



Cynulliad  
Cenedlaethol  
Cymru

National  
Assembly for  
Wales

# Cofnod y Trafodion The Record of Proceedings

[Pwyllgor yr Economi, Seilwaith a Sgiliau](#)

[The Economy, Infrastructure and Skills  
Committee](#)

21/09/2017

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Cofnodir y trafodion yn yr iaith y llefarwyd hwy ynddi yn y pwyllgor. Yn ogystal, cynhwysir trawsgrifiad o'r cyfieithu ar y pryd. Lle y mae cyfranwyr wedi darparu cywiriadau i'w tystiolaeth, nodir y rheini yn y trawsgrifiad.

The proceedings are reported in the language in which they were spoken in the committee. In addition, a transcription of the simultaneous interpretation is included. Where contributors have supplied corrections to their evidence, these are noted in the transcript.

**Aelodau'r pwyllgor yn bresennol**  
**Committee members in attendance**

Hannah Blythyn <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Llafur Labour
Hefin David <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Llafur Labour
Russell George <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Ceidwadwyr Cymreig (Cadeirydd y Pwyllgor) Welsh Conservatives (Committee Chair)
Vikki Howells <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Llafur Labour
Mark Isherwood <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Ceidwadwyr Cymreig Welsh Conservatives
Jeremy Miles <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Llafur Labour
Adam Price <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	Plaid Cymru The Party of Wales
David J. Rowlands <a href="#">Bywgraffiad</a>   <a href="#">Biography</a>	UKIP Cymru UKIP Wales

**Eraill yn bresennol**  
**Others in attendance**

Yr Athro / Professor Annette Pritchard	Cyn Athro Twristiaeth, Cyfarwyddwr Canolfan Ymchwil Twristiaeth Cymru, Prifysgol Metropolitan Caerdydd Former Professor of Tourism, Director of Welsh Centre for Tourism Research, Cardiff Metropolitan University
Debra Barber	Prif Swyddog Gweithredol, Maes Awyr Caerdydd Chief Executive Officer, Cardiff Airport

Adrian Barsby	Cadeirydd, Cynghrair Twristiaeth Cymru Chair, Wales Tourism Alliance
Adrian Greason– Walker	Eiriolwr Polisi, Cynghrair Twristiaeth Cymru Policy Advocate, Wales Tourism Alliance
Cassie Houghton	Pennaeth Marchnata a Chysylltiadau Cyhoeddus, Maes Awyr Caerdydd Head of Marketing and Public Relations, Cardiff Airport
Tom Jenkins	Prif Swyddog Gweithredol, Y Gymdeithas Dwristiaeth Ewropeaidd Chief Executive Officer, European Tourism Association
Yr Athro / Professor Nigel Morgan	Pennaeth Rheoli Busnes, Prifysgol Abertawe Head of Business Management, Swansea University

**Swyddogion Cynulliad Cenedlaethol Cymru yn bresennol**  
**National Assembly for Wales officials in attendance**

Joe Champion	Y Gwasanaeth Ymchil The Research Service
Gareth Price	Clerc Clerk
Robert Lloyd–Williams	Dirprwy Clerc Deputy Clerk

*Dechreuodd y cyfarfod am 09:23.*  
*The meeting began at 09:23.*

**Cyflwyniad, Ymddiheuriadau, Dirprwyon a Datgan Buddiannau**  
**Introductions, Apologies, Substitutions and Declarations of Interest**

[1] **Russell George:** Good morning. Welcome to the Economy, Infrastructure and Skills Committee. I'd like to welcome Members back from their summer break. This morning, we have got a number of items that we do need to discuss in private session, but we will go back into public session

at 10.30 a.m., and we've got a number of tourism panels with regard to our inquiry on selling Wales to the world. There are no apologies that have been brought to my attention this morning. We're waiting on a couple of Members to arrive still, and we are expecting them shortly.

09:24

**Cynnig o dan Reol Sefydlog 17.42 i Benderfynu Gwahardd y Cyhoedd  
o'r Cyfarfod ar gyfer Eitemau 3 ac 4**  
**Motion under Standing Order 17.42 to Resolve to Exclude the Public  
from Items 3 and 4**

*Cynnig:*

*Motion:*

*bod y pwyllgor yn penderfynu that the committee resolves to  
gwahardd y cyhoedd o weddill y exclude the public from the  
cyfarfod yn unol â Rheol Sefydlog remainder of the meeting in  
17.42(vi).*

*accordance with Standing Order  
17.42(vi).*

*Cynigiwyd y cynnig.*

*Motion moved.*

[2] **Russell George:** I move to item 2 and, under Standing Order 17.42, I resolve that we exclude the public from the next item. Are Members content? There we are. Thank you.

*Derbyniwyd y cynnig.*

*Motion agreed.*

*Daeth rhan gyhoeddus y cyfarfod i ben am 09:24.*

*The public part of the meeting ended at 09:24.*

*Ailymgynullodd y pwyllgor yn gyhoeddus am 10:33.*

*The committee reconvened in public at 10:33.*

**Panel Twristiaeth (1)—Gwerthu Cymru i'r Byd**  
**Tourism Panel (1)—Selling Wales to the World**

[3] **Russell George:** Croeso. I'd like to welcome Members back. This is the

first session in regards to our inquiry on selling Wales to the world. This morning we've got two panels with us. The first of our panels is a tourism panel, and I'd be grateful if the witnesses in front of us could just introduce yourselves, for the record, and your titles and roles. You can start on my left.

[4] **Professor Morgan:** Thank you. I'm Professor Nigel Morgan. My job title is professor of visitor economy management at the University of Swansea, where I'm also head of the department of business and management.

[5] **Professor Pritchard:** I'm Professor Annette Pritchard. I'm actually an independent scholar now, because I've just left Cardiff Metropolitan University, but I submitted the evidence. That was the final piece of work I did for my role there.

[6] **Mr Barsby:** Bore da. Good morning. Adrian Barsby—I'm chair of the Wales Tourism Alliance. I also operate a tourism consultancy based in Wales. I'm chair of the destination partnership in Flintshire, and I sit on the local action group dispensing rural development programme funds.

[7] **Mr Greason-Walker:** I'm Adrian Greason-Walker. I'm the policy advocate for the Wales Tourism Alliance and I'm also an independent tourism operator as well, with my own business.

[8] **Russell George:** Thank you. Members have got various questions this morning. I'll start with the first one. The Government's got its strategy, 'Partnership for Growth'. Is it a good strategy? Is it working well?

[9] **Mr Barsby:** I think the industry was broadly happy with 'Partnership for Growth'. It was a little bit painful in those early days in 2011-12, but, once adopted, I think the trade broadly got behind it. I think it's fair to say that it's sort of petered out a little bit and we had assurance from Jason Thomas just last month that the strategy's not going to be reviewed; it's going to be maintained until 2020. I think the criticism, or the observation, that we would make at this stage is that, of the five Ps, two areas haven't really been addressed. And that's profitable growth and people development. So, I think that that's really where the opportunity lies for the remaining period of 'Partnership for Growth'.

[10] **Russell George:** Perhaps if other—. There are more comments, but perhaps if I could specifically ask what areas could be improved—.

[11] **Mr Greason-Walker:** I think I would just wholeheartedly back up my chair, to be perfectly honest. [*Laughter.*]

[12] **Russell George:** I wish members of the committee had similar views as well on some occasions. [*Laughter.*]

[13] **Professor Pritchard:** I think that there are big areas for improvement, probably, in terms of skills development, and I think communication of tourism as an industry and as an employment of choice, really, within Wales as a whole. You know, it is so important to the Welsh economy and yet perhaps its perception is way below what it actually delivers to the Welsh economy. It is one of Wales's top-performing industries, it is one of its major growth contributors, it is one of the best-achieving priority sectors within Welsh Government, and yet, it's kind of a cinderella industry, still. And I think that goes all the way through from schools and colleges through to local authorities—you know, the whole sector, really. We really need to get behind this industry and embrace it wholeheartedly for the opportunities it offers young people. I'm from Anglesey, and, in many parts of north-west Wales and north Wales, and Wales in general, tourism is one of the few opportunities for people. We need to have the right skills structure in place, we need to have entrepreneurship opportunities being developed to retain young people in our communities, to give them hope and opportunity, because tourism is very good at attracting and employing hard-to-develop and hard-to-get-at groups, like young people, like women. But we really need to embrace it in terms of skills, apprenticeships—you know, partnership, really, between the Government and the industry, to deliver that, with education, obviously, anchoring it.

[14] **Russell George:** So, Adrian, you mentioned that you had some discussion with a Welsh Government official and talked about a refresh. Is there some more detail about that discussion?

[15] **Mr Barsby:** We've felt, for the last 18 months or so that, because of the period of 'Partnership for Growth', it is probably appropriate for it to be revisited to make sure that—. If all of it's appropriate then, fine, let's get behind it and see it through. But, really, what has happened now is there isn't an action plan for the final three years. For the first three years, there was an action plan. We're now operating a key strategy of Government without an action plan, and I guess if we are going to address all five Ps, particularly the two Ps in terms of profitable performance and people development, then, some form of action plan is going to be crucial. I guess

what's linked to that is the structure. So, as I said, I'm chair of the Flintshire destination partnership, so I have some insight. Are the destination partnerships funded adequately, particularly when you look at the enhanced population calculation that the Scarborough tourism economic activity model figures contribute towards? There's recognition from Welsh Government that tourism has an impact on local authorities, so there's funding in place. Destination partnerships have no oversight of that money. So, there's £204 million this current year coming into local authorities directly as a result of that. There are 22 destination partnerships. Destination partnerships are set up so that we can manage on the ground the visitor experience, whether they're international, whether they're local, or whether they're from within the United Kingdom. And, as I say, we have no oversight as to the long-term planning of that, so, during the lifetime of a Welsh Government, there's £1 billion of potential investment that isn't probably taking place in our infrastructure. Whilst this is going on, of course—whilst this money is being collected—there are parts of Wales where local authorities are saying, 'We can't afford to open lavatories; we can't afford to have tourist information centres; we can't afford to run rural bus services', and all of these things are, of course, integral to a successful, dynamic rural visitor economy.

[16] **Russell George:** Annette, you wanted to come in, I think.

[17] **Professor Pritchard:** I think that links back, really, to my earlier point about recognising the value of tourism within the local authority context. I think Adrian's right—there's a lot of money going into local authorities from this enhanced population calculation and, actually, local authorities are not spending it, really. We don't know what they're spending it on, but they're not really spending it on tourism. And a situation where they're closing toilets, they're closing visitor centres, it is ridiculous and it's crazy because it implies that Wales isn't welcoming, it's not open for business, because we haven't got these infrastructural basics right. But local authorities will continue to put money into marketing their area while they're closing the very important infrastructural items that they should be looking after. I think it does raise a question over their role in terms of this, and how they relate to the regional bodies and the actual structures that we've got in place in Wales, because we're a small country. Yet you drive from here to Tenby and you probably pass through nine local authority areas and they're all doing their own little thing, but they're actually undermining the visitor experience by the actions they're choosing to take.

[18] **Russell George:** Okay, that's interesting evidence for us. Thank you.



[19] **Professor Morgan:** I think this role of partnership is really important, which Adrian raised and Annette's endorsed. I guess, when I introduced myself, I've also got a number of different roles, and I neglected to say that one of them is actually I sit on the advisory board of Visit Wales, so I have got some insight into those conversations. And my understanding is that we have done an internal refresh of the strategy, but that there is currently no intention to actually do a formal refresh of that strategy and the focus is actually on delivering the strategy that we have.

[20] And also kind of to move the conversation back onto the partnerships, I think that it's absolutely critical that we start having a much more joined-up approach to tourism, and I've actually started using the term 'visitor economy' because I think that sometimes when we focus on the word 'tourism', we misunderstand the important role that it does actually play as an engine of economic growth across the whole of Wales. One of the areas that I focus on at the university is entrepreneurship and entrepreneurial development and actually teaching that, and preparing graduates for those kinds of skills for employment. For me, tourism is an absolutely critical industry for developing an entrepreneurial Wales.

[21] **Russell George:** Nigel, Swansea council provided us with some written evidence and they said,

[22] 'there is a danger that some businesses do not feel part of the Visit Wales "family" and excluded from the marketing opportunities available'.

[23] Is that fair?

[24] **Professor Morgan:** I don't honestly know if that's fair from my perspective. I would say that it's back to this issue of partnerships, and I do think that we need to be developing—. We often use the word 'Team Wales'. We are a relatively small country. I don't know if those conversations are sufficiently joined-up. I feel that we need—. Speaking personally, my experience as a board member is that I think we do need to be getting more visibility for board members. We do need to be getting more out and talking to the industry much more. I don't know if it's peculiar to Visit Wales—it's probably something across Welsh Government as a whole, I'm guessing—that there is perhaps a feeling of remoteness from some of the key stakeholders. I know we work very closely with, for instance, Celtic Manor Resort around the convention centre. So, I think, the key stakeholders, there is a really good

relationship with. I can't really comment on that particular evidence; I don't know which businesses you're referring to.

[25] **Russell George:** No, it wasn't me referring to them; Swansea council were saying it in their written evidence to us when we did a call for evidence over the summer.

10:45

[26] **Mr Greason-Walker:** I think, on that point, communication is key, because you've got to look at the structure of our industry in Wales. It's dominated by, not SMEs—. If you look at the definition of SMEs, I can't remember what it is, but the turnover is substantially more than most of our businesses. Ninety-six per cent of them are microbusinesses, like my own—very small, owner-manager-operated businesses—and that's the structure of our industry. It's a selling point. It's a strong point of our industry, but I also think it's also a weakness, in terms of, when you actually want to communicate something to that industry, it takes an awful lot of resources. And, as Nigel has said there, I don't think it's just a problem associated with our industry, it's a problem across—. Many of us come across that. We have to talk to a very broad audience in terms of their understanding of what the industry is in Wales. We have to talk to a very wide range of abilities within those different small companies. They're not even companies, a lot of them, they're just, as I say, owner-manager businesses. And to get those messages out, it's a balance between it being simple enough to understand and to be able to push out, whilst, at the same time, being able to engage in some very complex marketing projects, for example, or infrastructure projects. And what can happen is we end up losing a lot of the messages; we end up losing a lot of the actual substance of those initiatives.

[27] So, from my point of view, a lot more time, money, effort needs to be spent in communication. We also need to look at it much more from a microbusiness point of view. There are easy wins, obviously, and that's what we tend to go for a lot of the time; we tend to deal with the much bigger players because it's easier. I say 'we' in a broad context, of course. But it's getting to all those little tiny businesses out there and getting across those messages, which are key if we're going to have a co-ordinated product, if you like, and a co-ordinated way of actually selling that product to the world, because that's what we're talking about here. This is why I think Visit Wales is very important, because, when we're competing on that global stage, we're competing against some very big, well-organised companies, countries, who

are putting a lot of money into that, and, of course, it's very easy for them to draw together all of those parties that are necessary. It's much more difficult for us in Wales, I think, to draw together that 96 per cent of microbusinesses. And I think we need to give much more thought as to how we actually do that in the future.

[28] **Russell George:** If I can—. I'm just conscious that every Member's got at least a number of questions each. I'll come to Vikki first.

[29] **Vikki Howells:** Thank you, Chair. I'd like to explore the issue of international visitors to Wales, because the statistics show that, although they account for just 10 per cent of visitors, they actually account for 20 per cent of visitor spend, and it's clearly an area with huge growth potential for us. So, if I could ask, first of all, our colleagues from the Wales Tourism Alliance: could you expand on your comment about Visit Wales's relationship with Visit Britain? You've said that it's of vital importance. Could you expand on that for us, and maybe give us an idea of how you feel that relationship is currently working?

[30] **Mr Barsby:** Okay. An example of how it might be working is, if you go to the VisitBritain.org site, you'll see two logos, VisitBritain and Visit England—not Visit Scotland, Visit Wales, and Northern Ireland as well. To be fair to them, if you go to VisitBritain.com, you'll see the visitor-facing thing and you land on 'Great Britain'. But it's not clear what role Wales plays in promoting Great Britain, and that obviously is a failure on all of our behalf, I guess. Also, I think that, if you read what Annette has produced for the committee, you'll see a comparison in terms of the products that are available, by country, on sale. And, again, maybe there are some opportunities that are not being taken by Welsh businesses in that respect. But, again, that's related to Adrian's previous point about the complicated relationships that are needed to encourage businesses to perform on a world stage. And it is more expensive, both in time and resources, to encourage and maintain those clusters, so that they are packaged in a way that meets the expectations and then delivers the expectations of those international visitors.

[31] So, I think that, if you like, the framework is satisfactory, shall we say, but what's actually happening is insufficient.

[32] **Vikki Howells:** Some of the evidence that we've taken I've found quite extraordinary. For example, the fact that, in the online shop for VisitBritain,

there are only two Welsh castles available for people to purchase tickets for, despite the fact that this is our Year of Legends in Wales. And that our world heritage site castles of north Wales do not even feature within that online shop I find absolutely extraordinary.

[33] **Mr Barsby:** Although, to be fair, on the Great Britain campaign, there is a Cadw pass that you can buy, but it's not clear, I agree with you. Again, I think there's a relationship that needs to be better managed, I guess.

[34] **Professor Pritchard:** I used to work for the Wales Tourist Board a long time ago—when it was the Wales Tourist Board—and the relationship with VisitBritain was perhaps always a little bit strange because VisitBritain and Visit England are very integral. They work together and they're very closely connected. I think you're seeing perhaps some of that in terms of the website—the product of that longstanding relationship. But I do think that it's something that the industry, Visit Wales, and VisitBritain, need to look at in terms of the placement of Welsh product and the development of that Welsh product.

[35] I've done a little analysis of the website, and, if you go on and look at the products that are available, it's not rocket science; it's not some super-duper all-singing thing. It's things like you can go on a brewery tour in Yorkshire, you can go on a cream tea cruise in the Lake District, or a steam cruise to somewhere else. But we have not got anywhere near the degree of product that Wales can offer reflected on that website. Whose fault that is, I'm not totally sure. Is it Visit Wales? Is it the industry? Is it VisitBritain? There needs to be that more joined-up thinking and saying, 'Hey, you can put your product on here and you can sell.' Look at all the food products in Wales that we have. Look at all the gin that's being produced in Wales. You could have an artisan gin tour, which I'm sure people would lap up in terms of overseas visitors. It's having the acumen, the time, the interest, to actually develop that product and to put it on there. I do think we need to see much more foregrounding of Welsh product. Like you say, we have very few castles mentioned. The Cadw explorer pass is mentioned on one page, but it's not mentioned anywhere else, and, actually, there's an article that says which heritage pass is best for you, which is obviously appealing to the overseas market, and they don't talk about the Cadw pass; they just talk about the two or three Scottish passes and the English passes. So, it's in little moments and little encounters that we're tending to fall through the gaps.

[36] **Russell George:** Do you have further questions, Vikki?

[37] **Vikki Howells:** Could I just ask: in one word, then, would you all agree that there is significant room for improvement here?

[38] **Professor Pritchard:** Oh, yes, definitely.

[39] **Professor Morgan:** Yes.

[40] **Vikki Howells:** One further question then, Chair, if that's okay with you: what about resource then? Is it an issue perhaps of resource? Does Visit Wales have sufficient resource to support growth potential in the tourism sector? There's certainly some discrepancies in the level of spending compared to other areas of the UK. Could we have some brief comments on that?

[41] **Professor Morgan:** If I could just sort of link the two questions, in a way, there are four people in the research department at Visit Wales, one of whom is off sick and one's on secondment. That takes that department down to two people at the moment. I think Annette has done a comparison with Scotland. What are the figures for the number in research in Scotland? It's something like 20 people. So, the disparity in terms of the human resources as well as the budget is quite significant.

[42] **Professor Pritchard:** I think the budgets are significantly underfunded. When you look at what our competitors are doing in very similar-sized countries, with tourism equally important to those countries—actually less important probably than in Wales, because Wales is definitely the most tourism-dependent region within the whole of the UK—they are putting in more money, they are putting in more resources, because, I think, they've grasped the value of tourism to the overall economy. So, you have Scotland, a very significantly enhanced marketing budget; Ireland, a £30 million marketing budget—and those are just our closest competitors. But you also have Yorkshire—bigger budgets than Wales. So, we have all layers of funding where we are lower, in terms of cities, regions, the country itself, and that is a big factor.

[43] **Russell George:** Can I just bring Adam Price in on this?

[44] **Adam Price:** Gwelais i yn y **Adam Price:** I saw reference in the papur gyfeiriad at y ffaith fod paper to the fact that there had been cynnydd wedi bod yn ddiweddar o an increase in visitor numbers from

ran ymwelwyr tramor. Rwyf i wedi gweld ffigur o gynnydd o 12 y cant yn naw mis cyntaf y llynedd ar gyfer ymwelwyr tramor. O ystyried yr holl broblemau, beth sydd i gyfrif am y cynnydd yna sydd wedi bod yn sefyllfa Cymru o ran ymwelwyr tramor yn ystod y cyfnod diweddar?

abroad. I have seen a figure of an increase of 12 per cent in the first nine months of last year for visitors from abroad. Now, given all the problems, what accounts for the increase there has been in terms of visitors from abroad to Wales during the most recent period?

[45] **Professor Prichard:** I'm not trying to say that Visit Wales aren't doing a good job. They are doing a good job with limited resources. But I think what you're seeing in terms of the increase in visitor figures is that a lot of it is being driven by an overall increase to the UK. You know, it's cheaper to come here, so it's more attractive and appealing as an overseas visitor destination. So, what you're seeing is that the overall market has increased dramatically, and we are retaining our share of that market, if you like. So, that's why we are seeing this increase. But, unfortunately, we're not really able to break through the 2 per cent barrier. That's our market share. When we've been performing at our best, that's been the top of our market share. Now, we're getting close to that now, but to really break through and to match our competitors, you know, like the south-west—. They have a 5 per cent market share. They're only down the road from here, and they have nothing particularly extra in their visitor offering that we don't have. In fact, I'd argue we have a lot more, but we are way behind them in terms of our proportion of that market share. And then you go to Scotland, that's 8.5 per cent, something like that.

[46] A lot of it is down to resourcing. If we want to break that ceiling, if we want to grab more market share, which is what we're going to have to do if we're going to really develop the industry and really take it to the next level, we need the resources to do that.

[47] **Adam Price:** But—

[48] **Russell George:** Sorry, could I just ask Mark to come in and—?

[49] **Mark Isherwood:** You referred to Cadw passes, but what role could be played by regional passes? I'm conscious, for example, that we've had eight years of talking about developing a regional visitor offer based on Pontcysyllte aqueduct world heritage site. You've got organisations like Llangollen Railway pushing for that, and yet, eight years down the road,

we're still talking about it. Could that be playing a greater role too, both internationally and within Wales and the UK?

[50] **Professor Prichard:** I think we need more product development funding to develop those packages so that they are available to purchase on websites like VisitBritain. That's exactly what—. We need to be developing the experiential products that overseas tourists can buy. Because most overseas tourists are not explorers who like to do it all by themselves. Most of them like to go online, book their package—they're happy; they can book an easy package to Scotland, or they can book an easy package down to the south-west. That's what they want to do, and our competitors are busy developing all of those products and all of those packages for sale. So, if we're not careful, we'll go back to the situation where we are losing those because we haven't got the resources to develop those product experiences that can then be sold by VisitBritain and by the wider industry.

[51] **Russell George:** Adrian, did you want to come in?

[52] **Mr Barsby:** If I was going to be brutal, I would use the phrase 'fanfare then fizzle'. So, the Wales coast path is an example: a lot of fanfare, a lot of infrastructure, a lot of effort to make all the linkages and all of that. You go to some of those areas now, there's been little or no maintenance, so that what was created is starting to erode already, in less than five years. And to develop Annette's point—. So, Mark's made a good observation, but the linkage isn't there; it's not maintained over a period of time. So, those relationships aren't maintained, those relationships fragment, and so we haven't got a sustainable offer.

[53] It sometimes takes five years to penetrate a new market, and in that period—. So, if we've had a fanfare and fizzle through that period of time, you can understand why. We probably should be getting 3 to 4 per cent of that international market, and I guess that, if we'd been more robust and had the courage to stick to some of these plans and make sure that they are funded and the linkages are enhanced, then I'm sure that, by now, we would start to see. Particularly—. I mean, a world heritage site; it's no mean feat to achieve that, is it? But, again, all that work's gone into it and we're just not really capitalising on it.

11:00

[54] **Russell George:** Thank you, Adrian. I'm sorry I don't give you all an

opportunity to answer every question, because we're a bit pressed to get all the questions in, but if there is anything you feel pressing, then I'll come to each of you at the end. If you make a note, you can add any contributions at the end if that's helpful. Hannah Blythyn.

[55] **Hannah Blythyn:** Thanks, Chair. I just want to go into the idea of Wales as a brand in terms of attracting investment and visitors. I think, in Wales Tourism Alliance's written evidence, you said that although the brand has undoubtedly become stronger, there's still many within the industry who basically don't feel connected to it, they feel very disconnected, particularly, as you referenced before, the microbusinesses. Can you expand on that and what can be done to rectify that?

[56] **Mr Greason-Walker:** I think in terms of the Wales brand, yes, it has got stronger and it's been consolidated, I think. We've struggled with the brand and the brand values as well that surround that. So, it has been drawn together. The sub-brands are also better and our 'Year ofs' as well—the Year of Legends, for example. One area we think that needs improvement is there needs to be much more engagement with the industry, particularly smaller businesses, as I mentioned, being able to access just the physical assets of that brand. Having said that, obviously it has to be handled with care, because you can easily dilute the brand. It can easily be abused and misused as well. So, we understand all those issues, but there needs to be a bit more of a debate around that, to find out how that can be rolled out so that you do get that ownership as well.

[57] **Hannah Blythyn:** So, how we'd find the best way for people to get more actively involved with it—

[58] **Mr Greason-Walker:** Yes, that's right.

[59] **Hannah Blythyn:** —and to benefit from it.

[60] **Mr Barsby:** Things like food tourism has been quite well branded and the prominence of Welsh food is helping to attract and retain. I guess it's been encouraging as well that Visit Wales has decided to maintain and develop quality grading. I think, again, from the United Kingdom's perspective and Wales's role in that, our legislative system and our quality controls are one of the key competitive advantages that we have, and we don't really make enough of that. Perhaps in Wales we could look at ways in which we enforce legislation and rules, so it's a way that we can give more



confidence to customers. More confidence to customers means you get the environment where businesses—everybody wants to buy into the brand. At the moment, I think there's a confusion between are we buying into the logo or are we buying into the brand. I think that the opportunity, in fact, for Welsh Government is they've created—I think we're all broadly happy with it, but now we want, if you like, a mechanism as to how we get involved, how we then protect the product, develop the product, so we've got a meaningful cycle.

[61] **Hannah Blythyn:** And I think—I don't know whether you want to come in, sorry.

[62] **Professor Morgan:** I was just going to follow Adrian's point. I think it's an important point in the sense that, I guess—branding is one of the things that I do in my day job. I teach brand management and I've been researching it for 20 years. I think there's a huge difference between—. People think a brand is a logo, but a brand is actually much broader than that—it's the words that you use. There are values. I actually think the current brand strategy is hugely effective and it's moved a long way in the last couple of years. I think Mari Stevens, who's the marketing director, has done a really good job in that regard. My understanding is that there will be some loosening of the proprietorial protection of the brand—the logo bit of the brand, if you like. I think that needs to happen. I guess Adrian—sorry, too many Adrians—Adrian Greason-Walker has made the point, really, that I think, sometimes, marketers get a bit nervous about people diluting the brand and perhaps using it on products that aren't quite aligned with the values that we would like to see. So, I think there's much more conversation and dialogue that needs to happen.

[63] **Hannah Blythyn:** I guess what you're saying is, part of that is, if people want to benefit from the brand, they have to sign up to a certain set of standards.

[64] **Professor Morgan:** Yes.

[65] **Mr Barsby:** Sign up to the standards, yes. Can I make one other point on this? Often, branding is really successful when there are some targets. It's an additional sense of purpose. I guess if we looked at—at the moment, the day visitor spend in Wales is roughly £29. In England it's £34. In Scotland it's closer to £40. If using the brand and the values was part of a process to get as close to that £34 as quickly as possible, and then as close to that £40 as

quickly as possible, then I think we would bring more people in together. There's a sense of purpose there. There's something to be measured as well.

[66] **Hannah Blythyn:** Do you want to bring Adam in?

[67] **Russell George:** I've got Jeremy and Adam, and then I will come back to you for your last question if you want. Jeremy.

[68] **Jeremy Miles:** I'm just wondering about the practical application of this idea of a brand. If I am deciding where I want to go for a long weekend or holiday, I don't really think of it in terms of a brand, or I certainly don't think of it as a logo. I mean, what is the logo for Spain? I have no idea. So, how does what you are talking about now actually relate to potential visitor choices? I'm not sure I could tell you what I think the brand is for most countries, in a sense, apart from, you know, if you go to Spain, it's sunny and the food is nice, but—

[69] **Professor Pritchard:** But you have an image, though, don't you, of that country? You have an awareness, you have a perception, and it's that that drives your desire to visit. Branding is a posh word for that. It's all about what that country is trying to communicate to you: why you should come there, why it's desirable to visit. You talk about brands, and I think the Welsh coastal path is a classic case in point. You talk about Ireland. You've got a very distinct idea of what Ireland is. They've got a fantastic coastal path—not as good as ours, but a great one. It's called the Wild Atlantic Way. Immediately—emotion, experience, buy-in: 'The Wild Atlantic Way; that sounds fantastic.'

[70] **Jeremy Miles:** I can see that with an individual experience. I can absolutely see that because I can see the marketing connection. I'm just thinking in a more—*[Inaudible.]*—basis.

[71] **Professor Morgan:** Just to reiterate some of the points here, I think your choice of Spain as an example is really well chosen. If we had had this conversation perhaps 25 or 30 years ago, the brand of Spain would have stood for maybe cheap and cheerful costas. But, through very skilful marketing and consistent product development, what Spain has done is turn that—you might not think of it as a brand—reputation from being a cheap and cheerful destination of sun and sangria into a very high-quality cultural experiential brand. So, now they've brought high-quality food, they've brought gastronomy, they've brought wine, they've brought culture, they've

brought the language into the brand, and, actually, that's very similar to what we would like to see here, isn't it?

[72] **Professor Pritchard:** The brand is the communication device, really. It's the tool. It's the way in which we try to engage our potential consumers. That's why it's so important to get it right and then to get it used effectively across all levels.

[73] **Russell George:** Adam, did you want to come in?

[74] **Adam Price:** Yes. As I understand it, the nation branding work that has been done recently by Smörgåsbord is a kind of cross-sector branding that is being used, for instance, in the Welsh Government's GP recruitment campaign and major events as well. So, it's being used across Government. Do you welcome that sort of cross-sector approach within Government, and would you extend it to the private sector as well? You mentioned food, and even other high-quality products—the raspberry pie and things that Wales should shout about. Couldn't the private sector also have a common, made-in-Wales—? You know, everything that embodies the values could actually carry the same brand.

[75] **Mr Barsby:** We've been asking for licence to use the brand for the last two years because we can see the value in it. We can recognise the work that's gone into it and recognise—as Nigel and Annette have described—the thought and research that's gone behind it. I think it's a travesty that the vast majority—. This is the problem as well, sometimes, with Government—certainly from the trade perspective, there's a feeling that the Government feels that it is all there is for it to know about tourism. Of course, the vast majority of the experience that customers are going to have, and the practicality, is the private sector itself. So, to be excluded from being ambassadors for the country is particularly frustrating.

[76] **Professor Morgan:** I think that joined-up brand is critical. We've talked about food and drink, but also we know that other priority areas like life sciences, media, culture, industries—you might think, 'Well, what have they got to do with the visitor economy?' But I would argue that the visitor economy actually sits underneath all of those. If you are looking to attract world-leading surgeons to a new research facility, you've got to take them out to a nice restaurant, a nice hotel—they want to have that infrastructure. So, actually, to attract really good talent into Wales, the visitor economy underpins all of it. And I think that cross-sectoral work, where often we see

the tourism brand as—well, the phrase is the ‘flag carrier’, I know it sounds a bit jargonistic, but it’s often front and centre. So, you might go somewhere on holiday, to Spain, today. You might then be going back as a possible investor or your son or daughter might be going there to do an MBA in Barcelona or something. So, these nation brands in our heads are all connected.

[77] **Professor Pritchard:** And the very best ones have done that. So, New Zealand—its food products are very much branded around the ‘100 per cent pure New Zealand’ and everything like that. But it’s all very well for us to sit here in this room talking about this. I was driving up from here, from Cardiff, to north Wales during the Royal Welsh Show. I passed a hotel in Builth Wells the day of the Royal Welsh Show serving English breakfast. Now, we can talk until we’re blue in the face about how wonderful it is and how much buy-in we need and how much fantastic produce we’ve got in Wales, and it’s not the only place that does it. I lose count of the number of establishments that I see offering English breakfast. Now, if we’re to be serious—

[78] **Russell George:** Not just in Wales; it’s in Spain as well. [*Laughter.*]

[79] **Professor Pritchard:** But in Wales we pride ourselves on trying to offer that distinctive product.

[80] **Professor Morgan:** That sense of place.

[81] **Professor Pritchard:** So, we need industry buy-in and we need industry education over why it’s important to offer Welsh breakfast, Welsh produce.

[82] **Russell George:** I’m going to just bring in Hannah. We’re a bit pushed for time, so Hannah—.

[83] **Hannah Blythyn:** Very briefly, you were talking about the buy-in and the visitor economy, and it’s kind of linked to the whole idea of this brand Wales and ‘made in Wales’, and I think, Annette, you were touching on the whole skills and people development, and how it’s such a big employer, particularly in north Wales, where I’m from, as well. But it has a perception, I think. So, maybe we haven’t got the perceptions right on what the brand is for Wales, but for the industry as well, because for a lot of young people it’s seen as seasonal, something they do maybe when they’re studying or it’s low-paid. So, how can we perhaps tie in how we develop this idea of the perception, the Wales brand, with how we actually invest in the whole skill

side and develop it as a viable and decent sustainable career option for young people?

[84] **Mr Greason-Walker:** That's why the brand—going back to Jeremy's point—I think that's why the brand is important. We tend to perhaps see it as a marketing tool. In fact, it's something that we all need to rally behind, and I think that's everyone in Wales, to be perfectly honest. And that's why it's more important in some ways for us to take it on board in not a retrospective way but looking at it from our own point of view. And with regard to that, the 'great' campaign has been doing that, I suppose, because it's not just about tourism, although that's the flag carrier. You've got Jaguar on there, you've got a lot of other big companies who are there, so it's going cross-sectoral as well. But that point on training is a big one. That's something we need to address.

[85] **Professor Morgan:** Sorry, I know we're pressed for time, but I guess, speaking as somebody sitting in a university here, I've been working in tourism in various guises—local authorities et cetera—all my life, and I'm still fighting the battle that it's a serious sector. Academics are very snobby about it, and I'm saying that we just don't get how important the visitor economy is to Wales. I think local authorities don't appreciate it. I think educational establishments don't appreciate it. Careers advisers don't appreciate it. I think there's a big job of work to be done to persuade people that this is a serious industry. You can actually start as a pot washer, and you can end up as a general manager, and we've got countless case studies of people who've done that and it's an industry where you can come in and you can actually—okay, it's long hours, it's hard work, but lots of industries are like that anyway. It doesn't have to be something you do while you wait for a 'proper job'.

[86] **Russell George:** Right, I'm really sorry, we've got 15 minutes and I've got five different Members with five different subject areas, so we're really struggling, so that's less than five minutes per Member for each—. I'll have to say no to supplementary questions because we're too pushed. So, I've got Mark, Adam, Hefin, Jeremy and David. So, Mark first.

[87] **Mark Isherwood:** Thank you. In fact, in Yorkshire this summer I had Yorkshire breakfast and Yorkshire cream teas. What action would you propose to address the WTA's suggestion that the impact of Wales's overseas offices on visitor numbers cannot be assessed on the basis of the available statistics alone? Could I ask one of the Adrians to reply?

11:15

[88] **Mr Greason-Walker:** More openness, I think—more openness. We need to know what's going on. We need to know how much is there, how much resource is being actually allocated to promoting Wales overseas. That obviously needs to be targeted to very specific areas.

[89] **Mr Barsby:** Maybe timetables as well. We don't know what's planned with these international offices—what opportunities exist for us. Maybe there are opportunities for us to tap into new markets, joint working or ambassador programmes, whatever it might be. It's not that we're saying that they're not effective; it's just that we don't know. We assume that they are, but we just don't know.

[90] **Professor Pritchard:** I think there's very little—. Sorry, I was just going to say there's very little info.

[91] **Russell George:** Mark.

[92] **Mark Isherwood:** Thank you. UKTI, I think, have indicated that last year, 97 of the 103—or whatever it was—inward investment into Wales had UKTI involvement, so could this be co-ordinated better through Welsh presence in UK embassies internationally?

[93] **Mr Greason-Walker:** Yes.

[94] **Mr Barsby:** Yes.

[95] **Russell George:** Good. Mark.

[96] **Mark Isherwood:** Thank you. Professor Pritchard, could you expand on your comment in the evidence to us, that the Welsh Government's overseas office role in tourism development is, quote, 'Likely to be underdeveloped'?

[97] **Professor Pritchard:** I say that because I can't find any information out about it. I've done quite some extensive searches online to find out, you know, about what their roles are and everything, and I'm sure that there's lots of potential for them to be working in tandem with Visit Wales and VisitBritain in their roles in their overseas offices, but as of now, I couldn't actually find any paper trail that revealed any involvement. I'm not saying

there isn't an involvement, but I couldn't find any, and I think because of that—. And I know what Visit Wales do; I keep an eye on what all these organisations are doing. I've never seen any or come across any reference to joint working with the overseas offices. There may well be, but I haven't found it, which leads me to believe that it's underdeveloped.

[98] **Mark Isherwood:** Which, in turn, also raises questions about audit trails of public money.

[99] **Professor Pritchard:** Well, yes.

[100] **Russell George:** Okay, thank you. Did you have any questions, Adam?

[101] **Adam Price:** Yes, very briefly. I'd like to ask about the Wales.com website. In the written evidence that we've received, I think it's got decidedly mixed reviews. Particularly, I'd like to ask the Wales Tourism Alliance: how do you think it could be improved, the Wales.com website?

[102] **Mr Greason-Walker:** I think it's a nice website. There are good functionalities there. It's okay, but obviously web marketing has moved away from just websites. It's always going to be limited, because as a public sector site, it's not really allowed to carry bookable product on there anymore anyway, which would obviously be—. If you could actually sort out all the political issues that surround that—and believe me, there's a myriad of them—then that would probably be one of the ways you would actually change the effectiveness of it.

[103] **Adam Price:** Just on that, excuse my ignorance, but why couldn't a government website—?

[104] **Professor Morgan:** It would fall foul of state aid.

[105] **Mr Greason-Walker:** State aid rules.

[106] **Adam Price:** Right, but possibly, depending on what's going to happen in the next 18 months—.

[107] **Professor Morgan:** I'm told that Brexit won't matter, and that we will pretty much have to follow the existing guidelines. That's my understanding, but I'm not an expert.

[108] **Adam Price:** So, there are no Government websites in the world that have bookable product on them, or—

[109] **Professor Morgan:** I don't know about in the world, Adam, but my understanding is the advice that Visit Wales and all the other 'Visits' in the UK have been given is that if we have bookable products, we will fall foul of state aid, and we could end up in the European Court. Even post Brexit, we'll still follow the same guidelines, but you probably should talk to a more informed expert than me. That's all I know.

[110] **Adam Price:** Okay, well, maybe we'll take some—

[111] **Professor Pritchard:** You can buy products on the VisitBritain shop.

[112] **Professor Morgan:** Yes. Now—

[113] **Professor Pritchard:** Is it that they're arm's length or—? Because, you know, that's what I would like to see: much more Welsh product on the VisitBritain shop.

[114] **Adam Price:** Couldn't there be a Visit Wales shop, then, you know, using that same principle, possibly? We'll take some advice.

[115] **Russell George:** We'll do our own research.

[116] **Professor Morgan:** My understanding is that it's a legal minefield.

[117] **Professor Morgan:** Yes, it is, honestly. Yes.

[118] **Russell George:** Thank you. Hefin David.

[119] **Hefin David:** Thank you. You've made much of the make-up of the Wales tourism sector being microfirms. Is that any different to any other sector—any other country, sorry?

[120] **Mr Greason-Walker:** Yes, I suppose it is, because if you look at England, next to us, they've got a lot more larger companies and corporations that they can draw upon, whose head offices tend to be based in London and the south-east. That gives them a huge resource base from which to actually challenge us in terms of marketing. In terms of the rural product, probably not. If you took the Lake district alongside us in Wales, we



do have—. If you look at the research, we do have a much more rural product. Even Scotland has a sort of 50/50 balance between urban and rural products; you've got the Glasgow/Edinburgh belt there. So, we are—in terms of the UK, anyway—much more heavily biased towards rural businesses, which tends to mean that we are dominated by much more small and microbusinesses.

[121] **Hefin David:** So would that be more in comparison with other countries, smaller countries in Europe, then? Would there be a clearer comparison there?

[122] **Mr Greason-Walker:** Well, I think if you took somewhere like Croatia or Serbia, yes, we're probably comparable to them.

[123] **Hefin David:** Okay. So, with regard to large, international events, one of the things that's in the paper you submitted—you said that we need to consider

[124] 'adjusting what constitutes a major event and putting more resource into medium sized events that push benefit out across the whole of Wales.'

[125] Is that the link to the small firms and the geographical diversity?

[126] **Mr Greason-Walker:** Yes. And again, it comes back to what Annette says: a lot of this is about us being able to build product, actual product in a location, which we can then take to market via Visit Wales or via marketing that's undertaken by VisitBritain as well. In order to build that product, you very often need something that those businesses—particularly accommodation businesses—can rally around, i.e. brand and a central product. I mean, north Wales has been doing it very well recently, I have to say, with Zip World and, you know—I was going to say 'Smurf Snowdonia'—Surf Snowdonia. But, yes, absolutely.

[127] **Hefin David:** So, is there therefore a trade-off between having big, international events, which you've said primarily benefit Cardiff—that if you can't do those in parallel with the smaller events, you actually have to scale down the big events to benefit the other areas?

[128] **Mr Greason-Walker:** Oh, there's all sorts of combinations you can do. You can have spin-off events, you can extend those large events out into smaller areas. I mean, the Olympics was a classic example. You know, we

were trying to draw out smaller events up into Wales, which is what we did. I'm sure there's scalability on all of those events, but it does require much more resource to do that.

[129] **Hefin David:** Can you give me an example of a future event that would have that kind of benefit?

[130] **Mr Greason-Walker:** I'm likely to end up in political territory if I start favouring a particular area, but I suppose if you look at mid Wales—take mid Wales and the Royal Welsh Show—there's always the opportunity there, of course, to have smaller events, agricultural events. This is something that we tend to be seen to be competing with, actually, agriculture, which I've actually got issues on—they should be complimentary. So, I mean, if you take the whole agricultural side of things, if you take water, which is something we've got a lot of and we export a lot of into England, of course, there's all sorts of events I think that could be centred around that.

[131] **Professor Morgan:** There are very successful events that Visit Wales does work alongside, like the Machynlleth Comedy Festival. That seems to be going from strength to strength and the feedback that I've had from just talking anecdotally with people in Wales is that's very strongly now challenging the Edinburgh Festival Fringe, because as Edinburgh gets so commercialised, people are actually saying, 'Well, Wales is the place to go.' So, you know, it doesn't always have to be the big headline events; it can be what you might think are more quirky events, which help to build the brand through different platforms.

[132] **Hefin David:** Okay. So, that's what is meant by adjusting towards medium-sized events; that's what you're referring to, and these are more likely to take place beyond the—

[133] **Mr Greason-Walker:** Have you heard of Green Man?

[134] **Professor Morgan:** Green Man, yes.

[135] **Hefin David:** Okay.

[136] **Mr Greason-Walker:** You know, that's gone from strength to strength over the years.

[137] **Professor Morgan:** Festival No. 6 in Portmeirion.

[138] **Mr Greason-Walker:** Absolutely.

[139] **Hefin David:** Does that mean that there needs to be a refocus of Welsh Government emphasis away from these international events?

[140] **Mr Barsby:** I don't think we're implying that. I think we're saying 'Can we make sure there's an emphasis on the smaller, regional'—

[141] **Hefin David:** But if it's a finite resource—

[142] **Mr Barsby:** If it's a finite resource, then it's one of the things that would probably happen anyway, because you can get the sponsorship for those, in theory.

[143] **Hefin David:** So they look after themselves.

[144] **Mr Barsby:** Well, they're more likely to.

[145] **Professor Morgan:** I did a review of the major events unit in 2012, and I think, to be fair, they are trying to grow those medium-sized—. But I guess when something like the Champions League is available, that's almost a game-changing event. I'm not from Cardiff so I've got no axe to grind, but an event like that can probably only be in Cardiff, because of the accommodation base that we've got in Wales—

[146] **Hefin David:** And the stadium is there.

[147] **Professor Morgan:** And the stadium is there, yes.

[148] **Professor Pritchard:** There's also a perception thing, though, because Giro d'Italia—there's talk that that might come to Wales—

[149] **Hefin David:** Sorry?

[150] **Professor Pritchard:** Giro d'Italia. You know, the pink road race. It's like the tour of Italy. There's talk potentially of a stage coming to Cardiff. Now, a lot of the debate is about the stage coming to Cardiff, but, actually, if it does come, it will be the whole area that will benefit from it, because the bike rides will be out into the countryside, so there will be lots of opportunities to spread the resourcing round from Cardiff. So, nominally, it's

coming to Cardiff, but, actually, a lot of it will take place in and around this area, you know, and it might actually be far into mid Wales—you don't really know. So it's almost looking at the event and thinking, 'Okay, how can we spread it a bit more?' when we have managed to attract an event. But they are difficult to attract because it's a very competitive marketplace and all these other organisations are out there offering incentives to get you to come to this place. If we suddenly decide we're not going to, then we might find ourselves cut off from that very important stream.

[151] **Hefin David:** And with regard to events, there seem to be two—. There is attracting these international events that can benefit the whole of Wales and there is also creating our own international events that we then sell internationally. And those two things can work in parallel as well.

[152] **Mr Greason-Walker:** Yes, but they're also very high risk as well. If you've got to lay out capital for an event, it needs to have a very good business plan and a pretty firm—. You've got to have the confidence that you're actually going to get customers turning up, and that's taking into account things like weather and seasonality as well.

[153] **Mr Barsby:** I think also there is a split between urban and rural areas. In an urban area, it's probably easier to get the partners to get the match funding because they're all going to be within a defined area. When you start looking at rural areas, by definition, the essential partners are further apart so they're less likely to—. The gain for them is more of a risk. But a good example is Ironman in Tenby, isn't it? I mean, it's taken a few years to gather—. But now they've made a commitment for the next four years. That's a mixture of Tenby being a great place and the support of a network of tourism and visitor economy operators saying, 'Hey, this is great.' And Wales is on the map. I think it's the third or fourth most respected Ironman event in the world.

[154] **Russell George:** Hefin, do you have any final questions?

[155] **Hefin David:** No, that's fine.

[156] **Russell George:** No, that's it. Jeremy Miles.

[157] **Jeremy Miles:** Just briefly, I want to consider the impact of Brexit on tourism, both in terms of the availability of European Union funding and also the question of whether the strategy needs to change in terms of the selling

of Wales overseas as a consequence of leaving the European Union. Does anyone have any thoughts on that?

[158] **Mr Barsby:** The main thing is the ports—the ease with which people can visit, access to visas, if necessary, electronic mechanisms, whether it's goods or people coming in. We could find ourselves in a very strong position with close proximity to Ireland—and not excluding Cardiff Airport. So, I think we need to be reassured now that plans are in place to move those visitors within—. Twenty-five minutes seems to be the time at which it becomes intolerable. Forty-five minutes and people just won't come back again. So, what plans are in place at the moment to ensure that visitors will move through any form of customs control quickly? It's, I guess, one of the primary considerations.

[159] **Professor Pritchard:** Funding, I think, is key. You know, tourism has had a lot of money from the European Union in terms of product development and marketing. You know, losing that big chunk and it not being replaced would severely damage the industry, I believe.

[160] **Professor Morgan:** I just wrote three things down: funding, people and markets. So, on Annette's point, I think there's going to be a huge funding gap. A lot of that product development has been European-funded. Where's that going to be backfilled? There's a people challenge. Roughly about 25 per cent of people working in the visitor economy are from eastern Europe and mainland Europe. Where is that going to come from? How do we grow our own skills base very quickly? And then, I guess, the third one is markets. Do we now think about reprioritising markets? There are interesting conversations coming out of Cardiff Airport with the Qatar Airways link. I had an interesting statistic thrown at me the other day: 25 per cent of all senior clinicians in Wales are of Bangladeshi origin. There's a huge visiting-friends-and-relatives market that's now going to open up through Cardiff airport. Do we need to reconsider our priority markets in the wake of Brexit?

11:30

[161] **Jeremy Miles:** What's your view of that?

[162] **Professor Morgan:** Yes.

[163] **Professor Pritchard:** I think we need to be much more nimble and agile as well and respond to market opportunities. There's a massive market

opportunity for Wales at the moment in Japan. The Japanese see Wales as one of the top places to come and visit—Conwy and north Wales. Particularly Conwy is a ‘must’ place to see before you die—that kind of image over there, in Japan. It’s not a priority market at the moment for Wales but we need to be able to deliver the funding to make that product and that kind of tour to really build on that market opportunity, if you like, with the fantastic press, real interest in terms of what north Wales has to offer.

[164] **Jeremy Miles:** Can I just ask you, and you can answer the two points together then: are the WTA having conversations with the Welsh Government about the potential shortfall in funding that might arise as a consequence of leaving the EU?

[165] **Mr Barsby:** The last time we met them, we raised that. We constantly say that there ought to have been greater resources given to Visit Wales so that can cascade throughout the sector. Just to add to what Annette has mentioned about the Japanese market, in Deeside, there have been more than 2 million engines created by Toyota. So, you could make an argument that there are 2 million hearts of vehicles pounding throughout the world with a Welsh heart. We’ve also got the wings of Airbus. I don’t know if we are making enough of that, going back to linking marketing and promotion among other nations. It’s not just about attracting visitors to come and explore. But also, I think we need to recognise cultural differences. Certainly, where we’ve got international companies, we could be working more cohesively and providing for their cultural needs. So, if there comes a point when Toyota says, ‘Is it going to be Derby? Is it going to be Deeside?’, part of the consideration might be which country, which region actually values us more and how they’re demonstrating that. So, there’s a virtuous cycle there.

[166] **Jeremy Miles:** Thank you.

[167] **Russell George:** Before I come to our last Member’s set of questions, I will come to each of you, and if you’ve got a 30-second summary of points that perhaps have not been covered or you think are important for us to take away, then we’ll do that after David Rowlands has asked his set of questions.

[168] **David J. Rowlands:** Okay. You’ve touched on it just a little in discussions, but to examine it a little bit more: the lessons Wales can learn from similarly sized countries, really, for the WTA to expand on their comment that,

[169] 'Visit Scotland has been better resourced, better placed and tourism appears, at least, to be more highly valued in Scotland than in Wales'.

[170] Do you have anything you'd like to expand on?

[171] **Mr Greason-Walker:** Not beyond what I've written in there, really, to be honest. It is, it has been, and they don't employ that many more people, and yet the actual income that they receive—their GDP—is actually almost double ours, I think, if not more.

[172] **Mr Barsby:** If you look at New Zealand—and that's what mentioned about that—that, again, is a country where the visitor economy is part of its national economic strategy. So, it was no accident that *The Lord of the Rings* was filmed there, then all the Hobbit Land and all that was created. As much as that might seem pastiche, there was a whole lot of infrastructure built in and around that, and quality management. A good example might be Serbia as well. If you look at their national tourism plan for 2016 to 2020, they recognise that each region has a slightly different offer—a slightly different customer base. There's a difference between the cities and the rural areas. Also, they've got quite a detailed action plan. If you can't get to sleep at night, then I suggest the 200 pages are well worth a read.

[173] **Professor Pritchard:** I think if you look at New Zealand, they're spending £65 million on marketing New Zealand to the world this year. They recognise that tourism is the second most important industry in New Zealand, and they are putting the resources in to actually grow the industry beyond the peak seasons. So, 80 per cent of their budgets are now being spent on off-season and winter season marketing to make it a year-round destination. So, I think New Zealand is very similar to us. It's at the other end of the world, but, actually, its characteristics and the importance of tourism are the same. So, they're spending £65 million. Ireland, just across the sea, is spending £30 million and very much delivering that experiential product. Across the border, in England: the development fund, £40 million, on top of northern region partnership funding of £20 million, and, just for the south-west, £7.5 million in 2015. Significant sums of money are being spent all over, some very close to us, some of it further away, but it's all about delivering and developing the best tourism industry that is possible. And, if we don't keep up—and we're not keeping up, because we haven't got that resourcing being invested at this point in time—when those products start to come through and start to populate the websites and start to be taken up, it's going to undermine our position if we haven't got the equivalent.

[174] **Professor Morgan:** Just to give a very quick different example: northern Norway. You might not think of it for tourism. They've really grown their cruise market, and they're using tourism to fight rural depopulation, because they're losing women and young people from the region. Excuse me, I have a sore throat. And they're using tourism to turn that around. So, that's another way in which tourism is a vehicle for regional development.

[175] **Russell George:** David, do you have any other questions?

[176] **David J. Rowlands:** Yes. I'll just very quickly round up the last two parts of my question. Obviously, Visit Scotland seems to be doing much better than we are, but is there a specific country about which you would say, 'That's the way we ought to go. This is the perfect example of how marketing ought to be done, or how marketing a country ought to be done'?

[177] **Professor Pritchard:** I don't think it's rocket science. I think we've got some very good building blocks in place, but I think we need to always be keeping an eye on what our competitors are doing, and you have to include places like Scotland, you have to include Ireland in there, Yorkshire, with the Lake District, and Cornwall. You know, Cornwall seemed to come from nowhere about 15 years ago to, all of a sudden, be this incredibly trendy destination that everybody wants to go and see. We've got everything that they can offer and more, and we need to have the confidence that we know we're good at what we're doing and we know what we're doing; we just need some help to develop that product and to communicate that message, because we really are Britain's best-kept secret.

[178] **David J. Rowlands:** So, really, there's a plethora of examples out there, isn't there, of how we should follow that?

[179] **Mr Barsby:** I think the thing with New Zealand as well is that it does link education, it links product development, it links infrastructure investment, all aligned to the promotion of the country, and I think—

[180] **Professor Morgan:** Have a look at what Iceland are doing as well, I would just say, as another example of a country that's come from nowhere very quickly.

[181] **David J. Rowlands:** Thank you very much.



[182] **Russell George:** If I could ask each of you, under 30 seconds, to give us any points that you think are important for our inquiry or anything you think that you want to say that's not been drawn out in questions today. If I could start with Adrian.

[183] **Mr Greason-Walker:** I suppose, just to put the case for the industry, it's very sustainable in Wales. I think we also do have to make sure that we grow the market, and one of those areas is internationally, particularly if it's going to have to take up the slack from other areas of the economy in the future, post Brexit, which we don't know. But at the moment, we do need to grow that market if we're going to introduce more people into the industry as well. So, it can't be the be-all and end-all, but it's there as a strong pillar, I think, to our economy.

[184] **Russell George:** Good.

[185] **Mr Barsby:** I think one thing that we haven't touched on is transport infrastructure, which is crucial, I think, and, I guess, the old adage of linkage avoids leakage. And the whole concept of tourism is moving from A to B: the beginning of a journey, thinking about it, planning it and executing it. If you look at the train and bus timetables on a Sunday, anybody would think that we still just go to church on Sundays and don't do anything else. We really do need to really unpick that and say, whether you're an international visitor, or whether you're local, or whether you're coming in from Ireland, England or Scotland, we need to look at our transport infrastructure. It just isn't fit for purpose, particularly at weekends and evenings.

[186] The final thing is just on tax. We're having to pay too much tax as businesses, and, in our sector, international companies are charging us between 15 and 30 per cent commission in order to access business. So, if we're going to be more successful in international markets, we're going to be paying more and more in commission. Most businesses are paying something between 40 and 55 per cent of their revenue—it's being lost—in taxes of various forms. So, any way in which the legislative body can look at a transaction tax or some way of getting some of that 20 per cent to 30 per cent of commission charges back into our economy to fund our marketing, to fund our product development, then I think that's really part of the secret. Far too much is coming out of the top line, and it's going to hollow us out in the long term. Some businesses are getting to the point—

[187] **Russell George:** That's understood. Annette.

[188] **Professor Prichard:** Just to pick up on those points, I think, you look at Ireland, they've stopped air passenger duty and they've reduced VAT on tourism products to 9 per cent. So, I think we need to look at what our competitors are doing and make the case for why that, maybe, could be achieved here. Rail, again—most overseas visitors like to come by rail. They want easy options to buy. You can't actually buy a rail pass around Wales with any ease at all as it currently stands. I know the rail franchise is up for renewal, and maybe there needs to be some looking in terms of how we can put in tourism products—things like that.

[189] **Russell George:** Nigel.

[190] **Professor Morgan:** I would echo everything that's been said, but I would also just add I really think we need to be looking at the skills agenda and the education agenda around here. I guess, as an educationalist, that's my day job, but in a post-Brexit Wales, we are going to be faced with a skills shortage in this sector. I think education in the broader sense—. I would really like to be able to have five minutes to chat to local authorities and cabinet members in local authorities, and actually talk with them about the value of tourism in our local authorities and local regions, because I am just seeing so many local authorities pulling out of tourism and not taking it seriously, to the extent that, maybe, you've got one person with responsibility in some local authorities now for tourism. We've focused a lot on what Government can do, but a lot of this has to be followed through at local level.

[191] **Russell George:** Thank you, Nigel. Sorry that we've been pressed for time today. You're more than welcome to provide us some additional evidence, and I'd also say you're more than welcome to stay for the next panel session if you would like—come and go as you please. If you want to just stay for part of the session, you'll be very welcome. But can I thank you very much for the time that you've given us this morning? We're very grateful, so thank you very much.

11:43

**Papurau i'w Nodi  
Papers to Note**

[192] **Russell George:** Can I also, just whilst we're in session, as well, move

to item 7 briefly? Are Members happy to note the correspondence under item 7? Yes. That's fine. We'll note those items.

**Panel Twristiaeth (2)—Gwerthu Cymru i'r Byd**  
**Tourism Panel (2)—Selling Wales to the World**

[193] **Russell George:** We'll move back to item 6, when our panel have come before us. Good morning. Thank you very much for joining us and being part of our inquiry with regard to selling Wales to the world. I'd be very grateful if you could introduce yourselves for the record and what your role is.

[194] **Ms Houghton:** I'm Cassie Houghton. I'm the head of marketing and public relations at Cardiff Airport.

[195] **Ms Barber:** I'm Deb Barber, the chief executive of the airport.

[196] **Mr Jenkins:** My name is Tom Jenkins, from ETOA, which is the European Tourism Association.

[197] **Russell George:** Lovely, thank you. We've all got questions this morning, so we are going to go straight in, because we're a bit short of time, and I'll go to Vikki Howells first.

[198] **Vikki Howells:** Thank you, Chair. I'm interested in the potential for really growing our international tourism here in Wales. Although they account for just 10 per cent of visitors, they account for 20 per cent of visitor spend, so it's clearly an important market to tap into. So, I'd like to ask you, first of all, what you think about Visit Wales's relationship with VisitBritain, and how important that could be or how it is working currently as a vehicle to enhance that.

[199] **Ms Barber:** I think it's a really important relationship. We work very closely with both organisations, as you would expect. There are some reasons why it's really important for us to focus with Visit Wales. We're the only airport in Wales. We've got a really important role to play. But I think we absolutely recognise the importance of being an integral part of the overall UK offer. One thing we're looking at at the airport now, especially with our long haul connectivity that's growing, is to see Wales as an alternative entry point into the UK. There's a huge focus on London at the moment and, obviously, a huge number of visitors come into the UK through London and get stuck in London. So, for us, a really important part of our strategy is to

open up Wales to that UK market so that people come here first, they may stay for a few days, and then go on into the rest of the UK afterwards. So, for us, that relationship with VisitBritain is as important in terms of the overall message.

11:45

[200] **Vikki Howells:** And would you say it's working well now? I'm here looking at the Visit Britain website on the travel and transport page, and there's a plethora of information about airports in England and connectivity thereafter, and there's nothing at all about Cardiff Airport.

[201] **Ms Barber:** And this is why I say it's so important for us to be a focus for both organisations. We were going out to Barcelona at the weekend to attend a global routes conference, which is like a speed-dating event between airports and airlines. Previously, we used to do that with Visit Wales and we used to be on a Visit Wales stand with just us as Cardiff Airport. But we've now come to the conclusion that, actually, it's really helpful for us to be on the VisitBritain stand so that Wales is seen as an important part of the UK structure, and that's what we're now doing. We were out in the middle east last year at the Arabian Travel Market and, again, we did that as part of VisitBritain. So, I think all of that helps to raise the profile of Wales within the overall UK picture. Is there anything you want to add to that?

[202] **Ms Houghton:** I think, just going back to the first point Deb made, there is a really interesting example of when Emirates actually started operating in Newcastle, and how that became a true gateway for the UK. I think that's certainly an example that Wales can really focus on. And I think, just looking at some of the numbers, it's actually stimulated an increase in tourism to the area of 16.7 million per year, and that grew phenomenally in the first five years of the service operating. So, I think it's using that opportunity Deb mentioned in terms of growing our long-haul connectivity, and actually that opens up the whole world in a new way. Yes, we've currently got links to the world, but this is a daily service that gives access from Australia, the middle east, and Asia, to Wales, which we haven't had in this way. So, I think it's focusing on that and actually using these examples of how it's grown elsewhere, and building on that with VisitBritain.

[203] **Vikki Howells:** I agree with everything you're saying, but, if we're looking here specifically at the relationship between Visit Wales and VisitBritain and we're trying to unpick whether VisitBritain is actually doing

Wales justice, now surely Cardiff Airport and all that it offers should be featured on its website.

[204] **Ms Barber:** Absolutely agree with you, and I can say this is why our relationship with our—. I can't answer for Visit Wales, I can speak on behalf of Cardiff Airport, but, absolutely, that is our focus which is why we are actively almost as much engaged with VisitBritain as we are with Visit Wales, and that relationship is growing stronger because we absolutely recognise that point.

[205] **Russell George:** Hannah Blythyn. Sorry, Tom. Sorry, I didn't know you wanted to come in.

[206] **Mr Jenkins:** I ought to just explain where I'm coming from, I suppose. My association really is a grouping of tour operators who sell Europe throughout the world, so my members bring Japanese, Chinese, north American, and south American clients into Europe, and they sell Europe as a destination. I suppose I ought to—. In terms of declaration of interests, we're heading a multimillion European Union-funded campaign to sell Europe to the Chinese at the moment. We're bringing a big delegation of Chinese operators over to the UK and the whole of Europe as well in November. So, we're very much long-haul focused and we're very much interested in collaborative selling of entire regions as destinations. It's really important to understand—and I suppose I have to say this—that joint promotion, or certainly joint selling, from our point of view really works. Wales is very attractive and you're quite right—it represents a fraction of the number of people coming to the UK. I think 2 per cent of international visitors come to the UK and spend their money in Wales. So, you're a micro destination in some ways. But, collaboratively, Wales plus England is much, much stronger than Wales by itself. And, if I look at what my members sell—and they sell Rome, Paris; anywhere in Europe is in their brochure—the product that sells is not London, it's not Paris: the No. 1 seller is London and Paris. That's the one that sells. It's really difficult for Paris to accept that. It's really difficult for London to accept that. They don't like that. Nor does Atout France, nor does VisitBritain, like the fact that the biggest international selling product are two cities, their big cities—not the ones that they want to promote. But collaboration works. That's the first thing I'd say.

[207] Secondly, there is no way, when I'm dealing with VisitBritain, that they don't do everything they can to promote the less-selling zones of the UK. It's always on their agenda. I don't think it's their—. You can ask them to do

more, maybe you—. You're here to ask them to do more, so I'm not saying you shouldn't do that, but, from their point of view, they feel that they're trying very hard. And I say this as someone—. Again, I have to declare interests. I get money from VisitBritain, I get money from Visit Wales, I get a lot of money from the European Commission—and I think that may dry up very quickly in two years' time, unless I move fast—so I may be compromised in what I'm saying. But my impression is that's the case.

[208] **Vikki Howells:** Well, having just looked at VisitBritain.org and seeing that there are only two logos on there, one for VisitBritain and one for Visit England, right on the front page, I would say that, in many respects, I would have to perhaps disagree with you there, Tom, but thank you.

[209] **Russell George:** Hannah Blythyn now. Sorry.

[210] **Hannah Blythyn:** Returning to the idea of Wales as a brand, I think, if you caught some of the previous witnesses, we talked about how there's a perception of what Wales has to offer, what Wales is, and how we best communicate that, and there are many within the industry, the tourism industry in Wales, because a lot of businesses or organisations are so small, who don't feel part of this. I don't know what you think about where we are as Wales as a brand, and what the next steps would be to improve that perception, and for it to bring people in.

[211] **Ms Barber:** Do you want to start with that?

[212] **Ms Houghton:** I think Wales—. It is creating a strong, unified brand for the whole nation. I understand the work that has been done over the last 12 months, two years really, in terms of building something that's used consistently across tourism, business, food and drink. We need to be very confident with that brand. It needs to be very clear what the unique selling points of Wales are. I think the themed years around adventure and sea and legends give industry an idea to get behind. I guess, potentially, we could question are these moving too quickly: are they things that start to get traction and then we move to the next? I think there's an opportunity to build on these as the kind of three core strengths of the country, so people can really understand, get engaged with, and look at the products and the proposition that they're offering around those areas.

[213] So, I think a lot of the work has been definitely in the right direction and I think there's a clear purpose, and I think it's just that engagement with

the actual products and services to make sure it matches what the brand is then saying is important. For us, in terms of our relationship, in terms of how they've been moving the brand forward, I think there's a real strength to that. It's very clear when we're talking with our airlines' other ends what Wales is and what it has to offer, but I think it does take a little bit of time for a brand to really bed in, and it is getting that kind of engagement at all levels.

[214] **Hannah Blythyn:** You mentioned there, I think, unique selling points. So, from your perspective, what would you promote as the unique selling points to come to Wales via Cardiff Airport?

[215] **Ms Houghton:** So, that's difficult, because, depending on who you're talking to—. So, there are a couple of key things that have come across. Obviously from the themes, you can see, yes, okay, the coast—for next year's theme—the history and the culture. Adventure is a very strong product for Wales. Depending on who we're talking to at different markets, we'd probably tweak that message. So, it does depend.

[216] **Ms Barber:** I think another of the key things we talk about—as Cassie said, it's depending on who we're talking to, but it's what—. Wales has got a sort of microcosm, almost, of all the things that you can get in London, but in a much more compact way. And a lot of the Middle Eastern markets, a lot of the European markets, are very interested in the city of Cardiff as a destination, the culture that's available there in terms of the Welsh National Opera, the royal college. Also, shopping is a big attraction for Cardiff, and, actually, on St David's, I was really surprised the other day to learn that the footfall in St David's is actually larger than the Mall in Bristol, when you look at the relative sizes. So, shopping is a big selling point for people coming to Cardiff, and not having the London prices that are associated with that kind of quality. So, it's a whole mixture of things, but I think, in a way, that's almost the problem—there is not one specific thing that people think about when they think of Wales. But, as Cassie says, I think it's about targeting and understanding your market and focusing people on the element of Wales that is going to be most attractive to them, and that's where market intelligence becomes so important, and understanding your customers and then matching it. I think that's one benefit of Wales—we've got a huge range of things that we can then target at people coming in.

[217] **Mr Jenkins:** I agree with what's been said here, but I would just quietly stress that branding is important, but nobody goes on holiday to a

destination because of branding. They go because of product and they go because of the intelligence that they've received about that product. Branding's great: it gives people an identity and a commercial identity and this is really important, but, at core, and particularly now with social media, what matters is what people think and say and want to do. And that's very, very individual. It's not to do with a big label that's been attached to a zone.

[218] **Ms Barber:** It's more about awareness, isn't it, really, and people understanding what's there.

[219] **Hannah Blythyn:** Just finally, very briefly, are there other things that perhaps we could learn here from other European or non-European countries?

[220] **Mr Jenkins:** Partly what I just said: if you went to the European cities marketing conference last year, they had a whole morning on how branding is now seeping away and what they're now focusing on is individual components and what individuals want to do, because that's what they identify with. They're going to identify with that much more than a flag or logo or something that people have invested marketing money in. What matters is what people want to do and the quality of the product that you're delivering. That's the central thing that Wales I suppose has to be concerned with at the moment—not the intermediation bit, but the actual level of what you're doing and what you're delivering.

[221] **Ms Barber:** And it is that—it's about having that quality, but then having the confidence and the ambition to shout about it and make sure that people are hearing that message. I think that's one thing that we've certainly learned at the airport over the last two or three years: it is about being confident and ambitious and really believing in what you're selling. I think that's a really important message.

[222] **Russell George:** Mark Isherwood.

[223] **Mark Isherwood:** Actually, just an observation from the evidence that we heard before, which you heard the tail end of, I think: an interdependency between product and brand rather than—

[224] **Mr Pritchard:** I'm not saying, 'Get rid of it, please.' [*Laughter.*] I'm genuinely saying—. You've got to have that; this is part of the commercial identity of the operation you've got here. All I'm pleading with you is that—.



You have the most brilliant brand, but what people are now really starting to be very active in doing is engaging with one another and discussing things about holidays that have got nothing to do with branding.

[225] **Ms Houghton:** I think brand has to be thought of as more than just being a badge or a logo. The brand is everything: it's the product, it's through to the beliefs; it's the values that the country holds. It's a whole-nation brand that's being worked on, and that has to stem through every level. It's not the badge that sits superficially over the top; it has to go intrinsically into everything that's done.

[226] **Mark Isherwood:** Thank you. And I'll come to my theme now, which moves on. While developing new route opportunities, what engagement has Cardiff Airport had with the Welsh Government's overseas offices in Dubai and China?

[227] **Ms Barber:** We've worked with them very closely, actually. There are three key offices that we've worked with: the North American office, China, and the middle east, and that is absolutely reflective of our strategy for the development of long-haul routes. We've found them very useful in terms of market intelligence, understanding the businesses out there, getting local introductions. When we've done events out there in all three regions, they've been very supportive in terms of facilitating events and things like that. So, we've had good working relationships with those three offices in particular since 2008, going back to the middle-eastern office.

12:00

[228] **Mark Isherwood:** Have you also worked with UK embassies?

[229] **Ms Barber:** Yes.

[230] **Mark Isherwood:** And how have those complemented each other?

[231] **Ms Barber:** Oh, absolutely, because, you know, obviously, we've been talking so far generally about tourism, but also, a massively important thing for us is business travel and exporting opportunities. So, we've worked very closely with the old UK Trade and Investment department, the Department for International Trade now. We work very closely with the embassies when we're working overseas, and, generally, the support they give us in terms of—. As I say, a lot of it is market intelligence and introductions, which are a

key thing, and also them then promoting what we're talking about in the region when we're not there.

[232] **Mark Isherwood:** To what extent, from your experience, do you believe the role of the Welsh Government overseas offices is understood within the sector in Wales, within the tourism sector in this case?

[233] **Ms Barber:** That's difficult for me to answer. I'd say, certainly from our perspective, I think we understand it and we use it. I'm not sure whether you've had any other feedback, Cassie.

[234] **Ms Houghton:** I guess, no; only from our own opinions and our own experience, it's been of value.

[235] **Mr Jenkins:** And from an incoming tourism point of view, I don't think there is too much engagement there, no. With the Welsh tourist office and with VisitBritain when it has a Welsh hat on, yes, but not with the Welsh office, no.

[236] **Mark Isherwood:** So, do you have evidence that the organisations you work with in Wales and the businesses you work with in Wales are going to the DIT, or the UKTI as it was, or in the embassies instead, or not engaging at all?

[237] **Mr Jenkins:** No, I mean, if you've got a Japanese group, for instance, a Japanese tour operator sitting in Tokyo will ring up their European headquarters, which is usually in London, and say they're thinking of doing a tour to Wales, then the person in London will pack a suitcase, stick it in the back of a car and go to Wales and find hotels, or try to find hotels, for the Japanese market. There is no Government involvement in that. Now, it may be possible that the tour operator in Japan, wanting to produce a brochure, will seek support from Visit Wales or VisitBritain, but, in broad terms, there is very little Government involved in that transaction.

[238] **Ms Barber:** We've been involved, not directly with trade missions, but we've been in-market at the same time as trade missions, and, you know, we've seen a huge amount of interaction between the businesses that have gone out and the offices overseas. So, I think that whenever there is that kind of selling going on, then the Welsh Government offices overseas we've seen have been very heavily involved in those.

[239] **Mark Isherwood:** There seems to be a dichotomy here. Has the European Tourism Association or, to your knowledge, your members had any dealings with the Welsh Government's overseas offices?

[240] **Mr Jenkins:** I have not interrogated them on the subject, so I can't answer. I genuinely can't answer.

[241] **Mark Isherwood:** Organisationally, can you say that you've—?

[242] **Mr Jenkins:** Organisationally, I've had very little, other than contact with Visit Wales.

[243] **Mark Isherwood:** Okay, thank you.

[244] **Russell George:** Adam, do you have questions?

[245] **Adam Price:** Yes, I just briefly wanted to ask—

[246] **Mr Jenkins:** Can I just add, if I may, Chair, on this question?

[247] **Russell George:** Sure.

[248] **Mr Jenkins:** I ought to just stress that Governments actively involving themselves in the inbound tourism sector is extremely rare. So, what you're seeking would be a major, bold, innovative piece of initiative from the Welsh Government if they were doing that in my sector.

[249] **Mark Isherwood:** Thank you.

[250] **Russell George:** Thank you. Noted. Adam Price.

[251] **Adam Price:** Well, we're all for bold innovation from the Welsh Government. I'd just like to briefly ask you about the Wales.com website. We've had some written evidence from various partner stakeholders saying that it's got a very low profile, et cetera, but I think, Cardiff Airport, you have some ideas about an opportunity as part of the Wales digital gateway initiative that maybe you can actually inform us about.

[252] **Ms Houghton:** Yes. We understand from our conversations with Visit Wales and the team that they're looking at the websites and the roles and the functions. I think our thoughts at the moment are that they are a little

disjointed, because there are a couple of different sites in existence and they don't necessarily marry up. It's difficult to know where to go for the right bit of information. So, I think making sure that this project that they're starting on is looking at the purpose, the need for different sites—. Is it best to have a central hub where everything's integrated? I guess that's all that's being reviewed.

[253] From our perspective, what we would like to see is a focus on showcasing access to the country, especially from that international point of view. I think what there is an opportunity to do is to really look at that route network and the ease of connections into the country, because, for us, that stimulates traffic on our airlines, and using Cardiff Airport as the gateway, which is a key objective for us. So, I think it's just an opportunity to maybe do more in that area and really showcase how easy it is to get into Wales.

[254] **Adam Price:** I just want to make a general point. Governments love websites and portals and such. I'm just wondering whether—it relates a little bit to your nation brand versus individual direct communication—it is a bit yesteryear now. Is that where people get their information when they're thinking about, 'Where shall I go on holiday? Let's look at the Government website'? You know, is it Airbnb trips or Facebook or—

[255] **Ms Houghton:** You'd obviously need a broader digital strategy to support it, but I think a website still has a function. It's a hub for content, whether that's written content about a place, whether its video, whether its photos. It gives a central pot to put things in. You can then obviously have a very clear digital strategy around social media about how you engage with bloggers. There's so much opportunity to do digital activity and use that content, but there is still a place for having a hub to put it in, I think.

[256] **Ms Barber:** As you say, it is a question of where people will go first and whether that would be the one that they would go to first. If we're talking about perception and raising awareness, then I think it is useful to have a Wales.com tag for people who aren't necessarily hugely familiar with what they're going to find. It is a good first port of call.

[257] **Ms Houghton:** A lot of people will simply go on to Google and tap in 'cheap UK holidays' or whatever the key phrase would be, and you need to make sure that there's a presence there for whatever it is you want to appeal to, and a website is a good way of doing that. Whether you have third party endorsements through blogs and other sites, that's really important, but you

need something to hold on to.

[258] **Mr Jenkins:** I tend to agree with you. The short answer I can give you is that it's something you've got to have, and if you're going to have to have it, you have to do it well. Is it really important for tourism? Probably not. But, having said that, what's nice about Wales.com is that it mirrors the central fact that is always avoided, which is that no tourists see themselves as tourists. They actually see themselves as players in the service economy. They're just coming over and acting as consumers inside the Welsh service economy. What they enjoy and what they experience is that economy, which is supported by the inhabitants of Wales. So, you're really visiting the taste of the inhabitants, so it's not purely a tourist phenomenon; it's much more a socioeconomic phenomenon that we're witnessing nowadays. If that could be expressed on Wales.com, rather than, 'You are a tourist and this is a website for you', which is to a certain extent what you're getting on Visit Wales—it's a very beautiful, very persuasive website that Visit Wales has got—if you've got a wider context for these decisions to take place, then you're not wasting your time.

[259] **Adam Price:** Thanks very much.

[260] **Russell George:** Hefin David.

[261] **Hefin David:** The Wales Tourism Alliance gave some written evidence to the committee and one of the things they said was, whilst the focus has and will need to remain on major international events, they only tend to benefit a small number of areas and locations, particularly Cardiff. Can you give me your opinions on that point of view, please?

[262] **Mr Jenkins:** Why don't you go first?

[263] **Ms Barber:** Okay. I wouldn't agree with that statement. I think if you look at things like the UEFA Champion's League, I can't remember the exact figure now, but it was something like—80-how-many-hundred-million people around the world actually watched that? In terms of putting Cardiff and Wales on the map, then that was hugely important. The NATO summit did a similar thing. That certainly wasn't focused on Cardiff—

[264] **Hefin David:** It was focused on Newport.

[265] **Ms Barber:** It was in Newport, that's what I'm saying. And the imagery

associated with that event—. The imagery that we had at the airport in the welcome area, and the stuff that you saw on the tv—you know, beautiful imagery of Snowdonia and other parts of Wales—. So, again, it is really important in terms of global awareness of the country.

[266] **Hefin David:** So, the value for money there is less about what happens within the country than selling the country to the rest of the world.

[267] **Ms Barber:** Yes. Also, you know, if people have put money into any part of the Welsh economy, ultimately it is going to have a benefit for the whole of Wales because it is all generating revenue around that point.

[268] **Hefin David:** That's disputable though, isn't it? Money generated in Cardiff and Newport doesn't tend to spread out to the Valleys and the north. It's not necessarily the case. That could be argued against.

[269] **Ms Barber:** Well, yes. You could be right. I'm not an economic expert. I can just talk from the position of the airport. But, certainly, the feedback that we have when we're interacting with people overseas is that it is massively important in raising awareness of Wales as a whole.

[270] **Hefin David:** So, your strong argument is that value for money comes from a global Wales picture.

[271] **Ms Barber:** Yes, absolutely. I think, you know, the other thing we see is that the people who come in to Newport or Cardiff for those events—we see people coming back through the airport having been encouraged to see Wales from that big event. Then, there's potential that they'll come back and go further afield.

[272] **Hefin David:** Okay.

[273] **Mr Jenkins:** I'm professionally sceptical about these things. So, I'm very much at one with the tourism alliance in their position. The bigger the event, the greater the political stake there is in making it clear that this is wonderful, and the bigger disruption there is to the tourism pattern of demand. It would take a normal tourist destination one to two years to recover from an Olympic Games, in my experience. What you do when you hold a large event is you very publicly tell all your normal customers that you are closed for business. The repercussions of closing yourself for business play out month after month and, in some cases, year after year, until you re-

establish some kind of equilibrium. So, I would be very cautious about holding large events, and if you do, remember to contain them very carefully and try and maintain that your regular business is unaffected by such an event. Bigger event: bigger disruption, bigger problem.

[274] **Hefin David:** What you're saying is that it is not possible to avoid that disruption if you have a major event.

[275] **Mr Jenkins:** Well, if you have a super-big event, you have got real big problems.

[276] **Hefin David:** What are they? NATO was super-big, was it?

[277] **Mr Jenkins:** Well, an Olympic Games, which you don't want to do, but if you did that—

[278] **Hefin David:** Euro 2020.

[279] **Mr Jenkins:** What?

[280] **Hefin David:** Euro 2020. Football.

[281] **Mr Jenkins:** Football. Where are these people going to stay and what are they going to do when they stay there? What does this—

[282] **Hefin David:** So, you are saying it's just not worth it.

[283] **Mr Jenkins:** Well, some people really love these events. There are reasons for having it. There are lots of reasons for having a party, but economic benefit for the tourism industry is not necessarily one of them.

[284] **Ms Barber:** If you have got an event that goes on for two, three, four weeks like the Olympics, then I think, yes. Look at what happened around London. But, when we are talking about the Champions League, which ran over two days or 24 hours, I think the benefits far outweigh the disruption that you will get for 24 hours.

[285] **Hefin David:** Okay.

[286] **Ms Barber:** I'd just say, at the airport, we absolutely maintain business as usual for our customers. We installed a temporary terminal for UEFA and

the NATO summit, and the other half of the airport absolutely operated as normal, and none of our other flights were disrupted.

[287] **Mr Jenkins:** And the reasons—I'm interrupting to agree with you—for doing stuff I am not questioning in that area. But, I'm just saying, the bigger the event, in general, the bigger the disruption and the bigger problems you cause for your industry.

[288] **Hefin David:** So, one of the things that they suggested as an alternative is to adjust what constitutes a major event and putting more resource into medium-sized events to push the benefits out across the whole of Wales. They gave as an example the Machynlleth Comedy Festival.

[289] **Mr Jenkins:** Yes, the Machynlleth Comedy Festival—brilliant idea. I don't know who had it. I'm sure it came from Machynlleth. You know, this is an example of a small, organic event that is gradually building steam in an area that, frankly, desperately needs some sort of attention.

[290] **Hefin David:** So, can I just ask this then: that has a much more long-term sustainable value—those kinds of things—than having a big, one-off showcase event?

[291] **Mr Jenkins:** You're putting that to me as a question. The answer, to my mind, is 'yes'.

[292] **Hefin David:** Right. Deb, would you dispute that?

[293] **Ms Barber:** I think both have equal merit, to be honest. I think the small, local events—and, as you say, in terms of spreading the impact wider than just a particular city—are really important. But I absolutely support us hosting major events, having seen the benefits that we've had from things like NATO, the Ryder Cup, and the legacy benefits as well.

12:15

[294] **Hefin David:** And Cardiff Airport works with team Wales to deliver these things.

[295] **Ms Barber:** Oh, massively. And I think that's the strength of Wales—that we're able to do that. We were involved in planning all of these big events probably a year, two years out. NATO was a bit different: we had a



very short notice, relatively, for that. But right from the outset, the team is pooled together so we're in a big planning environment with the Government, the local authorities that are impacted, the police, the fire, trains, road networks—everything. And I think that's what sort of contributes to the success of Cardiff. We had—. When we did the UEFA cup this year, we were out in Milan looking at how they did the event, and obviously you look at a city the size of Milan and the infrastructure and the resources they've got. After the Cardiff event, we had both the Juventus and Madrid teams coming to us saying that they felt Cardiff was the best event they'd done.

[296] **Hefin David:** Okay. Well, we've got a very clear divide here on the panel.

[297] **Mr Jenkins:** From my point of view, Deb is dealing with a brilliant airport that is yet to yield its potential in terms of capacity—I think that's the right way of phrasing it. You've got a town in Cardiff that has got lots of hotels—or by Wales's standards, there are a lot of hotels. If I've got members who wish to feature Wales in a programme and sell it in Japan, and they get suddenly told, 'Actually, just two nights in your entire programme—block them out', they get very, very angry, and suddenly there's a denial of product. I'm not for one moment saying you shouldn't do this. I'm very careful to say this. There are good, sound reasons for doing it—

[298] **Hefin David:** But there are consequences.

[299] **Mr Jenkins:** —but there are consequences, and those consequences are not insignificant.

[300] **Ms Barber:** I think if you talk to the hotel operators that have supported the big events—*[Inaudible.]*—they charge significantly more than they would normally.

[301] **Hefin David:** They're all based in Cardiff though, aren't they?

[302] **Ms Barber:** Well, not just Cardiff.

[303] **Hefin David:** Or the city.

[304] **Ms Barber:** If you look at the UEFA cup, the hotels from Swansea to Swindon benefited from that, absolutely. I don't think that—. We couldn't get a hotel—

[305] **Mr Jenkins:** It was popular in Bristol.

[306] **Ms Barber:** We had air crew accommodated in Weston-super-Mare because they couldn't get into Wales.

[307] **Russell George:** Okay. Mark Isherwood, do you want to come in?

[308] **Mark Isherwood:** Debbie, you commented that when we had the NATO summit you had displays for Snowdonia, for example, so people were getting a whole-Wales promotion. When I visited or travelled through a number of international airports recently, in their arrivals they had displays from all their regions in their often major city airports. It's not just for particular events. Are you promoting the whole of Wales all year round?

[309] **Ms Barber:** Yes.

[310] **Mark Isherwood:** So, you've got displays at arrivals—

[311] **Ms Barber:** Yes, we have, throughout the year.

[312] **Mark Isherwood:** —for the north and the mid and—.

[313] **Ms Barber:** Yes.

[314] **Ms Houghton:** I think Visit Wales actually used the airport as a showcase for the new brand when it was launched in 2006. So, for different arrival points into the airport there is a showcase of the new brand and that covers the whole of Wales. It covers a number of different events, it covers both business, tourism, food and drink, and that is in place now. So, you would see that if you travelled through on the arrival journey.

[315] **Russell George:** Jeremy Miles. Sorry—.

[316] **Mr Jenkins:** Notwithstanding the fact, just to say that—and Debbie will now punch me—*[Laughter.]*

[317] **Russell George:** We don't allow that in committee. Take it outside. *[Laughter.]*

[318] **Mr Jenkins:** If you're wanting to promote the Machynlleth Comedy

Festival, the twinned airport would be Birmingham international.

[319] **Russell George:** It would, yes.

[320] **Ms Houghton:** Can I also make the point that, actually, both during the NATO event and more recently during the Eisteddfod this year, the UK 'great' campaign has actually also been running creative about using that point of Cardiff being a gateway to the UK? So, it works both from a local—in terms of Wales—picture, as well as a national, UK picture.

[321] **Russell George:** Okay. Jeremy Miles.

[322] **Jeremy Miles:** Can I ask you briefly about the impact of Brexit? You've obviously spoken, Tom, about the possible direct consequences in the funding, but a little more broadly, really, do you have any specific concerns about the potential loss of funding from the EU? That's the first question. Secondly, as a consequence of leaving the EU, should the Welsh Government's strategy, really, for selling Wales to the world change?

[323] **Ms Barber:** I think, in terms of direct funding from the EU, we, as a business, are not impacted by that. We don't receive any funding from the EU. But Brexit is a huge subject for us and it's something that we're following extremely closely with airlines and airports across the whole of the UK. I think the biggest challenges are around currency, and currency fluctuation, although there are opportunities for that because, clearly, for inbound tourism and business it's good, but that's an issue for the airlines as well. The other key issue for us is more of an airlines issue, but obviously directly impacts on us, and that's continued access to the European open skies agreements, because airline agreements aren't covered by the World Trade Organization. So, you know, in terms of the business side of it, we're watching that, and we have regular briefings with DfT to understand what's happening with that. But, I think, as well—

[324] **Jeremy Miles:** Sorry, can I just stop you there?

[325] **Ms Barber:** Sorry.

[326] **Jeremy Miles:** So, that access to the open skies agreement, if that were not maintained, would adversely impact Wales in what way?

[327] **Ms Barber:** At the moment, airlines operating from the UK into Europe

are able to do so in a completely open way through the open skies agreement. So, subject to, obviously, individual commercial agreements, they can operate with impunity into any European airport. For UK airlines as well, they can operate intra-Europe. So, Ryanair, for instance, may have a base in Copenhagen that allows them to operate flights to Paris, say. If the UK airlines are no longer able to benefit from the open skies agreement, it means all of that goes, and that we then go back to the sort of situation in the 1970s when we were into bilateral, single agreements with countries and airports. So, the impact for us is the continued ability of airlines to operate in and out of Europe.

[328] **Jeremy Miles:** Sorry, just as a passenger, then, does it mean there will be fewer flights to Wales?

[329] **Ms Barber:** Ultimately, if agreements aren't put in place, then airlines won't be able to operate, so it's a huge work package for the UK Government to ensure that those agreements are put in place before March 2019, or there are substantial transitional agreements that allow it to—. So, for us, this is a thing for the Welsh Government in terms of their interaction with the UK because, obviously, aviation is not devolved. It's a really important point for the Welsh Government to ensure, from our perspective and the future of Cardiff Airport, that that is taken into account going forward.

[330] **Mr Jenkins:** I think the issues facing Wales really are obviously very similar to those facing the rest of the UK. There's no specific Welsh dimension to Brexit other than the regional funding that Wales receives, which is very incidental—importantly incidental, but incidental to tourism. I think, from a broader tourism point of view, the worry is that the UK, from a tourism point of view, is very isolated, being outside Schengen. It was already quite isolated and it means that the UK, in many ways, has not benefited from the boom in tourism to continental Europe from India and from China, for example, both of which require visas. Just to give you an idea: a Schengen visa requires three pages of visa information to be filled out. UK visas have up to 12 pages of information that need to be filled out, and really a very extensive scrutiny of people's financial data—very intrusive. What that has led to is countries like Switzerland—and if you want to model yourself on a country, you may wish to choose Switzerland. Switzerland has benefited from a near doubling in the number of Indian visitors over the last 10 to 12 years, whereas the UK has seen a growth of about 4 to 5 per cent. There's significantly bigger growth in Europe as a result of this, and the point is that we were isolated and we've just voted to become more isolated. So, this is a

significant lessening of position, I think, for the whole of the UK.

[331] **Russell George:** Thank you. David Rowlands.

[332] **David J. Rowlands:** I just wanted to examine—and obviously this will be anecdotal evidence that you have, I would say—the lessons Wales can learn from similarly sized countries. Do you have any comments with regard to that? I mean, obviously, we would look at Scotland as one of those who sold its brand, if we get away from that, but has sold itself perhaps better than we have over a very long time. Do you have any comments as to what you might have seen out there?

[333] **Ms Barber:** Yes, I think general comments, really. I think it goes back to the points we were making earlier on: it's about being absolutely clear on what your selling points are and it's also about absolutely wanting to punch above your weight and to make a bigger noise than the size of your country might normally expect. So, that's the main thing: it's about, sort of, confidence and having something that people will immediately think of when they think about your country. And, as you say, we look at Scotland as an example often in terms of that almost brashness, and I think we need to be in that kind of ballpark, really.

[334] **David J. Rowlands:** Because obviously the two airports in Scotland are far ahead of us at this moment in time.

[335] **Ms Barber:** Yes, but I think, you know, this is what we're talking about. It's all about confidence, ambition and punching above your weight. I mean, who would have said six months ago that we'd have a long haul daily middle east flight operating from an airport that carries 1.4 million passengers a year? But, you know, we're a national airport, we serve a capital city, we've got a fantastic market for that airline to look at. We went out to the middle east and we sold that message and we've now got an airline operating from Cardiff from 1 May.

[336] **Mr Jenkins:** And the temptation is, to start as I did a moment ago, to look at Switzerland or Norway or the Netherlands or other points, but I think perhaps what you ought to do is just look at what Ireland did when Ireland was facing a situation not dissimilar to the one that Wales is facing back in about the 1950s and 1960s, which is—. You go right back 50 years ago. They restarted from ground zero. They didn't have an income in the tourism industry and they built up an entire industry. I mean, on the basis of need

they had to get this right. They built up the *céad míle fáilte*, Bord Fáilte ideas and spearheaded Ireland as the place to go for welcome and fun, and they really managed to reinvent themselves on the world stage in that way. And I think if I was looking at one example of something to perhaps look at—. And a hundred—. You can learn from every single small destination in Europe. I mean, there is a network out there called the European Travel Commission, which, again, were not members of; it's another example of splendid isolation on the part of the UK. But, you know, from those—. There are lots of countries there, and you can learn from every one of them because they all do something well, but Ireland in particular—largely Anglophone, catering to a very similar market to the markets that you're catering to—managed to reinvent themselves totally, and I think this is perhaps what needs to take place in Wales because you are at the moment only just scratching the surface of the potential. You're getting about a tenth of the international visitors you should be getting.

[337] **David J. Rowlands:** Yes, and obviously it comes down, fundamentally, to funding, doesn't it? And we really do, as a country, have to put more funds into the tourist industry.

[338] **Ms Barber:** Yes, I think you're right. I was reading through the evidence pack that you had before the meeting and if you look in there at the absolute correlation between the amount of money that is spent and the return that you get—. So, you know, I think, yes, it is a very close relationship, yes.

[339] **David J. Rowlands:** Thank you very much.

[340] **Russell George:** Thomas, if I can ask you: we took some written evidence over the summer and the British Council said that Wales needs an integrated international strategy, which would include tourism, trade and inward investment as well as the educational and cultural sectors. Is that something that you would agree with?

[341] **Mr Jenkins:** I could hardly disagree with that statement, particularly in this context. No, I mean, I think you are unfortunately dealing with someone who may sound like—who sees himself as Welsh and spends every single holiday in Wales, even though I am, in theory, European. Yes, I think Wales has fantastic potential and it needs to be unlocked, but I would just quietly disagree with Mr Rowlands insofar as funding is vital—without it, you won't really go very far down the road—but you need to have a complete reset and

recalibration of the importance of tourism and the importance of a career in tourism within Wales. You'll only do that if you actually re-energise the entire—. You need almost something like another 1904 awakening but on a secular level, if you get my evangelical allusion. [*Laughter.*] You need people to actually get out and say, 'This is really important to our existence that we are open when clients are here, because you're often shut.' I've been in Machynlleth on 29 December, and the tourist information centre was closed, and I was told very firmly when I protested that they were entitled to a holiday like everybody else. And they are, but not, perhaps, in the middle of the holidays was my point. I think, you know, you've got to have a complete rebooting of the way in which you look at this industry. It's not a gift. These guys don't fly out of the sky and land on you, throwing money around like some magic. They come because you have a service economy that is good, that people enjoy and that the people police, and you have people going and saying, 'This is the best we can do', and, if it isn't the best, all hell breaks loose. You need the sort of activity where people used to polish their front steps. It's a long-gone tradition. I don't want people doing that—

12:30

[342] **Russell George:** Do people do that?

[343] **Mr Jenkins:** I'm sure they still do it, I'm sure. But it's where you have that kind of attitude that, 'God help you if you serve a substandard cup of coffee.' It should be regarded as a national disgrace that there is instant coffee still served in coffee bars. [*Laughter.*]

[344] **Russell George:** If I can ask you all: the Welsh Government's got its partnership for growth strategy; can that be improved at all?

[345] **Mr Jenkins:** I can't comment.

[346] **Ms Barber:** I'm just desperately trying to—. I'm not really familiar with the partnership for growth strategy, so—.

[347] **Russell George:** Okay. I'll come to Thomas then.

[348] **Ms Barber:** Okay.

[349] **Mr Jenkins:** I'm really sorry, it really would be wrong of me to comment too.

[350] **Russell George:** So, it can be improved.

[351] **Mr Jenkins:** Yes.

[352] **Russell George:** They can tell you about it. [*Laughter.*]

[353] **Mr Jenkins:** You could tell me about it, yes. [*Laughter.*]

[354] **Russell George:** Right, in that case, I'll just give you a final moment as well. Have you got anything to say that will help our inquiry that perhaps has not been drawn out of questions— any final point that you briefly want to make? We're over time. Any brief point you want to make.

[355] **Ms Barber:** Very briefly, I think it's all about creating the environment that is going to attract inward investment, and this is not just about tourism; it's also about business. Speaking specifically from our business, it is all about integration and unity of purpose. The one key area that we're really focused on is integrated transport. You know, if we're looking at big events, if we're looking at attracting people into Wales from the rest of England or overseas, we've got to have a simplified integrated transport system that is going to pull everything together in terms of our roads, rail and all this kind of stuff. So, major projects like the M4, the metro systems in Swansea and Cardiff city deals—all of that is massively important.

[356] The other thing that I'd really just like to mention is APD—air passenger duty. That's a massive thing for us in Wales. It's a punitive tax anyway that is hampering the growth of aviation across the piece, and I think that, you know, from a Wales perspective, the fact that Scotland and Ireland have APD devolved and not Wales is totally illogical. I think that, potentially, could have a massive impact certainly on our ability as an airport, which then has a knock-on effect in terms of inward investment to the country.

[357] **Russell George:** Okay, thank you. Thank you, Deb. Thomas, just very briefly, any quick pointers?

[358] **Mr Jenkins:** People often ask me how do they get—. I mean, I was once asked, 'How do I get more Japanese tourists to Eastbourne?', and my reply was, 'How well are you selling Eastbourne in Brighton? Because if you can't attract people from Brighton, you're not going to get many from Japan.' I think the question Wales needs to ask itself is how it sells itself to the Welsh,



just to start off with. How many people from south Wales are going for a holiday in north Wales? Point 1. Point 2: go off—

[359] **Russell George:** Hannah does. [*Laughter.*]

[360] **Mr Jenkins:** Right, good. I'm sure you all do; I'm not questioning that. But it's about how many.

[361] **Russell George:** No, no, I take the point.

[362] **Mr Jenkins:** Secondly, do go abroad. And it's a good question: are there any countries that you can learn from? Go abroad and try and experience the sort of holiday you would have in Wales, but have it in Bavaria. Go on a walking trip in Bavaria, see what that's like. See what it's like in Switzerland. And, you know, see what the beaches are like in western Atlantic France or something. Just compare and contrast, because that is where you learn what your competitors are doing.

[363] **Russell George:** Okay. Can I thank our witnesses for your time? We are very grateful for your time this morning. You'll have a copy of the transcript and if you feel there's anything you want to add then please do let us know. Thank you very much.

[364] **Ms Barber:** Thank you.

[365] **Mr Jenkins:** Thank you very much indeed.

[366] **Russell George:** That concludes our meeting. We'll finish our meeting there, but I will ask Members just to hang around for a moment so we can have a quick debrief.

*Daeth y cyfarfod i ben am 12:35.  
The meeting ended at 12:35.*