



House of Commons
Welsh Affairs Committee

Wales as a global tourist destination

Fourth Report of Session 2022–23

*Report, together with formal minutes relating
to the report*

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Welsh Affairs Committee

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Summary

Tourism makes a significant contribution to the Welsh economy, providing employment for around 12% of the Welsh workforce. However, Wales significantly underperforms in attracting international visitors in comparison to the rest of the UK. In 2019, the UK received 41 million international visitors, who spent a total of £28.4 billion. However, only 1.02 million international tourists visited Wales, spending £514.6 million—2% of the total UK spend—while 3.46 million international tourists visited Scotland.

Throughout our inquiry, we identified several key themes and issues that will need to be rectified if Wales is to take a greater share of the tourism market in the UK. Our Report therefore makes the following conclusions and recommendations:

Welsh brand

Wales has a low profile overseas and attracts a small proportion of the international visitors coming to the UK. There is a lack of awareness of Wales' strengths as a holiday destination. Wales lacks a coherent brand for the overseas market. Marketing of Wales must be stronger, with a clear theme devised to attract international tourists based on Wales' unique strengths and attractions.

We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2024, for promoting Wales as a first-choice destination for international visitors to the UK. A key aspect of this should be the development of a distinctive brand that raises awareness of Wales that can be used consistently to help market Wales and to raise awareness of its location as a holiday destination.

Role of VisitBritain

It is important that UK Government bodies responsible for promoting Wales abroad reflect the distinct identity of each part of the UK in their activities. We are not convinced that VisitBritain is achieving all it can on behalf of Wales. We heard criticism of the UK Government's GREAT campaign in promoting Wales. We remain to be convinced that Wales has benefited from the campaign. VisitBritain should make improvements to better reflect Wales as a distinct location, and report to us on progress made by February 2024.

Holiday packages

Wales is often not included in UK holiday packages offered by tour operators. When developing a joint strategy to promote Wales as a distinct destination, we recommend that VisitBritain and Visit Wales encourage tour operators to include Wales in UK holiday packages. We expect VisitBritain to report its progress on this issue by February 2024.

Website

VisitBritain does not sufficiently promote Wales in its marketing materials, nor does it make a focused offering to international tourists of Wales' attractions. We recommend that VisitBritain improves its website to better market Wales overseas. We expect VisitBritain to report to us on its progress by February 2024.

Transport infrastructure

We are concerned that poor transport infrastructure has a negative impact on Wales' ability to attract a greater share of international tourists who arrive into the UK. Transport infrastructure has been underfunded by the UK and Welsh Governments for a number of years. Transport infrastructure spending must be regarded with higher priority.

We call on the UK Government and the Welsh Government to recognise the importance of transport to the tourism industry. We urge the UK Government and the Welsh Government to bring forward proposals to address these issues, focused on the potential positive impact on tourism. The UK Government and Welsh Government must look creatively at ways to fund transport infrastructure projects.

1 Introduction

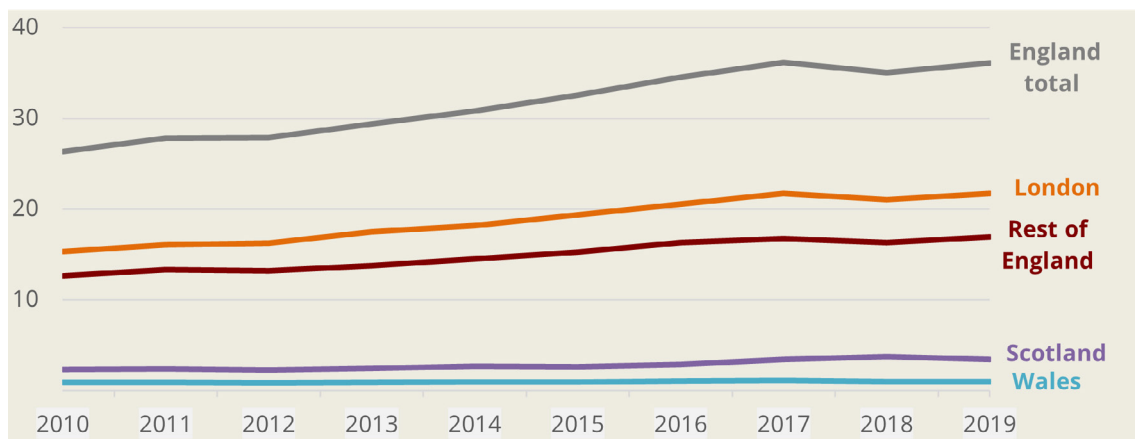
1. Tourism makes a significant contribution to the Welsh economy. Prior to the pandemic, the Welsh tourism sector was estimated to directly contribute £2.4 billion to Wales' GDP (about 5% of the total) and provided an estimated 161,000 jobs (12.1% of all employment in Wales).¹

Trends in international tourism in Wales

2. In 2019, there were 41 million international visitors to the UK, who spent a total of £28.4 billion, making the UK the tenth most visited country in the world and the fifth for inbound visitor spending.²

3. However, as acknowledged by Rt Hon Stuart Andrew MP, the then Minister for Tourism in the UK Government, Wales “is not getting enough of the fair share of that visitor economy”.³ In 2019, only 1.02 million international tourists visited Wales, spending £514.6million - 2% of the total UK spend.⁴ As shown in Figure 1, Scotland and England (outside of London) have over the past decade consistently attracted significantly more international visitors than Wales.

Figure 1: International visitors to UK regions (millions)



Source: Office for National Statistics' International Passenger Survey

4. Prior to the pandemic, 50% of international visitors to Wales came from Europe, 23% from north America and 27% from the rest of the world.⁵ Of the European visitors, 25% came from Germany, 19% from the Republic of Ireland and 15% from France.

1 Welsh Government, [Wales Visitor Economy Profile 2021](#), 28 April 2022

2 Office of the Secretary of State for Wales and the Department for Digital, Culture, Media and Sport ([TOU0014](#)) [Q210](#)

3 Statistics for Wales, [Wales Tourism Performance Report January to December 2019](#), 11 June 2020

5 Beaufort Research, [Wales Visitor Survey 2019: Overseas Visitors](#), 18 March 2021. The “Wales Visitor Survey 2019: Overseas Visitors” was commissioned by Visit Wales to track the profile, attitudes and satisfaction of visitors to Wales, and to gather information on locations visited, activities undertaken and transport and accommodation utilised by visitors.

5. The covid pandemic devastated the tourism industry in Wales and the rest of the UK, and it has still not fully recovered. We wanted to explore why Wales historically has done less well in attracting international tourists than other parts of the UK, and to examine what needs to be done to enable Wales to recover post pandemic to reach—and surpass—the figures of 2019.

Our inquiry

6. We launched our inquiry on 8 February 2022, publishing terms of reference and a call for evidence. We received 15 submissions of written evidence and held five oral evidence hearings, taking evidence from Welsh historical and cultural organisations, representatives from the Welsh tourism industry, Welsh businesses, experts in tourism marketing and Ministers from the Welsh and UK Governments. A full list of witnesses can be found at the end of this Report. We are extremely grateful to all those who have contributed to our inquiry.

7. We also undertook a visit to Washington DC, New York and Atlanta in the USA, meeting officials from the Welsh and UK Governments and representatives of a Welsh diaspora organisation, New York Welsh. We give special thanks to Gavin Landry and his team at VisitBritain's New York office; Efe Sokol, Head of the Welsh Government's Northeast region of North America; and Ty Francis MBE, co-founder of New York Welsh.

2 Wales' profile abroad

8. The Anholt-Ipsos Nation Brands Index is published annually and gathers perceptions of countries around the world. In 2022, the UK was ranked sixth on the Index, calculated on various indices, including “Culture”, “People” and “Tourism” as well as overall familiarity with a country. On the same Brands Index, Wales ranked 22nd, ahead of nations with huge international reputations, such as South Korea, Singapore and Taiwan, demonstrating the strength of Wales’ international offering. However, the Anholt-Ipsos Nation Brands Index 2020—similarly detailed results from the 2022 index are not publicly available—saw Wales ranked only 31st for its “vibrant cities”, and 45th out of 50 for overall familiarity.

9. Witnesses agreed that Wales’ low profile abroad was a barrier to growing its international market. Visit Wales has acknowledged that “there are challenges when it comes to [attracting] international tourism to Wales”, and that “building Wales’ international profile is a long and ongoing process”.⁶

A Welsh brand

10. Wales is a nation with a proud history and culture and culinary traditions of its own, but a clear and consistent theme in the evidence we received was the lack of an internationally recognised Welsh brand. Scotland’s brand identity is built on iconic symbols such as tartan, bagpipes and whisky, which are used extensively in marketing and promotional campaigns and are recognised worldwide. While Wales has a rich cultural heritage, its cultural symbols lack the same global recognition. As noted by Sean Taylor, founder and President of Zip World in North Wales⁷:

Brand Wales is weak compared to the Irish brand and the Scottish brand in particular [...] At the moment I think we get overshadowed quite a bit by the Royal family down in London, tartan and Loch Ness in Scotland and in Ireland you have Guinness, so they are all strong brands.⁸

Recognising Wales’ predicament is only half the issue; establishing a recognised brand is the other. Mr Taylor continued:

We need to definitely get away from sheep, wet weather and even [...] rugby as well, because football has come to the fore now.⁹

11. But in getting away from sheep, wet weather and rugby, the question remains for Wales: on what should it focus its international branding? According to the Welsh Government’s 2019 overseas visitor survey, 80% of international visitors to Wales were able to point to something distinctively Welsh about their trip, with 65% citing heritage sites, 46% selecting visitor attractions and 44% mentioning food and drink, demonstrating Wales’ strong cultural and heritage offer. Furthermore, 84% of international tourists regarded it

6 Visit Wales, [Welcome to Wales: Priorities for the Visitor Economy 2020–2025](#), January 2020

7 Zip World is an outdoor adventure company with four sites across Wales, offering zip lines for public use.

8 [Q98](#)

9 [Q101](#)

as important that their trip was distinctively Welsh, with 59% stating the importance of seeing or hearing the Welsh language during their visit, demonstrating the appetite for a greater sense of Welshness among international visitors.¹⁰ But what is distinctively Welsh?

The Natural Environment

12. VisitBritain's International Passenger Survey data for 2014–2019 highlighted that Wales' natural beauty was well regarded by international tourists, with 27% of visitors to Wales intending to visit the countryside and villages, 34% going to the coast and 37% planning to walk or hike.¹¹ Suzy Davies, Chair of the Wales Tourism Alliance, noted that:

... the strengths that Wales has played on for many years now, which are primarily our coastline, our countryside and our heritage, are things that we should be proud of [...] those qualities are particularly special in Wales.¹²

13. In a similar vein, Rebecca Williams, Assistant Director at National Trust Cymru, said:

When we brand Wales, we often think of dragons and daffodils, and we absolutely need to move beyond that in the messages that we give off internationally. For me, it is about the connection to nature, to beauty and to history, and about people getting that experience and that feeling—that is what we need to be selling and investing in.¹³

Paul Lewin, General Manager of Ffestiniog and Welsh Highland Railways, concurred, telling us that, especially for north Wales:

It is the wonderful environment, the wonderful scenery and how easily accessible it is compared to many other places for international visitors.¹⁴

14. However, it must be noted that beautiful landscapes and a connection to nature are offered by countless countries across Europe and the world and cannot be considered distinctly Welsh.¹⁵ For this reason, it seems unlikely that a focus on natural beauty could raise Wales' international brand recognition sufficiently so as to potentially increase international visitor numbers.

History and Legend

15. Wales boasts a strong heritage sector, with domestic and international visitors estimated to have contributed £1.72 billion to the Welsh economy in 2018–19 via heritage attractions.¹⁶ Prior to the pandemic, Cadw—the historic environment service of the Welsh Government—reported an increase in visits to its sites, with commercial income increasing

10 Beaufort Research, *Wales Visitor Survey 2019: Overseas Visitors*, 18 March 2021

11 Office of the Secretary of State for Wales and the Department for Digital, Culture, Media and Sport ([TOU0014](#))

12 [Q3](#)

13 [Q45](#)

14 [Q101](#)

15 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei ([TOU0005](#))

16 Cadw, *Heritage Counts Wales 2018–2019*, 23 January 2020

from £4.8 million in 2014–15 to £8 million in 2019–20. The historic environment sector, heritage tourism and heritage construction together support 40,670 jobs, nearly 3% of Wales' total employment.¹⁷

16. To build on this distinctive Welsh strength, Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei, marketing experts from Brunel University London, suggested that an increased emphasis on two uniquely Welsh myths, King Arthur and the Welsh dragon, and the rebranding of Wales as “The Land of Dragons and Legends”, would reposition Wales as “the first and only destination that tells the legendary stories of mythic dragons and King Arthur”.¹⁸ They further suggested that such changes could be bolstered by a museum dedicated to dragons, or dragon walks around towns and coastal lines, as well as theme parks or organised tourism activities that make reference to major films, including “King Arthur: Legend of the Sword”, a popular children’s film that was partly shot in the country.¹⁹

17. Vaughan Gething MS, Minister for the Economy in the Welsh Government, had his own ideas for improving Wales’ brand. He shared the analysis of Professor Yen, Dr Canhoto and Dr Wei, saying:

Other parts of the world have coasts and mountains [...] It is our built environment and the history around it, and lots of international visitors are interested in that. The fact that we have more castles per head than any other part of the world is a big plus [...] It is about seeing that as a real plus in exactly the way that, in the Basque Country, their distinctness within Spain is a positive that they lean into rather than try to walk away from.²⁰

However, he differed from the marketing experts in one crucial way:

The brand of Wales is not just the dragon. The fact that we have a really cool flag and that lots of people saw it during the football World Cup is interesting, but it is about how you see Wales as a whole and what you get when you come to Wales.²¹

The Welsh Language

18. A unique feature of Wales is the Welsh language. Anthony Pickles, former Head of Tourism Affairs at VisitBritain, suggested that VisitBritain could have tailored elements of the GREAT campaign to make greater use of the Welsh language, to achieve the kind of cultural cachet for Welsh as New Zealand has delivered in recent years for Māori.²² Gwyneth Sweatman, Head of Communications for the Federation of Small Businesses (FSB) Wales, told us that “international travellers value the Welsh language, and that is a real asset that we have to promote Wales as a country”.²³ David Anderson, Director General at Amgueddfa Cymru-Museum Wales, agreed, saying that:

17 Cadw ([TOU0018](#))

18 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei ([TOU0005](#))

19 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei ([TOU0005](#))

20 [Q191](#)

21 [Q191](#)

22 [Q154](#)

23 [Q5](#)

Welsh culture and the Welsh language are tremendous assets for Wales because they identify distinction, difference, tradition and heritage in a way that nobody else can offer.²⁴

Adventure Tourism

19. As part of its International Strategy, the Welsh Government states its ambition to be a “leader in sustainable adventure tourism”.²⁵ The 2019 visitor survey found that 85% of overseas visitors considered Wales to be a sustainable tourism destination for holidays and breaks, with 61% of visitors strongly agreeing, up from 39% in 2016.²⁶ Meanwhile, in 2019, almost half of international visitors to Wales took part in outdoor or sporting activities. The most popular was walking, with 92% of people having walked more than two miles and 11% having cycled during their stay. More than four in 10 overseas visitors to Wales considered themselves ‘adventurers’, rising to half during off-peak months.²⁷

20. Annette Pritchard, Professor of Tourism Marketing at Leeds Beckett University, told us that adventure tourism is a Welsh strength, commenting that Wales has “a very great adventure product”.²⁸ Matthew Williams, Policy and Communications Manager for the Welsh Sports Association, shared Professor Pritchard’s analysis, but pointed to factors limiting Wales’ ability to capitalise on its adventure tourism offering:

... there is definitely merit in that approach in attracting people particularly for adventure sports and extreme sports in the north and west. The issue that we are constantly going to come up against is public transport connections to the very rural west of the country, where public transport options are quite limited.²⁹

21. The Welsh Government has made some effort to include Wales’ adventure tourism offering in its international marketing. In 2016, Visit Wales launched its “Year of Adventure” campaign. The purpose of the campaign was to:

... build on a wave of exciting new openings and developments across the country, and over 10 years of ongoing investment by Welsh Government to make Wales one of the UK’s leading adventure destinations.³⁰

22. While it is hard to assess the causal impact of the campaign on visitor numbers—visitor numbers actually fell in 2018, before rebounding in 2019—the campaign was positively received. Sean Taylor told us, “Visit Wales did a great job with the “Year of Adventure” on the limited budget they have”.³¹

23. Vaughan Gething MS was clear that the adventure tourism offering must remain a part of Wales’ international marketing, telling us that it “is a key part of our offer and fits in with us promoting our landscape”.³²

24 [Q43](#)

25 Welsh Government, [International Strategy](#), 2020

26 Beaufort Research, [Wales Visitor Survey 2019: Overseas Visitors](#), 18 March 2021

27 Beaufort Research, [Wales Visitor Survey 2019: Overseas Visitors](#), 18 March 2021

28 [Q161](#)

29 [Q77](#)

30 Welsh Government, [2016: Wales’ Year of Adventure](#), 2015

31 [Q120](#)

32 [Q198](#)

Major Events and Film and TV locations

24. Witnesses spoke of the role of major events as drivers of international tourism, including sporting events, festivals and Wales being the shooting location of film and TV shows. This was particularly true in attracting international visitors from America. Patricia Yates, Chief Executive of both VisitBritain and VisitEngland, told us that the value of American tourists visiting the UK had increased by 40% from pre-covid figures, adding: “You would be mad not to be focused on the American market. We are looking at America”.³³

25. On our visit to the USA, we heard of the positive impact that “Welcome to Wrexham” was having on raising the international profile of Wales.³⁴ Despite focusing on a team in the fifth tier of the English football pyramid, the show has garnered remarkable popularity, bringing benefits to both Wrexham and Wales more widely. Speaking of the new Wrexham AFC owners, Hollywood actor Ryan Reynolds and TV star Rob McElhenney, Vaughan Gething MS told us that the pair:

... have fully committed not just to the football club but to Wales. If you look at the way that they have embraced the Welsh language, it is hugely positive to have international figures talking positively about the language.³⁵

26. While official figures are unavailable, Humphrey Ker, Wrexham’s executive director, revealed that the Turf pub, located directly beside Wrexham’s Racecourse Ground and featured prominently in the documentary, now welcomes 60 to 70 Americans per day, with many believed to combine a visit to the city with trips to Liverpool, either to visit Liverpool’s football attractions or to visit the Beatles heritage attractions in that city.³⁶

27. If the show maintains its current popularity, it is vital that the appropriate bodies maximise the possible benefit for Wales and Wrexham, which will require investment and forward thinking. For example, Llangollen, which hosts one of Wales’ premier cultural events, the International Musical Eisteddfod, is only a 20-minute drive from Wrexham and could be marketed to tourists who want to combine a trip to the city with further Welsh cultural events. However, Camilla King, Executive Producer at the festival, highlighted the difficulty currently presented due to a lack of local transport infrastructure in North Wales, noting that there was only one bus route between the two locations.³⁷

28. The Eisteddfodau—Welsh cultural festivals in various locations—are a clear example of how Wales can use major events to drive international tourism. David Chapman, Executive Director for Wales at UK Hospitality, talked of cultural “symmetries” between Wales and other nations, such as Germany, France and Italy, that could be expanded upon, citing the Eisteddfodau as potentially marketable to foreign visitors who may “want the same sort of thing as they have in their country in a different way”.³⁸ The festivals celebrate the culture and language of Wales, showcasing literature, music and performing arts.³⁹

33 [Q228](#)

34 “Welcome to Wrexham” is a Disney+ TV show focusing on the purchase of Wrexham AFC by actors Ryan Reynolds and Rob McElhenney

35 [Q188](#)

36 Twitter, [SportsPro - extract of an interview with Humphrey Ker](#), 26 April 2023

37 [Q73](#)

38 [Q27](#)

39 Eisteddfod, [About us](#), accessed 12 June 2023

29. The Welsh Government has recently made concerted efforts to attract American and other tourists by hosting major entertainment events. One example was the September 2022 WWE Clash at the Castle, held at the Principality Stadium in Cardiff, attended by 62,296 people. However, ticket sales were not necessarily the Welsh Government's focus; instead, the Welsh Government hoped to use the event to raise Wales' profile in the US. As Vaughan Gething MS told us: "The WWE event was about our access to America and a profile in the American market".⁴⁰

30. It is also vital that Wales capitalises on opportunities resulting from its being used as a filming location for popular television series and films, including "Game of Thrones" and the Harry Potter film series. An academic study on the topic, undertaken by academics at the University of Malaga and entitled, "Films and Destinations—Towards a Film Destination: A Review", noted how films and tv series had become powerful levers in attracting tourists:

The fact that a destination appears in a film can arouse the interest of a large number of potential tourists. This is why many destinations try to attract these tourists through a series of secondary elements, such as tours of film locations, souvenirs or museums.⁴¹

31. The study further found that being used as a filming location for "Game of Thrones" had increased visitors to Dubrovnik by 10% between 2012 and 2015. However, in order to convert interest into tourism, being a location in itself was not enough; it was about the management of the area, with co-operation required between film commissions, public institutions, private agents that developed the tourism offer, and residents of the area.⁴²

32. We welcome the fact that the Welsh Government, via Creative Wales, is taking proactive steps in this area, having signed memoranda of understanding with both S4C and BBC Wales. These MOUs emphasise the creation of content that can promote Wales to the rest of the UK and internationally, as well as meeting other aims such as encouraging greater diversity and celebrating up-and-coming Welsh talent.⁴³

33. Finally, sporting events also offer Wales the chance to significantly increase its familiarity among, and attractiveness to, international tourists. During the 2019 Rugby World Cup in Japan, the First Minister of Wales, Rt Hon Mark Drakeford MS, led a trade mission to Japan, building on Wales' profile as a rugby nation to strengthen economic ties with Japan and to highlight Wales's attractions. More recently, the UK and Ireland have submitted a joint bid to host the 2028 UEFA European Championship, Europe's premier international football competition. If successful, Cardiff's Principality Stadium will be used as a host venue. The UK Government has confirmed its support for the bid.⁴⁴

Utilising the Welsh Diaspora

34. The Welsh Government has the opportunity to utilise various Welsh diaspora groups around the world in order to boost positive awareness of the country, including in the

40 [Q192](#)

41 Domínguez-Azcue et al., [Films and Destinations— Towards a Film Destination: A Review](#), Information, 2021, 12(1), 39

42 Ibid.

43 Teledwyr Annibynnol Cymru ([TOU0013](#))

44 Welsh Sports Association ([TOU0015](#))

United States. When visiting the US, we met Cymry Efrog Newydd/New York Welsh, which was founded to provide a sense of community for Welsh expats and diaspora in the city, especially around St David's Day and rugby matches.⁴⁵ Co-founder Ty Francis MBE restarted New York's Wales Week in 2019, which occurs around St David's Day; it had been run between 2003 and 2013 by the Welsh Government's international office in New York. While unlikely to have the same cultural impact as, for example, New York's St Patrick's Day celebrations, a successful campaign could spark the interest of other Americans in Welsh culture. Mr Francis commented that, although the lack of awareness about Wales had improved over the years, it still did not meet the level of awareness of other parts of the UK, such as Scotland, and that "you have dig through some stuff to get to the meat of Wales".⁴⁶

35. The Welsh Government has made efforts to engage with and utilise the diaspora groups. In 2020, the Welsh Government's Diaspora Action Plan was launched.⁴⁷ While not explicitly intended to utilise diaspora groups in order to boost inward international tourism to Wales, the strategy includes working with a range of diaspora groups to:

... develop a global diaspora community that will raise Wales' global profile, showcase and promote areas of Welsh excellence and position Wales as a globally responsible nation.⁴⁸

36. Wales has a unique culture and language, boasts some of the most spectacular landscapes in Europe and offers a wide range of sporting activities. We are concerned by Wales' relatively low profile overseas and that it attracts such a small proportion of the international visitors coming to the UK.

37. We believe that there is a lack of awareness of Wales' strengths as a holiday destination. Wales lacks a coherent brand for the overseas market. Marketing of Wales must be stronger, with a clear theme devised to attract international tourists based on Wales' unique strengths and attractions.

38. We believe that there is substantial potential for growth in the Welsh tourism market as the global economy recovers post covid-19, and that the tourism bodies responsible for promoting Wales need to grasp that opportunity. Visit Wales must be nimble enough to capitalise on emerging opportunities to market Wales to an international audience, such as the huge international popularity of "Welcome to Wrexham".

39. We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2024, for promoting Wales as a first-choice destination for international visitors to the UK. A key aspect of this should be the development of a distinctive brand that raises awareness of Wales, which can be used consistently to help market Wales and to raise awareness of its location as a holiday destination.

40. Visit Wales should investigate working with the Welsh diaspora to increase the diaspora's attachment to its Welsh heritage, with a view to increasing international visitors to Wales.

45 [New York Welsh](#)

46 Private notes from Committee visit to USA

47 Welsh Government, [Action Plan: Diaspora Engagement 2020–2025](#), 2020

48 Ibid.

3 Role of VisitBritain in promoting Wales

41. While tourism in Wales is devolved to the Welsh Government, VisitBritain, an arm's length body of the Department for Culture, Media and Sport, retains responsibility for marketing Great Britain on the international stage.

42. David Anderson, Director General at National Museum Wales, believed that there was a need to see the UK as four nations, "each with very distinctive offers to make".⁴⁹ During our inquiry, we heard concerns regarding: VisitBritain not sufficiently identifying Wales as a distinct location, particularly in respect of the GREAT campaign; the VisitBritain website; VisitBritain's lack of engagement with Welsh businesses; VisitBritain's poor recognition of the importance of business tourism; and the availability of Welsh holiday packages. We examine each of these issues below.

The GREAT campaign

43. VisitBritain is a delivery partner of the Cabinet Office's GREAT campaign, launched in 2011 to promote trade, investment, tourism and education to enhance the country's global reputation and encourage engagement with the UK. Witnesses criticised the impact of the GREAT campaign in promoting Wales. Anthony Pickles, former Head of Tourism Affairs at VisitBritain, suggested that it had not represented Wales well enough.⁵⁰ Annette Pritchard, Professor of Tourism Marketing at Leeds Beckett University, told us that the campaign was not sufficiently tailored to Wales' strengths:

[Wales] is different. It offers you a different language, a different culture, a different set of myths and legends, which tourists would love to engage with. [...] I don't think the GREAT campaign has worked for Wales.⁵¹

44. The 2019 Welsh Government overseas visitor survey found that 57% of overseas visitors had not seen any advertising, marketing or publicity about Wales before visiting, rising to 63% of those from countries outside of Europe.⁵²

45. Witnesses criticised Visit Britain and its lack of focus on promoting Wales. David Chapman, Executive Director for Wales at UK Hospitality, told us that the Tourism Exchange Great Britain is funded by VisitEngland and saw little inclusion of Wales.⁵³ He also told us that the UK Government's "Enjoy Summer Safely" campaign regarding the reopening of businesses following covid-19 lockdowns, for which VisitBritain was a brand partner, seemingly did not grasp the different conditions for reopening in each nation.⁵⁴

46. Witnesses also expressed concern regarding the 2016 merger of the operational structures of VisitBritain and VisitEngland, with the organisations now sharing a single

49 [Q43](#)

50 [Q154](#)

51 [Q156](#)

52 Beaufort Research, *Wales Visitor Survey 2019: Overseas Visitors*, 18 March 2021

53 Tourism Exchange Great Britain is a digital platform that connects businesses in the tourism sector, working in partnership with VisitBritain, VisitEngland, Visit Wales and Tourism Northern Ireland. The platform acts as a central exchange for tourism businesses to manage 'live' availability and prices, reach new customers and drive sales.

54 [Q22](#)

Chief Executive. While it is VisitBritain's responsibility to attract tourists to the UK, it is VisitEngland's responsibility to ensure that those tourists remain in England. Anthony Pickles suggested that this called into question the two organisations' operational independence, with a concern that VisitBritain would naturally focus on marketing England to the detriment of the other nations within the UK.⁵⁵ Professor Pritchard noted that the aforementioned co-location of VisitBritain and VisitEngland "will always produce a degree of suspicion on the part of other Visits because they prepare joint reports, they share offices, their priorities are similar".⁵⁶

47. Vaughan Gething MS was also critical of the merger:

Because VisitBritain sees DCMS as its sponsoring Department, you have a tension around whether this is just a message about promoting Britain or just about England.⁵⁷

Website

48. The majority of VisitBritain's marketing and communications is online. Witnesses believed that VisitBritain's website poorly represented Wales as a distinct destination. Professor Yen of Brunel University highlighted the minimal attention paid to Welsh destinations on the GREAT website and the dearth of Welsh products available to purchase on the VisitBritain website, which was heavily linked to from the GREAT website.⁵⁸

49. The VisitBritain shop, the digital platform on which visitors buy package tours and tickets to UK attractions, has few references to Wales. In contrast, Scotland has its own button on the website for Scotland tours, with more than 20 Scottish tours and packages featured. The site also includes 10 tours to Stonehenge, and more than 60 tours to London, with 25 London river cruises featured. Professor Yen continued:

Overseas visitors want to go somewhere where they think there is a lot to do [...] If I looked at that site as an international visitor I would think, "Wales, oh, there doesn't seem to be anything to do there, but there is a lot to do in Scotland and there is a lot I can show my friends and gain a lot of social capital from going on a whisky and waterfalls tour". The paucity of information is such that if you look on "history and heritage", there is absolutely no entry for Wales. That is the *raison d'être* for Wales's international brand, but there is nothing.⁵⁹

50. In response to criticisms, Patricia Yates, Chief Executive of both VisitEngland and VisitBritain, commented that VisitBritain gave equal weight to Wales in its marketing materials:

We absolutely target Wales in the same way we promote Scotland or the Cotswolds. Wales is always part of our offer.⁶⁰

55 Institute of Welsh Affairs, [Tourism: How Can Wales Perform Better?](#), 19 November 2021

56 [Q148](#)

57 [Q199](#)

58 [Q155](#)

59 [Q156](#)

60 [Q246](#)

Lack of engagement with Welsh businesses

51. Welsh businesses told us that they have little to no contact with VisitBritain. Sean Taylor of Zip World told us that “we do not have much of a relationship with VisitBritain”.⁶¹ Paul Lewin, General Manager of Ffestiniog and Welsh Highland Railways, had a similar experience, telling us that, “Our connection with VisitBritain is quite weak”.⁶² Ian Roberts, Finance Director at Portmeirion Cymru, told us that his organisation has “virtually no contact with VisitBritain”.⁶³

52. The UK Government has recently launched a new multi-million-pound global marketing campaign to welcome visitors back to Britain. VisitBritain’s £10-million “Welcome to Another Side of Britain” campaign will put the spotlight on Britain’s cities, including Cardiff, to drive tourism from the UK’s major international markets including France, Germany, the Netherlands, Spain and the United States.⁶⁴ Witnesses from the Welsh Sports Association, the Wales Millennium Centre, the Llangollen International Musical Eisteddfod, UK Theatre and the Green Man Festival all confirmed that they had had no contact with VisitBritain regarding this new campaign.⁶⁵

53. In response, Patricia Yates stressed that “the first-line relationship you would expect Welsh businesses to have would be with Visit Wales”.⁶⁶ Nevertheless, the then Minister for Tourism for the UK Government told us that Welsh businesses “should come and speak to VisitBritain”.⁶⁷

Business tourism

54. Witnesses expressed concern concerning VisitBritain’s priorities and the negative impact its decisions could have on Wales. For 2022–23, VisitBritain funding for business events has been halved to £500k, with a consequential reduction in new business events to support key sector priorities and attract new foreign visitors and investment.⁶⁸ Ian Edwards, Chief Executive of the International Convention Centre Wales, told us that:

A big percentage of the international market comes from business tourism. When business tourists come to a destination, over 60% of those tourists will come back again not as individuals, but with family, so you can multiply that by one, two, three, four-plus people.⁶⁹

He continued:

Unfortunately, VisitBritain [...], because of a lack of funding, is stepping away from marketing business tourism, which is unbelievable.⁷⁰

61 [Q96](#)

62 [Q96](#)

63 [Q96](#)

64 [VisitBritain \(TOU0012\)](#)

65 [Q58](#)

66 [Q216](#)

67 [Q214](#)

68 [VisitBritain \(TOU0012\)](#)

69 [Q31](#)

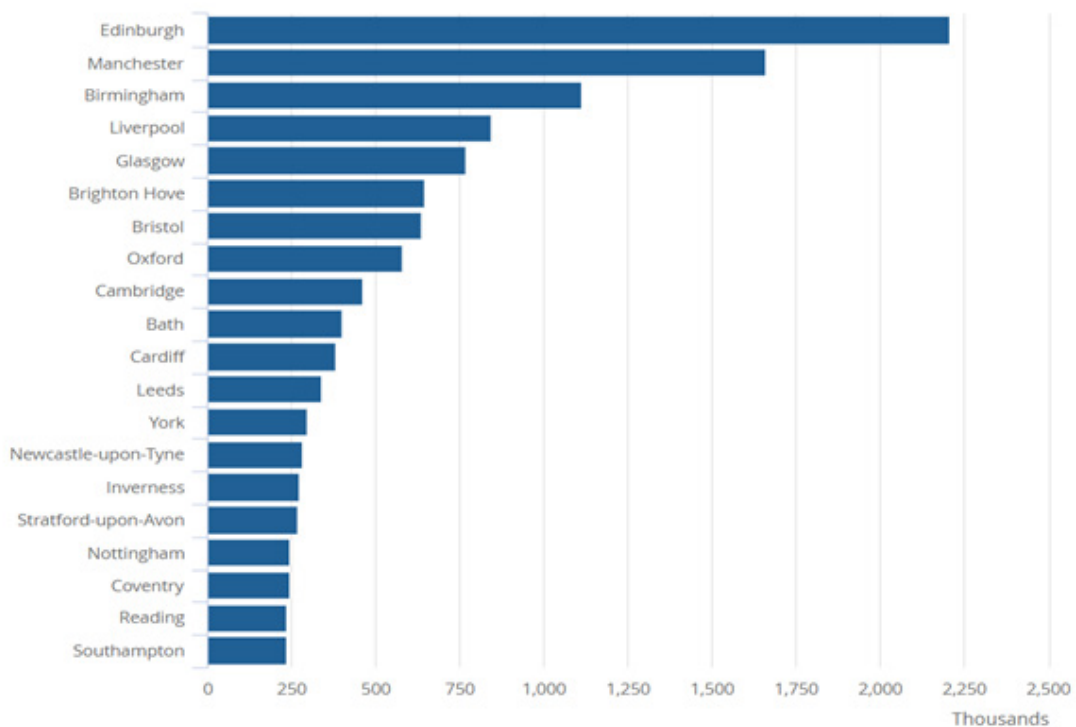
70 [Q44](#)

Holiday packages and city breaks

55. Wales is often not included on tour operators' pre-packed holidays to the UK, which are popular with many tourists. The Miller Research Survey found that 27% of those surveyed stated they would consider taking longer activity tourism trips to Wales if packages with accommodation were available.⁷¹ Annette Pritchard, Professor of Tourism Marketing at Leeds Beckett University, told us that "Wales is very unknown and very unpackaged".⁷² Paul Lewin confirmed the difficulty in arranging package tours to attract international visitors, principally citing the lack of experienced ground handlers who can facilitate transfers of international visitors between flights, accommodation and attractions.⁷³

56. European city breaks are popular because they can be an easy and affordable way to see a new country and experience a different culture. The importance of city breaks was raised numerous times throughout the inquiry, with the consensus being that Wales is perceived as having less attractive cities to entice international visitors. The 2020 Anholt-Ipsos Nation Brands Index found that, of the nations surveyed, Wales ranked 31st for its "vibrant cities".⁷⁴ Cardiff was only the 12th most-visited UK destination in 2019, with 382,000 visitors, compared with London's 21.7 million. In the same year, Edinburgh welcomed 2.2 million visitors, Manchester welcomed 1.7 million and Birmingham welcomed 1.1 million (see Figure 2).⁷⁵

Figure 2: Top 20 UK towns visited for at least one night, excluding London, 2019



Source: Office for National Statistics

71 Welsh Sports Association ([TOU0015](#))

72 [Q145](#)

73 [Q104](#)

74 Welsh Government, [Anholt Ipsos Nation Brands Index: 2020 Report for Wales](#), 16 September 2021

75 Office for National Statistics, [Travel trends: 2019](#), 22 May 2020

57. As the UK began to emerge from the covid-19 pandemic and its related lockdowns, the Welsh Government attempted to address the problem of Wales' low number of package tours by introducing the Wales International Inbound Tourism Fund, a competitive fund aimed at encouraging companies to develop and promote new packages and itineraries for international visitors.⁷⁶ However, with only £400,000 available, and maximum awards of only £50,000 per recipient, it is difficult to envisage the efficacy of the fund or its impact on boosting international tourism to Wales as being significant.

58. VisitBritain has begun efforts to improve the attractiveness and knowledge of UK cities, including Cardiff, with a £10-million "Welcome to Another Side of Britain" campaign to drive tourism from the UK's major international markets, including France, Germany, the Netherlands, Spain and the United States.⁷⁷

59. It is important that UK Government bodies responsible for promoting Wales abroad reflect the distinct identity of each part of the UK in their activities. We are not convinced that VisitBritain is achieving all it can on behalf of Wales. A single Chief Executive for both VisitBritain and VisitEngland does not inspire confidence that VisitBritain is committed equally to increasing tourism to all nations of the UK. We question whether VisitBritain has the knowledge and expertise required to successfully promote Wales and its attractions. We heard criticism of the UK Government's GREAT campaign in promoting Wales. We remain to be convinced that Wales has benefited from this campaign.

60. VisitBritain does not sufficiently promote Wales in its marketing materials, nor does it make a focused offering to international tourists of Wales' attractions. Wales can be reached from London within a few hours. However, it is often not included in UK holiday packages offered by tour operators.

61. *When developing a joint strategy to promote Wales, as a distinct destination, we recommend that VisitBritain and Visit Wales encourage tour operators to include Wales in UK holiday packages. We expect VisitBritain to report its progress on this issue by February 2024.*

62. *VisitBritain should make improvements to better reflect Wales as a distinct location, with an increased Welsh presence in its marketing materials and a greater number of Welsh tourism offerings featured on its website. VisitBritain should report to us on progress made by February 2024.*

63. We await to see whether current VisitBritain marketing campaigns will lead to an improvement in international visitor numbers to Wales, compared with 2019 figures. We expect VisitBritain to report 2023 international visitor figures to us by February 2024.

76 Welsh Government, [Written Statement: Wales International Inbound Tourism Fund](#), Written Statement, 14 December 2021

77 VisitBritain ([TOU0012](#))

4 Relationship between VisitBritain and Visit Wales

64. VisitBritain's primary role is to develop and deliver marketing campaigns to attract visitors to the UK. Visit Wales is the Welsh Government's tourism organisation. Whereas VisitBritain is an arm's length body of the Department for Culture, Media and Sport, operationally independent of the UK Government, Visit Wales works under the direction of the Welsh Government, is a ministerial responsibility of a Minister in the Welsh Government and is staffed by civil servants.

65. A crucial element in the effective marketing of Wales overseas is the relationship between VisitBritain and Visit Wales. During our inquiry, we examined the co-ordination between the two organisations.

66. In 2014, VisitBritain and Visit Wales signed a memorandum of understanding covering policy, operations and consumer and trade marketing. A Welsh representative sits on the VisitBritain board. They also work together through several groups that meet quarterly and comprise representatives from VisitBritain, Visit Wales and the other national tourist boards.

67. Witnesses expressed concern about aspects of the relationship between the two. As a previous employee, Anthony Pickles, former Head of Tourism Affairs at VisitBritain, told us that the two organisations did not work well together. Ian Edwards, Chief Executive of the International Convention Centre Wales, noted that there had been recent improvements in the relationship between the two bodies:

The relationship between Visit Wales and VisitBritain probably four or five years ago was not at its best, but there has been massive improvement and massive collaboration between Visit Wales and VisitBritain.⁷⁸

68. Examples of recent collaboration between the two organisations included the design, roll-out and governance of "We're Good to Go", the official campaign to signal that a tourism and hospitality business has followed Government and industry covid-19 guidelines; and a "Common Standards" group to ensure a cohesive approach to assessments across the nations. The VisitBritain PR team had also worked with Visit Wales to welcome media on press visits from Spain, Germany and north America.

69. We also looked at this issue during our visit to the USA. We found strong co-ordination between the UK and Welsh Government offices on matters relating to trade, identifying and taking advantage of commercial opportunities and giving Welsh businesses and industries access to investors. While in the USA, we were particularly impressed with the work of Efe Sokol, Head of Northeast, United States, for the Welsh Government. She has been particularly proactive in promoting Wales to investors, and was clear that, while co-operation between the Welsh and UK Governments is vital, her primary role is to promote Welsh interests.

70. The then UK Minister for Tourism told us that “there was a good and strong relationship” between VisitBritain and Visit Wales.⁷⁹ The devolved Administrations’ inter-ministerial group on tourism also met regularly to discuss key issues.

Visit Wales as a Departmental body

71. One recurring suggestion as to why Visit Wales and VisitBritain may not have the optimum working relationship was Visit Wales’ locus as a Government Department. While VisitBritain is independent from Government and is able to hire staff with expertise and industry experience, Visit Wales is staffed by civil servants who act under the instruction of the Welsh Government. Anthony Pickles suggested that centralised tourism bodies are the exception to the rule, and that Government Ministers should not have sign off on decisions covering an industry composed of thousands of small businesses.⁸⁰ He also suggested that, while Visit Wales’ marketing has been good, “there is a panoply of issues that if it was an independent body would be fixed”,⁸¹ including poor engagement with business leaders in the sector⁸²; and that if it were an independent arm’s length body it would make braver policy calls and produce more authentic marketing.⁸³ Ultimately, he believed that the current structure left Visit Wales staffed by civil servants who “don’t have the operational independence to push back on ministerial instruction”.⁸⁴

72. Anthony Pickles also suggested that the work of Visit Wales was coloured by the politics of the Welsh Government: “Fundamentally, you come down to the fact that tourism is very political. How you brand your nation is about as political as you can get. It is no surprise that you run into tension”.⁸⁵ He further believed that, for the GREAT campaign:

... there was a resistance to it in Wales, because it has a Union Jack on it, and there was a resistance because it was effectively decided in terms of its content through a marketing board that sat here [in London].⁸⁶

73. As well as political tensions affecting its work, it was also suggested that Visit Wales may be the victim of reordered political priorities. Anthony Pickles highlighted that tourism, despite constituting 11% of the economy, was listed 33rd out of the 46 areas of responsibility of the Deputy Minister for Arts and Sport. He added that, as Visit Wales answers to a Deputy Minister, we can therefore infer that tourism “does not have high priority within the Welsh Government”.⁸⁷ Annette Pritchard, Professor of Tourism Marketing at Leeds Beckett University, told us that “tourism has quite clearly slid down the pecking order”.⁸⁸

74. However, in evidence to us, both VisitBritain and the Welsh Government were content with Visit Wales remaining a Departmental body. When asked whether Visit Wales’ locus

79 [Q214](#)

80 Institute of Welsh Affairs, [Tourism: How Can Wales Perform Better?](#), 19 November 2021

81 [Q159](#)

82 [Q158](#)

83 [Q159](#)

84 Institute of Welsh Affairs, [Tourism: How Can Wales Perform Better?](#), 19 November 2021

85 [Q149](#)

86 [Q154](#)

87 [Q150](#)

88 [Q161](#)

within the Welsh Government presented difficulties in its collaborating with VisitBritain, Chief Executive Patricia Yates told us, “No, it does not”.⁸⁹ Meanwhile, Vaughan Gething MS told us:

I do not think that being internal makes any practical difference to its effectiveness [...] I do not think that somehow trying to create an external body will see a significant benefit to the sector.⁹⁰

Work of Visit Wales

75. We heard broadly positive comments on the work of Visit Wales from tourism operators. Zip World’s Sean Taylor told us that he “had an extremely good relationship with Visit Wales”, and that “they do a good job considering their budget, compared to Northern Ireland and Scotland”.⁹¹ He also highlighted the strength of Visit Wales’ “Year of Adventure” campaign, which benefited the adventure tourism and sustainable tourism sectors.⁹²

76. Most witnesses were impressed by the level of engagement with Visit Wales. According to Matthew Williams, Policy and Communications Manager at the Welsh Sports Association:

Engagement with the Welsh Government I think is pretty good. Engagement with the UK Government has a lot of room for improvement.⁹³

77. Stephen Davies, Chief Executive of Penderyn Distillery, Paul Lewin, General Manager of Ffestiniog and Welsh Highland Railways, Ian Roberts, Finance Director of Portmeirion Cymru, and Sean Taylor all agreed that their businesses’ relationships with Visit Wales were strong. Camilla King, Executive Producer at Llangollen International Musical Eisteddfod, and Graeme Farrow, artistic and creative director at Wales Millennium Centre, also told us that they had a close working relationship with Events Wales.⁹⁴

78. However, some areas for improvement were highlighted to us. Graeme Farrow stated he had “very little direct engagement” with Visit Wales’ marketing campaigns⁹⁵ and Ian Roberts also told us that he would like the opportunity to provide greater input into these campaigns.⁹⁶

79. Ian Roberts told us that it would be beneficial to have greater access to the statistics Visit Wales had, particularly on the demographics of people who visited north-west Wales, to be used as a basis for Portmeirion Cymru’s own marketing.⁹⁷ Sean Taylor also stated he would like more support from Visit Wales with new product launches and suggested there could be a benefit to having a dedicated Tourism Minister in the Welsh Government.⁹⁸

89 [Q218](#)

90 [Q195](#)

91 [Q96](#)

92 [Q120](#)

93 [Q62](#)

94 Events Wales is a Welsh Government body that aims to attract major events to Wales, and to maximise the reach, audience and impact of such events.

95 [Q61](#)

96 [Q96](#)

97 [Q96](#)

98 [Ibid.](#)

80. During our inquiry, we have heard different messages regarding the levels of engagement between VisitBritain and Visit Wales. We welcome recent efforts to improve this relationship. This must remain a priority, as good co-ordination is necessary to marketing Wales in a consistent manner.

81. We were very pleased with the level of co-operation we found between Visit Wales and VisitBritain in New York and Washington. We recommend that this level of co-operation is replicated across the UK's and Welsh Government's other overseas offices.

82. While we are impressed by much of the work of Visit Wales, we question whether the Welsh Government might be better served if the body had greater independence. We call on the Welsh Government to consider whether an independent tourism agency would better serve the interests of Wales.

83. *VisitBritain and Visit Wales, in fulfilling the various other recommendations made in this Report, should assess how they can better collaborate, including in the sharing of data.*

5 Transport infrastructure and Visitor Levy

84. It became clear during the course of our inquiry that two areas of policy that may appear only tangentially related to tourism are in fact key to securing a successful tourism policy. In this Chapter we consider transport infrastructure and visitor levy.

Transport Infrastructure

85. The Welsh Government enjoys broad competence over the overarching area of transport, particularly around local and public transport. The UK Government retains reserved powers for “national” transport, such as strategic road and rail, aviation and maritime policy.

86. During this and previous Parliaments, we have consistently raised concerns regarding transport infrastructure in Wales. We do so again in this Report, as it is clear that poor transport options across Wales are hampering the tourism industry and limiting Wales’ attractiveness to international visitors.

Rail

87. We have raised the poor condition of Welsh rail infrastructure in recent Parliaments. In 2018, we lamented the Government’s decision to cancel rail electrification across south Wales,⁹⁹ while in 2021 we concluded:

Improving transport infrastructure within Wales must be a priority and should focus on how infrastructure initiatives can remedy deprivation, boost the Welsh economy and contribute to meeting decarbonisation targets. Enhancements should include a focus on improving connectivity within Wales, such as more efficient rail links between North and South Wales, as well as between Wales and the rest of the UK.¹⁰⁰

88. On our visit to the USA, we heard of the poor perceptions there of Welsh infrastructure and its negative effect on US tourists considering Wales as a potential tourist destination. Paul Lewin, General Manager of Ffestiniog and Welsh Highland Railways, explained how this could affect tourists choosing Wales as their holiday destination:

... if you look at the national network of buses and trains in north Wales and say, “Would I take my family on these while I am on holiday?” I think you would think very carefully before doing so.¹⁰¹

89. Professor Yen, Dr Canhoto and Dr Wei of Brunel University described as “critical” the need to offer international tourists frequent and easy-to-use public transport.¹⁰² In recognition of this problem, VisitBritain launched its “Final Mile” guidelines to advise attractions and tourism companies on how to better facilitate and promote travel to

99 Welsh Affairs Committee, First Report of Session 2017–19, [The cancellation of rail electrification in South Wales](#)

100 Welsh Affairs Committee, First Report of Session 2021–22, [Railway Infrastructure in Wales](#), HC 438

101 [Q111](#)

102 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei ([TOU0005](#))

popular tourist locations.¹⁰³ Solutions offered included providing shuttle buses from stations to attractions or giving cost incentives for using public transport, such as a 2-for-1 admission voucher, for guests who travel by train.¹⁰⁴ As VisitBritain acknowledged:

No matter how appealing a tourist attraction might be, if visitors are not provided with a clear and simple way to travel there, they are likely to choose to go elsewhere.¹⁰⁵

90. Professor Yen, Dr Canhoto and Dr Wei also highlighted the importance of integrated transport passes for international visitors, suggesting that operators form partnerships and sell time-limited, unlimited-use tickets, to reduce the difficulty of navigating the variety of transport options for international travellers. It is true that Transport for Wales offers the “Explore Wales Pass”, but we were told that its operation is riddled with basic errors. First, and unfathomably, it cannot be purchased online; it is only available for purchase from ticket offices. Secondly, it is inflexible in duration and price, with only one price for a ticket that can be used on four days out of an eight-day period. Thirdly, brand recognition is low, exacerbated by the fact that it cannot be easily found on such websites as Snowdonia National Park’s “Traveling Around” section or the VisitBritain website.¹⁰⁶

91. These three academics further highlighted the need to offer reduced travel prices to international visitors, citing the example of the Japan Rail pass, which offered low-price fares on Japan’s rail networks for sightseers.¹⁰⁷ Once again, such a scheme is already in place, but its operation does not encourage travel specifically within Wales. The BritRail pass offered by UK train providers comes in various types, including England-only, London-only, south-west only and Scotland-only. However, there is no Wales-specific pass, meaning that tourists must purchase a BritRail pass covering the whole of Britain if they wish to use it in Wales. Vaughan Gething MS stated that the Welsh Government was holding conversations on integrated rail and bus tickets for tourists but did not supply specific details.¹⁰⁸

92. The UK Government has recently taken action, investing more than £5 billion in the Great Western route to improve connectivity between London and south Wales. The Great Western Route Modernisation, which delivered new trains, extra passenger capacity and the electrification of the line London Paddington and Cardiff, was completed in 2020.¹⁰⁹ Sir Peter Hendy’s Union Connectivity Review identified mid and west Wales as particularly reliant on tourism and significantly distant from existing strategic transport links. His report also recommended that the UK Government:

Develop a package of railway improvements to increase connectivity and reduce journey times between Cardiff, Birmingham and beyond, which could include better rolling stock, timetable changes and enhanced infrastructure.¹¹⁰

103 VisitBritain, *Final Mile - best practice guidelines*, 2017

104 VisitBritain ([TOU0012](#))

105 Ibid.

106 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyuan Wei ([TOU0005](#))

107 Ibid.

108 [Q203](#)

109 Office of the Secretary of State for Wales and the Department for Digital, Culture, Media and Sport ([TOU0014](#))

110 Department for Transport, *Union Connectivity Review*, November 2021

93. In addition to concerns surrounding national rail infrastructure, there are also problems with Wales' local services, with a consequential lack of transport connectivity to tourist locations. Amid the difficulties and consequential effect on passenger numbers of the Covid-19 pandemic, the Welsh Government decided in early 2021 to nationalise rail services within Wales, with Transport for Wales taking over day-to-day operations of the Welsh rail franchise.

94. Passengers have consistently raised concerns regarding the punctuality and reliability of services and the provision of accurate, up-to-date information. Transport for Wales has consistently performed among the worst of rail providers across a range of metrics. A rail user survey in March 2023 found that there was only a 69% satisfaction with punctuality and reliability, 52% satisfaction with value for money, 55% satisfaction with frequency of services and 60% satisfaction with the level of crowding. These were all the second worst scores among train operators, while the 66% satisfaction with cleanliness and 64% satisfaction with information provided during journeys were the worst.¹¹¹

95. In order to fund upgrades to help alleviate the above problems, we have previously recommended that HS2, the high-speed rail link from London to Manchester and Birmingham, be reclassified as an England-only project, which would have a significant effect on the Barnett formula used to establish appropriate funding for Wales.¹¹² However, in response to that Report, the UK Government declined to implement the Committee's suggestion, and suggested that Wales' income as a result of Barnett formula-based funding has significantly increased due to spending on HS2.¹¹³

96. Vaughan Gething MS signalled agreement with the premise that Welsh infrastructure spending has not remained at an appropriate level, telling us:

We want to see more investment in the rail network in particular to make it easier for people to get around more quickly and more reliably. It is a reserved area and, as you have pointed out, there is a significant problem in the way that that infrastructure spend is currently being used and that Wales is not getting its fair share.¹¹⁴

Road

97. Responsibility for road policy is devolved to the Welsh Government. Witnesses noted the importance of roads to Wales's national infrastructure and to the tourism industry. Many major tourist attractions such as the North Coast Way, Pembrokeshire and Snowdonia are typically hard to reach without a car.¹¹⁵ We have significant concerns regarding the condition of the Welsh road network, particularly Wales' stretch of the M4 motorway, which suffers with heavy congestion around Newport and the Brynglas tunnels.

98. In June 2021, the Welsh Government announced that a review of new road schemes would be undertaken. The independent Roads Review Panel reported in September 2022,

111 Transport Focus, [Rail User Survey](#), 28 March 2023

112 Welsh Affairs Committee, First Report of Session 2021–22, [Railway Infrastructure in Wales](#), HC 438

113 Welsh Affairs Committee, First Special Report of Session 2021–22, [Railway Infrastructure in Wales: Government response to the Committee's First Report of Session 2021–22](#), HC 715

114 [Q206](#)

115 Professor Dorothy Yen, Dr Ana Canhoto and Dr Liyian Wen ([TOU0005](#))

having assessed 59 road projects and made recommendations on which projects to proceed with, which to abandon and which to reconsider in a different form. While this Report was in preparation, the Welsh Government announced that 15 of the projects would go ahead, but all the rest had been rejected or would be revised. However, these and all future projects would have to adhere to a new set of strict criteria in order to be built.

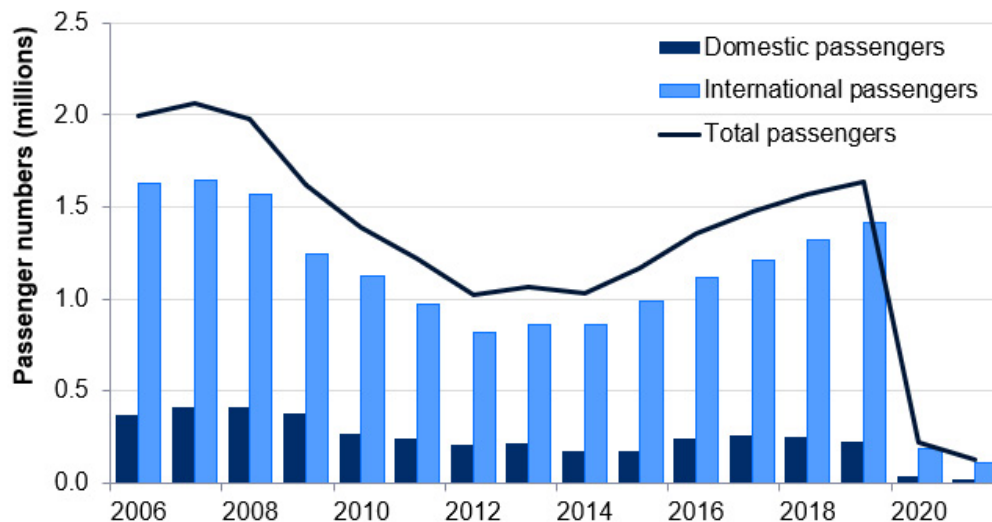
99. The UK Government has been critical of the Welsh Government’s record on roadbuilding. The Secretary of State for Wales noted that Wales will receive funding increases, via the Barnett formula, for any roadbuilding that takes place in England.¹¹⁶

Cardiff Airport

100. Visit Wales research shows that, while 67% of international visitors to Wales arrive by plane, very few fly into Cardiff: 32% fly into Heathrow, 8% fly into Gatwick and 7% fly into Bristol. Meanwhile, only around 4% fly into Cardiff Airport.¹¹⁷

101. On 27 March 2013, the Welsh Government purchased Cardiff Airport for £52 million from TBI plc, which had overseen a drop in international passenger numbers from 1.65 million in 2007 to 0.8 million in 2012. The then First Minister Carwyn Jones said the acquisition would provide “some very exciting opportunities for international trade and tourism”.¹¹⁸ However, while international passenger numbers rose steadily year on year after 2012, reaching 1.4 million by 2019, shortly before the onset of the covid-19 pandemic, the Welsh Government has not yet been able to return numbers to the 2008 peak (see Figure 3).¹¹⁹

Figure 3: Passengers at Cardiff Airport from 2006 to 2021



Source: Welsh Government analysis of Civil Aviation Authority data

102. On top of the complications of covid-19, Cardiff Airport has faced other setbacks: in January 2023, budget airline Wizz Air ceased operating from the airport, while Qatar Airways had previously suspended its Cardiff-Doha route. As a result of these setbacks,

116 [Q9](#), HC Deb, 24 May 2023, Vol. 733

117 [Q29](#)

118 [Cardiff Airport: What's next after a turbulent decade under Welsh Government ownership?](#), ITV, 27 March 2023

119 [StatsWales, International Passengers to and from Cardiff Airport by Flight Type, Area and Year](#), last updated June 2022

the airport is now valued at only £15 million, a £37 million fall in its valuation since it was purchased by the Welsh Government.¹²⁰ Nevertheless, the Government intends to secure direct flights to 50 destinations by 2026, and progress has already begun. Not only has Qatar Airways indicated that it intends to recommence its suspended service in 2024, but Air France has announced daily flights to Paris operated by Eastern Airways, Ryanair has increased the number of flights and destinations it offers from Cardiff, Aer Lingus has resumed offering flights to Belfast and Tui has announced that it will start flights to Sharm El-Sheikh from April 2024.¹²¹

103. The potential importance of Cardiff Airport in boosting the number of international visitors to Wales is immense. Gwyneth Sweatman of FSB Wales told us that 2018 research from Expedia shows that cities that host budget airlines, including in Scotland, saw a 40% uplift in bookings.¹²² Edinburgh Airport, from which Wizz Air, easyJet and Ryanair all fly, saw 11.3 million passengers pass through in 2022, including 8.2 million international passengers.¹²³

104. It is clear that the Welsh Government sees the potential of Cardiff Airport. As Vaughan Gething MS explained, “[t]he airport is still part of how we see our international connectivity [...] We still see a future for the airport”.¹²⁴

105. However, even if the airport is to deliver strong passenger growth, questions remain around its connectivity to the rest of Wales. There is currently no bus service from the airport to Cardiff city centre, while Sean Taylor of Zip World noted its lack of connections to north Wales.¹²⁵

106. We are concerned that poor transport infrastructure has a negative impact on Wales’ ability to attract a greater share of international tourists who arrive in the UK. Transport infrastructure has been underfunded by the UK and Welsh Governments for a number of years. Transport infrastructure spending should be considered a higher priority for spending than at present.

107. We call on the UK Government and the Welsh Government to recognise the key importance of transport to the tourism industry. We urge the UK Government and the Welsh Government to bring forward proposals to address these issues, focussing on the potential positive impact on tourism of resolving this infrastructural deficit. The UK Government and Welsh Government must look creatively at ways to better fund transport infrastructure projects.

108. In particular, we urge that positive consideration be given to the proposed new direct rail link to Heathrow Airport from the west. This would hugely improve connectivity between Wales and Heathrow and make it much easier for international tourists to come to Wales.

120 [Cardiff Airport: Lee Waters ‘not concerned’ about airport’s loss in value](#), ITV, 23 March 2023

121 [Cardiff Airport: What’s next after a turbulent decade under Welsh Government ownership?](#), ITV, 27 March 2023

122 [Q30](#)

123 Edinburgh Airport, [Edinburgh Airport records strong recovery in 2022](#)

124 [Q207](#)

125 [Q108](#)

Visitor levy

109. The Welsh Government was elected on a manifesto which included the introduction of a visitor levy, sometimes labelled a “tourism tax”, which would give local authorities the ability to levy small charges on rooms booked in commercial premises. Its aim is to:

generate additional revenue for local authorities to reinvest in local communities. This would enable them to address some of the costs associated with tourism and encourage a more sustainable approach.¹²⁶

110. The Welsh Government has acknowledged that many in the tourism industry are opposed to the levy. We did not receive a single piece of evidence in support of its introduction, with responses ranging from cautious indifference to outright hostility. However, as Anthony Pickles, former Head of Tourism Affairs at VisitBritain, acknowledged:

Over-tourism is an issue globally, and it is why the Welsh Government are talking about a tourism tax. Ultimately, why should local residents pay for the amenities that tourists use?¹²⁷

111. FSB Wales acknowledged the arguments in favour of the levy but also highlighted potential problems, stating:

There is a necessary discussion to be had about sustainable tourism, destination management, and in ensuring the value of tourism benefits the community and SMEs. Tax and costs may play a part in that, but it cannot be only about revenue raising and should not serve as a distraction from a wider tourism development strategy being in place.¹²⁸

112. The Welsh Beer and Pub Association and VisitBritain pointed to the potential harm to the tourism industry of increased consumer costs. Day visitors to Wales spend an average of £41, compared with £73 for overnight visitors, suggesting that overnight stays are more valuable to the nation¹²⁹; were a levy on accommodation to be introduced, VisitBritain believes that it would neither extract income from day visitors nor encourage them to stay overnight, harming revenue in the long run.¹³⁰ VisitBritain added that personal finances were now cited as the biggest barrier to taking a domestic holiday and therefore the current financial climate should discourage the Welsh Government from introducing the levy.¹³¹ VisitBritain also noted that while many destinations abroad operated a tourism levy, they generally collected VAT at a lower rate from hospitality and tourism businesses than was the case in the UK.¹³² Suzy Davies estimated that the VAT rate in such counties was at “10% and less, generally”.¹³³

126 Welsh Government, [A visitor levy for Wales](#), 30 September 2022

127 [Q170](#)

128 FSB Wales ([TOU0009](#))

129 Welsh Beer and Pub Association ([TOU0016](#))

130 VisitBritain ([TOU0012](#))

131 VisitBritain ([TOU0012](#))

132 VisitBritain ([TOU0012](#))

133 [Q19](#)

113. Vaughan Gething MS acknowledged the low level of support for the levy in the tourism sector, but reaffirmed the Government's commitment to its introduction, although he stated that this would occur towards the end of the Government's current term of office, which will end by May 2026 at the latest.¹³⁴ He recognised the need for flexibility and for certainty around how the raised funds would be used, and the necessity for accountability for local authorities. He told us that such levies were in use worldwide, including in the USA and Spain, and concluded by saying that:

... people want to go somewhere where there is a real community that exists and survives as well, which does bring particular pressures at various high points in the season. It is about the balance of that, and we think that local authorities are best placed to decide, in consultation with their local sector, on whether to introduce a levy, at what level, and then how they will publish information on its use.¹³⁵

114. The UK Government Minister, Stuart Andrew MP, appeared keen to avoid criticism of the Welsh Government on the matter, noting that this was a devolved area. However, the inference from his reply clearly suggests to us that the UK Government does not support such a levy:

We would not want the introduction of a tourism tax in England to deter anybody from coming here as a destination.¹³⁶

115. We are concerned that the proposed visitor levy may have a negative impact on the number of international tourists coming to Wales. While we see some benefits that might accrue from the proposal, there are other ways in which these might be achieved. We feel that the proposal, as it stands, may have a negative impact on the attractiveness of Wales to international tourists, and on the viability of affected businesses in the tourism sector. However, we note that decisions will be taken locally, with those on the ground able to best assess whether the levy would be appropriate in their localities. We ask the Welsh Government to re-examine this issue, and if they are still intent on implementing the levy, to consider ways of mitigating its potentially negative impact on the tourism sector.

134 [Q202](#)

135 [Q202](#)

136 [Q226](#)

Conclusions and recommendations

Wales' profile abroad

1. Wales has a unique culture and language, boasts some of the most spectacular landscapes in Europe and offers a wide range of sporting activities. We are concerned by Wales' relatively low profile overseas and that it attracts such a small proportion of the international visitors coming to the UK. (Paragraph 36)
2. We believe that there is a lack of awareness of Wales' strengths as a holiday destination. Wales lacks a coherent brand for the overseas market. Marketing of Wales must be stronger, with a clear theme devised to attract international tourists based on Wales' unique strengths and attractions. (Paragraph 37)
3. We believe that there is substantial potential for growth in the Welsh tourism market as the global economy recovers post covid-19, and that the tourism bodies responsible for promoting Wales need to grasp that opportunity. Visit Wales must be nimble enough to capitalise on emerging opportunities to market Wales to an international audience, such as the huge international popularity of "Welcome to Wrexham". (Paragraph 38)
4. *We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2024, for promoting Wales as a first-choice destination for international visitors to the UK. A key aspect of this should be the development of a distinctive brand that raises awareness of Wales, which can be used consistently to help market Wales and to raise awareness of its location as a holiday destination.* (Paragraph 39)
5. *Visit Wales should investigate working with the Welsh diaspora to increase the diaspora's attachment to its Welsh heritage, with a view to increasing international visitors to Wales.* (Paragraph 40)

Role of VisitBritain in promoting Wales

6. It is important that UK Government bodies responsible for promoting Wales abroad reflect the distinct identity of each part of the UK in their activities. We are not convinced that VisitBritain is achieving all it can on behalf of Wales. A single Chief Executive for both VisitBritain and VisitEngland does not inspire confidence that VisitBritain is committed equally to increasing tourism to all nations of the UK. We question whether VisitBritain has the knowledge and expertise required to successfully promote Wales and its attractions. We heard criticism of the UK Government's GREAT campaign in promoting Wales. We remain to be convinced that Wales has benefited from this campaign. (Paragraph 59)
7. VisitBritain does not sufficiently promote Wales in its marketing materials, nor does it make a focused offering to international tourists of Wales' attractions. Wales can be reached from London within a few hours. However, it is often not included in UK holiday packages offered by tour operators. (Paragraph 60)

8. *When developing a joint strategy to promote Wales, as a distinct destination, we recommend that VisitBritain and Visit Wales encourage tour operators to include Wales in UK holiday packages. We expect VisitBritain to report its progress on this issue by February 2024. (Paragraph 61)*
9. *VisitBritain should make improvements to better reflect Wales as a distinct location, with an increased Welsh presence in its marketing materials and a greater number of Welsh tourism offerings featured on its website. VisitBritain should report to us on progress made by February 2024. (Paragraph 62)*
10. We await to see whether current VisitBritain marketing campaigns will lead to an improvement in international visitor numbers to Wales, compared with 2019 figures. We expect VisitBritain to report 2023 international visitor figures to us by February 2024. (Paragraph 63)

Relationship between VisitBritain and Visit Wales

11. During our inquiry, we have heard different messages regarding the levels of engagement between VisitBritain and Visit Wales. We welcome recent efforts to improve this relationship. This must remain a priority, as good co-ordination is necessary to marketing Wales in a consistent manner. (Paragraph 80)
12. We were very pleased with the level of co-operation we found between Visit Wales and VisitBritain in New York and Washington. We recommend that this level of co-operation is replicated across the UK's and Welsh Government's other overseas offices. (Paragraph 81)
13. While we are impressed by much of the work of Visit Wales, we question whether the Welsh Government might be better served if the body had greater independence. We call on the Welsh Government to consider whether an independent tourism agency would better serve the interests of Wales. (Paragraph 82)
14. *VisitBritain and Visit Wales, in fulfilling the various other recommendations made in this Report, should assess how they can better collaborate, including in the sharing of data. (Paragraph 83)*

Transport infrastructure and Visitor Levy

15. We are concerned that poor transport infrastructure has a negative impact on Wales' ability to attract a greater share of international tourists who arrive in the UK. Transport infrastructure has been underfunded by the UK and Welsh Governments for a number of years. Transport infrastructure spending should be considered a higher priority for spending than at present. (Paragraph 106)
16. *We call on the UK Government and the Welsh Government to recognise the key importance of transport to the tourism industry. We urge the UK Government and the Welsh Government to bring forward proposals to address these issues, focussing on the potential positive impact on tourism of resolving this infrastructural deficit. The UK Government and Welsh Government must look creatively at ways to better fund transport infrastructure projects. (Paragraph 107)*

17. *In particular, we urge that positive consideration be given to the proposed new direct rail link to Heathrow Airport from the west. This would hugely improve connectivity between Wales and Heathrow and make it much easier for international tourists to come to Wales.* (Paragraph 108)
18. We are concerned that the proposed visitor levy may have a negative impact on the number of international tourists coming to Wales. While we see some benefits that might accrue from the proposal, there are other ways in which these might be achieved. We feel that the proposal, as it stands, may have a negative impact on the attractiveness of Wales to international tourists, and on the viability of affected businesses in the tourism sector. However, we note that decisions will be taken locally, with those on the ground able to best assess whether the levy would be appropriate in their localities. We ask the Welsh Government to re-examine this issue, and if they are still intent on implementing the levy, to consider ways of mitigating its potentially negative impact on the tourism sector. (Paragraph 115)

Formal minutes

Wednesday 5 July 2023

Members present

Rt Hon Stephen Crabb, in the Chair

Virginia Crosbie

Wayne David

Ben Lake

Rob Roberts

Beth Winter

Wales as a global tourist destination

Draft report (*Wales as a global tourist destination*), proposed by the Chair, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Question accordingly agreed to.

Paragraphs 1 to 115 read and agreed to.

Summary agreed to.

Resolved, That the Report be the Fourth Report of the Committee to the House.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available, in accordance with the provisions of Standing Order No. 134.

Adjournment

Adjourned till Wednesday 12 July at 9.30 a.m.

Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the [inquiry publications page](#) of the Committee's website.

Wednesday 20 April 2022

Gwyneth Sweatman, Head of Communications, Federation of Small Businesses Wales; **Suzy Davies**, Chair, Wales Tourism Alliance; **David Chapman**, Executive Director for Wales, UK Hospitality

[Q1–30](#)

David Anderson, Amgueddfa Cymru-Museum Wales; **Rebecca Williams**, Assistant Director, National Trust Cymru; **Ian Edwards**, Chief Executive, The Celtic Collection and ICC Wales

[Q31–50](#)

Wednesday 25 May 2022

Graeme Farrow, Artistic and Creative Director, Wales Millennium Centre; **Louise Miles-Payne**, Director, Creu Cymru and Board Member, UK Theatre; **Fiona Stewart**, Managing Director, Green Man Festival; **Camilla King**, Executive Producer, Llangollen International Musical Eisteddfod; **Matthew Williams**, Policy and Communications Manager, Welsh Sports Association

[Q51–93](#)

Wednesday 15 June 2022

Stephen Davies, Chief Executive, Penderyn Distillery; **Paul Lewin**, General Manager, Ffestiniog and Welsh Highland Railways; **Ian Roberts**, Finance Director, Portmeirion Cymru; **Sean Taylor**, Founder and President, Zip World

[Q94–142](#)

Wednesday 20 July 2022

Anthony Pickles, Former Head of Tourism Affairs, VisitBritain; **Professor Annette Pritchard**, Professor of Tourism Management, Leeds Beckett University; **Professor Dorothy A. Yen**, Professor in Marketing, Brunel Business School, Brunel University London

[Q143–187](#)

Wednesday 1 February 2023

Vaughan Gething MS, Minister for Economy, Welsh Government; **Jason Thomas**, Director of Culture, Sport and Tourism, Welsh Government; **Heledd Owen**, Deputy Director of Marketing, Welsh Government

[Q188–208](#)

Rt Hon Stuart Andrew MP, Minister for Sport, Tourism and Civil Society, Department for Digital, Culture, Media and Sport; **Duncan Parish**, Deputy Director for Tourism and Cultural Diplomacy, Department for Digital, Culture, Media and Sport; **Patricia Yates**, Chief Executive, VisitBritain/VisitEngland

[Q209–249](#)

Published written evidence

The following written evidence was received and can be viewed on the [inquiry publications page](#) of the Committee's website.

TOU numbers are generated by the evidence processing system and so may not be complete.

- 1 Cadw ([TOU0018](#))
- 2 Centre for Advanced Welsh and Celtic Studies, Bangor University and Swansea University ([TOU0001](#))
- 3 Fiona Stewart, Managing Director, Green Man Festival ([TOU0010](#))
- 4 FSB Wales ([TOU0009](#))
- 5 Growth Track 360 ([TOU0019](#))
- 6 Josh Green, Head of Public Affairs, Welsh Beer and Pub Association ([TOU0016](#))
- 7 National Lottery Heritage Fund ([TOU0008](#))
- 8 North Wales Tourism Ltd ([TOU0006](#))
- 9 Office of the Secretary of State for Wales and the Department for Digital, Culture, Media and Sport ([TOU0014](#))
- 10 Professor Dorothy Yen, Professor in Marketing, Dr Ana Canhoto, Reader in Marketing, and Dr Liyuan Wei, Senior Lecturer in Marketing, Brunel University London ([TOU0005](#))
- 11 TAC - Teledwyr Annibynnol Cymru ([TOU0013](#))
- 12 UK Music ([TOU0017](#))
- 13 UK Theatre ([TOU0011](#))
- 14 VisitBritain ([TOU0012](#))
- 15 Welsh Sports Association ([TOU0015](#))

List of Reports from the Committee during the current Parliament

All publications from the Committee are available on the [publications page](#) of the Committee's website.

Session 2022–23

Number	Title	Reference
1st Report	Grid Capacity in Wales	HC 218
2nd Report	Floating Offshore Wind in Wales	HC 1182
3rd Report	Nuclear energy in Wales	HC 240
1st Special Report	The Benefits System in Wales: Government response to the Committee's Fourth Report of Session 2021–22, and correspondence from the Welsh Government	HC 402
2nd Special Report	The economic and cultural impacts of trade and environmental policy on family farms in Wales: Government response to the Committee's Fifth Report of Session 2021–22	HC 470
3rd Special Report	Grid capacity in Wales: Government response to the Committee's First Report	HC 1063
4th Special Report	Floating Offshore Wind in Wales: Government Response to the Committee's Second Report	HC 1405
5th Special Report	Nuclear energy in Wales: Government Response to the Committee's Third Report	HC 1656

Session 2021–22

Number	Title	Reference
1st Report	Railway Infrastructure in Wales	HC 438
2nd Report	Renewable energy in Wales	HC 439
3rd Report	Implications of the UK-Australia FTA for Wales	HC 481
4th Report	The benefits system in Wales	HC 337
5th Report	The economic and cultural impacts of trade and environmental policy on family farms in Wales	HC 607
1st Special Report	Railway infrastructure in Wales: Government response to the Committee's First Report of Session 2021–22	HC 715
2nd Special Report	Renewable energy in Wales	HC 756
3rd Special Report	Implications of the UK/ Australia FTA for Wales: Government response to the Committee's Third Report of Session 2021–22	HC 895

Session 2019–21

Number	Title	Reference
1st Report	Pre-appointment hearing with the Government's preferred candidate for the Chair of S4C	HC 89
2nd Report	Freeports and Wales	HC 205
3rd Report	The Welsh economy and Covid-19: Interim Report	HC 324
4th Report	Wales and the Shared Prosperity Fund: Priorities for the replacement of EU structural funding	HC 90
5th Report	Brexit and trade: implications for Wales	HC 176
1st Special Report	The Armed Forces and Defence Industry in Wales: Government Response to the Committee's First Report of Session 2019	HC 97
2nd Special Report	City Deals and Growth Deals in Wales: Government Response to the Committee's Second Report of Session 2019	HC 146
3rd Special Report	Freeports and Wales: Government Response to Committee's Second Report of Session 2019–21	HC 667
4th Special Report	Wales and the Shared Prosperity Fund: Priorities for the replacement of EU structural funding: Government response to the Committee's Fourth Report of Session 2019–21	HC 1083
5th Special Report	Brexit and trade: implications for Wales: Government response to the Committee's Fifth Report of Session 2019–21	HC 1223