesneg yn unig)

Ôl-drafodaeth breifat (14:45 - 15:05)

Mae cyfyngiadau ar y ddogfen hon

Ymchwiliad Dilynol i Sgiliau Gwyddoniaeth, Technoleg, Peirianneg a Mathemateg (STEM)

Llywodraeth Cymru

Diben
Darparu tystiolaeth i'r Pwyllgor Menter a Busnes ar gyfer ei ymchwiliad dilynol i sgiliau STEM, gan nodi cynnydd mewn meysydd sydd dan ei gylch gorchwyl.

Pa effaith mae strategaeth Llywodraeth Cymru *Gwyddoniaeth i Gymru* a'r Cynllun Cyflawni wedi'i gael ar sgiliau STEM yng Nghymru?

Mae fframwaith strategol *Gwyddoniaeth i Gymru* yn gosod blaenoriaethau ac ymrwymiadau allweddol ar gyfer cynyddu'r gronfa dalent gwyddoniaeth a pheirianneg. Caiff y rhain eu symud ymlaen mewn polisïau penodol. Caiff cynnydd o ran cwrdd â'n hymrwymiadau ei adrodd yn fewnol yn rheolaidd ac rydym ni hefyd yn cyhoeddi adroddiad blynyddol i roi'r newyddion diweddaraf i randdeiliaid ar ein cynnydd, yn gysylltiedig â'r Rhaglen Lywodraethu. Mae'r Prif Gynghorydd Gwyddonol yn adrodd i Weinidogion ar y gweithredu ac yn cynghori ar unrhyw gamau pellach angenrheidiol i gwrdd â'n targedau. Byddwn yn monitro sgiliau STEM yn ein tri maes thema wrth symud i'r dyfodol, gan geisio canfod ac ymdrin ag unrhyw fylchau.

Pa gynnydd sydd wedi'i wneud i ymdrin â digonolrwydd darpariaeth sgiliau STEM mewn ysgolion, colegau addysg bellach, addysg uwch a dysgu'n seiliedig ar waith (gan gynnwys prentisiaethau)?

Mae ymwneud yn gynnar â mentrau STEM yn cael effaith gadarnhaol ar agweddau disgyblion cynradd at bynciau STEM ac felly mae gwyddoniaeth yn parhau'n bwysig yn y cwricwlwm cynradd. Yn y Cyfnod Sylfaen, drwy'r Maes Dysgu 'Gwybodaeth a Dealltwriaeth o'r Byd', caiff plant brofiadau sy'n cynyddu eu chwilfrydedd am y byd o'u cwmpas a chânt eu hannog i fwynhau dysgu drwy archwilio, ymholi, arbrofi, holi cwestiynau a cheisio dod o hyd i atebion.

Yn 2013 sefydlodd Llywodraeth Cymru Grŵp Gorchwyl a Gorffen i ystyried cyfrifiadureg a TGCh, a chyhoeddodd y grŵp ei adroddiad ym mis Hydref 2013. Roedd yn pwysleisio bod angen diweddaru'r modd y caiff TGCh ei dysgu mewn ysgolion, gan ei gwneud yn fwy perthnasol i anghenion cyfredol ac yn y dyfodol. Roedd yn galw hefyd am gwricwlwm Cyfrifiadura sy'n annog creadigrwydd, gan ganiatáu gweithio thematig a datblygu sgiliau datrys problemau yn y byd real. Nid nod terfynol yw llythrennedd digidol; rhaid i ddysgwyr greu yn ogystal â defnyddio.

Mae'r cwricwlwm gwyddoniaeth cyfredol yn CA2 a 3 yn pwysleisio datblygu sgiliau a gwyddoniaeth sy'n cael ei harwain gan ymholi. Yn ogystal â chymhwyso'r Fframwaith Sgiliau anstatudol i bobl ifanc 3 i 19 oed, caiff dysgwyr eu haddysgu i gymhwyso eu sgiliau, gwybodaeth, a dealltwriaeth wyddonol i gynllunio strategaethau, datrys problemau a chynnig esboniadau. Fodd bynnag mae Estyn wedi amlygu pryderon o ran cynllunio dilyniant mewn perthynas â gwybodaeth a dealltwriaeth wyddonol (Mehefin 2013), a'r modd y mae'r cyfnodau allweddol hyn yn paratoi dysgwyr ar gyfer astudiaethau ar lefel TGAU. Roedd yr adroddiad hefyd yn pwysleisio bod safonau gwyddoniaeth yn dda neu’n well yn y mwyafrif o wersi a arsylwyd.

Mae Llywodraeth Cymru yn cydnabod bod sgiliau STEM yn hanfodol bwysig, ac mae’n nodi gwelliannau fesul blwyddyn ers 2007/08 o ran y ganran o ddisgyblion 15 oed yn CA4 sy’n cyflawni graddau A* i C mewn gwyddoniaeth. Yn 2012/13 roedd hyn yn 74.8% - i fyny o 70.6% yn 2011/12. Serch hynny, dangosodd PISA 2012 fod perfformiad Cymru mewn gwyddoniaeth wedi syrthio’n is na chyfartaledd yr OECD, gan gynnwys cwymp o 50% ers 2006 o ran y rheini sy’n cyflawni’r lefelau uchaf. O ganlyniad, mae Llywodraeth Cymru yn awyddus i ddeall yn well y materion sy’n ymwneud â PISA, sut y gallwn gynorthwyo athrawon gwyddoniaeth ymhellach, a sut y gallwn ni helpu i newid y canfyddiad o’r gwyddorau a thechnoleg fel dewis gyrfa neu gwrs astudio. Yn benodol rydym ni’n awyddus i gefnogi ysgolion ymhellach yn ystod Cyfnod Allweddol 4 a mynd i’r afael â gwahaniaethau o ran rhyw.

Yn ddiweddar comisiynodd y Gweinidog Addysg a Sgiliau’r Athro Graham Donaldson i ymgymryd ag adolygiad annibynnol o’r Cwricwlwm Cenedlaethol a threfniadau asesu. Mae’r adolygiad yn cynnwys ymgysylltu’n eang â rhanddeiliaid ac mae’n ystyried anghenion busnes a’r economi, gan gynnwys rôl gritigol sgiliau STEM, yn ogystal â materion a amlygwyd gan Estyn yn ymwneud â chyflwyno gwyddoniaeth yng Nghyfnodau Allweddol 2 a 3 mewn ysgolion. Bydd adroddiad ac argymhellion yr Athro Donaldson yn cael eu cyflwyno tua diwedd y flwyddyn.

Wrth symud ymlaen gydag argymhellion yr Adolygiad o Gymwysterau mae swyddogion AdAS yn paratoi ar gyfer cyfres newydd o gyrsiau TGAU i’w haddysgu am y tro cyntaf o fis Medi 2016. Mae’n debygol mai cymwysterau TGAU fydd yr unig gymwysterau gwyddoniaeth a fydd yn cyfrif yn y dyfodol at fesurau perfformiad ysgol allweddol (eglurwyd y bwriad hwn mewn llythyr y llynedd). Mae’r gwaith a gynllunnir yn cynnwys ymgysylltu’n ffurfiol â rhanddeiliaid, gan gynnwys cyrff dyfarnu, ymarferwyr ac Estyn, i sicrhau bod ein cymwysterau’n parhau’n agored i ddatblygiadau ehangach a bod dysgwyr yn manteisio ar gymwysterau sy’n addas ar gyfer y dyfodol.

Y niferoedd a ymgymerodd â phrentisiaethau yn y prif sectorau’n gysylltiedig â STEM oedd:

	2011/12	**2012/13**
Peirianneg*	2,319	2,021
Electrodechnegol	981	1,031
Defnyddiwr/wyr TG	842	1,222
Cyfanswm	4,142	4,274

*Mae data ar gyfer Peirianneg yn cynnwys pob disgrifiad sector sydd â Pheirianneg yn yr enw.

Un o’r sectorau mwyaf poblogaidd oedd Defnyddiwr/wyr TG sy’n dangos cynnydd o 45% rhwng 2011/12 a 2012/13. Mae hyn oherwydd natur y fframwaith a’i berthnasedd i gyflogwyr y sector. Mae’n bosibl fod y gostyngiad o 13% yn nifer y dysgwyr Prentisiaeth ym maes Peirianneg i’w briodoli i’r nifer o ddysgwyr yn symud o Brentisiaeth Sylfaen i Brentisiaeth, a chylchoedd recriwtio cyflogwyr yn y sector hwn.

Mae’r buddsoddiad ychwanegol rydym wedi’i wneud mewn Prentisiaethau wedi caniatáu i ni gyllido Semta, y Cyngor Sgiliau Sector perthnasol i gynyddu’r nifer o

Brentisiaethau STEM drwy'r cynllun 'Rwyf i'n Beiriannydd', ar y cyd â Chynllun Addysg Beirianneg Cymru a'r Academi Wyddoniaeth Genedlaethol.

Rydym ni'n cefnogi hyfforddiant dwys i ddysgwyr 16-24 oed i ddod yn Brentisiaid STEM, y maes sydd bellach yn cyflawni'r dilyniant cryfaf i Brentisiaethau.

Mae Llywodraeth Cymru yn gosod pwyslais mawr ar ddatblygiad parhaus sgiliau STEM mewn addysg uwch. Drwy Gyngor Cyllido Addysg Uwch Cymru (CCAUC) rydym ni'n parhau i gefnogi darpariaeth STEM mewn AU i gefnogi agenda uchelgeisiol *Gwyddoniaeth i Gymru* sy'n adeiladu ar fentrau llwyddiannus CCAUC dros y blynyddoedd diweddar.

Rydym ni hefyd yn falch i nodi bod cofrestriadau cyrsiau STEM mewn AU yn parhau i gynyddu sy'n awgrymu bod yr ymyriadau rydym ni'n eu gwneud drwy'r cwricwlwm yn cael effaith gadarnhaol ar ddewisiadau unigolion mewn addysg uwch a bod darpariaeth yng Nghymru'n profi'n ddeniadol i ddarpar fyfyrwyr. Yn ogystal, mae ein diwygiadau AU wedi gosod y sector AU mewn sefyllfa lawer cryfach i fuddsoddi mewn darpariaeth STEM. Mae'r rhagolygon diweddaraf yn awgrymu y bydd y drefn gyllido newydd yn cyfrannu £200m ychwanegol mewn incwm i'r sector yn ystod oes y Llywodraeth hon, o'i gymharu â'r fformiwla cyllido flaenorol.

Pa gynnydd sydd wedi'i wneud i sicrhau gwerth am arian o'r cyllid ychwanegol i gefnogi a hyrwyddo sgiliau STEM, ac a yw'r cyflenwad o sgiliau STEM yn diwallu anghenion marchnad lafur Cymru?

Dros y cyfnod 2013-15 mae cynllun grant yr Academi Wyddoniaeth Genedlaethol wedi cyllido 29 o brosiectau, werth tua £1,650,000 ac amcangyfrifir eu bod yn cyrraedd 62,000 o ddisgyblion drwy amrywiaeth o weithgareddau ymgysylltu a chyfoethogi STEM. Mae'r cyfranogwyr yn amrywio o Gyfnod Allweddol 1 hyd at TGAU a Safon Uwch a myfyrwyr ôl-16 eraill. Mae cyllid gan yr Adran Addysg a Sgiliau (AdAS) i Techniquest (TQ) a Techniquest Glyndwr (TQG) yn £1.755miliwn arall. Mae'r Academi yn ategu Gyrfa Cymru, sy'n darparu gwybodaeth a chyngor gyrfaoedd sy'n canolbwyntio ar y cleient.

Mae cynllun yr Academi Wyddoniaeth Genedlaethol wedi cynnal dau gylch grant cystadleuol ac ar hyn o bryd mae'n hwyluso portffolio tymor hirach o brosiectau hyd at fis Mawrth 2015. Mae'r Academi hefyd wedi dyfarnu cyllid grant i Gynllun Addysg Beirianneg Cymru i ennyn diddordeb a hybu gyrfaoedd yn y sector peirianneg, ac i Gymdeithas Wyddoniaeth Prydain ar gyfer cynnal Gwobrau CREST. Mae'n awyddus i gyllido prosiectau sy'n denu neu sy'n targedu grwpiau sydd wedi'u tangynrychioli, fel 'Lab mewn Lori' y Sefydliad Ffiseg (a ddenodd dros 1,500 o fyfyrwyr benywaidd), 'Ysgol Haf S4' dan arweiniad Prifysgol Abertawe (yn targedu Wardiau Cymunedau yn Gyntaf a chyfranogwyr benywaidd) a 'Denu Merched i Faes Peirianneg' (dan Gynllun Addysg Beirianneg Cymru). Mae'r gwaith wedi'i gynorthwyo gan arolwg o weithgaredd STEM yng Nghymru a chaiff dangosyddion perthnasol eu hadrodd yn unol â Chynllun Cyflawni *Gwyddoniaeth i Gymru*.

Roedd adroddiad gan Gyngor Cynghori ar Wyddoniaeth Cymru yn cynnig y dylid datblygu'r Academi Wyddoniaeth Genedlaethol ymhellach, gan gynnwys strategaeth fwy ffurfiol, set o ddangosyddion a gwerthuso prosiect, ynghyd â chydlynu cryfach gyda STEMNET. Mae'r Prif Gynghorydd Gwyddonol yn cyfarfod â phartneriaid i drafod hyn ymhellach. Yn ystod y flwyddyn nesaf caiff prosiectau eu gwerthuso a chaiff argymhellion eu hystyried yn ystod y cylch grant nesaf. Rydym ni hefyd yn datblygu cysylltiadau cryfach gydag elusennau a chanolfannau gwyddoniaeth y DU ac yn cyfrannu at fforwm STEM newydd.

Lle bo'n berthnasol, mae'r Academi Wyddoniaeth Genedlaethol hefyd yn cydweithio gyda thimau sector. Er enghraifft mae tîm y Sector Deunyddiau a Gweithgynhyrchu Uwch yn cefnogi rhaglen beilot o Glybiau Sadwrn gyda Chwmni Moduro Ford i annog pobl ifanc i ymgymryd â gyrfaoedd peirianneg drwy waith ymarferol gydag electroneg cerbydau a pheiriannau (sy'n targedu merched, gyda chyfranogiad benywaidd o 29%). Mae gwaith y sector hefyd yn cynorthwyo Airbus i gynnal cohort o ferched yn unig ar y rhaglen Cadetiaid Diwydiannol.

Ar draws y DU mae sefydliad STEMNET yn hybu Llysgenhadon STEM a chlybiau gwyddoniaeth mewn ysgolion ac yn codi ymwybyddiaeth o gyfleoedd cyllido. Mae 96% o ysgolion uwchradd Cymru bellach yn cynnal o leiaf un digwyddiad Llysgenhadon STEM bob blwyddyn, gyda 65% o ysgolion yn cynnal tri ddigwyddiad neu ragor ac enillydd diweddaraf y wobr *Llysgennad STEM Mwyaf Ymroddedig* yn dod o Gymru. Mae hanner yr ysgolion uwchradd yn cynnal clybiau gwyddoniaeth gyda thraean o'r rhain yn derbyn cyllid grant o ryw fath.

Mae gwerthusiad wedi canfod bod y cymorth mae Llywodraeth Cymru'n ei roi yn chwarae rhan bwysig yn y rhaglen Techniquest a Techniquest Glyndŵr sy'n dysgu sgiliau STEM mewn ysgolion ar y safle a thrwy weithgaredd ymestyn. Caiff y cymorth hwn ei ystyried yn hanfodol i gynnal y gwasanaethau cyfredol a chyfoethogi'r arlwy ac mae'n anodd ei atgynhyrchu o ffynonellau eraill. Roedd y mwyafrif llethol o ysgolion yn ystyried bod y gwasanaeth diweddaraf yn hwyliog ac yn gyffrous i ddisgyblion, gan gyfrannu at ddeilliannau dysgu diriaethol a chawsant eu graddio'n dda iawn neu'n rhagorol. Yr effaith mwyaf cyffredin ar ddisgyblion a nodwyd oedd cynnydd o ran cymhelliant a brwdfrydedd, diddordeb yn y pwnc, dealltwriaeth o'r cysyniadau dan sylw a dealltwriaeth gyffredinol o bynciau STEM.

Mae Miller Research yn cynnal gwerthusiad allanol manwl o Raglen Gymorth Mathemateg Bellach Cymru, sy'n darparu tiwtora ac sy'n anelu at gynyddu'r niferoedd sy'n dewis y pwnc. Mae'r cynllun peilot hwn wedi derbyn dros £581,000 o gyllid gan Lywodraeth Cymru rhwng 2010-11 a 2013-14. Barnodd adroddiad gwerthuso interim (2013) ei fod wedi'i reoli'n dda a bod y mwyafrif o'r deilliannau dymunol wedi'u cyflawni. Yn yr ardaloedd peilot dros y tair blynedd diwethaf gwelwyd cynnydd clir bob blwyddyn yn y nifer o fyfyrwyr sy'n dewis astudio Mathemateg Bellach i Safon Uwch; pedair gwaith yn fwy yn sefyll Safon Uwch Mathemateg Bellach rhwng 2010 a 2012; cynnydd cyffredinol yn y nifer o fyfyrwyr sy'n astudio Mathemateg Safon Uwch; a chynnydd yn y nifer o geisiadau i gyrsiau mathemateg AU.

Pa gynnydd sydd wedi'i wneud i fynd i'r afael â'r cyflenwad o weithwyr addysg proffesiynol sy'n gallu addysgu pynciau STEM ac effaith Grantiau Hyfforddiant Cychwynnol i Athrawon a'r Rhaglen Athrawon Graddedig ar recriwtio athrawon a gweithwyr addysg proffesiynol ym maes STEM?

Mae'r gyfradd gyffredinol o swyddi athrawon gwag ar draws Cymru yn parhau'n isel, ar 0.3%. Canfu'r Cyfrifiad Ysgolion Blynyddol ar Lefel Disgyblion diweddaraf (2012)

mai cyfartaledd y gymhareb o geisiadau i swyddi addysgu cyfrwng Saesneg gwag mewn cemeg oedd 13; 6 mewn ffiseg a 10 mewn mathemateg. Roedd y gymhareb yn sylweddol is (4) i swyddi addysgu cyfrwng Cymraeg. Rhif cyfatebol y gymhareb ar draws pob swydd uwchradd cyfrwng Saesneg yw 13 – gweler:
https://statswales.wales.gov.uk/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Staff-and-Governors

Rydym ni'n cydnabod pwysigrwydd cyflenwad digonol o athrawon gwyddoniaeth a mathemateg cymwysedig i ddiwallu gofyion ysgolion a gynhelir yng Nghymru. Mae'r cymhelliannau hyfforddi bellach yn £20,000 i'r rheini sydd â graddau â'r dosbarth uchaf sy'n ymgymryd â hyfforddiant ôl-raddedig cychwynnol i athrawon mewn ffiseg, cemeg a mathemateg a hyd at £15,000 ar gyfer addysgu cyfrifiadureg. Mae'r rhaglen wedi'i chynllunio i annog y rheini sydd â'r lefel uchaf o wybodaeth pwnc i ystyried addysgu yng Nghymru fel gyrfa.

Rydym ni hefyd yn cefnogi'r pynciau hyn sy'n flaenoriaeth o ran recriwtio dan lwybrau'n seiliedig ar gyflogaeth i mewn i addysgu, gan gynnwys y Rhaglen Athrawon Graddedig, ac o 2013/14 drwy Teach First Cymru, sy'n pwysleisio pwysigrwydd recriwtio athrawon gwyddoniaeth dan hyfforddiant sydd â gwybodaeth ragorol o'r pwnc.

Mater i awdurdodau lleol, penaethiaid a chyrff llywodraethu yw cyflogi athrawon mewn ysgolion. Bydd cyrff llywodraethu'n rhoi ystyriaeth i sgiliau, gwybodaeth pwnc a chymwysterau ymgeiswyr ochr yn ochr ag anghenion yr ysgol a chydbwysedd arbenigedd o fewn y gweithlu addysgu.

Pa gynnydd sydd wedi'i wneud i fynd i'r afael ag effeithiolrwydd cysylltiadau addysg a busnes rhwng sefydliadau addysg a chyflogwyr STEM?

Pwysleisiwyd cysylltiadau addysg a busnes cyfoethocach gyda chefnogaeth yr Academi Wyddoniaeth Genedlaethol a gwaith yn y sector mewn adran gynharach. Dan STEMNET yng Nghymru erbyn hyn ceir 1,400 o Lysgenhadon STEM, tua 70% o blith cyflogwyr sector preifat, sy'n cynnwys 870 o gyflogwyr, 120 yn BBaChau. Mae partneriaid yn y sector cyhoeddus yn cynnwys Iechyd Cyhoeddus Cymru a'r GIG yn ehangach.

Yn 2013 dangosodd adolygiad gan ICF GHK Consulting Ltd o wasanaethau addysg craidd Techniquest (TQ) a Techniquest Glyndŵr (TQG) fod y sefydliadau wedi adeiladu rhwydweithiau cryf o bartneriaethau gyda darparwyr cymorth STEM a phrifysgolion eraill, ac wedi llwyddo i ddenu cyllid ychwanegol o amrywiaeth eang o ffynonellau. Mae eu gwaith yn is-gontractio gwaith ymestyn cynradd hefyd wedi dangos sut mae dod â sefydliadau gwahanol ynghyd, gan gynnwys arbenigwyr nad ydynt ym maes STEM, yn gallu cyfoethogi'r arlwy STEM i ysgolion. Ceir pwyslais ar y cysylltiadau clos rhwng TQG â Phrifysgol Glyndŵr a chyflogwyr diwydiant lleol (fel Ffatri Peiriannau Toyota UK) sy'n fuddiol i'r naill ochr a'r llall, ac sy'n cyfoethogi'r arlwy i ysgolion uwchradd ac yn sicrhau cyswllt â darpar fyfyrwyr newydd neu ddarpar recriwtiaid i'r partneriaid.

Gan adeiladu ar gynlluniau yn y Rhaglen Rhifedd Genedlaethol (2012), dyfarnodd Llywodraeth Cymru gontractau dwy flynedd o fis Ebrill 2013 i TQ, TQG a Steam Powered Stories i ddarparu gweithgareddau Ymgysylltu â Chyflogwyr ar Rifedd ar draws pedwar rhanbarth consortia Cymru. Mae'r rhaglen yn creu cysylltiadau rhwng cyflogwyr ac ysgolion i helpu i gynorthwyo athrawon a dysgwyr drwy ddatblygu sgiliau rhifedd a'u defnyddio yn y byd gwaith. Mae'r gweithgaredd hwn yn canolbwyntio'n benodol ar gynyddu hyder a gallu rhifedd disgyblion CA3 a CA4.

Yn ogystal, gall ysgolion fanteisio ar fentrau sy'n cael eu harwain gan gyflogwyr, fel y rhaglen Cyswllt Ysgolion. Mae'r fenter hon gan GE Healthcare yn croesawu myfyrwyr Safon Uwch mewn Bioleg, Cemeg, Ffiseg a Mathemateg i Ganolfan Maynard gan ddangos iddynt sut beth fyddai gyrfa mewn gwyddoniaeth a thechnoleg, a chanolbwyntio ar waith y safle ym maes technoleg celloedd a datblygu cylch oes cynhyrchion.

Amcan Stiwdio Arloesi Addysg Lego yw gwneud pynciau STEM yn hwyl ac yn gyffrous, a sicrhau bod gan fusnesau yng Ngogledd Cymru bobl â'r sgiliau a'r cymhelliant angenrheidiol i symud i gyflogaeth. Caiff gymorth gan G2G Communities gyda chyllid o Gronfa Datblygu Rhanbarthol Ewrop.

Cynnydd o ran mynd i'r afael â chanfyddiadau negyddol a stereoteipio rhyw ym maes STEM a hyrwyddo arferion da i annog menywod i gaffael sgiliau STEM a dilyn gyrfaoedd yn gysylltiedig â STEM.

Arweiniwyd y prosiect peilot Merched mewn Gwyddoniaeth, a gyllidwyd gan Lywodraeth Cymru, gan CaST Cymru a Chwarae Teg rhwng 2012 a 2014 i annog cyfranogiad ehangach gan ferched mewn addysg STEM a thrwy hynny gynyddu'r niferoedd sy'n dilyn gyrfaoedd ym maes STEM. Roedd y prosiect yn ymdrin â chanfyddiadau negyddol, a ddatblygir ar oedran cynnar yn aml, bod pynciau STEM yn anaddas i ferched. Amcan y gwaith oedd gwella'r ffordd y caiff gwyddoniaeth ei chyflwyno yn ystod cyfnod pontio CA2-CA3 mewn ysgolion cynradd ac uwchradd i adlewyrchu anghenion merched yn well.

Helpodd 'Hyrwyddwyr Gwyddoniaeth' i chwalu'r rhwystrau rhwng y rhywiau mewn ysgolion. Roedd y prosiect hefyd yn hybu gwelliannau ym mholisïau ac arferion gwaith diwydiant wrth ymgysylltu â gweithlu benywaidd. Bu 170 o athrawon, 1,580 o ddysgwyr a 170 o rieni'n cymryd rhan, gyda 31,000 o ddysgwyr eraill yn elwa'n anuniongyrchol ar ganlyniadau'r prosiect. Arweiniodd y prosiect at lunio canllawiau ar rywiau, adnoddau addysgol, deunyddiau ymarfer da ac astudiaethau achos. Caiff y rhain eu rhannu gydag athrawon ar draws Cymru drwy Hwb, yn dilyn cyfres o gynadleddau lledaenu. Rydym ni'n annog partneriaid STEM i gofleidio'r cysyniad o ryw a ddatblygwyd drwy'r prosiect, er enghraifft y newidiadau dilynol i gymorth grant AdAS i Techniquest a Techniquest Glyndŵr.

Yn 2013 cynhaliodd swyddogion AdAS adolygiad o niferoedd merched a'u dilyniant mewn gwyddoniaeth, yn enwedig at ffiseg Safon Uwch. Gan ymgysylltu â'r Sefydliad Ffiseg, roedd yr adolygiad yn amlygu bod angen cynorthwyo sgiliau a gwybodaeth ymarferwyr a mynd i'r afael â'r canfyddiad o ffiseg fel pwnc i'w ddewis gan ferched. Gwelwyd fod modd gwneud mwy i gofnodi ac amlygu tystiolaeth o wahaniaethau rhyw i ysgolion, a sbarduno mesurau adferol.

Fel y nodwyd uchod mae'r Academi Wyddoniaeth Genedlaethol wedi cefnogi nifer o brosiectau cyfoethogi STEM sy'n cydnabod ac yn ymdrin â gwahaniaeth rhwng y rhywiau.

Mae mater gwahaniaethau rhyw a dilyniant mewn pynciau'n gysylltiedig â STEM yn parhau'n flaenoriaeth i Lywodraeth Cymru wrth symud ymlaen â chyllid grantiau, datblygu'r cwricwlwm a gwaith ehangach mewn STEM. Mae'r Athro Julie Williams, fel Prif Gynghorydd Gwyddonol Cymru, yn sefydlu grŵp 'Menywod mewn Gwyddoniaeth yng Nghymru' gan ddod â gwyddonwyr benywaidd dylanwadol at ei gilydd i ddatblygu a chydlynu gweithgareddau i fynd i'r afael â'r mater hwn. Mae cynhadledd wedi'i drefnu ym mis Medi i annog menywod ifanc i ystyried rolau o fewn STEM ac fel gwneuthurwyr penderfyniadau gwasanaeth cyhoeddus. Rydym ni'n gefnogol iawn i gynllun gwobrwyo Athena Swan sy'n hybu ymarfer gorau mewn Prifysgolion i hyrwyddo gyrfaoedd ymchwil benywaidd. Cynllunnir y bydd Spearhead Science Cymru yn cynnwys camau i'w gwneud hi'n haws i ymchwilwyr symud yn ôl i mewn i ymchwil ar ôl toriad gyrfa ar gyfer gofalu am blant er enghraifft. Mae'r Prif Gynghorydd Gwyddonol yn gweithio gydag Ymddiriedolaeth Daphne Jackson, sydd â chyfradd lwyddiant o dros 90% wrth helpu gwyddonwyr i barhau â'u gyrfaoedd yn dilyn toriad gyrfa.

Pa gynnydd sydd wedi'i wneud ar ddysgu sgiliau STEM drwy addysg a hyfforddiant cyfrwng Cymraeg?

Dan Reoliadau Cynlluniau Strategol Cymraeg mewn Addysg ac Asesu'r Galw am Addysg Cyfrwng Cymraeg (Cymru) 2013 rhaid i Awdurdodau Lleol nodi eu strategaeth ar gyfer cynyddu'r ganran o ddisgyblion 15 oed ac uwch sy'n astudio am gymwysterau drwy gyfrwng y Gymraeg.

Ar gyfartaledd mae'r nifer o geisiadau a geir am swyddi addysgu cyfrwng Cymraeg ar draws pob pwnc yn is nag ar gyfer swyddi cyfrwng Saesneg. Fel y nodwyd uchod, mae'r un peth yn wir am bynciau STEM, ac yn 2012 cafwyd cyfartaledd o 4 cais am bob swydd addysgu cyfrwng Cymraeg uwchradd, o'i gymharu â 12 ar gyfer cyfrwng Saesneg. Mae'r Cynllun Cymhelliant Cyfrwng Cymraeg yn cynnig cymorth ymarferol ac ariannol, i helpu i gynyddu'r nifer o athrawon newydd gymhwyso yn y sector uwchradd sy'n gallu addysgu'n hyderus ac yn gymwys drwy gyfrwng y Gymraeg. Mae dros 90 yn y cynllun eleni, gan gynnwys 34 sy'n arbenigo mewn pynciau STEM, ac mae dros ddwy ran o dair o'r rhain eisoes wedi gwella o leiaf un radd yn eu sgiliau ieithyddol.

Eitem 4

Mae cyfyngiadau ar y ddogfen hon

Eitem 5

Mae cyfyngiadau ar y ddogfen hon

Eitem 6

Mae cyfyngiadau ar y ddogfen hon

Mae cyfyngiadau ar y ddogfen hon

WRITTEN EVIDENCE TO THE BUSINESS & ENTERPRISE COMMITTEE OF THE NATIONAL ASSEMBLY FOR WALES

Inquiry into Tourism

Submission by:

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Submission Highlights:

- Tourism is an economic engine for Wales; it is in the country's top three largest sectors and a major export industry, with 80% of visitor spending coming from outside Wales;

- Tourism is relatively *more* important to Wales' economy than to that of any other UK region. Five of the UK's 13 most tourism-dependent regions are in Wales (Anglesey, Gwynedd, Conwy and Denbighshire, Powys and SW Wales);

- The domestic tourism market accounts for 90% of Wales's visitors. Current visitors are extremely satisfied with their experience and exhibit high levels of destination loyalty but in key visitor markets Wales lacks currency as a desirable holiday destination by comparison with UK competitors (e.g. Cornwall);

- Brand Wales is at a tipping point. It needs greater clarity, stakeholder buy-in and consumer and media resonance;

- The overseas market is a small but valuable one, accounting for 10% of visitors but 20% of spend in Wales. Wales has lost almost a quarter of a million visitors during 2006-2013;

- Low consumer, media and travel trade awareness of Brand Wales and poor connectivity are barriers to promoting Wales in international markets;

- VW is operating in a challenging environment for which it is under-resourced – its marketing budget has fallen from almost £50 million in 2006 to just £7 million today. This compares to £47.5 million for Visit Scotland and £34.5 million for Tourism Ireland;

- Wales is almost totally absent from much of Visit Britain's digital content;

- Wales is building a significant events portfolio. Surprisingly, its reputation as an events destination has not changed deep-seated negative perceptions of Wales as a holiday destination in some key markets/regions;

- The London-based media does more to shape perceptions of Wales than any tourism marketing activities. More work needs to be done to challenge negative stereotypes and media representations of Wales.

1.0. Introduction

1.1. Tourism is an economic engine for Wales and is in its top three largest sectors with energy and environment, broadly the same as professional and financial services. Critically it is Wales's fastest growing sector; experiencing 15.3% growth since 2005 and continuous growth since 2008 (Tourism Sector End of Year Report 2013).

1.2. Promoting leisure and business travel to and in Wales is an effective means to support economic development because the industry cuts across and is linked to many other economic sectors, generating additional demand in a wide range of services and professions. Tourism touches every part of Wales and it is rooted in its urban and rural communities. The industry can play a central part in reinforcing and reflecting Wales' distinctive national identity and could assume a key role in Wales's public diplomacy and economic development strategies (Anholt 2007).

1.3. Tourism is a major export industry for Wales, with 80% of visitor spending coming from outside Wales. A 2013 Deloitte and Oxford Economics report on tourism's economic contribution suggests that the wider tourism industry contributes £6.9 billion to Welsh Gross Value Added (GVA) –13.9% of its total, supporting 206,000 jobs or 14.9% of the Welsh total (Deloitte 2013, p. 17). If Welsh Gross Domestic Product (GDP) is measured, tourism contributes £8.7 billion or 17.6% of total GDP and supports almost a quarter of a million jobs (Deloitte 2013, p. 17).

1.4. Wales tops UK regions for tourism direct GVA (i.e. goods & services consumed by tourists), ahead of Scotland, the SW and London. This is the most useful measure of the proportionate impact of tourism expenditure in a region and indicates that tourism is proportionately *more* important to Wales' economy than to any other UK region.

1.5. In fact, five of the UK's 13 most tourism-dependent regions are in Wales. Anglesey tops the UK table, with tourism accounting for over 20% of its total GVA. This places it well above Blackpool (15%), the second ranked destination. Tourism is also hugely significant in Gwynedd (ranked #5), Conwy and Denbighshire (ranked #11), Powys (ranked #12) and South West Wales (ranked #13).

1.6. These figures demonstrate that such is tourism's significance to Wales, any improvements in tourism performance would lead to significant economic gains for Wales' communities. At the moment, London and the SE and Scotland account for the lion's share of UK tourism spending with Wales in the bottom two regions, just ahead of the NE.

2.0. Clarity and strengths of Wales' brand

2.1. Most leading destination brands (e.g. New Zealand, Spain and Ireland), have evolved over a long period of time and have consistently communicated a set of agreed and clearly established brand values (InterBrands 2005; Morgan, Pritchard & Piggott 2005).

2.2. Research clearly demonstrates that effective brand building requires sustained and prolonged investment in both the tourism product and its marketing (Morgan, Pritchard & Pride 2011). Unfortunately, the evidence suggests that Wales has been unable to achieve this. Investment in marketing has waxed and waned and the brand position has subsequently been compromised.

2.3. The brand identity of Wales is now at a critical point. Recently the brand has lacked a clear strategic focus, which may be the result of the hiatus created during the recent brand review. Previously, Wales Tourist Board (WTB) and later Visit Wales (VW) had pursued a clear brand strategy, evolving from the multi-award-winning *Two Hours and a Million Miles Away* campaigns to the challenger brand strategy of *Original Thinking*.

2.4. The territory captured by these campaigns has arguably been lost recently and today Wales faces a challenge to compete with Scotland, Ireland and key English regions, such as the SW. A persistent challenge is convincing potential tourists that Wales has a varied and high quality tourism offering. Whilst many people recognise Wales as a scenic destination, they remain unconvinced that it can offer aspirational, vibrant and fulfilling products and experiences (Morgan, Hastings & Pritchard 2012).

2.5. The current VW '*Have you Packed for Wales?'* campaign seeks to address this perceptual gap and by using a Welsh lullaby for its soundtrack it is attempting to communicate Wales' distinctive Welsh Celtic heritage. It is too early to comment on its impact and it remains to be seen how this campaign aligns with a long-term brand narrative for Wales.

2.6. Whilst the recent brand review has been completed, there appears to have been little discussion of its outcomes. Brand Wales must address the aspirational deficit discussed above and engage industry stakeholders. The development or evolution of a successful destination brand must involve its key stakeholders as they deliver the brand promise on the ground. The very best destination brands are those built on consultation and extensive stakeholder buy-in (Piggott, Morgan & Pritchard 2003).

3.0. Effectiveness of Welsh Government in the domestic tourism market

3.1. The domestic tourism market is key to Wales' economic success. It accounts for 90% of visitors and 80% of visitor spending. Within this market the holiday segment is the most important, accounting for almost 6 million trips and £1.1 billion spend.

3.2. 2013 figures suggest that Wales has performed well following a difficult period for the domestic tourism industry. In 2013 there were 9.93 million overnight trips to Wales by domestic or Great Britain (GB) residents, up 3.4% on the previous year. In contrast the GB total fell by 2.6%.

3.3. Existing research demonstrates that current visitors to Wales are extremely satisfied with their experience and exhibit high levels of destination loyalty; at the same time, people are very aware of Wales as a holiday destination and of its frequent award-winning marketing campaign activity (Morgan, Hastings and Pritchard 2012). In the long term, however, key challenges remain.

3.4. In a UK holiday market where proximity and familiarity are key drivers of tourist behaviour, Wales should be in a very strong market position vis-à-vis its competitors; it should at the very least be in UK consumers' decision-making sets. However, despite high levels of awareness, people are less likely to holiday in Wales than in other UK destinations, primarily because their emotional closeness to the country is lower and they are less likely to see Wales as an aspirational destination. In key visitor markets Wales lacks currency as a desirable holiday destination by comparison with competitors such as Cornwall.

4.0. Effectiveness of Welsh Government in the international tourism market

4.1. National Tourism Organisations (NTOs) like VW operate in an increasingly competitive marketplace. Around two-thirds of international tourists visit the top 10 major destinations; this means that there are over 180 countries and territories chasing less than a third of the world's international tourists (Morgan & Pritchard 2000; 2006). This creates a severe challenge for small countries, which are competing with a number of very powerful, well-resourced destination brands.

4.2. However, investment in destination marketing does deliver substantial ROI, with on average, each US$1 spent in destination marketing generating US$38 in visitor spending across international markets (Destination Marketing Association International, 2014). Similarly, Visit Scotland reports that every £1 spent on tourism marketing generates an additional £20 of visitor spending for the Scottish economy.

4.3. A 2013 survey conducted by Oxford Economics on behalf of the World Travel & Tourism Council (WTTC) suggests that destination marketing activities are likely to: increase brand awareness; enhance perceptions of travel destinations; increase visitation and visitor spending.

4.4. The United Nations World Tourism Organization (UNWTO) provides the most recent and comprehensive survey of National Tourism Organization (NTO) budgets. Expenditure data for 2009 is the most complete (Appendix A) and shows that the *average* national DMO budget was approximately US$50 million.

4.5. The survey demonstrates that a positive relationship exists between the funding of destination marketing and actual tourism receipts and that governments with larger tourism promotion budgets enjoy a higher level of international tourism spending (Morgan, Hastings & Pritchard 2012).

4.6. Total NTO funding had exhibited a general upward trend in this century before the global economic downturn reduced many countries' budgets in 2009/2010. This is now stabilizing and even reversing: for example Tourism New Zealand's budget will increase from NZ$83.8m in 2014 to NZ$115.8m by 2016, enabling significant expansion in Tourism New Zealand's current marketing activity (Tourism New Zealand, 2014).

4.7. The overseas market is a small but a high spending one for Wales. Whilst only 10% of staying trips are from overseas visitors they account for 20% of all staying expenditure (VB 2013). Wales has had overseas marketing powers since 1996 however, resource constraints and VW's need to prioritize the domestic market means that VW is heavily reliant on the overseas marketing conducted by Visit Britain (VB).

4.8. The overseas market is hugely significant in Great Britain and places the UK eighth in the world's tourism destinations. However, the growth in overseas visitors to GB is not being matched by similar growth in Wales. In contrast, Wales' share of the overseas visitor market has been falling for almost a decade. This is not a blip but a sustained decline, falling from a high point of 3.6% of the UK market (over 1.1. million visitors) to a current figure of 2.6% (884,000 visitors), spending £346 million. That is a loss of almost a quarter of a million visitors (VB 2013).

4.9. The fall in Welsh figures is replicated in other parts of the UK which have traditionally had a much stronger presence in the overseas market (i.e. Scotland and the English regions) – with one exception – London. During 2008-2013 Scotland has seen average figures fall from 7.8% to 7.4%, whilst the rest of England recorded a decline from 44.7% to 41.5% (VB 2013).

4.10. London, by contrast has seen its already dominant percentage share rise from 46.3% to 51% in the same period (VB 2013). It is absorbing a much bigger share of visitors than previously, whilst the rest of the UK is losing market share. The UK is not seeing a dispersal of overseas visitors around its countries and regions, which may well reflect changes in VB priorities and marketing campaigns, both of which are heavily influenced by the UK government's political and strategic requirements.

4.11. Wales has three major barriers to growing its international market. These barriers remain those identified by the WTB Marketing Plan 1994/5 and Pritchard and Morgan 1996. In overall terms, little progress has been made in the two decades since Wales secured overseas marketing powers to address these issues of:

- Low brand visibility;
- Lack of brand awareness and perceived product offering across key travel sectors, the media and consumers;
- Limited transport connectivity.

4.12. These barriers are compounded by a lack of funding. Table 1 demonstrates that there has been a steady decline in already scarce resources in each key market for Wales. It is not surprising therefore that visitor figures are recording steady declines. Indeed the correlation between spend and success appears quite clear. It is likely that this will continue to be the pattern if resources remain at their current level or are further eroded.

Table 1: VW Overseas Marketing Spend (£k)

	2011-12	2010-11	2009-10	2008-09
USA	473	411	391	720
Germany	63	82	98	300
France	117	76	99	323
The Netherlands	62	95	90	268
Belgium	40	26	43	54
Ireland	-	-	10	79
Spain	-	-	-	42
European specific	745.6	1925	1710	278.6

Source: Freedom of Information Request 3 Jan 2013, VW site

4.13. Wales is currently a destination only for the overseas traveller who is already familiar with the UK, probably on a third or fourth trip. There seems very little chance of Wales becoming a first choice destination.

4.14. Regardless of the independence vote result in Scotland, we are seeing a divergence in GB overseas marketing strategy with Scotland much more resourced and equipped and more inclined to work independently of VB in key inbound markets. Visit Scotland's marketing budget is approximately £50 million; by comparison, VW has a marketing budget of £7 million.

4.15. In contrast, Wales is heavily dependent on partnerships with VB and on influencing visitors who are already in the UK, paying particular attention to points of entry and to overseas visitor honeypot areas. Wales cannot rely on the ethnic roots and discovery market and it has neither the communication and transport links nor the image strengths to compete for overseas visitors on equal terms with its competitors. However, it does have the potential to build a unique destination within the UK based on its language, very strong built heritage (especially its castles) and living cultural heritage (Pritchard & Morgan 1996, 2001).

4.16. It is vital that investment in Cardiff Airport continues and that every effort is made to develop services between Wales and key hub cities. This is a key medium term aim of the Welsh government's strategy, which needs implementation. Air transport links are vital to growing the overseas market and facilitating overseas tourism. The recently announced Qatar-Edinburgh flight service for example is predicted to be worth an estimated £86 million to the Scottish economy (Glasgow Evening Times, May 19, 2014).

5.0. Performance of VW compared with tourism development agencies in the rest of the UK

5.1. A number of factors are affecting VW's ability to perform effectively vis-à-vis its competitor TDAs. In contrast to Scotland, VW is significantly under-resourced (in budgets and staff). It should be commended for the work it undertakes in the domestic market but it has been less successful in international markets and is more reliant here on building partnerships with VB. This does not seem to have been very successful over recent years but may be improving through a planned VW secondment to VB's London offices and VW-VB work programmes.

5.2. Under-resourcing not only constrains VW's marketing effectiveness but also its stakeholder partnerships and communications. For example, VW undertakes excellent research yet its website contains very little research compared to those of Visit Scotland, Tourism Ireland or VB. Not only is it lacking content but easy interpretation, which undermines its take-up by partners. This is a key aspect of VW's remit and ability to lead debates, yet without more resources, this function will be further compromised.

6.0. The success of Visit Wales marketing activities

6.1. VW have consistently produced high quality and often award-winning marketing material. The most recent campaign, *Have you Packed for Wales* was launched on St David's Day 2014 and its full impact will not be known until this summer season. It does however, promise an experience-rich offering which combines scenery, culture and heritage.

7.0. Work of VB as it relates to Wales

7.1. It is evident that the international promotion of Wales is problematic. The current GREAT campaign is not an effective platform for Wales. Indeed, there are few opportunities for Wales in a campaign focused on promoting GB PLC where the creative platform is the Union flag. It is clear that the more British the message, the less space there is for communicating a distinctively Welsh message.

7.2. A more effective VB strategy for Wales would be one which marketed GB as a constellation of three distinct countries and cultures. However, this is not a preferred option for the UK government and it is difficult to see any significant change to VB priorities and strategies in the short term. A 'yes' vote for Scottish independence would of course have far reaching ramifications for all the GB Visit organisations.

7.3. It is vital that every effort is made to make the VB and VW partnership work effectively for Wales. This involves cooperation at a governmental and organisational level.

7.4. As it stands, Wales is not being explicitly presented as a distinctive, different destination offer in VB presentations. Creative executions in campaigns may occasionally feature Welsh castles or its coast/coastal path and countryside but it is rarely made transparent that these are photographs of Wales. VB's iconography is dominated by London and it seems that Wales is being squeezed out as VB pursues strong commercial partnerships with the private sector, such as British Airways and with other UK government departments.

7.5. Much more needs to be done to embed Welsh products on VB's digital platforms. This is particularly acute given that VB identifies its digital presence as 'the bedrock of contact with potential travellers' (VB evidence to WG Inquiry).

7.6. Welsh content is hard to find on the VB websites http://www.visitbritain.tv/ and http://www.visitbritainshop.com; there is nothing on the homepages (dominated by London, England and Scotland) or in the Visit Britain shop. On the attraction pages, there are 20 Scottish and 4 Welsh attractions, none under 'we recommend' (http://www.visitbritainshop.com/world/attractions/attractions-in-wales.html). A Google search for Visit Britain, results in www.visitbritain.com/, described as 'Official UK tourism & places to visit England, Scotland & Britain'.

7.7. Wales is not alone in being disadvantaged by the current VB approach. Indeed, the situation is also of concern to Visit England and the English regions and will be the subject of *The Tourism Divide* conference in Liverpool in June 2014. It seems that without key strategic agreements to promote more effective working partnerships, however, Wales' marginalisation will only continue.

8.0. Sufficiency and Effectiveness of Welsh Government Resources Targeted at Promoting Tourism/VFM

8.1. Tourism is vitally important to the Welsh economy and unlike other sectors it touches every part of Wales. Moreover, promoting leisure and business travel to and in Wales delivers excellent VFM as it is an effective means to support economic development because the industry cuts across and is linked to many other economic sectors, generating additional demand in a wide range of services and professions.

8.2. In spite of tourism's importance to the Welsh economy, VW is much less resourced than its competitor tourism development agencies in the UK, as Visit Scotland and Tourism Ireland have marketing budgets of £47.5 million and £35.2 million respectively.

8.3. In Wales expenditure on tourism marketing has fallen dramatically since the mid-2000s when WTB expenditure was around £50 million (when EU funds were included). It is now £7 million; a fall much greater than that experienced by its competitor regions and most immediately reflected in the decline in overseas tourists to Wales, although domestic tourism performance has remained more robust.

8.4. It is difficult to see how Visit Wales can compete in this scenario as its position is being threatened by significant under-funding by comparison with its competitors. Their budgets are not only attracting tourists today but are building strong, effective and aspirational brands *for tomorrow*. In a context where Wales' brand is already weaker than those of its competitors, this is very worrying for the long-term sustainability of the industry.

8.5. Since 2010 tourism has been the fastest growing sector in the UK in employment terms, accounting for a third of the net increase in UK jobs 2010-2012. This trend is expected to continue until 2025 with annual growth rates of 3.8% - rates predicted to be much faster than manufacturing, construction and retail sectors. Given this predicted UK growth rate, a 10% Welsh growth target probably lacks ambition. Competitor TDAs have set more stretching targets, for example, Visit Scotland has a 50% growth target. Although it is unlikely to be achieved, setting a high and ambitious growth target sets the tone for Visit Scotland's organisational culture and ambition.

9.0. How the WG monitors and evaluates the effectiveness of its tourism support and marketing activities

9.1. VW undertakes substantial research and monitoring of its tourism marketing and support programmes. This research is a high quality but it could be more effectively communicated to key stakeholders and thereby used for advocacy and lobbying purposes.

10.0. The Use Made of Opportunities for Funding and Other Support From the EU

10.1. The current VW marketing campaign '*Have you Packed for Wales'* is part funded by EU funds and certainly in the past WTB/VW has made significant use of EU funding opportunities. Clearly, the Welsh Government, VW and the Welsh tourism industry need to maximize EU funding opportunities for both marketing spend and product development.

11.0. The success of WG's efforts to increase the quality of Wales's tourism offer

11.1. The VW's strategy rightly places considerable emphasis on improving the quality of the Welsh tourism product. This is central to building a strong and aspirational brand as Wales must convince opinion-formers in key markets/regions (especially London and the SE) that it can deliver a sophisticated and experience-rich travel product.

12.0 The Extent to Which the Marketing and Development of Tourism Utilises Wales' Cultural, Historical and Natural Assets

12.1. Wales' major leisure tourism attractions are its natural environment (especially its coastline and landscapes for activity and adventure tourists) and its heritage (especially its castles and language for cultural tourists). The Wales Coastal Path is a major attraction, which has attracted worldwide media attention and which features heavily in VW and to a lesser extent in VB marketing. Tourism offerings are also being developed around Wales's heritage in partnership with agencies such as Cadw.

12.2. Traditionally, domestic UK tourists have been less interested in Wales' linguistic heritage and more interested in its coastline and natural environment; although some important market segments (e.g. older explorers) are attracted by Wales' culture and heritage (see Pritchard & Morgan 1995, 1996, 1998, 2001). Non visitors or those who have not visited for three or more years have much more stereotypical and negative views and regard Wales as a destination with little to do (Morgan, Hastings & Pritchard 2012).

12.3. Internationally there is much greater interest in Wales' cultural, linguistic and heritage offering. Visitors often cite its castles, language and culture as key travel motivations. European visitors are also attracted by Wales' landscape and the opportunities it offers for exploration and adventure (see Pritchard & Morgan 1996, 2001).

12.4. Wales' castles are one of Britain's most popular attractions with foreign visitors according to a VB survey (2011). In this survey Wales' castles were more popular than Buckingham Palace and shopping in Harrods. Touring the castles of Wales has strong appeal in almost all markets, with Poland (49%), Russia (48%), Italy (46%), and Germany (44%) scoring the highest (BBC 2011).

12.5. Building on this, VB's most recent survey highlights how French visitors rank eating in a 'cosy Welsh pub' as a top three dream activity. American visitors are similarly attracted to Wales and rate it as *the* place to go for food (Nicolls 2013).

12.6. These attractors offer an ideal opportunity to develop appealing content and packages for these markets.The problem is that currently Wales lacks a clear brand strategy to harness and build on these key assets. Without such a brand to provide direction, marketing activities will be fragmented.

13.0. Impact of Major Events and Success of Welsh Government Maximisation

13.1. Wales has a strong reputation for events, both sporting and cultural; it is a well-established player in this area. The Major Events Strategy was launched in September 2010 and the Major Events Unit (MEU) was established to lead and coordinate a coherent approach to major events in Wales.

13.2. The MEU has been very successful in attracting a number of high profile events to Wales with more planned. It has also helped to grow a number of Welsh events and Wales has an emerging reputation for alternative and 'quirky' events which generate a disproportionate amount of positive PR and social media coverage, such as the Do Lectures and Bog Snorkelling Championships.

13.3. Wales's reputation for and success in building events does not seem to be feeding through into the Welsh brand, however, which still lacks cachet. There is a disconnect between the two, which is hard to explain. At the same time, although Wales has some world-leading cultural events and a vibrant cultural offering, this has not translated into Wales having a reputation as a place to go to for culture.

13.4. The challenge remains to harness the success of the individual world-leading and national events and to make them work for Wales. The role of the UK and international media is key in challenging these perceptions and although beyond the scope of this inquiry, the London-based media does more to shape perceptions of Wales than any marketing activities. Much more work needs to be done to challenge negative stereotypes and media representations of Wales.

Appendix A: NTO Marketing Spend, 2009

	Country	(US$ millions)
1	Australia	85.4
2	Austria	44.1
3	Bahamas	59.3
4	Belgium	25.8
5	Brazil	39.6
6	China	11.8
7	Colombia	9.9
8	Costa Rica	17.1
9	Cyprus	111.7
10	Czech Republic	15.7
11	Denmark	29.6
12	Estonia	7.5
13	Finland	17.1
14	Greece	45.7
15	Hungary	19.3
16	Iceland	4.3
17	Ireland	77
18	Italy	22
19	Japan	18
20	Jordan	15.4
21	Korea (Republic of)	56
22	Latvia	1.1
23	Lithuania	1.7
24	Luxembourg	2.5
25	Madagascar	0.5
26	Malaysia	98.2
27	Malta	36
28	Mexico	148
29	Norway	37
30	Paraguay	0.5
31	Poland	9.4
32	Portugal	111.6
33	Romania	13.9
34	Serbia	1.8
35	Slovenia	9.8
36	South Africa	75.2
37	Spain	97.1
38	Sri Lanka	4.8
39	Sweden	16.7
40	Switzerland	53.2
41	UK	63.7
42	Uruguay	2.9

Source: WTTC, 2012 and UNWTO 2010.

Appendix B: Prof Pritchard Biography & Select Publications Informing This Evidence

Professor Pritchard holds a personal chair in tourism at Cardiff Met University and has a background in sport, leisure and tourism national agency research. She has held senior academic posts and has extensive experience of leading international research teams and projects (she is currently leading a work package in a £1.7 million research project on the impact of tourism and events in peripheral regions funded by the Norwegian Research Council). She is Director of Cardiff Met's internationally recognised Welsh Centre for Tourism Research, with tourism and events management at the core of its research, teaching and industry consultancy and engagement activities.

Professor Pritchard is a leading international expert on place reputation management and tourism marketing and has completed several major tourism branding and marketing consultancy projects for governments and organisations in the UK and Europe, including the BBC and UNESCO and completed an evaluation of the £1.3 million European Union-funded Objective 1 Visit Wales Tourism Marketing Programmes (2011).

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Enterprise & Business Committee
Inquiry into Tourism

Evidence from the Welsh Local Government Association

Introduction

1. The Welsh Local Government Association (WLGA) represents the 22 local authorities in Wales, the three national park authorities and the three fire and rescue authorities.

2. It seeks to provide representation to local authorities within an emerging policy framework that satisfies the key priorities of our members and delivers a broad range of services that add value to Welsh Local Government and the communities they serve.

3. The WLGA welcomes this opportunity to contribute to the Enterprise and Business Committee's Inquiry into Tourism. Comments are offered against a number of the issues that the Committee is considering as part of the terms of reference.

The sufficiency and effectiveness of Welsh Government resources targeted at promoting tourism and supporting Welsh tourism businesses, and whether it represents good value for money;

4. Local authorities in discussion with tourism-related businesses have identified that these businesses require general business support in addition to IT, Marketing and using social media specifically tailored to the tourism business sector. Traditionally, local authorities have operated business grant schemes that target start up businesses and manufacturing based businesses. There would be merit in further developing targeted financial support for the tourism sector which would have different tiers of intervention by local government and Welsh government based on the level of tourism operation and level of financial support required.

5. All local authorities have prepared Destination Management Plans and these should inform resource allocation at a regional and local level. With limited

resources available nationally, there is concern that future funding could be directed at the high profile traditional tourism areas and the areas in Wales with a smaller tourism sector are under funded and as a result remain under-developed.

How the Welsh Government monitors and evaluates the effectiveness of its tourism support and marketing activities;

6. There are inherent difficulties in measuring the effectiveness of marketing activities and indeed defining marketing activities. Local authorities have a key role to play in promoting their council area, events and the facilities that they and other stakeholders provide. This promotion should complement regional and national promotion. There are opportunities for greater co-ordination in evaluating marketing activity by working with tourism-related businesses to understand their customers and the effectiveness of marketing activities. The information that Welsh Government has on the effectiveness of marketing activities is not routinely shared with local authorities.

7. The WLGA is aware of a specific report into the economic benefits of the Wales Coast Path and the desire to widen the benefits to more businesses (tourism and retail) and this is welcomed and is considered good practice.

8. Measuring success and effectiveness also depends on being able to ascertain exactly what the value of domestic or overseas tourism is actually worth. Measuring the volume and value of tourism in Wales is problematic as it needs to be model based with a number of variables fed into that model such as accommodation occupancy statistics. The Wales occupancy survey undertaken on behalf of Welsh Government is a small sample size and cannot be used reliably for sub-national analysis to inform future initiatives.

The use made of opportunities for funding and other support from the EU;

9. In the current programme, EU funding has been used to support tourism related initiatives including Digital Tourism programmes. Projects such as Valleys Regional Park have accessed significant levels of ERDF funding which has benefited a specific geographical area. Further, local authorities have benefited from ERDF funding via the Visit Wales led projects within the West

Wales and the Valleys Convergence Programmes' Environment for Growth theme.

10. It is anticipated that future EU funding for tourism will be locally targeted through the Rural Development Plan and that funding will be available from the other ESI Funds (Structural Funds & Fisheries) when linked to the Jobs & Growth agenda. Rural areas rely heavily on the tourism sector and RDP funding through Priority 6 – Promoting social inclusion, poverty and economic development in rural areas – and via the new Rural Community Development Fund will be crucial in supporting tourism based activities and businesses. It will be important that tourism related activity developed for RDP funding complements tourism related activity to be funded by ERDF. We would encourage further discussions between Visit Wales, and the wider Welsh Government Department for Economy and Transport, and local authorities as potential projects evolve for ERDF funding in order to ensure that activity developed nationally complements what is emerging regionally, sub-regionally and locally and vice-versa in order to maximise the impact of the funding available.

11. It is not clear whether Welsh Government will match EU funds at source thereby establishing financial support for tourism related businesses or whether this will be a more locally based approach. Locally the Destination Management Plans prepared by local authorities provide evidence for future funding applications.

The success of Welsh Government efforts to increase the quality of Wales's tourism offer;

12. Local authorities and the former Regional Tourism Partnerships have/had a key role to place in increasing the quality of Wales's tourism offer. It is not clear yet how the new arrangements will work with Visit Wales having a regional role; however we strongly advocate the need for enhanced partnership working to deliver programmes and projects at a local level. This localised approach should be inclusive of local government and local businesses and linked to the priorities with the Destination Management Plans which all local authorities have prepared.

13. Direct funding support such as Tourism Investment Support Scheme (TISS) has improved the tourism offer. However, the quality grading scheme for accommodation providers for which participation is a prerequisite for TISS funding is likely to become less effective in the future. In the past the most effective route to market accommodation was through Visit Wales and marketing area destination brochures. As more accommodation providers use the internet for marketing, there is no incentive for them to participate in the quality grading scheme and therefore do not receive feedback on how to improve their offer.

The extent to which the marketing and development of tourism in Wales makes the most of Wales's cultural, historical and natural assets;

14. The Destination Management Plans seek to capitalise on the local cultural, historical and natural assets. They set out key strategic priorities including products and themes for further development. It is important to recognise the important role local authorities play in the co-ordination, account management and guidance in developing iconic visitor destinations and the expertise that exists in local authorities; expertise that can be utilised by Visit Wales and Welsh Government to support the marketing and development of tourism in Wales.

15. There are existing partnerships and organisations that can be supported by Welsh Government to market and develop tourism; these include local authority partners, third sector and other public bodies. For example Cadw are proposing the preparation of a Strategic Plan for the historic environment as part of the forthcoming Heritage Bill and tourism opportunities should feature strongly in this plan. Natural Resources Wales are developing their thinking on the ecosystems approach to natural resource planning and using natural assets for tourism should be incorporated within this approach.

16. In 2013, the WLGA and the 3 National Parks commissioned a study to consider the economic value of the three National Parks. The study found "The economic benefits of the National Parks are felt outside the Park boundaries. Nowhere are the 'spillover' benefits of the National Parks more evident than with regard to the tourism sector. The Parks receive 12 million visitors each year spending an estimated £1bn on goods and services. This greatly exceeds

the turnover of tourism related businesses within the National Parks themselves, highlighting the fact that visitors to the Parks also stay and spend time in other parts of Wales." "The Parks provide strong tourism 'brands' which are recognisable to both domestic and international visitors and convey positive messages about Wales as a place to live, work or visit."

17. Further to the abolition of the Regional Tourism Partnerships, the WLGA is keen to ensure that the regional engagement teams within Welsh Government have a hands-on role across Wales. Local authorities are keen to engage particularly on destination marketing and in many areas existing partnerships such as the Destination Pembrokeshire Partnership would benefit from Visit Wales support. In times of restricted budgets, it is crucial that joint working is strengthened and that any funding is used to maximum effect at a local, regional and national level.

The impact of major events on Wales's tourism economy, and the success of Welsh Government attempts to maximise this

18. Major Events can have a big impact on local areas and provide a significant boost to local economies. A number of local authorities have worked very closely with the Major Events Unit in Welsh Government to support and attract national and international events to different parts of Wales. Conwy County Borough Council, for example, has worked well in partnership with the Unit to secure a number of high profile events to their area, which have benefited the wider North Wales region as a whole, such as the Wales Rally GB and the Tour of Britain and World Mountain Championship in 2015.

19. We are keen to see such joint working increasing in the future, and are encouraging local authorities to progress their regional working to develop a more strategic approach to supporting, resourcing and coordinating major events across Wales.

20. This will be a key feature of the new regional working relationships to be developed following the demise of the Regional Tourism Partnerships. Local government is looking forward to working with the Welsh Government to develop the appropriate arrangements across Wales.

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