



Welsh Affairs Committee

Oral evidence: [International Representation and Promotion of Wales by UK bodies](#), HC 1206

Tuesday 1 April 2014

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Written evidence from witnesses:

- [Dr Andrew Crawley](#)
- Professor Jerry Hunter
- Professor Annette Pritchard

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Members present: David T. C. Davies (Chair); Glyn Davies; Stephen Doughty; Jonathan Edwards; Mrs Siân C. James; Jessica Morden; Mr Mark Williams

Questions 1-41

Witnesses: **Dr Andrew Crawley**, Research Fellow, Cardiff Business School, Cardiff University, **Professor Jerry Hunter**, School of Welsh, Pro Vice-Chancellor, Bangor University, and **Professor Annette Pritchard**, Director, Welsh Centre for Tourism Research, Cardiff Metropolitan University, gave evidence.

Q1 Chair: Thank you very much for coming along this morning. We are quite a friendly Committee. We are not doing a very controversial inquiry—we are just looking at how we could market Wales better and what we can learn about the way in which Wales is perceived across the rest of the world. I understand you all have different specialities in this area. We are very grateful to you for coming along and are here to listen and find out a little bit.

Could I start by asking how you feel that Wales is perceived globally? I will start with you, Professor Hunter, because I know you have a great knowledge of Wales and the Welsh language, but you are actually from America.

Professor Hunter: Yes, I am from Cincinnati, Ohio. I have a lot of experience of things Welsh in North America. It is a complicated picture. Speaking about the United States, you can travel for many days and talk to many hundreds of people and not meet someone who knows anything at all about Wales, other than maybe the Princess of Wales, but there are networks of people who are intensely interested in things Welsh, largely because of heritage but also because they have an active interest in language, culture or history. The key is identifying those networks and plugging into them. There is a small college in southern Ohio called Rio Grande—it is not in Texas but in

Ohio; the Ohio river is the river there—that has a centre for Welsh studies. Years ago, a researcher who was originally from Lampeter was working there. She compiled a list of Welsh societies in the United States, and there were 800 societies. Sadly, I cannot find that database, but there is a current list of about 200. The key is to plug into those networks.

Q2 Chair: How do we compare to the Irish? The Irish seem to have a very strong profile in the States, but we do not.

Professor Hunter: You cannot compare the two. There is the saying that everyone wants to be Irish. To be honest, St David's day is a pretty small affair in Wales, let alone in the United States, but St Patrick's day is massive—people drinking green beer and all kinds of silly stuff like that. The reasons are largely historical, with the Irish in America being connected to the Catholic Church, the politics of the Democratic party in New York City and things of that kind. Social movements have given them a high profile compared with the Welsh, especially once the Welsh language started to die in the United States. That was the main identifier for the Welsh in America, so that they could go underground, but there are these huge networks. Looking at the list I have of Welsh societies and organisations, 13 are listed just in my own state of Ohio.

There are several institutions, such as the Gymanfa Ganu Association and the North American festival of Wales, which is held in a different city every year between the United States and Canada at the end of August or in early September. I was the academic guest lecturer at the last one, which was in Toronto. More than 900 people from all over Canada and the United States were there, staying at the Royal York hotel, which is a really expensive four-star hotel—these are people with an intense interest. I was giving academic seminars on the Welsh-language press in the United States and the Welsh involvement in the American civil war. I had to do each one twice, because more than 60 people turned up for what was a fairly esoteric academic seminar. Nine hundred people were there for the whole festival. In these very vibrant networks, there are people with an intense interest, but you really have to identify and plug into them, instead of having a scattergun approach.

Q3 Chair: Would anyone else like to offer something on that?

Dr Crawley: I can offer a little bit of perspective. Although I am at Cardiff business school, I am actually at the university of Illinois at Urbana-Champaign; at the moment, I am based in the US on a European fellowship. The point has been made that there are networks out there. For example, in Chicago, there is a very strong network called the Tafia, of which I am a member. However, it is not a business network—it is a network where people come to talk, watch the rugby and get together with people who are from Wales. The Irish networks are incredibly sophisticated. They are based around business institutes, business groups and the Democratic party. On St Patrick's day, there was the business breakfast, which happened on the Saturday. Then there were a further three or four business breakfasts all through the week, leading up to St Patrick's day. On St David's day, I think the Tafia got together and had a pint. It is a little bit different.

I am not saying that the will is not there for it. I know there are historical reasons why the Irish are strong; I am half Irish, so I can speak from that perspective. They have travelled very well and those networks have not dissipated as fast. If you go to somewhere like Pennsylvania, there are still quite a lot of Welsh communities, particularly in the old mining places around Scranton. However, they have not become the industrial leaders in the United States. They have stayed in the industries they started in, which are predominantly working-class and predominantly small and medium-sized enterprises, whereas the Irish seem to have gone from working on the ground floor to owning the corporation. You have a huge amount of history that explains why that is; there are a lot of cultural issues.

Q4 Chair: You said that there were Welsh communities in Pennsylvania.

Dr Crawley: A huge number of them. In Scranton, Pennsylvania, there is a very large statue in the middle of the square of the town's founder; his name escapes me now, but he was from Pembrokeshire. He was one of the first people to invest heavily in the coal-mining industry there. They did not have the skills in Appalachia to develop it, so they brought in 30,000 or 40,000 Welsh. Afterwards, people came from other parts of Europe.

Q5 Chair: Professor Pritchard, do you think that we are making use of this for our tourism industry in the way that the Irish do, to get lots of people going over to Ireland and, probably, bringing in good money? Are we doing enough of that? Could we do more?

Professor Pritchard: Wales is in a very difficult position. It is Britain's best-kept secret abroad. We do not have anything like the diasporic population that Ireland has around the world. When Welsh people have gone to a country, they have tended to settle in and be absorbed; they have not tended to form themselves into the kind of communities you are talking about. The situation for Wales is that there are small pockets of communities around the world that are very interested in Wales and the Welsh product and cultural offering, but they are swamped by huge communities. Wales is in a situation where we have very low brand visibility, brand awareness and product visibility. We also suffer from a lack of connectivity to these key markets, such as transport.

In that scenario, Wales has a very difficult job to make itself heard. At the same time, the international market is incredibly competitive. The top 10 tourism destinations account for two thirds of the whole global tourism industry, so everybody else—180-odd countries and territories and, within those, hundreds of thousands of destinations—is competing for a very small one third. Wales is part of the UK, which is one of the top 10 receiving countries for tourism, so it is lucky in that respect. As the meeting progresses, we may talk about things to do with the relationship between VisitBritain and Visit Wales, and how that is or is not functioning to the benefit of Wales.

Q6 Mrs James: You mentioned low brand awareness. I have been involved in the tourism industry in the past, and there always seemed to be this counter-pressure. We in Wales have a certain image of ourselves, and those marketing us have a different image of us. For example, every visitor I have had from Belmont or Scranton—I have relatives in Belmont, Ohio, and Scranton—has wanted to see a choir singing, a colliery and little girls in Welsh costumes, which are really important, but the Wales Tourist Board, as it was then, was marketing things like mountain biking and modern Wales. How do you think we are going to manage that dichotomy?

Professor Pritchard: I did some work on that a while ago, but the ideas still hold true today. In the 1990s, you had a period where Wales was using all those very traditional Welsh cultural icons and symbols—things like choirs, language and love spoons—in brochure communications with people, particularly in America. You could see a very distinct difference between Wales and Scotland and Ireland at that time, because Scotland and Ireland were much more focused on the modern—as well as the craic, with Ireland.

Mrs James: Oh yes—the craic.

Professor Pritchard: But they were not heavily reliant on those kinds of symbols. Wales went through a period of trying to use those symbols to create that kind of identity.

It is very difficult to see how the overseas marketing is functioning at the moment. If you go on to things like YouTube and look at VisitBritain and Visit Wales channels, most of the Welsh content is directed at the domestic market—not surprisingly, because the domestic market is the key market for Wales. As somebody who is really interested in this, I have gone on to have a look and to think about what I can say about the marketing, but the overseas message is very difficult to find at the moment. It is partly a result of resources and, perhaps, partly a result of relationships

between governmental Departments and organisations, but there is a big issue of teasing out how to bring forward that overseas marketing, how to enhance it and how to develop it for the interests of Wales and the Welsh tourism industry.

From my point of view, the worrying thing about the overseas market is that it is declining in Wales. It has gone from a high point of 1.1 million visitors to about 850,000 visitors currently. That has happened over a 10-year period. The interesting thing is that that decline is happening for every other region in the UK outside London, so it is not just a Welsh decline. It is a Welsh decline, but it is being experienced by all the other regions and nations in GB apart from London.

Q7 Jonathan Edwards: You said that Wales was the “best-kept secret.” Do you agree that knowledge of a location drives desire in terms of tourism? In your view, is London the key thing people think about when they think about the UK? Do they not think about anything apart from London?

Professor Pritchard: A place like Scotland has more knowledge than a place like Wales. It has been marketing itself overseas for longer and has a bigger diaspora population to market to. There have been lots of nice little films about Scotland, there are lots of famous Scottish actors and, of course, there is a big Scottish political debate going on at the moment. Scotland is in the news a lot more than Wales. Somebody I know who used to work for Visit Wales said that the only time you ever heard Wales mentioned in the news was when there was some disaster and it was said to involve “a country the size of Wales,” “a lake the size of Wales,” or “a fire the size of Wales.” Wales has found it very hard to be recognised on the world stage.

The interesting thing is that Visit Wales has done some really good work in terms of making connections with tour operators to get product on the shelf for visits to Wales, but the operators have found it hard to sell it because the population in those countries is not aware of Wales. The product may be there and may be great, but there is a lack of awareness and knowledge, which drives desire. Everybody wants to go to somewhere desirable when they go on holiday. They want to say, “I’ve been here. Where have you been?” Without that celebrity value and knowledge base to push the product, you are in a bit of a cleft stick. You can develop all the great product in the world, but if people do not know about you they will not buy that product.

Q8 Jonathan Edwards: I like the idea of a Welsh independence referendum as a tourist attraction, but we will not go into that this morning. The stats are quite worrying in terms of visitors from the US: 70% of those coming from the States to the UK stay one night in London, but only 3% stay one night in Wales. There was an argument by some tourist chief from London that the Welsh tourist pot would be better spent on advertising London and then trying to move people out from there. You have said yourself that we are in a highly competitive globalised market. In your view, therefore, is the main tourism strategy in the UK to market London at the cost of everybody else?

Professor Pritchard: Well, actually—

Chair: I would not mind hearing Professor Hunter’s and Dr Crawley’s views.

Jonathan Edwards: Of course.

Q9 Stephen Doughty: My question follows on quite well from what Jonathan has said. It is brutally parochial as well, but I have noticed a much higher promotion of Edinburgh as both an investment and a tourism destination on its own—distinctly—than of Cardiff. I do not want to besmirch any of the other locations in Wales, but Cardiff does not appear to be used as much as a gateway into Wales. This fits in with what Jonathan was asking about London. Do you think that enough has been done to promote Cardiff, particularly given the changes that have gone on in Cardiff over the last 20 years? Is that working, both on the investment side and on the tourist side?

Professor Pritchard: From a tourism point of view, I would be very worried about using the argument that the visitors will come to London and then go somewhere else, because that is not happening. The figures show that the visitors are coming to London but are not going anywhere else. Every region in the UK is worried about that, because the rest of England's figures are going down: Scotland's figures are going down and Wales's figures are going down. I do not buy the argument that you get visitors to London and somehow they will mysteriously end up elsewhere by osmosis.

Q10 Mr Williams: That is a change, isn't it? There was a point where we characterised it as a sort of triangular tour. People would come to London, go up to Edinburgh and then come down to Stratford to see a show—

Professor Pritchard: That is the golden tour—the golden circle.

Mr Williams:—and then to Wales. Has that changed fairly recently?

Professor Pritchard: The trouble for Wales is that visitors need to be on their third, fourth or even fifth visit to the UK before they get over the border into Wales. They will do London first. On their next trip, they may do the golden circle and go to Edinburgh and Stratford. Maybe, on the third visit, they will think, "Where haven't we been? Oh, we haven't been to Wales—maybe we will go there." Wales is not yet on any kind of golden circle. It is not even on a silver or bronze circle tour. Only very familiar Anglophiles, Britophiles or whatever you want to call them will come to Wales.

Q11 Chair: I must bring in your colleagues.

Professor Hunter: You really have to have a targeted campaign, working with tourism companies in the United States. I have been talking to Megan Williams, a Welsh American who did a PhD in heritage studies in Wales. She organised two series of 12-day tours for Americans specifically around Wales, which were fantastically successful. You need to plug in and say, "Look, we will bring you here on a specific tour." I know somebody who is organising a high-end tour for Harvard university alumni who are coming to Wales this summer. They have a fantastic suite of activities. Once you get them here, those kinds of things are always successful, rather than hoping they come to London and filter over to Wales. Look at practical travel considerations. Heathrow and Gatwick are a nightmare, especially if you are an elderly American who does not travel that often. Fly them into Liverpool, Manchester or Cardiff; get them over from Dublin to Holyhead, which is fairly easy. With things like that, we can put together a package that makes a fairly low-stress, easy package holiday with some great stuff. If you really had those targeted packages to attract Americans, they would be successful.

Dr Crawley: I am sure we will get into this more later, but from my perspective—talking about the economic side and inward investment, in particular—there is the advertising of Wales as an inward investment location. To begin with, I have to say that there have been significant changes in the last two years but, overall, I do not believe that it has been marketed that well overseas. In fact, in the past, there has been a great conflict between tourism and business that other places have not had to that extent. It comes back to the point about the Irish. The Irish link the two concepts together: tourism—having the craic—and doing some business. I do not think that link has been there. The biggest example was a number of years ago, when the Wales Tourist Board was advertising Wales saying, "We have poor reception for phones. You can get away from everything." If you had been speaking to a Fortune 500 company in Chicago and saying, "I tell you where you can come," they would probably have laughed at you.

An interesting thing has happened in the last week. Scotland has utilised that campaign. I believe there has been huge criticism from the business community in the last week saying, "You cannot

do that.” We ran it for two years, but after just one week they said, “We can’t do this.” Even if they are on holiday, most people would like to call someone, possibly, or send a picture, maybe. That problem persists. We need a more joined-up approach. With our limited resources, we cannot afford to treat them as separate entities. These things have a synergistic ability to link together. If you say, “Come over and see the beautiful scenery,” and, “By the way, if you are looking to invest”—

Chair: As it happens, we will have some questions about International Business Wales a bit later on, so I would rather not trespass on that—which I have already done. Mark, since we have started to encroach on your area of questioning, do you want to come back before I go to Jessica on NATO?

Q12 Mr Williams: You have talked about a lot of the problems and challenges. In terms of where we are now, can you quantify the importance of international tourism to the Welsh economy? The potential is vast, isn’t it?

Professor Pritchard: At the moment, the international economy is 8% of tourism to Wales. Domestic tourism is worth 92% of the total tourism pot for Wales. Tourism is incredibly important for Wales, because 80% of all tourism revenue is export earning. Basically, 80% comes from over the border with England and further afield—Ireland, the US and places like that. Tourism is incredibly important and generates enormous sums of money. It is the third most important industry within a Welsh context.

The important thing about tourism is that, unlike a lot of other industries, it is everywhere in Wales—it touches every corner and community and provides jobs for local people. The most recent study was done by Oxford Economics. It said that tourism accounts for over 200,000 jobs in Wales and 6.5% of GVA. I used to like GDP—I cannot really get my head around GVA—but it is hugely significant. Overseas tourism is a very small part of that domestic pot, but it is hugely significant. It spends more money, so, if you can convert more overseas visitors, you will have a bigger impact economically.

Over the past few years, we have lost almost a quarter of a million overseas visitors. Expenditure figures for visitors have stayed the same, but imagine what we would have had now if we had retained those visitors—never mind grown them. If we had managed to retain them and were at a flat level, we would be seeing significantly more expenditure by those overseas visitors. They are 8% of the total, but they account for something like 16% of the spend.

Professor Hunter: It is not just about increasing numbers—it is also about getting tourists to spend when they come. To talk about one micro-example, Caernarfon, near where I live, has a medieval castle and town walls and is a great attraction. About 10 years ago, Gwynedd council did a study on tourists in Caernarfon. There was a huge number of tourists a year—I forget how many—but on average they spent about £2 each. They would come, see the castle from the outside, buy a cup of tea and one postcard and get back on; often these were buses from over the border—from Chester—on a day trip. This is an area with Communities First—one of the poorest communities in western Europe—that needs inward investment. You need not just to get the tourists to places but to get them to stay and spend money. That is a big part of the challenge.

Q13 Mr Williams: A British Hospitality Association report in 2011 looking at the potential for growth talked about vast increases in the numbers of jobs that could be created on the back of that spend.

Professor Pritchard: On that point, a survey was done most recently by VisitBritain. According to a survey of European visitors, the thing they most wanted to do when they came to Britain was to

go on a tour of Welsh castles. That is unheard of—and that is mostly in markets that have not been identified as a priority for Wales, because we do not have the resources to spend in all European markets. If a tour of Welsh castles comes top, beating Buckingham palace, going shopping at Harrods and visiting Edinburgh, that is something that should be capitalised on. Product should be developed around it and there should be digital content to communicate that awareness and knowledge.

Q14 Mr Williams: How big are the practical challenges of infrastructure in taking tourists beyond the admirable visits to Cardiff and along the M4 corridor? Are people making the consideration that we are not doing very favourably on that? I have the spectre of some very brave American tourists jumping on to an Arriva Sprinter train at Birmingham International and not being aware that they will have a three-and-a-half-hour trip on a scruffy train to Aberystwyth.

Professor Pritchard: There are points of entry that are quite convenient, aren't there? There is Manchester airport, which is excellent for north Wales. In October, autumn time, there was a holiday offer that you could book via Bloomingdale's that would take you first to Manchester and then to Llandudno, where you stayed in nice hotels, and to Snowdonia. That was solely based around a photo shoot that they did for men's clothing in Snowdonia. The interesting thing with that was that all the outside shots were in Snowdonia, but you could not see Snowdonia on any of the symbolic markers—it was all Penny Lane and shopping in London. They had these lovely scenic shots that were all taken around Snowdonia, but there was no label saying, "This is Wales." It is difficult to generate the interest, because there is no marker that identifies it.

Q15 Mr Williams: You have talked about the decline in figures of visitors to Wales. Can you put that into the context of the costs? I chair the all-party tourism group in Wales. One thing we have been looking at is the 20% VAT charge. Obviously, that is not something unique to Wales—it is across the UK—but we are urging the Treasury to look at it. How much do you think the decline in those figures is related to costs, as opposed to promotion—the fact that we have a good product and are not promoting it sufficiently?

Professor Pritchard: A lot of it is probably due to that. Part of it is certainly due to costs. Visits to Britain go up and down depending on the exchange rates. You may be able to find ways of making it cheaper, such as a reduction in VAT on hotel bed spaces; Ireland has done something similar to that. It is about making things easy for tourists. If you can get that reduction, you probably will see quite a substantial increase in tourists, certainly from overseas, taking part in that offering.

Q16 Jessica Morden: On raising awareness of Wales, we have the NATO summit in Newport fast approaching. How do you think we should be using that event to best advantage in terms of promoting Wales?

Dr Crawley: In the past, with events such as the Ryder cup, sometimes we have let these things slip away. To hark back to my old friend Scotland, more events were organised by VisitScotland, Scottish Development International and the Scottish Government around the Ryder cup than were organised by some of the agencies in Wales. However, there is an opportunity really to latch on to it. Using the airport is a key to this. Hopefully, a lot of the world leaders who will be flying in will utilise Cardiff airport. I saw an interesting story about this. Ordinarily, they would use the bigger airports, but for security purposes it would probably be quite useful to use Cardiff airport. I utilise Cardiff airport a huge amount. I fly back to the States from there via Dublin, because you pre-clear customs and everything is sorted in Dublin; it is a fantastic thing. Not many people are aware of that. You should put in advertising to say, "This is where the NATO summit is going to be."

We need to promote the links to the outside world that we have and that are already there. I am talking not from a tourism point of view but purely from a business point of view. We should be

saying, “Look, we’ve got an airport. We haven’t got the best infrastructure around it at the moment, but it means that you can fly into Cardiff. You don’t have to go to London and wait two hours”—two hours, 20 minutes, probably—“to get down there.” It is an opportunity. From an economic point of view, it is an opportunity that we cannot let slip away. We need to build on the resources that we have.

Q17 Jessica Morden: You mentioned the Ryder cup experience. When the G8 came to Northern Ireland, were there any lessons from that?

Dr Crawley: Off hand, I do not know of any huge amount of marketing that was done. It is a difficult one. I think you will be promoting it not to the world leaders who are there but probably to the world’s cameras and media. When they are filming these people coming in, if there is a massive banner behind them showing something very nice in Wales and it is broadcast on CNN 42 times a day when it is repeating the same story, that will give you some positive feedback. It is not directly about the people who are coming—it is about the world’s media, which will be here. It is about getting as many photo opportunities as possible to show what we have.

Professor Hunter: I have one very simple challenge—get them to say that they are in Wales. Don’t get Barack Obama to say in his news conference that it is great to be here in England or the UK—get him to say that it is great to be here in Wales. If you can get them to say that in their news conferences, that is one thing that will get the idea of Wales out there. If it was in London, they would say, “It is great to be in London.” Get them to say they are in Wales. That is a simple thing, but it should be your main goal. You will have achieved a lot if you do that.

Professor Pritchard: Looking at it realistically, I think it will be very difficult. If the Union flag is the emblem that you see everywhere, if the Severn bridge is decked out in Union Jacks and there is no red dragon, and if there are no Welsh symbols and icons around, it will be very difficult to use it at all. I agree that you can get them to fly into Cardiff and have advertising around. You can arrange spousal programmes and media and journalist trips for familiarisation, but not when there is a Barack Obama press conference—it has to be at times when they can actually go. If you have lots of news items about 10 quirky things you did not know that connect Wales and America that can get played in newspapers, that will help, but the more British the message is, in a sense, the harder it is for Wales to have a little voice in that message.

Dr Crawley: I totally agree about the flag, but one of the issues in the past may have been that we were trying so hard to differentiate ourselves. What if we just show what we have got? Instead of trying to brand it as something totally different, we could just show the fantastic locations that are around there and have the world’s media looking at those images and pictures. If we can get the word “Wales” in, fantastic, but it will then have to be followed up with large amounts of international advertising—in terms of business as well as tourism—that connects those images back to Wales.

Q18 Stephen Doughty: Aside from the leaders themselves, the NATO summit will bring with it thousands and thousands of delegates, hangers-on, assistants and everything else, who will stay in the likes of Newport, Cardiff, Swansea and all around—it is a huge apparatus. You mentioned the Ryder cup, but there are many other international conferences that come in. My experience is that people come, stay in their hotel and leave. What more do you think the local authorities, particularly in Newport, Cardiff and so on, ought to be making of an opportunity like this in terms of getting people out on little visits to the cities and seeing what is around, aside from their official business? Do they do a good enough job at the moment?

Professor Pritchard: There is a little cottage somewhere around Brecon that is falling down but is the cottage where Abraham Lincoln’s grandmother lived. If you could get someone like Michelle

Obama to that, with a nice story about this being the cottage where Abraham Lincoln's grandmother was born and raised and lived her life—

Professor Hunter: And when he was growing up, Lloyd George had a portrait of Lincoln on his wall that inspired him.

Professor Pritchard: Yes. There are all sorts of ways that you can tell a story. It is all about storytelling and making connections. A lot of my family are Americans, and they love that kind of connection.

Q19 Stephen Doughty: Practically, whose responsibility is that? Is it down to the tourist board? Is it down to the local authorities? Is it down to the Welsh Government? We are going to come on to how these bodies work together. We know this summit is coming in September. Who ought to be leading the way in making sure this happens?

Professor Pritchard: It is very difficult, isn't it? I believe that when the G8 summit was in Northern Ireland they had hundreds of people working on it. Visit Wales is a very small organisation; there are about 20-odd people who work there. They have not been taking on loads of extra staff to support the NATO summit, so it is difficult. Visit Wales would obviously have to take the lead on things like identifying these packages and relationships. It would have to be done in tandem with bodies such as local authorities and with the Government, but how are you going to get at somebody's diary to be able to arrange that sort of visit? I guess there are lots of security issues and practicalities, but you could have a story about it that would run, I am sure, in newspapers.

Professor Hunter: On the theme of the NATO summit, it is easy to get stories out in the international media. If you can get Michelle Obama to visit a site, that is great, but you can get the stories out there. A few weeks ago, I had an e-mail from a serving officer in the NATO quick reaction forces, based somewhere in England. He had been on a tour of civil war battlefields in the United States. There was a lot of stuff about the Irish brigade and he wanted to know about the Welsh soldiers. I have written a few books on that, so I gave him a lot of information. You have a whole history of Welsh involvement in war, peace and diplomacy. Looking at the positive side, there is the abolition movement. We had some real leaders in abolition—bringing the slave trade to an end—from Wales, tied into Welsh nonconformity. Those are easy stories you could get out there to get the attention of the world media. The question is, who is responsible for doing it?

Dr Crawley: This is quite a short point. Whatever it is, it needs to be joined up. The problem we have had in the past is that people have all been pulling in different directions. With the Ryder cup, you had a local authority advertising in one of the trade publications saying, "Come here," and on the very next page another local authority saying, "Come here." All that pulling apart is never going to help. If you are talking particularly from a business audience point of view, it has to be linked by someone, which could be Visit Wales.

It is also possibly about doing innovative, different things that have not been tried before. For example, what about going after the media presence? A large number of reporters are probably going to be there beforehand with a lot of time on their hands. If you have been exposed to the large volume of CNN that is on in the US, you will know they have a lot of time to fill. If you have a lot of reporters there, what about getting some innovative programmes? Have outreach—bring them to places. This is just off the top of my head, but it is about doing things differently. The old, traditional way is not going to work. It is great to tell them the stories, but my thought is that it is going into a very crowded marketplace, as has been said.

Do something different. Organise seven buses—if you say these are going to be world media, you could probably even get some good companies around Newport and Cardiff, in particular, to

provide them—and bring them to places. Just show them—actually take them somewhere. We do a lot of talking rather than doing. It needs to be co-ordinated right so that we get one body doing this, not seven generals saying, “We should all go off and do this.” We need one body saying, “This is what we are going to do, this is who we are going to do it for and this is when we are going to do it.” That is a very productive thing.

Chair: That is a good point, but I do not know who that one body is going to be, unfortunately.

Q20 Mr Williams: I very much agree with what you have just said about the practicalities, but I hope that—within the confines of possibilities—it is not restricted to south Wales, because there is a hell of a lot out there that needs to be seen and observed on a world stage.

Our next series of questions relates specifically to the role of VisitBritain and Visit Wales. I suppose I am looking for an assessment of how effectively you see VisitBritain working on behalf of Wales. It is supposed to be a partnership. Obviously, VisitBritain has a much bigger perspective to look at, but is Wales getting its fair share of VisitBritain’s time? How effectively is it working?

Professor Pritchard: I do not think it is getting a fair share of VisitBritain’s time at the moment. It is a very complicated relationship. You have two organisations. They do work in partnership, and in some areas the partnership works very well. VisitBritain and Visit Wales are quite good at sharing market intelligence and the travel trade element is probably working quite well, but the marketing and the campaign to get visitors to go to Wales are not working very well at all.

Twenty-odd years ago you had the sense that there was some sort of reasonable spread of VisitBritain activity: it was expected that x% would end up in Scotland, x% would end up in Wales and x% would end up in the English regions. London was obviously seen as the main driver, but there was the sense that there was a kind of duty to the rest of Britain—that VisitBritain was looking after their interests as well. Targets for VisitBritain have changed. The emphasis is on getting as many tourists in as possible, and the easy way to get those tourists in is to market London and to do so very visibly. That is what has been happening over the past few years. Obviously, you have had certain key events in London that have helped the emphasis on that.

You have also had a change, perhaps, in the offices of the people who work at VisitBritain. Twenty years ago, they were probably civil servants. They were British, so they had a good knowledge of Britain. Now, you find that a lot of people employed at VisitBritain offices around the world are local employees, so their knowledge of Britain is perhaps not that well developed. The easiest thing in the world then is to move on to sell London, as opposed to the rest of the UK. I think that there is an issue and that the figures are showing that there is an issue. It is an issue not just for Wales but for all of the constituent parts of Great Britain.

There are things that need to be looked at. The only way we can get a well-functioning relationship is by having quite clear targets, guidelines and demarcation of responsibilities. It may be Visit Wales’s turn to lead in certain key markets and VisitBritain’s turn to lead in others. It is VisitBritain’s duty to put Wales as a lead product in some of its marketing campaigns, but that has not really been happening recently. That is a major problem, because then you do not have the awareness, the demand or the excitement—you do not feel the product. There are issues in terms of how the two organisations have functioned. We need a kind of strategic agreement that says, “This is what we do. You do this; we do that. We have these targets and will review them. Hopefully, at the end of a couple of years we will see the beginnings of an increase in visitors to Wales.”

Q21 Mrs James: I want to go back to one of the things you talked about—the co-ordinated approach. It reminded me—this is a shameless plug for the Treboeth Historical Society, whose pen I

have here—that we all know little stories that are important in our own constituencies. For example, if you think of Swansea, you think of Dylan Thomas, but for us in Swansea East it is the constituency where “Calon Lân”—which is sung by every Welsh person all over the world—was written. How co-ordinated and how deep do you think the awareness of the tourism product goes? How well do you think the various components—the regional tourism partnership and the local groups—are working together?

Professor Pritchard: I do not think there is massive awareness of the Welsh product in VisitBritain offices at the moment. If you asked most VisitBritain people, they would not know what “Calon Lân” was. That is an issue, because VisitBritain officers are there to sell Britain, which demands a good knowledge of the constituent parts of Britain. I do not think that is there at the moment. There needs to be education of officers and staff on the ground to facilitate a much wider knowledge and to develop that interest. They may be developing a campaign around something and Wales may be perfect for it, but if the people developing it have no particular knowledge, they may think, “It could be the West Country,” or, “It could be the Lake District.” There is a barrier, which needs to be addressed. We need knowledge as well as targets.

Professor Hunter: You mention Dylan Thomas and “Calon Lân”. Culture, specifically literature, is one area where Wales punches above its weight. A lot of the tourists who come over—I am thinking of North American tourists—are people who have an interest in culture. They want to see the Tower of London, castles, Stratford-upon-Avon and Shakespeare—they are really people who are interested in books, culture and history. There is a lot you could do with that. We have an R. S. Thomas centre in Bangor and have had visitors this year from China, Australia, America and France. R. S. Thomas and Dylan Thomas are both long dead, but they are still international brands that attract people to Wales.

There are huge things you could do. I think you are going to have written testimony from Sioned Puw Rowlands and the Wales Literature Exchange. I urge you to take that very seriously. They have worked well with the British Council on promoting Welsh literature abroad. Literature is a soft option and an easy investment. You get books out there. We are not talking about getting 5,000 more tourists next year, but as far as increasing awareness about Wales internationally is concerned, there will be that “drip, drip” effect. Currently, Wales spends £10,000 a year on translation of Welsh literature internationally, which is the lowest in Europe. Ireland and Finland spend over £200,000 a year; even Iceland, with a smaller population, spends more than Wales.

If you talk to Sioned, who goes to book fairs, you find that once you get it out there it is incredibly successful. On 2 May, we are launching in Bangor a special Welsh edition of a big Chinese literary journal, translating Welsh literature into Chinese. We will have people from Chinese publishers in Bangor. There is huge interest in Welsh literature. It is a cheap investment, but it is also important economically, if you look at rural economies. There is Y Lolfa, a publisher in rural Ceredigion, and Gomer in rural Carmarthenshire. Those are important employers in rural areas. It is fairly easy to give them a small investment to help them to market Welsh literature internationally. That will plug into the kinds of people who tend to like to come to Wales or the UK anyway—people who are interested in culture. Even Shakespeare has a Welsh aspect to it.

Q22 Mrs James: It is certainly something that is really well recognised within organisations such as the National Trust that culture vultures spend more money. You talked about the £2 spend. The average spend at a National Trust property is way above that: it is about £20 per visitor—

Professor Hunter: Exactly. People will pay to see a Shakespeare play in Stratford-upon-Avon. Look at the cultural venues we have in Wales. You have the Millennium Centre, the arts centre at Aberystwyth, the new Pontio building opening in Bangor and Venue Cymru in Llandudno—a

huge suite of cultural venues with great activities on for those kinds of cultural vultures who want to see a concert.

There are things that are happening that you do not have to spend on. When I take Americans to the National Eisteddfod, they are bowled over. The Urdd Eisteddfod is the largest youth festival in Europe, but the Chelsea flower show in London gets more media attention every year than the largest youth festival in Europe, which is there on a plate. You are talking about a small investment to get people to come and see musical performances of a high level. When the Cerdd Dant festival was in Llandudno, I took Americans to it, and they were bowled over. This uniquely Welsh form of music is there on a plate, to professional standards, is cheap and is already there—just get them there and advertise it. We are underselling our culture in Wales.

Q23 Mrs James: So we are not doing as well as Scotland and Ireland.

Professor Hunter: No—and I think we have more to sell as far as culture is concerned.

Dr Crawley: I must admit that I am not a tourism expert; my input would be from an economics point of view. The one thing I would say is that again it comes back to the co-ordination of these things and not being seen to be competing with one another. This is all fantastic, and it is great to have all these different things, as long as we are not seen to be creating almost a rivalry between every bit of Wales trying to have its say in this. Balancing that is more easily said than done, but if we try to promote everything we may end up losing what little we have. We do not have a huge amount of resource to fire it at the world, so we need to make sure that we are taking a high-level approach so that we are able to pick up things that can link together and show not just one thing but multiple activities. If we do not, we will lose the message that we are trying to get across.

Professor Pritchard: A lot of it is that forward planning aspect. It is the anniversary festival for Dylan Thomas this year, but I am not totally sure what is happening in terms of developing, enhancing and marketing that abroad. In a couple of years, it is the anniversary of Roald Dahl's birth in Cardiff. These things keep popping up, but my worry is that we keep missing them. We think about them, but the plan never seems quite to get off the ground in terms of harnessing that potential. The Urdd and the Eisteddfod happen every year and are ideal culture tours that pockets of people around the world would find really interesting.

Q24 Mrs James: An awful lot of time and attention has gone into the Dylan Thomas festival; there are some great events in Swansea.

Professor Pritchard: But how is the message?

Mrs James: How do you think we could take it further?

Q25 Chair: From the American point of view, how can we get Americans to come and visit Swansea to see Dylan Thomas events?

Professor Hunter: Make sure they know about it and make it easy for them to get there. Line it up by saying, “Here is where you fly in. Here is your travel—your bus or train.” Make it easy.

Q26 Jonathan Edwards: We have had a very interesting discussion about the cultural aspects of tourism today, so I will not delve too deeply into something along those lines. Professor Hunter, in terms of broadcasting, BBC Wales and S4C are producing some very good, high-quality output. To what degree do you think that the UK Government and the Welsh Government should be using that broadcast output to market Wales globally?

Professor Hunter: They should, and they are not doing nearly enough. Like the Eisteddfod and the Urdd, this is stuff that is already happening and is there on a plate. For a very small investment, you could turn it into an outward-moving mechanism to get people interested in Wales. I have been involved in some historical documentaries for S4C, one of which won a BAFTA award. People said, “Why didn’t you do it back to back in English during the production process?” I know that the producer worked very hard to get the BBC to give him enough money to do it in English as well, but it would not fund it. You are talking about £30,000 or £40,000 at a time. There is a lot of stuff happening where, if people would invest a little bit of money, you would have a product that you could market internationally.

The Welsh film industry is very small but has had some great successes. The “Hedd Wyn” film 20-some years ago, which I saw onscreen at the Boston film festival in Boston, Massachusetts, was nominated for an Oscar not because somebody in the Welsh Government promoted it but because an individual living in Llanberis or somewhere wrote to the Oscar committee off his own bat, sent it a video tape and said, “Why don’t you put this film in?” Virtually nothing has been done really to get out the stuff that is there. Once you have a good film, whether it is a dramatic film or a documentary film, it is there—you can market and broadcast these things all over the world. It is a ready tool. There is tons of stuff. Opportunities are lost all the time because of lack of investment when it is being created.

Q27 Mr Williams: On that point, I must make a plug for “Hinterland,” which advertises the joys of the north Ceredigion area. S4C’s view was very much that that should be marketed in both languages globally.

Professor Hunter: Exactly. That is an example of doing it right, isn’t it?

Q28 Jonathan Edwards: I have a quick question on this theme; I have to ask it because William Wilkins is a constituent of mine. The Artes Mundi prize in Cardiff annually is a hugely significant prize—there is £40,000, I believe, if you win it—and one of the largest art prizes in the world, yet recognition of the event is tiny in Wales, the UK and across the world. What can we do as politicians to urge our Governments to market these events? Would that be useful?

Professor Hunter: Absolutely. You should plug into all kinds of international arts organisations. Within Wales itself, it has a smaller profile than the Arts Council of Wales book of the year award, for example. You also have to look at something and say, “If it has been there for a long time and has not received attention, what are the competitors?” You have the Orange award and all the various other arts awards in the UK. That is a tough one.

Q29 Chair: Professor Hunter, you may be aware that the British Council sponsors the Welsh language project in Argentina.

Professor Hunter: Yes—in Patagonia.

Q30 Chair: Do you feel that that is an effective way of raising knowledge about Welsh language and culture?

Professor Hunter: I think it is, even though it is geographically far flung. Anecdotally, I have had a lot of people say that they took note of that and appreciate the fact that there is an involvement supporting it. The Welsh community in Patagonia is also very high profile in terms of Argentine politics, so it is an important initiative.

On the back of that, Welsh as a language is incredibly popular for a small language. About 10 years ago, I did a survey of universities teaching Welsh in the United States, and it was taught at

more universities in the United States and Canada than national languages such as Hungarian and Danish. I had a Hungarian friend who was quite annoyed at that fact.

Q31 Chair: I am probably one of the few people with a knowledge of both, and Welsh is a lot easier than Hungarian.

Professor Hunter: Welsh is taught at two universities in Poland—Lublin and Poznań.

Q32 Chair: Welsh is taught?

Professor Hunter: Yes—the Welsh language is taught. It is extremely popular. We had a lecturer in Lublin visiting last year, and she had 50 students turning up for courses to hear about Welsh literature in Lublin in Poland. Vienna—

Q33 Mrs James: And Japan.

Professor Hunter: Yes, it is taught in Japan—and at Leipzig and Bonn in Germany. We have found that Welsh is taught as a language at universities around the world more than many larger languages. Again, these are people with an intense interest. It is a small community, but they are already committed—they have already given time, money, resources, energy and emotional investment in Wales, in a sense.

Chair: I learn something new every day. Thank you for that. Can I bring in Stephen, who has some further questions?

Q34 Stephen Doughty: Some of these questions are primarily for Andrew; they are around investment, trade and business links. They follow on a little bit from our visit to Argentina, where we had some interesting experiences engaging with UKTI, and whether there are any business and trade links to build on top of the very established cultural and linguistic links that exist. Can you give us an overview of how you see Wales currently fitting into the wider work of UKTI, in particular, and whether that works? What has changed over the last few years? As you mentioned earlier, there has been an improvement over the last couple of years, but obviously there was a dip, which a lot of people put down to the abolition of the WDA. Could you say a little bit about both the UKTI work and where Wales sits within that, and Wales as a trade and investment destination more broadly?

Dr Crawley: That is not a simple task.

Q35 Stephen Doughty: It gives you the opportunity to wax lyrical.

Dr Crawley: Yes—there is a fair bit to say. I should probably start by saying that in 2012 I wrote a report called “Selling Wales,” ironically enough, that was looking at the agencies involved in attracting inward investment into the Cardiff city region. I use the term “city region” because that is what we were looking at at the time—the 10 local authorities that make it up. We found that a huge number of agencies were involved in attracting inward investment, from individuals in local authorities to Capital Wales, Cardiff and Co, the council’s separate fund looking at that and the Welsh Government—IBW and other bits of the Welsh Government. A huge number of agencies were doing this, but we found that there was very little co-ordination between them. I want to emphasise that this is pre-2012. We found that there was competition between them, that there was no joined-up thinking and that in some cases they were almost competing with one another, rather than with the outside world.

I know that since 2012 things have changed. The Welsh Government have got more to grips with this and there has been a more concerted effort in terms of overseas offices, for example. When the

abolition of the WDA happened, a lot of the offices were closed, mothballed or left to one side. I know that, now, some of those offices are being reopened and restocked with people. I do not want to criticise the Welsh Government too much, as I think that is a positive thing. However, there is still a huge amount of work to do. Having that infrastructure is one element to it, but working with UKTI and other groups requires economic intelligence. At the moment, we do not have sufficient resources in terms of economic intelligence. What I mean by economic intelligence is looking at the high-growth sectors in the world and in target countries, and at linkages between those high-growth sectors and how we can attract them back to Wales through our existing infrastructure. We do not utilise enough expertise from overseas and do not utilise local knowledge enough. Again, I am not throwing huge criticism at the Welsh Government. There have been such dramatic changes that I think this is a work in progress. This is what we should be doing and building together.

In my opinion, the use of priority sectors is not a good means of attracting inward investment. My fear is that you create silos. To go back to my report of 2012, one of the biggest things we found was silos. For example, I spoke to a company that was seeking to invest in Wales. This was when the priority sectors were in place. The company in question was in video game design. When it was speaking to the Welsh Government, it was pushed from pillar to post—to creative industries or ICT. Because it was between those sectors, it did not know exactly where it fitted. It ended up going to Newcastle. Tying ourselves to the sector-based approach constrains a lot of this activity.

If we are saying that our international offices have to look at those precise brackets, I would love to know how the links exist between UKTI, the local offices and the people on the ground. For example, I know that in Chicago there is a mid-west office. If you wanted to look at advanced manufacturing industries, I think you would struggle to find specific companies that would identify themselves as being in advanced manufacturing. That is not to say that they are not there, but they probably do not call themselves that. The problem is that trying to bracket it too much into sectors creates a significant problem.

I come back to the economic intelligence argument. We may discuss this a bit later, but there is the issue of the data. At the moment, we do not have the data I would want to see that show what sectors have the greatest impact in Wales—what sectors we should be building into our links. I am an econometric modeller. The projects I am working on in the United States at the moment involve designing new ways of modelling economic impact. These are high-level, very sophisticated things. One of the biggest problems I have is not the techniques or the computing power, but data. The Welsh economy research unit, which is based at Cardiff university, has done huge amounts of work to produce input-output tables—simple accounting structures, just to see what is going in and out. These are basic tables, but they have been done off the back of individual small projects. We need the Welsh Government and other agencies to link all of this together. It comes back to connectivity and drawing together the strands, where we can show these relationships.

Q36 Stephen Doughty: On the visit to Argentina, where I had lengthy discussions with UKTI, which is obviously promoting a whole series of British companies there, I was quite struck by the fact that when I asked how many Welsh companies were involved—given the links that exist and the fertile ground for them to grow in—less than a handful had had any contact in terms of Welsh-Argentine trade links. For example, we saw the development of the renewable energy sector there—building massive wind farms and so on. That is a matter of controversy on this Committee, but there is an expertise in Wales with potential for exports and linking. Clearly, something is not quite connecting. Is that just a one-off example or is it characteristic of the UKTI-Welsh Government relationship more widely?

Dr Crawley: Historically, there have been greater disagreements between them. When the WDA ceased to exist, we went through a very dark period where there was very poor communication and co-ordination. At one point, I believe, we did not have a representative down there; I do not know

for exactly how long, but it was for quite a considerable period of time. I know that that is starting to change and that things are moving in the direction of trying to get people working and co-ordinating better, but the emphasis has been on getting civil servants in to do this. What we need to do is bring in expertise, where it exists. We need to see where expertise is. If someone has expertise in international finance, we need to get them, if we are trying to attract international finance. If you are interested in renewable energy, you need to get experts who are into renewable energy. If you are going somewhere to sell it and you do not understand the industry yourself, you are already on a downer, because you are immediately playing catch-up. You need to understand the industry, the structure and the difficulties that are there.

The second bit of this, which is probably the critical bit, is saying how that links to Wales. You can have the expert in the sector, but if they cannot tell people, “We have manufacturing technologies and research development units that are building new generators in Wales”—I know about the contention with renewables—there is very little point. We said this repeatedly on tourism as well, but it comes back to co-ordinating these things. We are too small to do things independently—we need to work together. That is where Scotland has done so well. Scotland has pulled in one direction, particularly around inward investment. You could look at many different aspects, but I firmly believe that the reason they have succeeded is because they are all moving in the same direction.

Q37 Jessica Morden: I have a quick question to Andrew on that note. What do you see the Wales Office’s role as being in this area? I know that the Secretary of State for Wales has been on the Japan and Malaysia trade missions. Do you think those have a worth? Do you see anything coming out of them? Do you think there is a co-ordinated and strategic approach between the Wales Office and the Welsh Government?

Dr Crawley: Right now I could not say whether there is strategic co-ordination between them. Honestly, I could not say whether there is perfect co-ordination between them. However, if you ask me whether there should be, the answer is yes. If the Secretary of State goes overseas, particularly on trade missions, that has huge kudos attached to it. You are showing a UK presence and showing how Wales fits into the larger picture of the UK. The Secretary of State definitely has a role to play, but it must be a co-ordinated role before we go there.

One of our problems in the past has been that, if we are seeking to do this and we send out different groups of people who have not spoken, have not organised and have not co-ordinated before meetings, we end up having this competition factor, with different levels of Government and different groups trying to show it. If we are sending out trade missions, we need to sing from the same hymn sheet. We all need to sing from the same page and say, “This is what we are doing”—and we must put politics to one side. We should take politics out of this as much as we can, because a large Fortune 500 company is not going to be interested in the politics.

Q38 Chair: Do you think that it might be worth considering joint trade missions, with the First Minister and the Secretary of State for Wales riding off together to show unity?

Dr Crawley: It is a nice idea. As much as we can join things up, we should. I know there is politics at play. I am an economist. From my point of view, with limited resource, you need to co-ordinate it. You will then get a greater return from it. If that means sending out joint trade missions, yes, but again it is about having discussion and co-ordination before it happens—not afterwards. Rather than having separate meetings to try to build things up when we are out there trying to sell it, we should have them beforehand to get everyone on the same page, so we all know what our roles are and where they fit in.

Q39 Glyn Davies: I come from a background that colours the way I look at issues. I spent a huge amount of time involved in this sector when we had Wales looking at the world incredibly aggressively, working in Baden-Württemberg, Strasbourg and Catalonia and opening offices in Princeton. At 22% inward investment, it was just unbelievable. Really it built on the effectiveness of the WDA, linked to WDI at the time, but it seemed just to go.

I do not want to revisit the incorporation of the WDA, the Wales Tourist Board and the DBRW into the civil service, effectively, but it was not something I approved of; I thought it was a big step backwards. I have listened to the evidence you have been giving to us, and much of what you want in terms of co-ordination and developing expertise outside the civil service seems to be harking back a little bit to the kind of attitudes and approach—the real “can do” Wales—that we had then. I thought it was a wonderful period for Wales, and it has gone. We have not got it back, and I would like to see it back. To what extent do you think we can get back to the really dynamic position we were in in the late '80s and early '90s?

Dr Crawley: I agree with a lot of what you have just said. To go back to the piece of work I did in 2012, we looked at a number of studies that were carried out on brand recognition for development agencies across Europe. There were 2,000 people surveyed. The second most popular development agency in 2011 was the Welsh Development Agency, which had ceased to exist four years beforehand. The third most popular was the Welsh Development Agency, which had ceased to exist three years beforehand. IBW was not even in there.

The Welsh Development Agency had a huge amount of baggage at the end—a lot of people would not disagree with that—but the problem is that it had huge brand kudos. If you went somewhere in the world, people knew what it was. There have been some recent comments saying how little work it did or how few jobs it was bringing in, but I totally disagree. Quite a long time ago, when I was teaching in Hong Kong, I remember someone telling me some examples of case studies they were using in the Hong Kong university of science and technology economics programme. The WDA was one of the case examples where, using a small, independent body, you were able to bring in 22.5% of all inward investment in a country.

To an extent, I do not want to hark back. Personally, I think that in Wales right now it would be very politically difficult to bring back the WDA. Should it be brought back? Probably not as it was, but the bit that I liked about it was its independence—the independent ability to go and do things. This comes back to my economic intelligence argument. If you have people who are wise and have the smarts in particular sectors and industries, they are probably not people who are in the civil service. I am talking about people who are right there in the industry—who have their finger on the pulse and know exactly what is happening. Those people are not going to be civil servants. If you are setting up some kind of body to attract inward investment or to develop what we have, you need some kind of independent arm to be able to bring in that expertise. I do not mean just hiring consultants, because they will be hired guns who will come in and sell to the highest bidder. You need a body that is constructed of these experts. The fact is that we do have some industries in Wales that are doing pretty well. The people who are in those are probably the best ambassadors for you.

Scotland does it. Look at how Scotland attracts in financial investment services, in particular. They bring companies up to Scotland and get them to talk to the existing companies there. That is the best advertising you can have. If they are saying, “We are here. We think it’s great. We are doing this,” you already have an immediate link—a club has been formed. It is about having an independent voice that is able to do that. What Scottish Development International has done is effectively from the WDA textbook. It used what the WDA did as a starting point and carried on with it. If you look at what happened when the WDA ceased to exist, Scottish Development International kept going and pushing forward, because it knew that its biggest competitor was out

of the way. Right now in England we have got rid of the development agencies. We have the LEPs—the local economic partnerships—in place, but their role is less co-ordinated at the moment and there is not a precise notion of what is happening. If you have a development agency at the moment, you have a huge head start over other parts of the UK.

Q40 Glyn Davies: Can I ask you one further question? It is almost a philosophical point. You talked about baggage. I remember the baggage only too well, but the baggage was in Wales, not overseas. Overseas, nobody knew about this. All they knew about was the WDA and that Wales was a great place to go. It was a wonderful strap line and has been a massive loss. That is my view.

Dr Crawley: I agree with you. On the baggage, I am very much talking from a Welsh point of view; I am not saying that that existed internationally.

Q41 Glyn Davies: That is not what I wanted to ask you—it was a preamble to the point I wanted to make. If you are moving into bringing in expertise, the philosophy there is driven by the bottom line. In Government, it is not. In Government, we care about how things are done and how things look on the surface—if one thing is slightly wrong and hits a headline, that is great. When the private sector comes in, it is about the bottom line—the delivery and what you bring in. That is the mentality we have to learn to grow up with. We must not be completely afraid of something in the *Daily Mail* that kills something. We need to be looking at something in the *Financial Times* about a great financial success for Wales. That is the kind of “can do” attitude that I think we have lost. Can we get it back?

Dr Crawley: Yes, I think we can. There is a good example—that of Cardiff airport. I am about to praise the Welsh Government quite a lot. A lot of people were critical when the Welsh Government bought Cardiff airport. I must admit that I had my concerns, but I have to say that the strategy they have used of setting up an independent, arm’s length body with expertise—people on it who know what they are doing—is exactly the right thing. The Welsh Government have done exactly the right thing there. If they could take a similar approach to inward investment, that would be a positive attitude. Whether they use a badge to which they still own the copyright is another matter. You are 100% right—the baggage is in Wales; it is not international.

Chair: We have come to the end of our set of questions. Thank you very much for the full answers you have given. I certainly look forward to being proved wrong in my concerns about what the Welsh Assembly Government have done on Cardiff airport.