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

Inquiry into Tourism

Submission by:

Professor Annette Pritchard
Welsh Centre for Tourism Research
Cardiff School of Management
Cardiff Metropolitan University
apritchard@cardiffmet.ac.uk

Welsh Centre for Tourism Research WCTR Canolfan Cymru ar gyfer Ymchwil i Dwristiaeth

Dated: 4th. June 2014

CONTENTS

Submission Highlights:

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

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

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

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

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

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

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

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

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

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

1.0. Introduction

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

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

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

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

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

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

2.0. Clarity and strengths of Wales' brand

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

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

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

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

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

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

3.0. Effectiveness of Welsh Government in the domestic tourism market

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

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

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

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

4.0. Effectiveness of Welsh Government in the international tourism market

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 1: VW Overseas Marketing Spend (£k)

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

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

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

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

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

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

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

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

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

6.0. The success of Visit Wales marketing activities

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

7.0. Work of VB as it relates to Wales

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Appendix A: NTO Marketing Spend, 2009

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

Source: WTTC, 2012 and UNWTO 2010.

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

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

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

Morgan, N. & Pritchard, A. 2014. Key issues in destination brand management, 411-424 in S. McCabe (Ed.) *The Routledge Handbook of Tourism Marketing*, Oxford: Taylor & Francis.

Morgan, N., Pritchard, A. & Hastings, E. 2012. Developing a New DMO Marketing Framework: The Case of Visit Wales, *Journal of Vacation Marketing*. 18 (1), 73-89.

Morgan, N., Pritchard, A. & Pride, R. Eds. 2011. *Destination Brands. Managing Place Reputation* 3rd edition, Oxford: Butterworth-Heinemann.

Huertas Roig, A., Morgan, N., & Pritchard, A. 2010. Place making or place branding? Case Studies of Catalonia and Wales, 116-135 in Ashworth, G.J. & M. Kavaratzis (Eds.), *Towards effective place brand management: branding European cities and regions*, Cheltenham, UK and Northampton, MA, US: Edward Elgar.

Morgan, N. & Pritchard, A. 2006. Promoting Niche Tourism Destination Brands: Case studies of New Zealand and Wales, *Journal of Promotion Management*, 12 (1) 17-33.

Piggott, R., Morgan, N. & Pritchard, A. 2003. 'Destination Branding and the role of the stakeholders: The case of New Zealand, *Journal of Vacation Marketing*, 9 (3): 285-299.

Morgan, N., Pritchard, A. & Pride, R. 2002. Marketing to the Welsh diaspora: the appeal to hiraeth and homecoming, *Journal of Vacation Marketing* 9 (1) 69-80.

Morgan, N. & Pritchard, A. 2004. Mae'n Bryd I Ddod Adref - It's time to come home. Exploring the contested emotional geographies of Wales, 233-245 in Coles, T. and Timothy D. (Eds.) *Tourism, Diaspora and Space*, Routledge, London.

Pritchard, A. & Morgan, N. 2001. Culture, identity and representation. Marketing Cymru or Wales? *Tourism Management*, 22 167-179.

Morgan, & Pritchard, A. 2000. *Advertising in Tourism and Leisure*, Butterworth Heinemann, Oxford

Morgan, N. & Pritchard, A. 1999. Building Destination Brands. The cases of Wales and Australia, *Journal of Brand Management* 7 (2): 102-118.

Pritchard, A. & Morgan, N. 1998. Mood Marketing - The New Destination Marketing Strategy. A Case Study of Wales The Brand, *Journal of Vacation Marketing* 4 (3) June 215-229.

Pritchard, A. & Morgan, N. 1998. Creating "Wales" The Brand: Opportunities in Destination Branding Strategy, 165-176 in Nahrstedt W. and Kombol T.P. (Eds.) *Leisure, Culture and Tourism in Europe*. Bielefeld, Germany.

Pritchard, A. & Morgan, N. 1996. Selling the Celtic Arc to the USA: a comparative analysis of the destination brochure images used in the marketing of Ireland, Scotland and Wales, *Journal of Vacation Marketing* (2) 4 September: 346-365.

Pritchard, A. & Morgan, N. 1995. Evaluating Vacation Destination Brochure Images: the case of local authorities in Wales, *Journal of Vacation Marketing,* (2) 1 December: 23-38.

Appendix C: Additional References

Anholt, S. (2007) Competitive Identity: The New Brand Management for Nations, Cities and Regions, London: Palgrave.

Destination Marketing Association International (2014) The Value of DMOs, http://cdnorigin.annual.destinationmarketing.org/value-dmos, accessed 21 Feb. 2014.

Freedom of Information Request 3 Jan 2013, www.Visit Wales.com, accessed 30 May 2014.

Glasgow Evening Times, VisitScotland: New Qatar Flight Service Worth £86 million to Scots Economy, May 19, 2014 www.eveningimes.co.uk/.../visitscotland-new-qatar-flight-service-worth-86, accessed 30 May 2014

Interbrand/Business Week 2005 Best Global Brands survey, http://10yearsyoung.tourismnewzealand.com/ accessed 27 February 2014.

Morgan, N., Pritchard, A. and Pride, R. (2011) Destination Brands: Managing Place Reputation. Oxford: Elsevier.

Nicholls, L. (2013) 'What visitors want 'Dream activities for tourists revealed by Visit Britain' www.bighospitality.co.uk, accessed 28 May 2014.

Tourism New Zealand (2014) www.tourismnewzealand.com/.../tnz_three_year_strategy_fy14-fy16.pdf, accessed 2 June 2014.

UNWTO (2010) Annual Report: A year of recovery, http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/final_annual_report_pdf_3.pdf, accessed 24 February 2014.

Visit Britain, Deloitte Oxford Economics (2013) Tourism jobs and growth: The economic contribution of the tourism economy in the UK, www.VisitBritain.org

Visit Britain (2013) American travellers dream of 'GREAT' British heritage, www.VisitBritain.org/mediaroom/pressreleases/dreamactivities.aspx, December 10;

Visit Britain (2013) IPS, www.VisitBritain.org accessed 28 May 2014.

Visit Britain (2011) quoted on bbc.co.uk 'Welsh castles top visit Britain's must see list', www.bbc.co.uk/news/uk-wales-12175173, accessed 28 May 2014.

Welsh Government (2013) Tourism Sector End of Year Report 2013, http://www.wales.gov.uk, accessed 2 June 2014.

World Travel and Tourism Council (2012), The Economic Impact of Travel and Tourism http://www.wttc.org/research/economic-impact-research/, accessed 23 Feb 2014.