

16th October 2017

Introduction

1. Repeated requests to Visit Wales for information to support this evidence remain unanswered but will be made available to the Committee once received.
2. With the benefit, however, of access to the 35 pages of evidence submitted by Welsh Government on 11th September 2017,¹ and evidence submitted to the Welsh Affairs Committee in 2014 on the [International representation and promotion of Wales by UK bodies](#),² This Week Wales begged permission to submit this supplementary evidence after its first submission,³ which may have appeared over-critical in paragraphs 10 and 11, and unnecessarily harsh in paragraph 20. But there was good reason for this, which this evidence addresses in detail to help break the mold and liberate tourism for Wales.

History

3. On devolution in 1998, Wales inherited a UK tourism Act unfit for purpose in the new digital marketplace. It presented the Wales Tourist Board (WTB)⁴ with a difficult challenge: to get to grips with the dynamics at play in this new marketplace; recognise the resistance to change from vested interest, and gain consensus on how best to move forward.
4. The Board had largely failed to achieve this before being abolished in 2006 along with the Welsh Development Agency (WDA)⁵ and Education and Learning Wales (ELWa).⁶ WTB's functions were transferred in 2006 to the National Assembly for Wales under the 2005 Abolition Order⁷ and subsequently to the Welsh Ministers under the Government of Wales Act 2006.⁸
5. It was, however, a relatively small Visit Wales⁹ department of the Welsh Assembly Government that attempted to absorb the Board's functions with few staff changes and a culture that remained much as before.
6. Thus tourism became devolved in Wales, with one singularly-important factor: the Assembly was now able to pass new Acts relating to tourism that would be better aligned to the new marketplace and the visitor economy as a whole, and to get out from under the influence of VisitBritain to go its own way.
7. Wales needed to assert itself more aggressively and with greater confidence in the marketplace and to believe in itself a great deal more than it believed, and still believes, in VisitBritain with little justification. Visit Wales deference to VisitBritain is mindful of the deference of Wales to Westminster before devolution.
8. These past events need closer examination for Wales to learn from early mistakes; with technology providers in particular that sold tourism web platforms to government, benefited from commission payments on the outputs they produced, and retained intellectual property rights in both the platforms and the data they gathered.

9. This, together with the demise of the WDA and ELWa did little to improve Wales' prospects in the new marketplace and the broader visitor economy.

Tourist Industry v Visitor Economy

10. Each of these Assembly sponsored bodies had a key role to play in developing the visitor economy, embracing the environment, food and drink, farm diversifications into tourism under CAP reforms, training for industry, development of information communications technologies, online mapping, and community development.

11. When it came to tourism, however, all agencies deferred to the one with "Tourist" in its name with budget and staffing inconsistencies that saw WTB as a junior partner (See Annex 1: Tourist Industry v Visitor Economy).¹⁰ Tourism in its narrow sense was dwarfed by the potential of the visitor economy, which was unheard of at the time.

12. Despite being the fourth largest industry in the UK with huge growth potential, tourism in Wales became a Cinderella industry. Instead of co-operating with senior ASPBs and other bodies to manage tourism and grow the visitor economy, the new department spent a large proportion of its budget on promoting a faux Visit Wales brand of little intrinsic value, much as WTB had done before it.

13. This, instead of focusing resource on tourism management to promote solid brand values based on visitors' first hand experience of Wales' unique selling propositions: landscapes, seascapes, clean beaches, Welsh language, indigenous festivals, events and culture that differentiate Wales from other UK destinations.

14. It was an impractical arrangement from the start. The new department inherited a web platform unable to show a return on public money used to build it, throwing good money after bad in attempts to generate visits to the platform rather than bed bookings to accommodation providers as a mark of success.

15. Responsibility for managing tourism was abdicated to local authorities who dealt with it in a piecemeal fashion and were rather more inclined, like Visit Wales, to spend their own budgets on marketing activity. Meanwhile, the Wales Tourism Alliance (WTA) focused its meagre budgets on visitor accommodation and, to a lesser extent, visitor attractions with little expansion into the wider visitor economy.

16. Fragmentation was worsened still by Local Authorities entry into the marketing fray with no effective strategy, instead of focusing on destination management to grow individual destination brands, based on local culture, history, indigenous arts and crafts, food festivals, farmers' markets and distinctive places-of-origin food and drink products.

17. Since devolution, almost twenty years have been forsaken in building a strong *Welsh* Wales brand to match those of other UK countries. It will take a strong and confident Welsh Government to take decisive action necessary to reverse the trend.

18. A first step has already been taken through amalgamation of the three land

management agencies into Natural Resources Wales. It's these resources and the community cultures they give rise to, and continue to support, that must work together to add value to a new, confident and truly indigenous Wales brand

19. Bringing back the Wales Tourist Board under the aegis of the 1969 Development of Tourism Act¹¹ is not an option. The Act is hopelessly out of date and simply not fit for the digital economy of the second millennium.

20. A solution is more likely to be found in an altogether new, arms-length agency to cover all Welsh export opportunities as an extension of tourism, where the customer comes to Wales to sample what the country has to offer.

21. Sponsoring Wales Tourist Board's Welsh Event of the Year Award for 2000¹² bought This Week Wales the benefit of a place alongside Professor Terry Stevens on the panel of competition judges. As a result, the award went to Sesiwn Fawr Dolgellau¹³ a community event expressing Welsh pop culture instead of a major golfing event in South Wales that was tipped for the Award.

22. This Week Wales' aim was to gain greater support for local, cultural events that, properly managed, could elevate small communities in Wales onto the world stage. Major "vanity" events come and go with hardly any lasting trace of gross added value to local economies, and little reliable proof of value for public money spent. There was a need to ensure tourism was allowed to develop naturally as part of a local community rather than having tourism thrust upon it. It's this that has done so much for tourism in Ireland.¹⁴

23. It will be interesting to see how the Major Events Unit will fit into the long-awaited Action Plan for the remaining three years of the 2013-2020 Partnership for Growth tourism strategy. Very little information is available from Visit Wales on how this Action Plan is taking shape.

Selling Wales to the World

24. On 2 August 2017, the National Library of Wales announced that Jason Evans, their Wikipedian in Residence,¹⁵ would transition into the role of National Wikimedian.¹⁶ In this change in role, Evans will be permanently tasked with developing collaborations, programming, and services that advance the representation of Wales and the Welsh language worldwide on Wikimedia projects.

25. Wikipedia is the fifth most visited website in the world after Google, YouTube, Facebook and Baidu.¹⁷ It's the largest repository of open content available in 295 different languages.

26. The aim is to substantially increase the amount of information about Wales on Wikipedia, for worldwide consumption in both Welsh and English. Collaboration with Visit Wales and all other bodies involved in developing Wales' visitor economy will be crucial to gaining maximum traction from this opportunity.

27. In wanting to attract higher spending visitors to Wales from overseas markets and to surpass the overall soft target of 10% increase in visitors to Wales during the lifetime of the Partnership for Growth strategy, it would be a huge mistake for Wales to ignore the growth of the collaborative, sharing economy and new

regulations needed for better governance.¹⁸ “It’s clearly here to stay and the proposition is very attractive... but the big issue is the lack of regulation” (Robert Bernard BDO)¹⁹ Owing to long-standing vested interest in the status quo, it would be unwise for existing bodies most threatened by the disruption to be given the lead in handling this.

28. A recent study by Price Waterhouse Cooper (PwC) for the European Commission shows the UK has emerged as the fastest-growing sharing economy hub in Europe, with transactions almost doubling to £7.4bn in 2015.²⁰ Going forward, PwC expects the UK’s sharing economy to expand at over 30% per year over the next decade, with Airbnb as the main disruptor in the visitor economy. Now valued at £74b, the company has more rooms on its books – 4 million in 191 countries – than the top five hotel brands combined.

29. The exponential growth of peer-to-peer platforms like Airbnb has brought unprecedented choice and economic value. But a question posed by the Open Data Institute is how can they be regulated best to benefit everyone?²¹ According to the ODI, regulation for peer-to-peer accommodation is being discussed around the world, but data isn’t being used effectively to inform, design and implement.²²

30. Owing to the profile of its overnight accommodation, Wales is well positioned to take a UK lead in this debate. The country has an exceptionally high percentage of self-catering accommodation – much resulting from farm diversification into tourism under CAP reforms – and is well placed to benefit from this new economy.

31. Welsh Government, however, can expect substantial resistance from embedded industry bodies likely to lose market traction and will attempt to use their lobbying powers to prevent or at best slow down their inevitable fall from grace. To accede to lobbyists’ attempts to protect the status quo would be doing few favours for Wales’ visitor economy.

32. With Cardiff Wales Airport now in public ownership, the right thing to do would be to embrace this new economy and endeavour to collaborate at arm-length with its proponents to introduce new regulations to address downside affects and accelerate growth of local community tourism economies.

33. With support afforded by VisitBritain and Visit Wales to online travel agents (OTAs) over the last 20 years, this isn’t too much to expect.

Tourism as an Export

34. Tourism is recognised today as a major world export industry that provides gateways to other export markets. Yet at present it’s not included in statistical tables for exports^{23 24} to compare its contribution. This is work the Research and Insights team might care to undertake.

35. Interestingly, the EU-funded 2007-2013 Wales Rural Development (WRD) programme, administered by the Welsh European Funding Office (WEFO) supported 88 tourism-aligned projects at a total project cost of £26.4m. There appeared to be little synergy between this and EU-funded Visit Wales tourism projects other than a requirement for applicants to show they would take advantage of Visit Wales marketing campaigns.

Reaching World Markets Online

36. Information requests have been made to Visit Wales to determine how best to deploy accumulated digital assets with a notional value of £2.7m^{25 26} to exploit substantial gaps in the market. These gaps were identified in two study reports supported by the EU-funded Digital Tourism Business Framework (DTBF).²⁷ The aim is to ensure synergy with Visit Wales' management and marketing activities

37. The disruptive forces of new technology and the innovation it drives does not sit comfortably within the risk-averse environment of the civil service. Welsh Government needs to ensure that the civil service encourages innovation rather than obstructing it by pursuing its own agenda, no matter how well meaning.

38. In 2016 an application was made by Visit Wales for a single tender action for the supply of a dynamic content Google Map. A claim in support of the application that Google Maps was seen as the industry standard for Internet mapping technology was a self-fulfilling prophecy. Public money should not be used to support a product simply on the grounds of its familiarity amongst a particular set of users, no matter how large the group. Doing so bolsters monopoly positions in the market, shuts down competition, and enables large corporations to pursue their goal of market domination.

39. A second justification for not going out to open tender was that the favoured supplier was the only Google Maps Premier Partner in the UK at the time. This was irrelevant. The open tender would have gone out to EU suppliers of which there was one in Norway that presented the required competition.

40. A third justification for single tender action was the risk that Visit Wales would not be able to deliver the dynamic content Google Map for use at the beginning of 2016 if the single tender action was refused. Being under time pressure, however, is insufficient justification for a single tender action.

41. It was also stated in the application that the proposed contract was not WEFO funded. It was, however, to be a component of a larger project supported by EU funding. This had implications for Procurement Regulations and Competition Law in that the overall proposition including the Google Maps element was clearly anti-competitive.

42. The over-riding procurement policy requirement is that all public procurement must be based on value for money. This is defined as "the best mix of quality and effectiveness for the least outlay over the period of use of the goods or services bought". This should be achieved through competition, unless there are compelling reasons to the contrary.

43. The following circumstances can **never** justify single tender action:²⁸

- The customer is familiar with a particular provider, or has a good working relationship with them, or the provider has a good track record with the National Audit Office (NAO) over several years.
- The customer is under time pressure to complete the procurement.

44. There were also open data issues to be considered, in that content and software funded from the public purse should be made available under Open Government Licence (OGL)²⁹ to anyone that can use it to introduce innovative

new products beyond the reach of a civil service obliged to comply with Competition Law.

45. In the same request for a single tender action it was asserted that potential and returning visitors to the visitwales.com website require inspirational and informative information to aid their holiday planning and booking process. As evidence of the success it was stated that website had received 4.8m visitors since its launch in July 2013, and this gives financial support to over 12,500 providers throughout Wales.

46. To estimate the value rather than the quantum of visitors to the website, Visit Wales uses a formula that requires a nine-step calculation with two unknowns that have been requested to support this evidence (see paragraph 1).

47. Meanwhile, the table below provides an analysis of key performance indicators (KPIs) for the website measured by Google Analytics for Visit Wales. It confirms Visit Wales' claims that the number of visitors to the site has increased dramatically since it was launched in July 2013.

2014-2016 Overall Comparisons:				2014-2016 Bounce Rate Evaluations & Results			
Year	2014	2016		2014	2014	2016	2016
Time period	20th Oct 2013-19th Oct 2014	1st Jan 2016-31st Dec 2016	Change	Single Page Sessions 2014	Multi Page Sessions 2014	Single Page Sessions 2016	Multi Page Sessions 2016
Sessions	3,442,922	6,092,828	77%	1,757,267	1,685,655	3,695,909	2,396,919
Users	2,607,020	4,968,308	91%	1,330,623	1,276,397	3,013,776	1,954,532
Page Views	12,385,476	15,064,073	22%	6,321,547	6,063,929	9,137,867	5,926,206
Pages/ Session	3.60	2.47	-31%	1.00	2.60	1.00	1.47
Avg Session Duration	00.03:02	00.02:09	-29%				
Bounce Rate	51.04%	60.66%	19%	1,330,623	1,276,397	3,013,776	1,954,532
% New sessions	75.08%	74.81%	0%	1,319,356	1,265,589	2,764,910	1,793,135

Source: Visit Wales (2015)

48. On closer inspection, however, between 2014 and 2016 the increasingly high 60.66% Bounce Rate; the reduced 1.23 number of Average Repeat Visits; the 31% reduction in Pages/ Session; the 29% reduction in Average Session Duration, and high rate of churn tell a different story with potentially adverse implications for VFM, GVA and the value of web visitors shown in Figure 14 below:

Figure 14: Added value estimates for Visit Wales website (2010-2013)

Source: Visit Wales (2015)	2010	2011	2012	2013
Web visitors to UK site	421,591	649,162	626,221	808,775
Value of web visitors (£)	85,792,963	120,977,556	108,698,916	137,554,417

49. To predicate performance on web traffic alone, however, is fraught with difficulty because there's no commercial evidence by which to measure it. The only thing that can be determined with the evidence available is the per capita

cost of attracting visitors to the Visit Wales websites, which is a cost and not an economic outcome.

50. To justify additional expenditure on this level of evidence is a high-risk strategy in handling public funds and risks throwing good money after bad. In seeking to substantiate value for money (VFM)³⁰ and gross value added (GVA) requires dispassionate scrutiny by people disengaged from the project but with sufficient knowledge and experience to help steer it in the right direction.

51. Web traffic means little unless it results in measurable economic outcomes that can be fully evidenced. VisitBritain generated high levels of web traffic in competition with other travel brands using pay-per-click (PPC) advertising at substantial cost to the taxpayer but produced only a reported 202 bookings a month at the same time as diluting the market for legitimate providers. Brought to book by the EU Competitions Office, it was found to be competing unfairly with private sector businesses while producing a minus return on public investment.

52. The full cost of supporting the visitwales.co.uk and visitwales.com websites needs to be established. The calculation should include all related procurement costs and Visit Wales support staff costs including overheads or 2 x salary over the last 4-year period 2010-2013.

53. The resulting total should then be compared with the value of booking referrals generated by the websites over the same period, if this data is available from the OTAs they serve. As with other State-aided web platforms like VisitBritain, the results are unlikely to make good reading.

Competition Law v State Aid

54. EU structural funding is designed to help restructure economies where fault lines exist in administrative structures, and mindsets frequently stand in the way of progress.

55. The money doesn't come without terms and conditions. It comes with a set of rules and regulations,³¹ not so much to govern to but to make room for healthy competition that drives innovation; gives entrepreneurship its head, and generates economic wealth.

56. For governments to blame "State Aid" for its inability to act, demonstrates a lack of understanding of what Competition Law sets out to achieve. It's not State Aid that blocks progress but Competition Law that encourages it.

57. State aid rules apply to any organisations or bodies involved in economic activity. For State Aid purposes these bodies are designated "undertakings". Destination Management Organisations (DMOs) who are trading in any form, including acting as de-facto sales agents, are clearly undertakings, whether or not they're dealing with public funds.

58. In 2006, following State-aid complaints, the European Commission investigated web platforms funded by Visit Wales, VisitBritain and VisitScotland to find these bodies were using public money to offer online booking services that competed unfairly with commercial operators.

59. Following advice from the Welsh Assembly Government Legal and State Aid

teams, Visit Wales withdrew its online booking facility from its websites by 1st January 2008. Given all marketing leads to a sale, this rendered the platform ineffective in achieving what it had promised the trade it would achieve when first launched in 2001.

60. It negated a key justification for spending public money on the platform in the first place. Its effect was to leave several thousand small and micro accommodation businesses in Wales, stranded and digitally immature.

61. Many quickly became prey to technology companies with little knowledge of the tourist industry in Wales, who promised much and delivered little in the way of lasting value. Others fell directly into the hands of predatory Online Travel Agents (OTAs), including eviivo Limited's own OTA subsidiary BookDirectRooms, which had been receiving commission payments up to that point on bookings made via the ill-fated VisitBritain platform.

62. With eviivo Limited having leased its technology to VisitBritain in the first instance, it was, and remains, a pernicious process that the civil service failed to recognise and has had difficulty coming to terms with since.

63. It was to be another 3 years before the EU-funded Digital Tourism Business Framework (DTBF) programme was launched to bring 2,000 such businesses to digital maturity. Despite closure of its booking system it included further expenditure on the Visit Wales web platform to improve its usability and performance. An independent review of the final evaluation of the DTBF project found it had failed on both counts.

64. Nevertheless, State-aid complaints continued³²⁻³⁷ with over 50 companies in the UK claiming unfair competition from publicly funded web platforms. Matters finally came to a head in 2011, narrowly avoiding a class action by the companies that had been adversely affected.

65. The EU Commission's findings led to urgent restorative action by VisitBritain resulting in:

- withdrawal in 2011 by VisitEngland of public funds from EnglandNet forcing closure of the National Tourism Open Platform (NTOP);
- cancellation by VisitBritain of its 10th November 2006 Commercial Cooperation Agreement with Agilysis and eviivo Limited, which, as a matter of expedience, Visit Wales had become party to in later years;
- assets including the National Tourism Product Database passing into the hands of eviivo Limited;
- the disbanding of the VisitBritain web team leading to civil service redundancies.

66. By virtue of VisitBritain's Agreement³⁸ with the Welsh Ministers to extend use of its web platform to Visit Wales, it left Wales' civil service in an embarrassing position and forced to take emergency action. It resulted in:

- an award by Visit Wales of an emergency contract under single tender action, not entirely at arms-length, to retain the services of evvivo Limited;
- the award of a £300k contract for data collection services, including business training, to a consortium of suppliers, Mid Wales Tourism Limited (MWT) and

North Wales Tourism Limited (NWT), led by New Vision Group Limited (NVG);

- use of the training funds to sell NVG's booking products to businesses attending the training courses;
- the creation thereby of a de-facto "Destination Marketing System" for Wales, which circumvented rather than complied with Competition Law, and
- the use of public funds to bid for keyphrases in the pay-per-click (PPC) market in competition with online travel agents (OTAs) including eviivo Limited, and the AA who were also contracted to eviivo Limited.

67. The effect of this was to increase the bidding prices for keyphrases, adding to OTAs' PPC costs, which had to be recovered in booking commissions. The model was unsustainable.

68. Booking enquiries achieved by Visit Wales were referred to the OTAs for conversion and commission to be collected, thus Visit Wales became a de-facto sales agent for the OTAs. In a number of instances, the OTAs were the same, or branches of the same, entities providing supply-end technology products and services under contract to Visit Wales e.g. eviivo Limited and New Vision Group.

69. This created a complex legal environment and a 700-page compilation of the issues was made available by the European Commission for the pursuit of claims through National courts, likely to be a faster avenue for resolution. The issues, again, were fairly obvious. Circumvent rather than comply.

70. Online booking represents a cost, not a revenue stream. Filling the funnel is costly with little evidence of success. In the case of VisitBritain, most of its marketing efforts were directed towards filling the funnel of visits to their website.

71. Contemporary research, however, confirmed the EU Competition Office's view that visitors to visitbritain.com had generally made the decision to visit Britain – they were already at the "intention stage" of the consumer purchasing cycle, which meant a substantial waste of marketing money and effort.

72. The House of Commons Culture, Media and Sports Committee found VisitBritain had, in truth, succumbed to the temptation of "mission creep". They had obstructed and found themselves ignored by large sections of the industry including some of the most progressive companies in UK tourism. VisitBritain had focused on structures and relationships with other publicly funded bodies, which have failed to help them fulfil their statutory role. They had failed to engage the private sector to any appreciable extent.³⁹

73. The EU Competition Office also found there was no focus on primary (statutory) duty of promoting tourism to Britain. VisitBritain had, instead, been trying to promote visits to its own website, which had been singularly ineffective in converting these visitors into real bookings via its polling service which was said to be attracting just 202 bookings a month.

74. Visit Wales failure was copy-book. So much so that in 2015 only 11% of accommodation business in Wales had signed up the polling system with no evidence available of bookings received by these few.

75. The investigation found the VisitBritain platform to be a substantial waste of

marketing money and effort; there was no focus on the primary (statutory) duty of promoting tourism to Britain; it had been trying instead to promote visits to its own website, and that the site had been singularly ineffective in converting these visitors into real bookings via its polling service.

76. According to the Commission, this implied real risk for all National Tourism Organisations (NTOs) engaged in this misdirection of resources. If applied throughout Europe, or indeed worldwide, then there is a substantial waste of taxpayers' money. If DMSs cost more than they generate in direct revenue and generate very little business for businesses, they distort the use of public sector resources; they don't serve the visitor and, above all, they don't serve the industry. A poor distribution channel is a poor investment that dilutes the market, competes unfairly with private sector investment in new innovation, and presents a barrier to progress.

77. Meanwhile, by virtue of its separate contracts with eviivo Limited and New Vision Group, Visit Wales believed they had engineered a reasonable solution under pressing circumstances but hadn't accounted for the Chinese wall being broken by NVG, ushering in its booking products under cover of training paid for by Visit Wales and delivered by the other beneficiaries, MWT and NWT, of the information collection contract.

78. The result was the de-facto, State-aided DMS that circumvented rather than complied with Competition Law and, more recently, Visit Wales like VisitBritain before it, succumbing to the temptation of "mission creep" beyond its statutory remit, justified by claims of added value not yet proven.

79. In its published written evidence to the House of Commons Welsh Affairs Committee 2014 on the International representation and promotion of Wales by UK bodies, the Institute of Directors in Wales observed under the headings Probity, Accountability and Measurement: "Substantial sums of public money are required to carry out promotional activities. Organisations involved in these activities must demonstrate careful stewardship of public funds. Overseas promotional organisations must be fully accountable to the Welsh Government and the National Assembly for Wales. All activities should be subject to on-going and systematic evaluation to ensure they are appropriately targeted and managed, their economic impacts are assessed where possible, and their value for money can be demonstrated."⁴⁰

80. This is even more apposite in the new digital marketplace, where mission creep can easily occur with insufficient justification for public money spent.

So Where to from Here?

81. In response to a call from Welsh Tories for a major overhaul of Welsh tourism, Ken Skates AM, Welsh Deputy Minister for Culture, Sport and Tourism at the time, was reported to have said getting rid of Visit Wales would cause chaos.⁴¹

82. A major overhaul, however, would not mean breaking up teams that function well within the department and whose focus is on tourism management, working with Local Authorities and other strategic partners to improve the in-visit experience to reinforce the Wales brand. Not “Visit Wales”, however, which has run its course and was never a match for the WDA brand in terms of business and economic development.

83. The Major Events Unit would be maintained, possibly renamed the Wales Festivals and Events team to nurture indigenous events, which reflect Welsh language and culture and the appropriately named *Light Springs through the Dark* statement⁴² made by the Cabinet Secretary as a prelude to change.

84. The Research and Insights team, now back up to full strength, would sharpen its pencil on monitoring value for public money spent on tourism, and to reassess the formula for determining gross added value to justify previous expenditure and new applications for public funds.

85. If the team were to take on the work mentioned in Para 34, this would then complete the picture. With tourism to Wales devolved, so too is its visitor economy. It can be argued that all inbound tourism to Wales is an export,

86. A tighter relationship then between FSB Wales, Business Wales and Careers Wales would focus on the many micro-businesses delivering all aspects of the in-visit experience at the interface between host communities and visitors, in partnership with Arts Council Wales, Historic Wales and Natural Resources Wales amongst others (see Annex 2).

87. New pillars likely to support the growth of Wales’ visitor economy are:

- this current Inquiry into Selling Wales to the World;
- the newly-reviewed Welsh Government Open Data Plan;⁴⁴
- the Independent Review of Support for Publishing and Literature in Wales;⁴⁵
- Historic Wales,⁴⁶ and
- the Lle Geo-Portal for Wales.⁴⁷

88. Finally, all ideas of bringing back the Welsh Development Agency must be put aside. The WDA was an arms-length body focused on importing industry to Wales. What’s needed now is an arms-length body focusing on exports from Wales. It should understand and embrace tourism as an export industry to help build a visitor economy from which other export markets can be grown.

89. Welsh food and drink, business training, and information communication technologies are prime examples of industries affected by the failure of WDA and WTB to collaborate to compete with other tourism destinations, rather than competing with each other. It’s ironic that the growth of tourism itself was, and continues to be, badly affected by this failure.

90. Every visitor to Wales should be recruited as an Ambassador to help build the *Welsh* Wales brand with Hybu Cig Cymru and Welsh Lamb entering the fray, and Natural Resources Wales working with the cultural agencies and Wikipedia to help build Wales' image abroad.

91. It needs a new, arm's-length body – a community interest company for example – to develop and implement new policies to grow Wales' visitor economy by sparking innovation and entrepreneurial activity, using new technology to get under the skin of the macro and down to real business.

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ANNEX 1: TOURIST INDUSTRY v VISITOR ECONOMY

The tables below comprises all Executive Assembly Sponsored Bodies¹ that have/ have had an impact on the visit experience, contribute substantially to the visitor economy yet only the Wales Tourist Board carried a specific brief for tourism under the Development of Tourism Act 1969 with a budget that saw it little more than a junior partner.

Table 1: 1997-98

EXECUTIVE ASSEMBLY SPONSORED BODIES (ASPBs) 1997-98 (VISITOR ECONOMY & VISIT EXPERIENCE)	£m	%	Staff	%
Welsh Development Agency (WDA)*	88	38%	337	17%
Cardiff Bay Development Corporation	48	21%	101	5%
Countryside Council for Wales (CCW)	23	10%	343	18%
Wales Tourist Board (WTB)	15	7%	112	6%
Arts Council of Wales	14	6%	69	4%
National Museums and Galleries of Wales	12	5%	465	24%
Development Board for Rural Wales (DBRW)*	10	4%	88	5%
Sports Council for Wales	7	3%	155	8%
Welsh Language Board	6	3%	30	2%
National Library of Wales	5	2%	210	11%
Royal Commission on the Ancient and Historic Monuments for Wales	1	0%	31	2%
TOTALS:	229	100%	1,941	100%

Table 2: 1998-99

EXECUTIVE ASSEMBLY SPONSORED BODIES (ASPBs) 1998-99 (VISITOR ECONOMY & VISIT EXPERIENCE)	£m	%	Staff	%
Welsh Development Agency (WDA)*	122	49%	482	23%
Cardiff Bay Development Corporation	37	15%	94	5%
Countryside Council for Wales (CCW)	26	10%	358	17%
Wales Tourist Board (WTB)	15	6%	107	5%
Arts Council of Wales	14	6%	69	3%
National Museums and Galleries of Wales	16	6%	496	24%
Development Board for Rural Wales (DBRW)*	0	0%	0	0%
Sports Council for Wales	7	3%	161	8%
Welsh Language Board	6	2%	29	1%
National Library of Wales	6	2%	228	11%
Royal Commission on the Ancient and Historic Monuments for Wales	1	0%	31	2%
TOTALS:	250	100%	2,055	100%

*DBRW was integrated into the WDA in 1998. This resulted in uplift in WDA's 1998-99 budget to £122m and staff numbers in 1990 to 482.

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ANNEX 2: THE VISITOR ECONOMY

The listings below give a broad impression of tourism assets and resources that contribute/ have contributed in various ways to the visit experience. The list is by no means exhaustive:

Wales Tourist Board

Tourism

- Development of Tourism Act 1969¹
- Tourism (Overseas promotion) (Wales) Act²

Welsh Development Agency

1. Food and drink
 - Taste of Wales–Blas ar Gymru
2. Information Communication Technologies
 - Cymru Ar-lein
 - Geospatial Data Gathering
 - Online Mapping Development
3. Industry training
 - Opportunity Wales

Countryside Council for Wales

1. Landmap Information System
 - Cultural Aspects
 - History & Archaeology Aspects
 - Visual & Sensory aspects
2. Geospatial resources
 - Location-based Datasets
 - Ordnance Survey Derived Data
3. National Parks³
 - Brecon Beacons
 - Pembrokeshire Coast

- Snowdonia
 - Valleys Regional Park (not designated)⁴
4. National Trails⁵
- Glyndŵr's Way
 - Offa's Dyke Path
 - Pembrokeshire Coast Path

- Wales Coast Path (not designated)
5. National Nature Reserves (71)⁶
- Isle of Anglesey: 4 reserves
 - North Wales: 25 reserves
 - Mid Wales: 11 reserves
 - South Wales: 31 reserves

Natural Resources Wales

1. Land Management Agencies Merger
- Countryside Council for Wales
 - Forestry Commission Wales
 - Environment Agency Wales
2. Landscapes and seascapes

3. Forestry Recreation
4. Beaches
5. Lle Geo-portal for Wales
6. Taking a Place Based Approach

Development Board for Rural Wales

1. Rural regeneration
2. Development of Rural Wales Act 1976⁷

Dŵr Cymru–Welsh Water

1. Digital Wales Mapping Development
2. Inland Waterways Management

- | | |
|---|---|
| <ul style="list-style-type: none"> • Cefni • Llyn Alaw • Alwen • Llyn Aled • Llyn Brenig • Beacons • Cantref | <ul style="list-style-type: none"> • Elan Valley • Llyn On/ Garwnant • Tal-y-Bont • Usk • Llandegfedd • Llys-y-Frân |
|---|---|

Cadw

Castles

- | | |
|---|---|
| <ul style="list-style-type: none"> • Barry Castle • Beaumaris Castle • Bronllys Castle • Caernarfon Castle • Caerphilly Castle • Carreg Cennen Castle • Castell Coch • Castell y Bere • Chepstow Castle • Cilgerran Castle • Coity Castle • Conwy Castle • Criccieth Castle • Denbigh Castle • Dinefwr Castle • Dolbadarn Castle • Dolforwyn Castle • Dolwyddelan Castle • Dryslwyn Castle • Ewloe Castle • Flint Castle | <ul style="list-style-type: none"> • Grosmont Castle • Harlech Castle • Kidwelly Castle • Laugharne Castle • Llansteffan Castle • Llawhaden Castle • Loughor Castle • Monmouth Castle • Montgomery Castle • Newcastle • Newport Castle • Ogmore Castle • Old Beaupre Castle • Oxwich Castle • Raglan Castle • Rhuddlan Castle • Skenfrith Castle • St Donat's Castle • St Quintins Castle • Swansea Castle • Tretower Castle |
|---|---|

- Twthill, Rhuddlan
- Weobley Castle

- White Castle
- Wiston Castle

National Trust

1. Great Houses⁸

- Tredegar House
- Erddig
- Newton House, Dinefwr
- Plas Newydd
- Plas yn Rhiw
- Llanerchaeron
- Dyffryn Gardens

2. Mighty Castles⁹

- Chirk Castle
- Penrhyn Castle
- Powis Castle
- Dinefwr Castle
- Skenfrith Castle
- Cilgerran Castle

3. Quirky, Cosy or Urban Places¹⁰

- Tŷ Mawr Wybrnant

- Dolaucothi Gold Mines
- Aberdulais Tin Works and Waterfall
- Tudor Merchant's House
- Conwy Suspension Bridge
- The Kymin
- Aberconwy House
- Porth y Swnt

4. Glorious Gardens in Wales¹¹

- Bodnant Garden
- Chirk Castle, Wrexham
- Colby Woodland Garden
- Dyffryn Gardens
- Erddig
- Powis Castle
- Plas Newydd House and Gardens
- Plas yn Rhiw
- Tredegar House

Royal Society for the Protection of Birds (RSPB)

RSPB Nature Reserves¹²

- Conwy
- Ynys-hir
- Cwm Clydach
- South Stack
- Gwenffrwd-dinas
- Carngafallt
- Llyn Evyrnwy/ Llyn Llanwddyn
- Ramsey Island
- Valley Wetlands
- Machynlleth
- Newport Wetlands

Canal & River Trust

Canals¹³

- Llangollen/ Montgomery Canals
- Monmouthshire & Brecon Canal

Visit Wales

1. Research and Insights Team
2. Major Events Unit
3. Visit Wales Website

National Library of Wales

1. Wales' National Wikimedian¹⁴
2. The People's Collection¹⁵

Literature Wales

Literary Tourism

- Land of Legends
- International Dylan Thomas Day
- Weird and Wonderful Wales
- The Valley, The City, The Village: Stories of Wales and India

- Welsh Encyclopaedia

Arts Council Wales

1. Gwyliau Cymru–Festivals of Wales
2. Ireland–Wales Co-operation Programme 2014-2020¹⁶
3. Association of Irish Festivals and Events (AOIFE)

Welsh Language Policy Unit

Cymraeg 2050 Work Programme¹⁷

Sports Council for Wales¹⁸

Community Sport

Historic Wales¹⁹

1. Royal Commission on the Ancient and Historical Monuments of Wales²⁰
 - Coflein²¹
 - National Monuments Record of Wales (NMRW)
 - Coflein Mapping
2. The Welsh Archaeological Trusts
3. Cadw
4. National Museum Wales

Keep Wales Tidy²²

1. Tidy Towns
2. Tidy Beaches
3. Tidy Wales Awards
4. Long Forest

Wales Rural Development Programme 2014-2020

1. Measure 16.1
2. Measure 16.2

Hybu Cig Cymru

Protected Geographical Indication (PGI)²³

- Welsh Lamb and Welsh Beef

Welsh Council for Voluntary Action (WCVA)²⁴

1. Third Wales
2. The Co-production Network for Wales²⁵
3. County Voluntary Councils
4. □ational voluntary organisations

Open Data Institute (ODI) Cardiff Node²⁶

1. Peer-to-Peer Accommodation World Study
2. GovCamp Cymru²⁷

Business Wales

Tourism Product Innovation

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