



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

www.cymru.gov.uk

A photograph of a family of four running on a beach at sunset. The sun is low on the horizon, creating long shadows and a golden glow. The family consists of a young boy in the foreground, a young girl, a woman, and a man. A dog is running alongside them on the right. The background shows the ocean and distant hills.

Visit Wales: Strategic Marketing Action Plan Summary 2010 – 2013

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1.0 Purpose



1.1 The Strategic Marketing Action Plan (SMAP) provides a framework within which action plans for Visit Wales's marketing activities are developed. It does not replace these action plans. The action plans will be consistent with the principles set out in SMAP, but will always reflect developing market conditions and the needs of our stakeholders in the Wales tourism industry.

1.2 The SMAP also seeks to better define the marketing role of Visit Wales so that our partners and stakeholders are able to plan their own activity more effectively. Our aim is to encourage tourism marketing for Wales that avoids duplication.



2.0 Situation



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- 2.1 The visitor economy makes an important contribution to Wales's economic, social and cultural well-being. Tourism contributes some £3.5 billion to the Welsh economy each year. Overnight visits by domestic (UK) and international visitors contribute £1,745 billion to the overall total, with the balance coming from day visits by residents of Wales and England.
- 2.2 The domestic UK market is by far the most important source of overnight visits to Wales, providing around 90% of all visits to Wales. There has been a slow decline in the volume of the domestic UK tourism market since 2002.
- 2.3 Visitors from outside the UK do, however, spend rather more during their time in Wales. While international visitors account for about 10% of the total overnight visits to Wales, they contribute almost 20% to the amount spent in Wales by staying visitors.
- 2.4 Broader social trends towards valuing authenticity and distinctive local products and experiences underline the relevance of Wales's extensive tourism offering. There have been significant incremental improvements in the tourism product in Wales since the turn of the century, but some visitors' experiences continue to be uneven.
- 2.5 Access to online information and services is pervasive and demanded by today's consumers. Potential visitors seek information, opinion and advice from a wide variety of sources, and successful destinations are those that are discussed and recommended in many online places.



3.0 External Marketing Environment: A Realistic Scenario for 2010 – 2013



- 3.1 The external marketing environment is expected to remain challenging during the lifetime of the SMAP. Economic conditions in particular are expected to impact on consumers' purchasing patterns. There are opportunities for Wales, but the downward pressure on public sector spending will make realizing any opportunity a challenge.
- 3.2 Visit Wales expects the global economy to gradually return to modest growth. The long-term future growth trend will be significantly slower than over the past decade in those markets that are most important to the Wales visitor economy. There will be slow progress in restoring the public finances in most developed countries, and consumer confidence will remain fragile compared with recent years as uncertainty over incomes and job security continues.
- 3.3 We can expect pandemic health alerts to occur comparatively regularly, and it is sadly inevitable that instability in some regions of the world will result in a continuing risk of random terror attacks on civilian populations.
- 3.4 Global tourism is also subject to the effects of natural events. Extreme weather and other natural phenomena like the Eyjafjallajökull volcano have a direct impact on travel plans. More generally, any high-profile reminders of nature's ability to disrupt global travel may make consumers temporarily wary of embarking on adventurous itineraries, and may also affect longer-term holiday plans.
- 3.5 Use of the internet for everything, including travel planning and purchasing, will only increase.

Traditional publishers (including official tourism organisations) will remain a useful source of online information only if their content continues to evolve to engage and inspire consumers who are spoilt for online choice.

- 3.5 Tourism has, however, proven to be a particularly resilient industry, capable of continuing to contribute to a destination's economic well-being during difficult times. In the face of significant economic and emotional disincentives to travel, we expect many consumers to continue to value and to prioritise rewarding holiday experiences.



4.0 Challenge

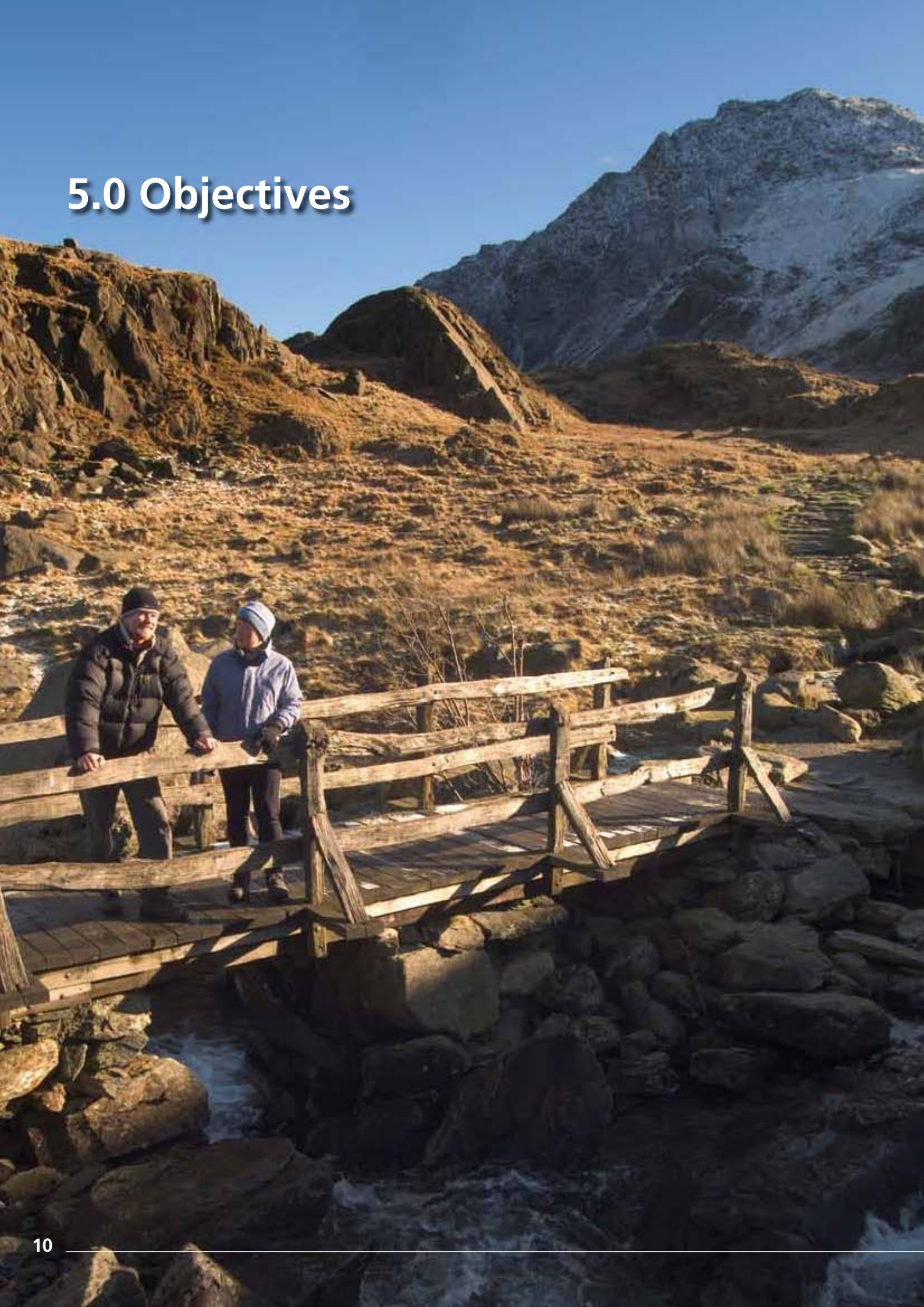


4.1 Research shows us that recent visitors with first-hand experience of the tourism product in Wales are very positive about their experience. Non-visitors, and those who have not visited for three or more years, have a different view.

4.2 Their impression of Wales is coloured by persistent stereotypes, particularly the notion that, although Wales is endowed with plenty of natural beauty, there is little else to see and do here. Unlike those who have visited, many non-visitors are not aware of the range of events, attractions and activities that Wales has to offer.



5.0 Objectives



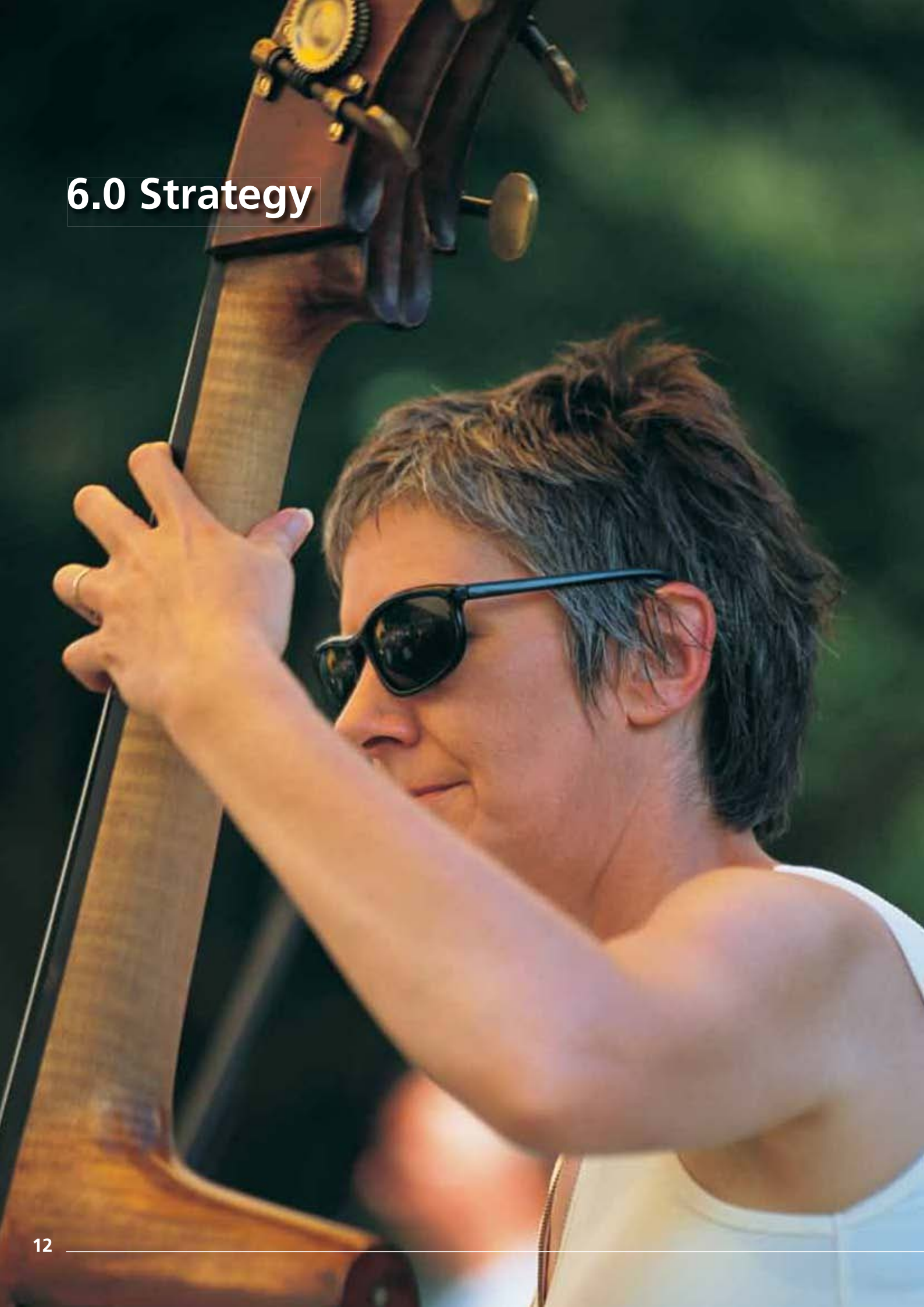
The priority for the Visit Wales marketing team is to work with our partners in the public and private sectors to build a sustainable visitor economy.

During the period 2010-2013, we will aim to do so by:

- Maintaining the visitor economy's £3.5 billion annual contribution to Wales
- Improving perceptions of Wales as a tourism destination in order to create an environment of increased demand for our stakeholders in 2013 and beyond.

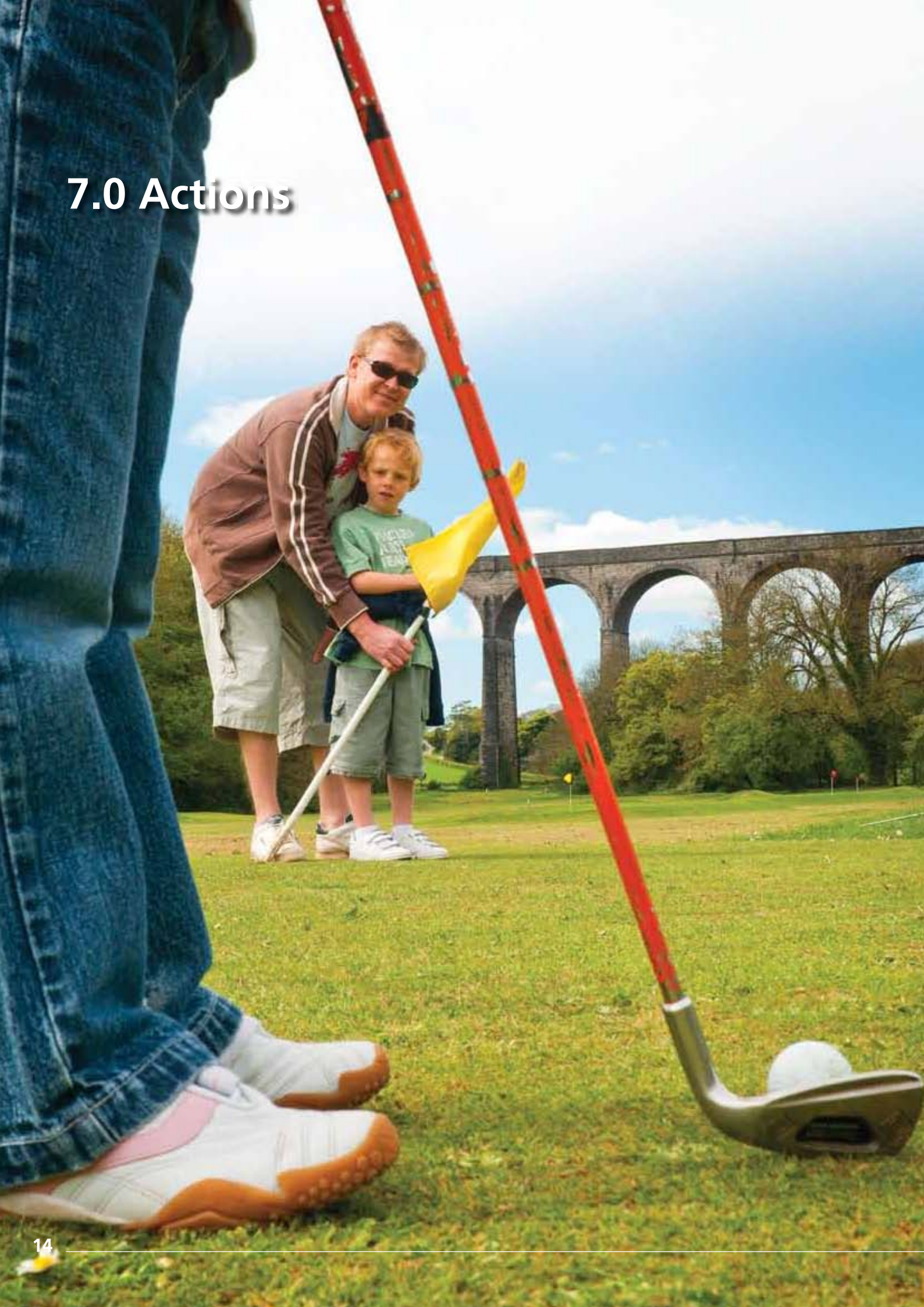


6.0 Strategy



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- 6.1 A national tourism body should, in principle, be focussed on generating new business for the destination. Visit Wales provides the most value to the visitor economy where we can provide incremental demand or activate latent demand. Relationships with existing customers are better managed at a level closer to the customer's purchase.
- 6.2 However, Visit Wales evaluation work also reveals that Wales could lose more uncommitted visitors in the near future than we could gain non-visitors from our competitors. We therefore need a balanced marketing strategy that refocuses resources and effort over time.
- 6.3 Over the lifetime of SMAP, Visit Wales will implement a gradual change in emphasis from customer retention to acquisition. Much of the remaining retention work will move online.
- 6.4 We cannot effectively build Wales's reputation as a place to visit by confining our marketing to bland, generic claims that any other destination could make. Our marketing must be built on strong statements of opinion, and substantiated by content that showcases the specific products offered by Wales. In order to access this product information and related expertise, we need to work more closely with our partners in the tourism industry.
- 6.5 A prioritized analysis of Wales's strengths reveals that the following product areas deliver significant actual and potential benefits in terms of building our reputation and motivating sustainable visits:
- Adventure Activities
 - Business Tourism
 - Culture and Heritage
 - Family Attractions
 - Food
 - Golf
 - Mountain Biking/Off-road Cycling
 - Sustainable Tourism
 - Walking
- 6.6 Separate product campaigns will be replaced with the integration of product information into all the appropriate elements of Visit Wales marketing activity. We will engage with the Wales Tourism Alliance, its affiliated industry bodies and other stakeholders to agree the most appropriate way of working together for each product area. Product areas necessarily have differing needs. However the requirement to facilitate access to motivating content is a theme common to all.
- 6.7 Our analysis of Wales's product strengths will be periodically reviewed and updated to ensure that changes in consumer preference and product developments in Wales are reflected in our marketing.
- 6.8 Our marketing must inform and complement the plans of our partners in the *Partneriaeth Marchnata Cymru (PMC)* Local Authority group and in the Regional Tourism Partnerships. We must also be able to support the work of VisitBritain in marketing the whole of Britain overseas.

7.0 Actions



The action plans needed to meet the challenge set out in SMAP will be prepared and implemented by the Visit Wales marketing team. These plans will adapt and evolve over time as partners come on board and activity starts to take shape.

Action 1

Work in partnership with the tourism industry to bring Wales's tourism product to market

- 1a. With the assistance of representative industry bodies and our other stakeholders, Visit Wales will agree the most appropriate way of working in partnership in priority product areas. Plans will be developed and implemented to share information, access industry content and advice, and enable Visit Wales to bring more motivating product messages into mainstream marketing activity.
- 1b. Visit Wales will develop and implement a plan for post-Ryder Cup golf marketing. The objective will be to build on the legacy of The 2010 Ryder Cup, ensuring that a Wales golf message stays in front of consumers, travel trade and media in the aftermath of the tournament.
- 1c. For Business Tourism, Visit Wales will investigate the feasibility of establishing a unit in Wales to actively bid for business events. This investigation will form part of a plan for Business Tourism that will prioritize closer links with the Welsh Assembly Government's Department of the Economy and Transport and cost-effective relationships with Destination Management Companies and other specialist business event buyers and organizers.

Action 2

Develop and implement an integrated destination marketing campaign

- 2a. Visit Wales will develop and implement a consumer marketing campaign that reflects the Wales tourism brand values, sets out Wales's opinion about holidays and uses the product offering in Wales to substantiate our claims and motivate consumers. The plan will implement a consistent campaign in the UK and Ireland and in appropriate target international markets. It will also ensure that Wales product content is available for VisitBritain's international campaigns.
- 2b. Visit Wales will develop and implement a strategy for eCRM and database marketing that will reflect revised priorities, the needs of our partners and the desire to reduce our dependency on paper-based marketing.
- 2c. Visit Wales will work with our Local Authority and RTP partners to develop and implement marketing activity for *Partneriaeth Marchnata Cymru* that complements our pan-Wales reputation-building focus.

Action 3

Develop and implement Visit Wales's Digital Marketing Plan

The challenge is to align our digital marketing with consumers' online lifestyles. We will clarify the role that Visit Wales plays in bringing visitors to our online media, and taking content from our partners and our current visitors to the places where our potential visitors converse.

Visit Wales will develop and implement a plan for digital marketing that makes the best use of content from Wales to

improve our organic search performance and our social media presence. It will set out a coherent approach to the media we own, the paid-for media we target, and the online coverage we earn through the provision or aggregation of motivating content.

Action 4

Work with media and travel trade intermediaries

- 4a. In markets or sectors where the travel trade continues to shape consumers' preferences and facilitate their purchases, Visit Wales will work with the travel trade directly and through VisitBritain. Visit Wales will benchmark global travel trade coverage of Wales's holiday and business tourism products and develop a cost-effective programme for travel-trade communications using predominantly online channels.
- 4b. Visit Wales will work with global media contacts and with Visit Britain to prioritize the promotion of priority product area experiences through media communications and media visits to Wales.
- 4c. Visit Wales will develop the digital tools and content required to make maintaining media relationships more cost-effective. We will ensure that content for the media is also available for direct-to-consumer use, and will develop new media partnerships in order to maximize positive editorial coverage of Wales.

Action 5

Evaluation and measurement

- 5a. Visit Wales will continue to track and report on the seven Key Performance Indicators through our ongoing Evaluation Project. Starting in 2010, research dips will be undertaken in international markets in order to provide a more rounded picture of Wales's position in all our target markets.
- 5b. Visit Wales will supplement the quantitative Evaluation Project with qualitative research in Wales and in selected target markets, and will ensure that our market intelligence continues to be shared with our partners and stakeholders in Wales.
- 5c. Visit Wales will update and further refine our Independent Explorer target market segment definition.

More information

For more information about tourism in Wales and Visit Wales's work, see www.wales.gov.uk/topics/tourism