

## Enterprise and Business Committee Inquiry into Tourism

Evidence from Visit Britain

### National Assembly for Wales' Enterprise and Business Committee inquiry into tourism VisitBritain's response to Call for Evidence



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May 2014

#### About VisitBritain

VisitBritain is Britain's strategic body for inbound tourism. A non-departmental public body, funded by the Department for Culture, Media and Sport, it is responsible for promoting Britain worldwide and developing its visitor economy.

VisitBritain plays a unique role promoting Britain around the world, supporting tourism growth and thereby economic growth. VisitBritain has been directed by Government to run a £100 million marketing programme, to inspire travellers to visit and explore Britain, across a four year period (2011/12-2014/15). This programme includes £50 million of partner funding (cash and in-kind). VisitBritain has a strong record of partnership working and locking in private sector funds to sell the destination. VisitBritain is also a key part of the GREAT Britain campaign, which brings together the Foreign & Commonwealth Office, UK Trade & Investment and the British Council to promote the UK as a GREAT place to visit, invest, trade and study. Together these campaigns aim to attract 4.6 million additional visitors, spending £2.6 billion across the UK, sustaining jobs and supporting economic growth, across a four-year period.

In 2013, VisitBritain announced an ambition to attract 40 million visitors a year by 2020 (an increase of 8 million on 2012). This would deliver £31.7 billion annual spend by overseas visitors (in real terms) and support an additional 200,000 additional jobs across the UK. VisitBritain has developed a clear strategy to work with partners to deliver on this ambition which was launched by the Secretary of State for Culture, Media and Sport in April 2013. Our strategy is supported by the Welsh Government.

In 2014/15 VisitBritain received £19 million Grant-in-Aid funding, which covers all our marketing activity and our running costs at our London headquarters as well as across 24 overseas offices in 22 overseas markets. This is supplemented by a separate budget of £17 million for GREAT campaign activity to promote Britain's image overseas. VisitBritain's marketing activity is focussed on attracting leisure visitors, and operates in 22 overseas markets which account for approximately three-quarters of inbound tourism spend.

In this response tourism refers to all inbound travel to Britain, whether for recreational, leisure or business purposes, encompassing people visiting Britain for a holiday, for business or to visit friends and family.

VisitBritain's response does not respond to every aspect of this inquiry's terms of reference, only the areas relating to VisitBritain's remit.

#### Summary of VisitBritain's Response

1. International travellers in short haul markets are more likely to be aware of Wales than those in long haul markets. However, research suggests that overall awareness of Britain overseas is greater than that of Wales. For this reason VisitBritain has an important role in partnering with Visit Wales to promote Wales overseas.
2. VisitBritain and Visit Wales, the Welsh Government's tourism department, work closely on a range of areas including business planning and has governance structures and formal agreements in place to ensure that we work in

partnership. This includes a seat on our Board and a Memorandum of Understanding, signed by both of these organisations in January 2013, which aims to optimise promotional activity overseas and support growth of the visitor economy.

3. VisitBritain will – in the near future – have a member of Visit Wales’s marketing team work from our London office where they will represent Wales in internal meetings, attend VisitBritain’s international sales missions and events and bring enhanced knowledge of Wales’s product and industry.
4. Between 2012 and 2013 overseas spend and visits to Wales grew 3.5 and 2.5 per cent respectively. Holiday visits saw even greater growth. Over this period the number of holiday visits to Wales grew 13 per cent and spending on holiday visits increased 27 per cent, outperforming the rate of growth experienced by Britain’s other nations.
5. VisitBritain’s work to grow visits to Wales is integral to our work promoting Britain overseas and we deliver for Wales:
  - The majority of VisitBritain’s marketing and communications is now online and our digital presence and e-communication is the bedrock of our contact with potential travellers. At least 40 per cent of our ROI is derived from our consumer digital presence (visitbritain.com, database marketing, social media) and a further 40 per cent from our Business to Business (travel trade) work which is reliant on the excellent market intelligence and contacts of our members’ network. Our retail platform underpins a £16 million turnover business which generates business for suppliers across the country. These activities benefit Britain as a whole, including Wales.
  - Our greatest asset of value to Visit Wales and the Wales tourism industry is our international marketing expertise and delivery, achieved by means of our insights and contacts, through our overseas network across 22 markets. This enables extensive showcasing and selling of Wales through our ongoing activity (online, PR and the travel trade).
  - To provide an example of the impact of our digital activity, in 2012/13 users of VisitBritain.com were twice as likely to spend money in Wales than the average visitor and those visitors spent £16 million.
  - In the 2012/13 financial year our press and PR teams generated 1,491 articles and 79 press visits on Wales worth advertising equivalent (AVE) of just under £90 million.<sup>1</sup> To put this in context, VisitBritain’s target for 2012/13 was AVE of £400 million. To continue attracting a high level of PR we need support from the Welsh Government, particularly when hosting international media.
  - Our consumer marketing activity has two strands: the cross-governmental GREAT image campaign, which aims to build Britain’s image abroad as a GREAT place to visit, study, do business and invest and a four-year £100 million match-funded tactical campaign, which aims to encourage visits from those already considering a trip to Britain.
    - Evaluation of the cross-governmental GREAT image campaign in 2012/13 shows that Wales saw a three-fold increase in the number of nights spent in the destination among those influenced by the campaign, compared with those who had not been influenced by the campaign.<sup>2</sup>
    - Evaluation of our 2012/13 tactical partnership campaigns shows that those who travel to Britain as a result of our campaigns are almost twice as likely to visit Wales than the average visitor to Britain.
  - Through our commercial trade activity, Britain promotes Welsh products overseas successfully. Sales of Welsh products in our online shop grew 105 per cent between 2012 and 2013. B2B activities including our programme of international sales missions, travel agent training programme, trade website and trade workshops play a key role in selling the destination and Welsh product to international markets.
6. Through analysis of data and insights on VisitBritain highlights what overseas consumers want. According to our research coast, countryside, national parks and walking are enjoyed by international visitors to Wales, with visiting Welsh castles listed as a dream activity. We share these insights with Visit Wales and they inform our work.
7. We would welcome the chance to contribute to this inquiry further and would be happy to provide oral evidence.

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<sup>1</sup> Advertising Value Equivalent (AVE) is the cost of buying space taken up by a piece of coverage in print/online/broadcast, had it been garnered through an advertisement.

<sup>2</sup> These results are based on GREAT activity in Australia, Brazil, Canada, China, France, Germany, India, Japan, the USA.

## 1 The clarity and strength of Wales's tourism brand

- 1.1 International travellers in short-haul markets are more likely to be aware of Wales than those in long-haul markets. However, research suggests that overall awareness of Britain overseas is greater than that of Wales. For this reason VisitBritain has an important role in partnering with Visit Wales to promote Wales overseas.
- 1.2 Travellers from short haul markets are more likely to be aware of Wales than those from long-haul markets. Research undertaken in spring 2013 in four established visitor markets (France, Germany, Norway and the US) and research undertaken in late 2013-early 2014 in three emerging markets (Brazil, the GCC and India) highlighted this:<sup>3</sup>
  - People in short-haul markets were more aware of Wales. Norway and Germany had the most positive images of Wales, with positive images of scenery, culture and people. On the other hand, French travellers had limited knowledge of Wales and among those familiar with Wales, images of rugby and mining predominated.
  - Awareness among long-haul travellers was low. Although an established market, US travellers had very low awareness of Wales. Likewise travellers from long-haul markets had limited knowledge of Britain's offer outside London and therefore of Wales.<sup>4</sup>
- 1.3 Compared with Britain's other nations, Wales is the least known internationally. Besides London, awareness of Britain as a whole is the greatest. In 2006 people from 35 countries were asked how well they felt they knew Britain's nations and regions – providing a score of 1-7, with 1 = never heard of the region and 7 = know the region very well. Evidence from the VisitBritain's proprietary question on the GfK Nations Brand Index (2006) shows that awareness and knowledge of 'Britain' (4.65 out of 7) amongst potential overseas visitors is greater than that for 'England' (4.28) 'Scotland' (4.15) or 'Wales' (3.78).<sup>5</sup> At VisitBritain we promote Britain's brand overseas and, for this reason, VisitBritain has an important role in partnering with Visit Wales to promote Wales as a distinct and beautiful part of the country.

## 2 The extent of coordination between VisitBritain and Visit Wales, including the effectiveness of Welsh Government attempts to maximise the value of the international tourism market

- 2.1 VisitBritain and Visit Wales, the Welsh Government's tourism department, work closely on a range of areas including business planning and governance structures and formal agreements are in place to ensure that we work in partnership.
- 2.2 To encourage more visits to Wales, each year we outline how we will work with Visit Wales as part of our annual business planning cycle. Business planning with Visit Wales is ongoing for the 2014/15 financial year. This will see us agree how VisitBritain and Visit Wales will work together to promote Wales overseas, through agreement of marketing themes, marketing channels, resource allocations and activities across target markets. It also provides Visit Wales with an opportunity to highlight their plans for the year, which we feed into our work. We also share our final business plan with Visit Wales every year.
- 2.3 To support the business planning process and facilitate engagement, VisitBritain and Visit Wales work together through a number of governance groups which operate at levels ranging from senior to operational. They meet on a quarterly basis and comprise representatives from VisitBritain, Visit Wales and Britain's other national tourist boards. VisitBritain supplies a core service for these groups, which are wholly funded by VisitBritain.
- 2.4 These groups operate at three levels:
  - (i) CEOs – The Chief Executives (CEOs) of the national tourist boards and VisitBritain meet quarterly.

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<sup>3</sup> VisitBritain commissioned research from Olive Insight for both studies.

<sup>4</sup> Ibid

<sup>5</sup> The Nations Brand Index is an annual study of the views of people in 20 countries around the world about 50 nations, including the UK. In this sample the majority of respondents had not visited Britain and this pattern of knowledge applies whether respondents had visited or not, however perceived knowledge of Britain's nations is higher among those who have visited.

- (ii) Britain Marketing Board (BMB) – The marketing directors of the national tourist boards and VisitBritain meet quarterly, along with other relevant stakeholders. The group’s terms of reference set out an agreement to share international marketing strategies and review progress on a quarterly basis; seek ways to minimise duplication of taxpayers’ money in pursuit of more visitors to Britain, whilst meeting individual objectives of the national tourist boards; look at marketing best practice; provide direction for the interboards, described below; identify areas that might benefit from a collective approach; and respond to any directives from the CEOs.
- (iii) Interboards – These groups discuss operational aspects of VisitBritain and the national tourist boards’ work. There are groups for planning, digital, press & PR, B2B and research and evaluation. The BMB provides direction to the functional interboards asking them to review and report on matters concerning all.

- 2.5 VisitBritain also has bilateral meetings with Visit Wales as and when required. Furthermore, the Welsh Assembly appoints one member of our Board: currently this is the Chair of the Wales Tourism Advisory Board.
- 2.6 In January 2014 VisitBritain and Visit Wales signed a Memorandum of Understanding (MoU) to optimise promotional activity overseas and support growth of the visitor economy. Both parties formally agreed to engage each other early in planning and actively seek opportunities to work together where this would deliver enhanced returns.
- 2.7 This MoU covers policy, operations and consumer and trade marketing. It enshrines joint commissioning of research, running joint familiarisation trips for international media and trade, joint marketing promotions on territory and working together with commercial partners. Notably, VisitBritain will – in the near future – have a member of Visit Wales’s marketing team work from our London office where they will represent Wales in internal meetings, attend VisitBritain’s international sales events and bring enhanced knowledge of Wales’s product and industry.
- 2.8 For the Welsh Government’s attempts to maximise the value of the international tourism market to be effective, their approach must be predicated on consistent application of a strategy. We welcome the publication of the Welsh Government’s long-term tourism strategy 2013 to 2020, which complements our Britain tourism strategy (as detailed below).

### **3 The work of VisitBritain as it relates to Wales**

- 3.1 VisitBritain delivers for Wales and growing visits to Wales is integral to our work promoting Britain overseas. In the 2012/13 financial year we developed and consulted on a clear, evidence-based 2020 Tourism Growth Strategy. The strategy sets out how Britain can grow demand to attract 40 million visitors and earn £32 billion from international tourism by 2020. It is endorsed by the Welsh Government and Manon Williams, the Chief Executive of Visit Wales, is cited in this document as supporting our strategy.
- 3.2 Our strategy complements the Welsh Government’s tourism strategy. Published last year, it is framed as a product-led approach to developing and marketing tourism in Wales. It is designed to create and promote more high-quality products, events and well-being facilities as well as all-year round attractions, activities and cultural experiences. To achieve this, the Welsh Government’s strategy aims to differentiate Wales’s distinctive offer through more effective packaging, to be developed with stakeholders including VisitBritain.<sup>6</sup> This strategy’s main focus is the supply-side; VisitBritain’s tourism strategy aims to grow demand.
- 3.3 Encouraging visits to Wales, and promoting regional spread more broadly, is a key aspect of our strategy. Recent numbers from the International Passenger Survey are positive. In 2013 Wales welcomed a total of 884,000 overseas visitors, up 3.5 per cent on 2012. These visits generated spend of £353 million, a nominal increase of 2 per cent on 2012. Holiday visits and spend in Wales saw an even higher rate of growth, outperforming Britain’s other nations. In 2013 the number of holiday visits to Wales grew 13 per cent and spending on holiday visits increased 27 per cent.<sup>7</sup>

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<sup>6</sup> Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020, The Welsh Government, August 2013

<sup>7</sup> More on overseas holiday visitors data: Holiday visits to Wales and spend on holiday visits grew at a greater proportion than holiday visits and spend to Britain’s other nations. In 2013, when holiday visits to Wales grew 13 per cent on 2012, overseas holiday visits to London grew 11 per cent, the rest of England (total visits to England minus numbers to London) saw holiday visits grow 7 per cent and holiday visits to Scotland increased 6 per cent. Meanwhile Wales saw spend on holiday visits 27 per cent, spend in Scotland increased 20%, 15% in London and 5% in the rest of England. Source of data in this paragraph: International Passenger Survey.

- 3.4 VisitBritain has 24 offices in 22 overseas markets. VisitBritain helps the Welsh Government extend its reach beyond its primary overseas tourism target markets of Germany, Ireland and North America. This can be demonstrated across VisitBritain's work in London and overseas. Our overseas network provides insights, connectivity with media and trade and supports the execution of marketing programmes and international visits to promote Britain, including Wales, overseas.
- Insights – Insights and statistics on international visits to Wales are available on VisitBritain's corporate website; in response to requests, we provide Visit Wales with tailored information on inbound visitors; and we use our insights to highlight how Visit Wales can work to optimise product-market fit.
  - Connectivity – We provide connections through our press & PR, B2B, digital and partnerships teams, which we make available to Visit Wales; our overseas PRs are conscious we have responsibility to promote England, Scotland and Wales and ensure that regional spread is a key aspect of our work; and our overseas network engages with Visit Wales as and when required.
  - Execution – We run overseas campaigns on behalf of Visit Wales; we help Visit Wales with overseas events, media buying and local partner engagement; and we support Visit Wales, particularly with international trade and media representatives, in preparation for international visits. We also lead follow-up once a Welsh minister leaves an overseas market.
- 3.5 This activity, at no cost to the Welsh Government, helps raise the profile of Wales overseas. This is our greatest asset of value to Visit Wales and the Wales tourism industry. The range and impact of our work relating to Wales, which reflects that carried out in London and overseas, is summarised below.

## Marketing

### (i) Digital

- 3.6 The majority of VisitBritain's marketing and communications is online and our digital presence and e-communication is the bedrock of our contact with potential travellers in key members' markets. At least 40 per cent of our ROI is derived from our consumer digital presence (our consumer website, database marketing and social media).
- 3.7 Our digital work to promote Wales spans a number of channels. Wales is promoted on our consumer website, VisitBritain.com; LoveWall, an interactive website which aims to inspire visitors to love and share the best of what Wales and other parts of Britain has to offer; VisitBritain.tv, which streams videos on a dedicated website; and VisitBritain's superblog, a multi-author blog which publishes pan-Britain content on a weekly basis. We also use social media, such as our Love GREAT Britain Facebook page and Twitter to promote Wales, and more traditional channels such as e-newsletters featuring content on Wales.
- 3.8 Our work has an impact. In 2012/13 those who viewed our consumer website, VisitBritain.com, were twice as likely to spend money in Wales than the average visitor and those visitors spent £16 million.<sup>8</sup> Making the extremely conservative assumption that this is the only economic benefit from VisitBritain's activity to the Welsh visitor economy, this represents 4 per cent of all spending by overseas visitors to Wales. To set this in context, VisitBritain's activities account for 2.4 per cent all spending by international visitors to the UK as a whole. On this basis, therefore, VisitBritain is doing proportionately more to support the visitor economy in Wales.
- 3.9 To provide several other examples, a recent consumer newsletter with Welsh themes went to over 1 million recipients with an average email open rate of 25 per cent; an average of 10 Facebook posts featuring Wales are posted on our Love GREAT Britain Facebook page each month; and on 1 March 2013 our St David's Day Facebook Twitter takeover featured Welsh content on VisitBritain's consumer Twitter account all day, reaching 283,000 people.

<sup>8</sup> In 2012 only 2 per cent of all inbound visitors spent money in Wales; of those who viewed the website, the proportion of spend in Wales was 5 per cent of all inbound spend.

## (ii) Press & PR

- 3.10 We publish stories about Welsh destinations and events on our multi-language media centre website regularly to inspire and provide content for overseas journalists and broadcasters. The media centre also provides story ideas in our 'pillar guides', available on VisitBritain.com, which cover content on Wales relating to countryside, culture, heritage, food, shopping, music and sport.
- 3.11 Our overseas PRs promote big stories (for example, the centenary of Dylan Thomas's birth this year) at deskside briefings, and media conferences at events such as our international sales missions. Selected stories on VisitBritain's online media centre are translated by our overseas PR teams and uploaded on to their media-centres.
- 3.12 Notably, Visit Wales and VisitBritain worked together closely to use the opportunity of the London 2012 Olympic & Paralympic Games to promote Wales and Welsh product to audiences worldwide. During the Olympics, we hosted almost 9,000 non-accredited media at the London Media Centre, which we shared with Visit Wales amongst others. There more than 200 events took place, such as media briefings and interviews with VIP guests including Jamie Oliver and Lennox Lewis.
- 3.13 The Olympics saw us work with our partners – including Visit Wales – to promote media tours across the UK for more than 500 journalists, including a number of tours to the Wales Coast Path. We also provided collateral for the media, including a short film of Cardiff, nine media offers and three itineraries for Wales and a guide for broadcasters featuring 30 top Welsh tourism destinations. For the Paralympic Games we ran a bespoke trip for VIP journalists which saw them follow the Paralympic Flame across the UK's capital cities, including Cardiff.
- 3.14 The Games also saw us invite the world's top travel operators to Britain and take 20 VIP influential travel company chiefs on tours of Wales, Scotland, England and London. Influential tourism leaders from the increasingly important markets of China and Russia, as well as global companies – such as TUI Europe and Omeir Travel – visited Wales, escorted by our Chief Executive.
- 3.15 To illustrate our impact in 2012/13, when the Olympics took place, our press and PR teams generated 1,491 articles and 79 press visits on Wales with AVE of just under £90 million (to put this in context, VisitBritain's target for 2012/13 was AVE of £400 million). The latest available data highlights that between April and September 2013 we generated 1,278 articles and 25 press visits on Wales worth £44.5 million AVE. To continue attracting a high level PR we need support from the Welsh Government to carry out this work, particularly when hosting international media.
- 3.16 At the time of writing, on our online media centre 245 stories are tagged, or contain the word Wales (23 per cent of the website's total), 23 news releases are tagged or contain the word Wales (18 per cent of the total) and 16 items (3 per cent of the total) of B-roll and short-film are tagged or contain the word Wales.

## (iii) GREAT consumer marketing

- 3.17 Our consumer marketing activity is across two strands, the GREAT image campaign and the tactical campaign. Primarily funded by HM Government, the former aims to build Britain's image abroad as a GREAT place to visit, study, do business and invest.<sup>9</sup> Alongside this campaign, we launched a four-year £100 million match-funded tactical campaign which has the objective to encourage those already considering a trip to Britain to visit. Activity centres around eye-catching images and experiences coupled with a special price on offer to close the sale.
- 3.18 The GREAT image campaign provides a strong platform to leverage the image of Britain's regions and nations, including Wales, overseas. For example in 2012/13 post-Games marketing showcased Wales, this included *Time Out* inserts (circulation of 1.9 million per insert) featuring Welsh destinations such as Carreg Cennen Castle. We also used an image of the Wales Coastal Path in adverts for *Lonely Planet* and the *National Geographic*, as well as in a supplement in the weekly German newspaper *Die Welt* (circulation of 2.2 million). In addition, we partnered with Sony to promote the release of the James Bond film *Skyfall* which coincided with the 50<sup>th</sup> anniversary of Bond. This included the production of a video promoting British Bond destinations, including the Welsh coast.

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<sup>9</sup> The GREAT image campaign brings together a number of government bodies - including the Foreign & Commonwealth Office, UK Trade & Investment and the British Council - who together operate under a common brand overseas.



- 3.19 VisitBritain has encouraged more visits to Wales as a result of GREAT image activity – in 2012/13 Wales saw a three-fold increase in the number of nights spent in the destination among influenced by the campaign, compared with those who had not been influenced by the campaign.<sup>10</sup>
- 3.20 Recent activity includes the Sounds of Great Britain campaign, which uses the fortification at Caerphilly Castle. Comprising online and TV advertisement components, this was rolled out in key markets including USA, Brazil, China, India and Europe between February and April 2014.
- 3.21 We are also putting the finishing touches to a Countryside is GREAT campaign which will promote the very best of Britain's rural offer focusing on National Parks and Areas of Outstanding Beauty – naturally, it will feature Wales. It will run for two to three years across France, Germany and the US and it will include commercial support. Although the campaign is still in the planning stage, we can confirm that on Wales specifically it will promote the Coast Path, mountaineering, castles and natural beauty. It will not simply focus on landscapes, but the social and cultural experiences the British countryside can offer. In the lead-up to the countryside campaign, Welsh mezzo-soprano Katherine Jenkins will work with us on a range of projects showcasing the best of Britain's culture and heritage.
- 3.22 We have also encouraged more visits to Wales through work with commercial partners as part of our tactical campaigns. We are now in the third year of the campaign. Highlights to date are as follows:
- In 2011, the first phase of VisitBritain's £100 million four year GREAT Britain tactical advertising campaign, we encouraged visits to Britain – including Wales, specifically – by offering GREAT deals. For instance our EasyJet campaign used an image of Cardiff, while our British Airways partnership campaign featured an image of the Welsh coastline.
  - As part of our post-Games marketing push, in the second year of the campaign (2012/13) we extended our partnership with British Airways to include an additional £7.5 million match-funded activity in Brazil, Canada, China, Japan, India, Russia, the UAE and the US. Under the slogan 'The Big British Invite', the campaign featured 'real' British people inviting potential visitors to visit Britain. Of the nine ambassadors, two represented Welsh destinations: Sue Rice promoted the Wales Coast Path and Tara Brown promoted Laugharne Castle.
  - Now in its third year, recent activity showcasing Wales includes Expedia's Find Your Storybook campaign. Launched in the US in February 2014, it uses TV and digital advertising to encourage Americans to visit Britain – the Cynghordy Viaduct train ride features. Also a €60k EasyJet campaign featuring Wales ran from February to April 2014.
- 3.23 Evaluation of tactical activity found that those who travel to Britain as a result of our campaigns are around twice as likely to visit Wales than the average visitor to Britain.<sup>11</sup> In 2012, 3 per cent of overseas visitors who travelled to Britain went to Wales; in comparison, of all visitors who travelled to Britain as a result of our tactical campaigns, 5 per cent visited Wales. 7 per cent of all visitors who added extra nights to their holiday as a result of our campaigns travelled to Wales.<sup>12</sup>

### Commercial trade

- 3.24 Through our retail and B2B activity, VisitBritain promotes Welsh products overseas successfully. Our retail platform underpins a £16 million turnover business which generates business for suppliers across the country and 40 per cent of our ROI is derived from our Business to Business (travel trade) work, which is reliant on our excellent market intelligence and contacts.

<sup>10</sup> These results are based on GREAT activity in Australia, Brazil, Canada, China, France, Germany, India, Japan and the US. Source: GREAT image evaluation 2012/13, Ipsos-MORI.

<sup>11</sup> A campaign visitor is a visitor who has travelled to Britain as a result of VisitBritain's partnership campaigns or competitions. Their status has been evaluated through surveys of VisitBritain's partnership activities.

<sup>12</sup> Annual VisitBritain partnerships report 2012/13.

- 3.25 VisitBritain's online shops comprise 13 local-market websites with 150 products - including discounts that are exclusive to the international traveller - and offer customer service in seven languages. Sales of Welsh products in our online shop grew 105 per cent between 2012 and 2013. We sell day tours of Wales from Cardiff, sightseeing tours of Cardiff and coastering products on our online shop.
- 3.26 VisitBritain also promotes Welsh product through its B2B activity. This includes coverage in travel trade newsletters, dedicated coverage on our trade website, inclusion in travel trade advertising, support and funding for familiarisation trips (bringing tour operators and agents here on buying trips), the facilitation of on-territory introductions and the inclusion of Wales in agent training. Also in 2013, working with UKinbound and the British Hospitality Association, we rolled out a programme of UK-based forums and workshops where we shared insights and export opportunities with Welsh suppliers, setting out which overseas markets are the best prospects and how they can be reached.
- 3.27 Working with Visit Wales, we give Welsh product an international platform through the coordination of a branded presence at ITB, the world's largest tourism trade fair; provide sponsorship opportunities at missions; secure seminar slots on Wales at missions; and assist Visit Wales with the recruitment of buyers to workshops on Wales.
- 3.28 Currently, we are in the process of launching a dedicated Wales module for our online travel agent training programme, BritAgent, and we are developing a travel itinerary tool as well as a trade listings tool, which will also raise Wales's profile among the overseas trade.

#### Internal working groups

- 3.29 VisitBritain' has a number of internal working groups which bring together staff across the organisation to ensure that VisitBritain's strategic objectives are achieved. VisitBritain's content group and PR Champions are examples which work to promote Britain's nations and regions.
- 3.30 An internal content group meets every fortnight. Composed of VisitBritain staff only, it has one representative from B2B, one from PR, one from Campaigns, one from Digital and one from PR. Each of Britain's national tourist boards, including Visit Wales, provides VisitBritain with content – text, links and imagery – which is used in VisitBritain's work promoting Britain's nations and regions overseas.<sup>13</sup> Through this group VisitBritain tries to build this content into our tactical campaign, if this is not possible we use it throughout our other marketing platforms.
- 3.31 VisitBritain has appointed a team of PR Champions, drawn from its overseas network, who meet quarterly. The group develops VisitBritain's global destination PR strategy and oversees the implementation of local PR plans across the network. Its terms of reference states that it will develop 'PR strategies and initiatives, which will meet VisitBritain's obligations to its strategic and commercial partnerships'. As one of our strategic partners, this statement applies to Visit Wales and work to promote Wales is regularly discussed at these meetings. Moreover, a recent initiative to boost exposure of Wales and product knowledge among our overseas PR teams saw the convening of the PR Interboard and PR Champions meetings in Wales in April 2014.
- 3.32 Overall, promotion of Wales is integral to VisitBritain's work promoting Britain overseas and we will continue to work with Visit Wales and Welsh stakeholders to grow visits to the nation. We use the data and insights we collect and analyse to highlight what overseas consumers want. According to our research coast, countryside, national parks and walking are enjoyed by international visitors to Wales, with going on a tour of Welsh castles listed as a dream activity.<sup>14</sup> We share these insights with Visit Wales – through the governance structures described previously and at ad hoc bilateral meetings – and they also inform our marketing programme.
- 3.33 VisitBritain would advocate greater investment in Visit Wales to allow for increased international marketing activity, which could be conducted with and through VisitBritain, to make the most of Wales assets and grow the number of overseas visitors and the value of tourism to Wales.

<sup>13</sup> Note that content does not only come from the national tourist boards – other sources include VisitBritain itself, commercial partners, ad-hoc requests from industry and users-generated content.

<sup>14</sup> Inbound tourism to Britain's nations and regions: profile and activities of international visitors, VisitBritain, September 2013.



**Further Information:**

Thank you for taking our comments into consideration. We would welcome the opportunity to discuss any points raised in our response further with the commission.

For further information please contact:

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