

1. How Welsh and UK Governments sell Wales to the World at present in terms of trade, tourism and skills/training

- 1.1 In terms of Trade, City & County of Swansea feel there is an overall lack of engagement between Welsh Government teams, Local Authorities and business partnerships such as Swansea Economic Regeneration Partnership. We would welcome an opportunity to work closer together and to learn more about the activities undertaken by Welsh Government as well as UK Government to sell Wales to the World with a view to identifying how we can add value to this.
- 1.2 We feel there is no visibility to local authorities of the work undertaken to promote Wales to the World. We are not notified of events for example that we could promote to our business networks and contacts or aware of any overall pipeline plan of inward investment activities or ongoing enquiries. Developing closer working links would enable Welsh Government to take advantage of local networks, partnerships and resources to respond to investment enquiries and add value to the offer.
- 1.3 We would like to see increased visibility of Swansea on Welsh Government's marketing materials and hyperlinks through to our own websites.
- 1.4 From purely a tourism perspective, and in our opinion, it appears like most organisations, that due to increased budgetary pressure Visit Wales has had to prioritise its European and international target markets as it continues to promote the Wales brand in Ireland, Germany and the US. We would agree that by rationalising the markets and with focused investment, the benefits from a long-term strategy will increase awareness in these markets (and therefore, yield a higher return on a more limited budget).
- 1.5 We are aware that Visit Wales' relationship with Visit Britain has led to access to the wider European and international marketplace via a 'partner-led' agreement with Visit Britain.
- 1.6 We would anticipate that the success of this arrangement would depend on the volume and quality of the content submitted to Visit Britain; this could be affected by the resources available in Visit Wales to actively collate (from destinations), curate and disseminate the content on a regular basis to ensure that opportunities are not being missed.
- 1.7 Currently the Wales content on www.visitbritain.com is limited and especially so in relation to our own destination (which does not appear in the drop-down list of Wales' destinations).
- 1.8 The volume and type of information displayed on Visit Britain will be dependent on their content strategy; but receiving regular updates to refresh the content available will ensure that Wales remains front of mind.
- 1.9 We would suggest that to maximise resources digital channels could be introduced to automatically exchange content to Visit Britain for inclusion when Visit Wales' website is updated. Choosing pre-arranged criteria for the type and range of content to be included according to Visit Britain's content strategy.

This digital exchange could be extended further to increase efficiency, for example, between Visit Swansea Bay and Visit Wales.

- 1.10 What we are unaware of at present is how a/the strategy for international marketing would/will react to the emergence of new markets like China and the far east of Asia and would welcome the opportunity to discuss the opportunities that may emerge.
- 1.11 Overall having a strong dialogue with local authorities and regeneration partnerships to build up a portfolio of assets/information that can be used to attract investment, events and visitors to the area would be beneficial. Specifically Swansea's regeneration programme includes developing a digital arena & conference/special events venue that will help increase Wales's ability to attract special events.

2. The role of the Welsh Government's overseas offices

- 2.1 Whilst we are broadly aware of the trade and investment overseas offices, currently there does not appear to be any working links between these and local authorities who could support each other in this area of work. We feel these links should be strengthened so there is increased awareness of activities overseas.
- 2.2 In terms of tourism, we are aware of the Visit Wales offices in a number of key markets and it is understood that the US team based in New York operate out of the Visit Britain office; whilst a PR/Marketing company is engaged as the direct contact in Germany.
- 2.3 The Welsh Government has offices in key (in terms of tourism) territories eg China and Japan. What we don't know is whether there are opportunities to allocate resources to providing a tourism function operating out of those markets to ensure that the Wales (tourism) brand is not overshadowed by other strong markets in the UK, eg Cornwall, Scotland. These markets are interested in heritage, culture and the natural landscape; all of which are our strength in Wales.*

3. Welsh and UK Government support for exporters, and inward investment

- 3.1 Inward Investment needs to be part of an Economic Regeneration Strategy for Wales with a clear plan of activities and the role that each partner can bring to the table. There should be a brand that all partners can buy into with clear guidelines enabling partners to promote Wales at all available opportunities.
- 3.2 Again, there is an opportunity to improve public/private relationships. We feel it would be beneficial for local authorities to receive regular reports/updates on inward investment enquires as well as feedback on cases which do not proceed so we can identify why an area is not chosen by the potential investor. This would help build intelligence to inform local economic development plans.

4. The knowledge of 'Wales.Com' web site and in particular the help given by Business Wales

- 4.1 We feel Wales.com is very low profile and there should be more of a team approach to developing and promoting it. Maximum use should be made of digital media.

5. The clarity and strength of Wales's international tourism "brand"

- 5.1 What always disappoints are statements which indicate that in terms of brand awareness Wales is still way behind its competitors and this is still evident despite the amount of work to change perceptions over many years.
- 5.2 Awareness of Wales as a part of the Great Britain brand is growing but is still limited outside of Europe, as is its independence as a principality (and not part of England). **
- 5.3 However, the role that the Swansea City Football Club has played in raising awareness of Swansea and Wales on a global scale, since their promotion to the Premier League in 2011, is an excellent example of how tourism marketing messages can be linked to special interests in international markets. This has already worked well with football, golf and rugby and has helped to increase the number of overseas visitors to Wales. The introduction of a major events strategy for Wales has further helped raise the profile of the Wales brand across sectors.

6. The success of Visit Wales' international marketing activities

- 6.1 Previously, the coordination of the international marketing activity was delivered through the 'Prydain' meetings, where regular dialogue between the Tourism Marketing Areas of Wales and Visit Wales regarding overseas marketing was discussed, but this group has not met for a number of years now. Whilst Visit Wales arrange Roadshows, these are more often than not presentation led, with very little opportunity for a frank exchange of ideas and information.
- 6.2 There is a general feeling that destinations and their stakeholders feel disenfranchised from the limited overseas activity that takes place and a consequence is a lack of awareness of any progress the Wales brand is having in those markets.
- 6.3 In addition, the B2B approach adopted by Visit Wales is understood, however there is a danger of continually working with businesses with established relationships (especially if time and resources are limited) rather than showcasing a range of product available for different markets. There is a danger that some businesses do not feel part of the Visit Wales 'family' and excluded from the marketing opportunities available.
- 6.4 We would see a stronger regional role developing closer and defined partnerships with destination teams to help bridge these gaps in marketing and development requirements. A better understanding of destination needs is required, resulting in funding arrangements which help meet these needs. This should be a focus moving forward – whilst still demonstrating that the targets for Wales are being met.

- 6.5 We believe the introduction of the thematic years has resulted in improved coordination of both the development strategy and the marketing campaigns, something that we have long been advocates of.
- 6.6 We would welcome the opportunity to explore how this could be further developed with investment schemes that are focussed and relevant to the destinations, whilst also achieving Wales' outcomes.
- 6.7 Finally, we do recognise that the success of the international marketing campaigns require product to support the destination sell, with previous structures helping to facilitate this. The erosion of structures and regular dialogue is not helping in our opinion maximising access to international markets, made all the more easier with digital content marketing strategies supporting traditional ways of doing business with these markets.

7. How Colleges/Universities promote international studying in Wales

- 7.1 Swansea University has been very successful in this area reflected in its high proportion of overseas students.

8. How the Welsh Government can assist in attracting large international events to Wales

- 8.1 There is a general feeling that many local authorities often feel disenfranchised from initial discussions over the wider strategy of attracting major international events despite a Major Events Strategy (MES) being in place.
- 8.2 The Major Event Unit's (MEU) approach has tended to be internally led often focussed on their own agenda/strategy of targeting certain major international events which has been developed internally within WG. Major international events have generally been staged in the more established areas other than some which have been located because of site logistics or location suitability and particular appropriateness for an event.
- 8.3 Given we are now well into the term of the current WG Major Events Strategy it may be a suitable time for local authorities to obtain a better understanding of what MEU's priorities now are as these will have evolved over time. Major international events inevitably require the support of hosted local authorities and how the aspirations and ambitions of WG fit with the aspirations and ambitions of local authorities can often be unclear. More frequent liaison and information exchange is required as there is a feeling that not enough regular dialogue currently exists.
- 8.4 The introduction of the thematic years whilst very interesting has given some new opportunities but lead-in times and availability of funding and late decision making timelines have limited the potential for really developing these themes in practice.
- 8.5 We, like many other local authorities with ambitions to stage major events, would welcome the opportunity to explore further with WG how potential projects could be further developed with the appropriate investment support or shared risk investment which are relevant to the local authorities and whilst also delivering the WG Major Events Strategy outcomes. Long lead in times to

engender local support and to enable adequate planning both strategically and financially are vital however to achieve this aim.

9. The use made of support from the EU and the impact of Brexit

- 9.1 We are aware Welsh Government utilise ERDF to support Selling Wales to the World however compared to past arrangements these schemes appear to lack visibility and are difficult to identify among the high volume of information on WG's website.
- 9.2 Brexit has played a role in delayed investment decisions on major regeneration projects albeit at a local level the focus is on positive messages and business as usual to ensure potential investors are reassured and encouraged to invest in Swansea.

10. What lessons Wales can learn from similarly sized countries?

- 10.2 Other countries appear to make the most of their assets and unique selling points to a greater extent than us. We too need to capitalise on our unique selling points. For example, Rhossili has been successful in using its Trip Advisor awards to boost its visibility and increase tourism to the area.

* Source: Visit Britain website 'Markets & Segments, China'

** Source: Enterprise and Business Committee Inquiry into Tourism Evidence from Visit Britain (2014)