House of Commons
Welsh Affairs Committee

International representation and promotion of Wales by UK bodies

Second Report of Session 2014–15
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Second Report of Session 2014–15

Report, together with formal minutes relating to the report

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The Welsh Affairs Committee

The Welsh Affairs Committee is appointed by the House of Commons to examine the expenditure, administration, and policy of the Office of the Secretary of State for Wales (including relations with the National Assembly for Wales).

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The Reports of the Committee, the formal minutes relating to that report, oral evidence taken and some or all written evidence are available in printed volumes.

Additional written evidence may be published on the internet only.

Committee staff

The current staff of the Committee is Marek Kubala (Clerk), Anwen Rees (Committee Specialist), Shane Murray (Senior Committee Assistant), Baris Tufekci (Committee Assistant), and Jessica Bridges-Palmer (Media Officer).

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2 International representation and promotion of Wales by UK bodies
Summary

Developments in global communication and the increasing popularity and accessibility of new global destinations have made it easier to attract businesses and tourists to and from new emerging markets. As a small nation of three million people on the western edge of Europe, Wales faces particularly keen competition to attract skilled workers, tourists and inward investors from within the UK, and from Europe and further afield. Wales remains one of the poorer parts of both the UK and the EU and the revenue brought through trade, by overseas tourists and from inward investors is vital.

Both the UK Government and the Welsh Government have responsibility for promoting Wales abroad, although the responsibility of the UK Government relates primarily to the promotion of the UK (or Great Britain in some instances) as a whole, whereas the Welsh Government relates to Wales only. Some of the UK government bodies responsible for promoting Wales abroad include VisitBritain, UK Trade and Investment and the British Council.

Our inquiry examined the role of the UK Government and its associated bodies in promoting Wales abroad, with a particular emphasis on tourism, inward investment and trade, and culture.

The Committee’s key conclusions and recommendations are:

International tourism

- Wales boasts some of the most spectacular landscape in Britain and Europe, has a unique culture, language and history, dynamic cities, and offers a range of activities and a high quality of life. It is therefore a natural destination for the growing market of cultural and environmental tourists. We are therefore concerned that Wales still has a low profile overseas compared to other parts of the UK and attracts the third smallest number of international visitors of any UK ‘region’.

- We believe that a lack of awareness internationally about Wales’s strengths as a holiday destination is a key reason for Wales’ relatively low share of UK-bound holidaymakers. Wales lacks a coherent brand for the overseas market. Wales needs to be marketed much more vigorously overseas, with a strong and clear narrative about the country’s historic and modern aspects and its attractions for tourists. For example, whilst Dylan Thomas centenary events have been organised in Wales, London and New York, they have not been used to promote long-term growth in the number of cultural tourists to South Wales, through attaching the Dylan Thomas brand to the Wales brand.

- We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2015, for promoting Wales as a first choice destination for international visitors to the UK. A key aspect of this should be the use of a distinctive brand used consistently in communications to help raise awareness of
Wales internationally.

- We recommend that VisitBritain sets clear, measurable targets for encouraging international tourists to visit different regions of the UK.

- We recommend the UK Government review its policy on the VAT rate for the tourism industry, with the ultimate aim of reducing the current 20% rate.

Inward investment and trade

- Nine of the ten poorest regions in Northern Europe are in the UK, including West Wales and the Valleys. The UK also houses the richest—Inner London. The Committee believes that UKTI has a crucial role in helping address geographical wealth inequalities and notes the efforts of German Trade and Investment to reduce disparities within the German state. UKTI should be mandated to perform a similar function.

- Modern broadband alongside the prospect of rail electrification, means that Wales can increasingly offer a lower cost, lower congestion and better quality of life offer to inward investors than London and the South East. We reiterate our previous calls for the establishment of a dedicated trade promotion agency, either sitting within the Welsh Government or as a private sector vehicle working in collaboration with the Welsh Government to drive inward investment projects into Wales.

- We recommend that the Wales Office and Welsh Government seek greater opportunities for joint overseas trade delegations, at both the ministerial and official level, where interests align and to promote Wales internationally as a place to do business.

Culture and language

- The British Council does some good work to promote Wales, most notably with the excellent Welsh Language Project in Patagonia, Argentina. However, there are other parts of the world, including the USA, with a notable Welsh diaspora or where there is an interest in the Welsh language. We recommend that the British Council investigate other opportunities where Welsh culture and language can be promoted to overseas markets.

- We recommend that the UK Embassy in Argentina should have a specific strategic goal to help promote the Welsh language in Patagonia and foster relations between the region and Wales.

- We congratulate all those involved with bringing the NATO Summit to Wales, notably the previous Secretary of State for Wales and the Wales Office, the Foreign and Commonwealth Office, the Welsh Government, and the Celtic Manor Resort. The summit helped to increase awareness about Wales around the world. It is
important that the UK and Welsh Government capitalise upon this to bring
longer-term benefits to Wales, through investment and tourism opportunities.

In this report, conclusions are printed in bold and recommendations are printed in
bold italics.
1 Introduction

1. Today’s world is increasingly inter-connected and inter-dependent. Global communications and the increasing popularity and accessibility of new global destinations have made it easier to attract businesses and tourists to and from new emerging markets. The competition for countries to be “seen and heard” on the global stage is increasingly intense. The current UK Government has often espoused the need for Britain to compete in and win “the global race”.

2. As a small nation of three million people on the western edge of Europe, Wales faces particularly keen economic competition to attract skilled workers, tourists and inward investment from within the UK, and from Europe and further afield. Wales also remains one of the poorer parts of both the UK and the EU and the additional revenue brought through trade, by overseas tourists and from inward investors is vital. The tourism industry already accounts for 15% of the Welsh economy, either directly or indirectly, and there is potential for further growth. Wales has a highly skilled workforce in certain sectors and can offer a good quality of life for potential investors.

3. Both the UK Government and the Welsh Government have responsibility for promoting Wales abroad, although the responsibilities of the UK Government relate primarily to the promotion of the UK (or Great Britain in some instances) as a whole, whereas those of the Welsh Government relate to Wales only. It is unclear to what extent the UK Government’s international promotional work focuses specifically on promoting Wales and whether it is broadly comparable to Wales’s 5% share of the British population.

4. Box 1 lists some of the UK Government bodies with responsibility for promoting Wales abroad.

<table>
<thead>
<tr>
<th>Box 1: UK Government bodies promoting Wales overseas</th>
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<tr>
<td><strong>VisitBritain</strong> is responsible for promoting Britain overseas as a tourist destination. It has a budget of approximately £20 million and employs 98 individuals in the UK¹ and 82 staff overseas. It works in partnership with the tourist boards in England, Scotland, Wales and London to ensure that Britain is marketed around the world in mature and developing markets. VisitBritain’s role is to deliver on the Government’s international targets for tourism numbers and to make the British tourism industry more competitive.</td>
</tr>
<tr>
<td><strong>UK Trade &amp; Investment (UKTI)</strong> is the joint UK government department with lead responsibility for trade and investment. UKTI’s aims and objectives are to:</td>
</tr>
<tr>
<td>• Deliver measurable improvement in the business performance of UK Trade &amp; Investment’s international trade customers, with an emphasis on innovative and firms active in research and development (R&amp;D);</td>
</tr>
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¹ In addition, 47 individuals are employed by VisitBritain and VisitEngland for business services, which provide a shared service in human resources, IT and finance.
• Increase the contribution of foreign direct investment to knowledge intensive economic activity in the UK, including R&D; and
• Deliver a measurable improvement in the reputation of the UK in leading overseas market as the international business partner of choice.

**The British Council** aims to promote British culture in other countries and to create international opportunities for the people of the UK. The Council has offices in six continents and over 100 countries. It “works with millions of people, connecting them with the UK, sharing their cultures and the UK’s most attractive assets: English, the Arts, Education and our ways of living and organising society”.

### Our inquiry

5. We launched an inquiry in January 2014 to examine the role of the UK Government and its associated bodies in promoting Wales abroad. This is not the first time we have examined the status of Wales overseas. Earlier in this Parliament we produced a report on inward investment in Wales. This Report follows up our previous work on inward investment, but also examines other aspects of international promotion, such as tourism and culture.

6. We took oral evidence from academics, representatives from Welsh business, tourism and cultural organisations, VisitBritain, and the UK Government, represented by the then Secretary of State for Wales, Rt Hon David Jones MP, and the Minister for Trade and Industry, Lord Livingston. We invited Visit Wales to give oral evidence but they preferred to submit written evidence only. A full list of witnesses can be found at the end of this report.

7. We also undertook two visits. In March 2014, we visited Chubut Province in the region of Patagonia, and Buenos Aires, in Argentina. We visited the Welsh communities in the west and east of the Chubut province. We also examined the work of the British Council in promoting the Welsh language in the region through the Welsh Language Project (there are approximately 7,000 speakers of Welsh in Patagonia). 2015 also marks the 150-year anniversary of the emigration of the first Welsh settlers to Patagonia and we were keen to learn about plans to celebrate this symbolic anniversary in Chubut, and the support provided by the UK and Welsh Governments. In Buenos Aires we met Argentinian parliamentarians and business representatives to discuss the economic and cultural relationship between Argentina and Wales. A summary of our meetings can be found in Annex A. In June 2014 we visited the British Council Wales office in Cardiff to learn about the Council’s work around the world to promote Welsh culture. We are extremely grateful to those who facilitated our visits, particularly the British Embassy in Buenos Aires.

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2 British Council (IRW0003) para 1.1
3 Welsh Affairs Committee, Eighth Report of Session 2010-12, Inward Investment in Wales HC854-I
4 Patagonia is a region at the southern end of South America, shared by Argentina and Chile. The Argentine portion of Patagonia includes the provinces of Chubut, Neuquén, Río Negro, and Santa Cruz.
2  Tourism

8. Tourism is one of the largest and most important industries in Wales, and makes a major contribution to the Welsh economy. Wales offers a rich culture and history, dynamic cities, a scenic landscape, a beautiful coastline and a diversity of experiences for visitors. The Welsh tourism sector is estimated to directly contribute £3.1 billion annually to Wales’s GDP (about 6% of the total),\(^5\) and provides an estimated 114,000 jobs (about 8% of all jobs in Wales). When including supporting businesses in the supply chain, tourism contributes £7 billion annually to Wales’s GDP, about 14% of the Welsh economy, and supports 206,000 jobs (about 15% of total employment).\(^6\)

Trends in international tourism to Wales

9. The majority of tourists to Wales are domestic UK visitors, who account for 90% of all tourists and 80% of spend. Wales is performing reasonably well in the domestic tourism market, accounting for 6% of all domestic visitor spending in the UK. However, given Wales’s tourism potential, we think this figure should be higher.

10. In respect of international visitors, we heard that Wales “has a historically relatively weak position […] with a low share of inbound visits across most markets”.\(^7\) As shown in Figure 1, Scotland, Ireland, and England (outside of London) have over the past decade consistently attracted significantly more international visitors than Wales (by market share).\(^8\) Figure 2 breaks down the most recent annual statistics by each UK region. It shows that Wales attracted the third fewest number of international tourists of any UK ‘region’ in 2013, behind for example the East Midlands, West Midlands and Eastern England.

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6  Tourism: jobs and growth. The economic contribution of the tourism economy in the UK, Deloitte and Oxford Economics, November 2013
7  Visit Wales, Welsh Government (IRW0024) para 12
8  Office for National Statistics, International Passenger Survey
Figure 1: Percentage of overseas visitors to regions of the UK 2003–2013

Source: Travel Trends

Figure 2: Number of overseas visitors to the regions of the UK in 2013

Source: Travel Trends

The figures sum to more than 100 because if someone visits Wales and Scotland they will be counted in Wales figures and in the Scotland figures separately, but only once in the UK total. Irish day visitors to Northern Ireland are excluded from the Northern Ireland figures, but are included in the UK total.
11. Along with other parts of the UK, the number of overseas visitors to Wales has been declining for almost a decade.10 Over this period, Wales’s share of the overseas market has also declined. In 2006, 1.14 million international tourists visited Wales, accounting for 3.5% of the UK market. By 2012, this had declined to 854,000 international visitors, accounting for 2.7% of the market.

12. The global recession was said to be the main factor in accounting for the falling number of visitors to the UK between 2006 and 2012.11 However, VisitBritain told us that the severe economic downturn in Ireland—“traditionally the most valuable market for Wales”—was a particular factor for the decline in Wales.12 The Irish tourist market in Wales had halved in value since 2009, from £50 million to £25 million.

13. The international tourism market improved in 2013, with the number of visitors to the UK increasing by almost 3 million visitors compared to 2009. But Visit Wales expressed concern that the 2013 growth had not been shared to the same extent across the UK. For example, the number of international visitors to London increased by 9% between 2012 and 2013, Scotland by 10% and England (excluding London) by 6%, whereas the numbers visiting Wales only increased by 4% in 2013 (to 884,000 visitors). This remains significantly lower than the 2006 level of 1.14 million visitors.

14. We wanted to explore why Wales has a historically weak position in respect of attracting international tourists and why Wales was doing less well than other parts of the UK in the recent recovery in the market. We particularly focussed on three areas: Wales’s profile abroad; the role of VisitBritain (including its relationship with Visit Wales); and the impact of the 20% VAT rate on tourism.

Wales’s profile abroad

15. In 2010, VisitBritain published a study on the trends, attitudes and characteristics of overseas visitors to Britain.13 As shown in Figure 3, stated knowledge of Wales by non-UK respondents was lower than any other part of the UK. London was the most well-known (and better known than the concept of Britain itself).14

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10 Q6
11 Q261
12 Q261
13 Overseas visitors to Wales: Understanding Trends, Attitudes and Characteristics, VisitBritain, September 2010
14 Wales also scored less with UK respondents who felt they know Britain overall the best, with England outside of London coming second and London third.
16. Witnesses agreed that Wales’s low profile abroad was a barrier to growing its international market. Professor Annette Pritchard, Director of the Welsh Centre for Tourism Research at Cardiff Metropolitan University, described Wales as “Britain’s best secret” with “very low brand visibility, brand awareness and product visibility”. Tour operators struggled to ‘sell’ Wales because:

… the population in those countries is not aware of Wales […] there is a lack of awareness and knowledge, which drives desire.\(^{15}\)

17. VisitBritain told us that Wales had a particularly low-profile in long-haul destinations, for instance in Asia, with London having a higher profile in these locations.\(^{17}\) Wales was better known in Europe, although populations in these countries tended to have narrow stereotypical views of Wales, for instance relating to rugby and mining.\(^{18}\)

**A Welsh ‘brand’?**

18. To help raise awareness, many witnesses said that Wales needed to develop a stronger brand identity with greater use of distinctive, iconic images. There was a challenge, however, in promoting the more traditional aspects of Wales and its heritage and the more modern, vibrant image of the country. During the 1990s, Wales had promoted traditional Welsh cultural icons and symbols, such as choirs, language and love spoons in communications with overseas markets, although some witnesses questioned the success of

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15 Q5
16 Q7
17 Q264
18 Q49
this approach.\textsuperscript{19} Today, Wales’s castles continue to be an important attraction for international tourists. A 2011 survey by VisitBritain showed that a visit to Wales’s castles was potentially more popular to prospective tourists than visiting Buckingham Palace or shopping in Harrods, with particularly strong appeal amongst tourists from Poland, Russia, Italy and Germany.\textsuperscript{20}

19. But we also heard that Wales ought to project a more modern and vibrant image. Simon Gibson, Director of the Celtic Manor Resort, spoke of the need to publicise the “modern, iconic, contemporary nation”, represented by places such as the Royal Welsh College of Music and Drama, the Senedd and Cardiff Bay.\textsuperscript{21} Witnesses noted that there were many successful music and cultural festivals each year in Wales. Witnesses also described the various outdoor activities and sports available to experience in Wales, such as coasteering,\textsuperscript{22} cliff diving and motor biking. The Wales Association of Self Catering Operators (WASCO) told us that there was much within Wales’s heritage, language and geography to offer good opportunity without “resort[ing] to the gimmicky which has characterised some of the marketing of the past”.\textsuperscript{23}

20. Mike Morgan, Director of the Welsh Rarebits Collection,\textsuperscript{24} recognised that there could be a “conundrum” between the more traditional and the modern aspects of Wales, but contended both could be marketed successfully. Visit Wales had a vital role in “hold[ing] these messages in a coherent way”.\textsuperscript{25} Other places, such as London, have combined their historic and modern aspects successfully.

21. Witnesses agreed that key factors in having a successful brand were for it to be persistent and consistent, and that Wales had suffered from the lack of a consistent message in the past. The Wales Tourism Alliance noted that brands took a “long, long” time to build up.\textsuperscript{26} Simon Glover commented that: “You establish brand through consistency–by not changing it every five minutes. A brand needs to stick around”.\textsuperscript{27}

22. VisitBritain told us that it was the responsibility of Visit Wales to develop a clear message about what Wales could offer, which VisitBritain could then promote. Visit Wales needed to provide:

\begin{quote}
... good quality product and the packaging of product that makes it easier for the international visitor to access it, and for the international travel trade to package and sell it.\textsuperscript{28}
\end{quote}

\begin{itemize}
\item \textsuperscript{19} Q6
\item \textsuperscript{20} Foresight, VisitBritain, January 2011
\item \textsuperscript{21} Q80
\item \textsuperscript{22} Coasteering is a physical activity that encompasses movement along a rocky coastline on foot or by swimming.
\item \textsuperscript{23} Wales Association of Self Catering Operators (IRW0020)
\item \textsuperscript{24} The Welsh Rarebits Collection markets nearly 300 hospitality businesses in Wales.
\item \textsuperscript{25} Q113
\item \textsuperscript{26} Q49
\item \textsuperscript{27} Q81
\item \textsuperscript{28} Q284
\end{itemize}
23. Wales boasts some of the most spectacular landscape in Britain and Europe, has a unique culture, language and history, dynamic cities, and offers a range of activities and a high quality of life. It is therefore a natural destination for the growing market of cultural and environmental tourists. We are therefore concerned that Wales still has a low profile overseas compared to other parts of the UK and attracts the third smallest number of international visitors of any UK region.

24. We believe that a lack of awareness internationally about Wales’s strengths as a holiday destination is a key reason for Wales’ relatively low share of UK-bound holidaymakers. Wales lacks a coherent brand for the overseas market. Wales needs to be marketed much more vigorously overseas, with a strong and clear narrative about the country’s historic and modern aspects and attractions for tourists. For example, whilst Dylan Thomas centenary events have been organised in Wales, London and New York, they have not been used to promote long-term growth in the number of cultural tourists to South Wales, through attaching the Dylan Thomas brand to the Wales brand.

25. While the current number of international tourists to Wales remains below pre-2006 levels, we believe there is substantial potential for growth in Wales’ tourism market if the global economy continues to recover. Tourism bodies responsible for promoting Wales need to grasp this opportunity.

26. We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2015, for promoting Wales as a first choice destination for international visitors to the UK. A key aspect of this should be the use of a distinctive brand used consistently in communications to help raise awareness of Wales internationally.

Role of VisitBritain in promoting Wales

27. VisitBritain is the UK body responsible for promoting Britain abroad as a tourist destination. We examined the extent to which VisitBritain promoted Wales abroad, and its relationship with Visit Wales—the Welsh Government’s tourism team within the Department of Economy, Science and Transport, which took over the functions of the Wales Tourist Board in 2006.

Does VisitBritain’s target-led approach benefit Wales?

28. In 2013, VisitBritain announced an ambition to attract 40 million visitors a year by 2020 to Britain, following a statement made by the then Secretary of State for Culture, Olympics, Media and Sport, Rt Hon Jeremy Hunt MP, in August 2012. This represents an increase of 8 million compared to 2012.29 Some witnesses believed that VisitBritain’s target-led approach would result in it promoting better known parts of the UK, such as London, which provided a higher short-term return. Professor Pritchard said:

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29 VisitBritain, ‘Delivering a Golden Legacy: A growth strategy for inbound tourism to Britain from 2012 to 2020’, April 2013
Twenty-odd years ago you had the sense that there was some sort of reasonable spread of VisitBritain activity: it was expected that x% would end up in Scotland, x% would end up in Wales, and x% would end in the English regions. London was obviously seen as the main driver, but there was a sense that there was a kind of duty to the rest of Britain—that VisitBritain was looking after their interest as well. Targets for VisitBritain have changed. The emphasis is on getting as many tourists in as possible, and the easy way to get those tourists in is to market London and to do so very visibly.\footnote{Q20}

Visit Wales told us that VisitBritain activities had generated only a small proportion (4%) of the total value of inbound international tourism to Wales.\footnote{Visit Wales, Welsh Government (IRW0024)}

29. In response to these criticisms, VisitBritain told us that increasing visitor numbers to different regions of the UK (outside London) was a key aspect of their strategy. In 2013, it had spent £104 million on promotional work and international media for Wales—12% of its total spend on such activities—and so was “delivering disproportionately for Wales” in respect of public relations.\footnote{Q271} VisitBritain also told us that its record in attracting 4% of all international tourists to Wales compared favourably to its figure of attracting 2.4% of international tourists to the UK as a whole: “if you look at what we deliver for Wales versus what we deliver for the UK as a whole in terms of international visitors, we are actually doing much better in getting people to go to Wales”.\footnote{Q277}

30. We asked the then Secretary of State for Wales whether he thought VisitBritain ought to have regional targets. His view was that the “important thing is to get tourists into Britain”.\footnote{Q310} He said that London was going to be the principal draw because of its status as a global city.

31. We acknowledge the efforts by VisitBritain to promote different parts of the UK to potential overseas tourists. We share concerns, however, that the current emphasis on meeting an overall target for UK visitor numbers may lead VisitBritain to focus disproportionately on promoting more well-known destinations, such as London, at the expense of other areas, including Wales.

32. We recommend that VisitBritain sets clear, measurable targets for encouraging international tourists to visit different regions of the UK.

Identifying Wales as a distinct location

33. Another criticism we heard was that VisitBritain did not sufficiently identify Wales as a distinct location. Amgueddfa Cymru (National Museum Wales) believed that there was “still a way to go in emphasising that Wales is a country in its own right and not just part of
the UK”. This was said to be a particular issue in respect of the GREAT campaign, trade fairs, the VisitBritain website, and holiday packages.

**GREAT Britain campaign**

34. The UK Government’s £100 million GREAT Britain campaign, launched in 2011, aims to promote the UK internationally as a “GREAT place to visit, study and do business”. It is described as “the Government’s most ambitious campaign event and showcases the very best of what Britain has to offer”. Tourism is a key part of the GREAT campaign, and is led by VisitBritain.

35. Many witnesses did not believe that the GREAT campaign focused sufficiently on Wales. The Wales Tourism Alliance accepted that people who saw the GREAT brand and promotion were more likely to make trips to Britain, but said that London as a destination dominated the campaign. Visit Wales said that the GREAT branding did not offer a “strong platform to help build a clear, distinct destination brand for Wales”. It said it was working with the GREAT campaign team, Visit Britain and UKTI to “significantly strengthen Wales’s profile in GREAT marketing and PR programmes”.

36. The then Secretary of State for Wales argued, however, that Wales had benefited from the GREAT campaign. In particular, the inclusion on some GREAT campaign posters of a map showing the location of Wales within Britain and the logo of visitwales.com “would do a huge amount for Wales”.

**VisitBritain presence at tourism trade fairs**

37. Trade fairs present an important opportunity for countries to promote themselves abroad. Ian Edwards, Chief Operative Officer for the Celtic Manor Resort, stated that Wales was often not represented at VisitBritain’s stalls at tourism trade fairs:

There are huge events that happen in Europe, such as EIBTM in Barcelona and the international travel market in Frankfurt. We—Wales—have no representation there. These are international markets with 15,000 buyers who want to bring international events into the UK, but we have no presence there. VisitBritain will have a presence, but Wales has no presence within that VisitBritain stand; we do not even have a stand of our own. If you go to a

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35 Amgueddfa Cymru (IRW0001)
36 The campaign is global in reach but has ten key markets – China/Hong Kong, India, USA, Korea, Indonesia, Brazil, Mexico, Russian, Turkey, and Emerging Europe.
37 Wales Office (IRW0011)
38 Wales Tourism Alliance (IRW0009)
39 Visit Wales, Welsh Government (IRW0024)para 25.7
40 Visit Wales, Welsh Government (IRW0024)para 26.8
41 Q311
conference show in London, Visit Yorkshire has a bigger stand than Visit Wales, which is ridiculous.\(^{42}\)

38. Visit Britain told us that tourism trade fairs were an effective tool to market the UK abroad, “particularly in newer markets where legislation may be complex, and personal contact is all”.\(^{43}\) It said that individual Welsh attractions and sites attended some of the fairs, but that a co-ordinated approach from Wales was needed, in order to ‘sell’ the country as a destination to the international tourism market.

**Website**

39. The majority of VisitBritain’s marketing and communications is now online: VisitBritain stated that its digital presence and e-communication was now “the bedrock of [our] contact with potential travellers”.\(^{44}\) Visit Wales, however, believed that VisitBritain’s website poorly represented Wales as a distinct destination, with “gaps in product content for Wales across the VisitBritain websites and digital channels”.\(^{45}\) It also argued that VisitBritain’s site had poor links to the Visit Wales website and that traffic from VisitBritain’s website to its own was very low. Visit Britain acknowledged that its website was “ripe for re-development”.\(^{46}\) It told us it was having discussions with Visit Wales regarding content about Wales on the website.\(^{47}\)

**Holiday packages**

40. Professor Pritchard believed that visitors often needed to be on their third, fourth or fifth visit to the UK before they visited Wales. This was partly because Wales was often not included on tour operators’ pre-packed holidays to the UK, which were popular with many tourists:

> Wales is not yet on any kind of golden circle. It is not even on a silver or bronze circle tour.\(^{48}\)

Professor Jerry Hunter, from the School of Welsh and Pro Vice-Chancellor at Bangor University and an American, said that ready-formed holiday packages were particularly popular in the USA: “if you really had those targeted packages to attract Americans, they would be successful”.\(^{49}\)

41. For many international visitors, “Britain” is often perceived as being England only. It is therefore important that UK government bodies responsible for international
promotion reflect the distinct identity of each constituent part of the UK in their activities.

42. The evidence on the effectiveness of the UK Government’s GREAT campaign in promoting Wales is mixed. We remain to be convinced that Wales has benefited much from the campaign.

43. We recommend that the UK Government make improvements to its GREAT campaign to better reflect Wales as a distinct location, and report to us on progress made by February 2015.

44. Wales can be reached from London within a few hours yet, unlike Scotland, is often not included in ready-made UK holiday packages offered by tour operators.

45. In developing a joint strategy with Visit Wales to promote Wales as a first choice destination, we recommend that VisitBritain prioritises efforts to encourage tour operators to include Wales in ready-formed UK holiday packages. We expect VisitBritain to report progress to us by February 2015.

46. We recommend that VisitBritain improves its website to better market Wales overseas. VisitBritain should report back to us on progress made by February 2015.

**Relationship between VisitBritain and Visit Wales**

47. An important element of effective marketing of Wales overseas is the relationship between Visit Britain and Visit Wales. While VisitBritain’s role is to promote Britain as a tourist destination to overseas tourists only, Visit Wales promotes Wales to both domestic and overseas markets. Visit Wales’s overseas marketing focuses on three key markets: Ireland, Germany, and the USA. It is therefore reliant on VisitBritain to “promote growth in tourism visits to Wales across a wider set of international visitor markets”.

48. Witnesses called for better co-ordination between the two organisations. Professor Pritchard told us that the two organisations co-operated well in some areas, such as sharing market intelligence, but less so in others, such as using a consistent campaign to attract visitors to Wales. The then Secretary of State for Wales agreed that there could be better engagement and “joined-up working” between the two organisations.

49. Both VisitBritain and Visit Wales expressed concerns about aspects of their relationship with the other. Visit Wales said that it generally had “close working relationships” with VisitBritain, but lacked the opportunity to “influence the overall direction and priorities for VisitBritain and how these can be optimised for Wales”.

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50 Visit Wales, Welsh Government (IRW0024) para 13
51 Q20
52 Q314
53 Visit Wales, Welsh Government (IRW0024) para 16
VisitBritain told us it had limited opportunity to address Visit Wales’s board, and would like to do so more often.54

50. We heard about some recent improvements in the relationship between the two bodies. In January 2014, VisitBritain and Visit Wales signed a Memorandum of Understanding (MOU) “to optimise promotional activity overseas and support growth of the visitor economy”.55 We were told that a member of Visit Wales’s marketing team would also soon join Visit Britain’s London office. The secondee would represent Wales in internal meetings and bring “enhanced knowledge of Wales’s product and industry”.56

51. At the ministerial level, we were disappointed to hear from VisitBritain that there was no regular engagement with the Welsh Government minister responsible for tourism. The previous chief executive of VisitBritain, Sandie Dawe, had only met the Tourism Minister on one occasion in 2012, during a familiarisation trip with trade officials to Wales.57 Despite the willingness of VisitBritain to engage with the Welsh Government, we are disappointed with the current levels of engagement between VisitBritain and the Welsh Government.

52. We welcome recent efforts to improve the relationship between VisitBritain and Visit Wales. Both promote Wales in different overseas markets but good co-ordination is necessary to market Wales in a consistent way, to share market intelligence, and avoid duplication of effort. VisitBritain has much greater resources than Visit Wales and there are clear advantages for Wales to be included under the auspices of the international work of the UK Government.

53. We recommend that VisitBritain reports on the impact of the Memorandum of Understanding with Visit Wales by February 2015.

Impact of current VAT rate

54. The UK Government increased value added tax (VAT) from 17.5% to 20% in 2011.58 Under EU VAT legislation, member states are permitted to reduce VAT rates for a limited number of services and industries, including tourism.59 Other EU member states have taken advantage of this, with 24 (out of 28) having reduced VAT rates for visitor accommodation, and 14 reducing VAT rates for restaurants.60

55. Witnesses believed that the higher VAT rate in the UK deterred some tourists from visiting the UK. The Wales Tourism Alliance told us that a lower rate would enable hotels,
visitor attractions and other related tourism businesses to become more competitive, leading to increased sales and employment:

The 20% VAT rate is a disincentive to our visitors and has obviously had an impact […] If we want to attract international visitors, we have to offer them incentives, be they financial, be it making sure that we have the right product in place or be it making sure that we link up with the right markets.61

56. The then Secretary of State for Wales told us that the Government currently had no plans to reduce VAT, as it would lead to a “significant shortfall in revenue”.62 He did not agree that reducing the VAT rate alone would increase the UK’s competitiveness in tourism: he noted that the UK was already ranked fifth in the world in terms of competitiveness.63

57. The refusal of the UK Government to reduce the VAT rate for the tourism industry, unlike most other EU states, could be having a detrimental effect on the Welsh tourism industry.

58. We recommend the UK Government review its policy on the VAT rate for the tourism industry, with the ultimate aim of reducing the current 20% rate.

61 Q48
62 Q306
3 Inward investment and trade

Wales’s recent performance on inward investment

59. The late 1980s and early 1990s was a golden age for Wales in attracting inward investment. The country offered a compelling package of grants, large parcels of land available for development, low labour costs, and a ready supply of workers. However, countries from Central and Eastern Europe, China and other developing countries are now able to offer potential investors significantly lower employment costs. Since 2006, Wales’s share of UK investment projects has ranged between 3.4% and 4.5%. Wales, one of the top regional performers in attracting FDI in the period 1990–2004, receiving approximately 15% of the UK’s inward investment and associated jobs created, had become almost the worst performer by 2009.

60. We published a major report on inward investment in Wales in February 2012. We are pleased to note that Wales’ inward investment record has improved in the couple of years since the publication of our report. The 2013 Ernst and Young attractiveness survey found that Wales had increased its number of foreign-backed projects by 224% since 2011. Wales’s foreign-backed projects quadrupled from nine to 31 in 2012, the highest total for five years, creating 2,051 new jobs in the process.64

61. Nevertheless, only 4% of foreign investors chose Wales as the most attractive destination in the UK to set up foreign operations. In contrast, 11% saw Scotland as an attractive place and 45% saw London as the best place to relocate.65

Role of UKTI in promoting Wales abroad

Attracting inward investment to Wales

62. UKTI is the joint UK government department with lead responsibility for trade and investment. It has an annual budget of £157.2 million and 1,911 staff.66 Many witnesses expressed concern over the way in which UKTI promoted Wales overseas. The Institute of Directors (IoD) Wales told us that, following devolution, UKTI had focused its activities on England and had “failed dismally” to fulfil its obligation to promote Wales abroad.67 It believed Wales needed a “new approach to the fiercely competitive overseas promotional market”.68
63. Others, however, were more complimentary. Michael Carrick, Chief Executive of Aventa Capital Partners, praised two organisations within UKTI—the Regeneration Investment Organisation and the Automotive Investment Organisation—which “heavily promoted” Welsh projects, such as the Circuit of Wales. Mr Carrick said that UKTI’s approach was to secure international investment for specific projects, rather than direct investors to a particular UK region:

[UKTI] are very clear that it does not matter to them whether that [project] is in the south-east of England, Shetland, Northern Ireland or Wales. They want good structured, robust, investable opportunities to attract international investment.  

64. Similarly, the Minister of State for Trade and Investment said that UKTI had a “UK first” policy in respect of attracting inward investment:

In term of the UK’s welcoming of business and openness, we try to attract a company to the UK and then depending on what it does, we present it with the best option of region, town or cities or whatever for its particular type of investment […] It is very much about getting people to decide they are coming to the UK, not Germany. 

65. The then Secretary of State for Wales believed that improved knowledge by UKTI of the attributes that Wales could offer to prospective investors had resulted in “more and higher quality inward investment projects” to Wales.

**Engagement with Welsh businesses**

66. Some witnesses expressed concern that Welsh companies did not tend to utilise, or have relations with, UKTI. Simon Gibson from the Celtic Manor Resort told us that UKTI had little impact on Welsh companies: “I do not think we are always at the front of the queue at UKTI when it comes to opportunities”. In 2013, the Confederation of British Industry (CBI) recommended that UKTI needed to do more to promote its services to companies at the regional level.

67. Although the then Secretary of State for Wales believed that UKTI did a “tremendous amount overseas” to promote Wales, he expressed concern that there was a perception by many businesses across Wales that UKTI was an “England only body”. He said that UKTI needed to “strengthen its operating market in Wales” and increase direct interaction

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69 Q168  
70 Q168  
71 Q322  
72 Q322  
73 Wales Office (IRW0011)  
74 Q92  
75 CBI, Local Champions: The Economic Contribution of Medium-Sized Businesses  
76 Wales Office (IRW0011)
between itself and businesses in Wales. Simon Gibson told us he favoured a specific UKTI office in Wales.

**Relations between UKTI and the Welsh Government**

68. Dr Andrew Crawley, Marie Curie Research Fellow at the University of Illinois Urbana-Champaign, said that, following the demise of the Welsh Development Agency (WDA) in 2006, the relationship between UKTI and the Welsh Government had gone through “a very dark period” with poor communication and co-ordination. Business representatives believed that the relationship was now better, but there was still “a great deal of room for improvement”.

69. The Minister for Trade and Investment told us that UKTI officials worked closely with their counterparts in the Welsh Government. He described it as a “structured relationship”, as defined by an MOU, signed in 2012, which set out the responsibilities of both the Welsh Government and the UKTI on co-operative working and information sharing. The then Secretary of State for Wales believed that the MoU had improved relationships between the two organisations.

70. We were told that a secondee from UKTI had also recently been placed with the Welsh Government, whose role would be to liaise with the Welsh Government, the Wales Office, and businesses in Wales. The Minister for Trade and Investment told us that this position was unique to Wales and a similar secondment position did not exist in Scotland or Northern Ireland. He said he expected to meet the Welsh Government’s Business Minister twice a year.

71. The Welsh Government did not provide written evidence on the parts of our terms of reference related to inward investment and trade.

72. We accept that UKTI’s role is to maximise the total amount of investment in the UK. While there are specific examples of UKTI promoting Welsh projects overseas, we believe that Wales could still benefit more from UKTI’s expertise, reputation, and international contacts. It is particularly worrying that Welsh companies do not utilise UKTI as much as they could.

73. We recommend that UKTI reports to us by February 2015 on progress made to improve its profile amongst Welsh businesses and its engagement with them.

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77 Wales Office (IRW0011)
78 Q92
79 Q36
80 Q170
81 Q329
82 Wales Office (IRW0011)
83 Q339
84 Q338
74. Nine of the ten poorest regions in Northern Europe are in the UK, including West Wales and the Valleys. The UK also houses the richest—Inner London. The Committee believes that UKTI has a crucial role in helping address geographical wealth inequalities and notes the efforts of German Trade and Investment to reduce disparities within the German state. **UKTI should be mandated by the UK Government to perform a similar function.**

A new dedicated trade agency for Wales?

75. For approximately 30 years, the WDA was responsible for encouraging business development and investment in Wales. It was abolished in 2006 by the Welsh Government. Its international remit was transferred to the newly created International Business Wales (IBW), which sat within the then Department for the Economy and Transport. At the end of 2010, IBW ceased to exist as a separate entity and its activities were subsumed into the Welsh Government’s Department for Business, Enterprise, Technology and Science, now the Department for Economy, Science and Transport.

76. In our 2012 report on *Inward investment in Wales*, we concluded that the abolition of the WDA had “reduced Wales’s visibility in the global market place”. Two years later this view was still shared by several witnesses. IoD Wales said the abolition had significantly reduced Wales’s profile of its brand. The then Secretary of State for Wales told us that the WDA’s demise had led to a loss of a “lot of impetus” in promoting Wales: “scrapping the WDA was a seriously bad retrograde step”. The Minister for Trade and Investment agreed that the abolition of a separate body had affected Wales’s ability to attract inward investment.

77. Some witnesses noted, however, that the WDA had been “far from perfect.” IoD Wales said that the WDA had lacked good leadership in the final years before its abolition and had lost the confidence of politicians and the business community. Dr Andrew Crawley agreed that the WDA had a “huge amount of baggage at the end,” but still had “huge brand kudos” internationally.

78. Some witnesses believed that Welsh Government civil servants now responsible for inward investment were not best suited to make business decisions. IoD Wales told us that the role of civil servants in supporting ministers “restricted their effectiveness when operating in the fiercely competitive overseas market”. Dr Crawley said that business decisions were best made by those within the business community:

> If you have people who are wise and have the smarts in particular sectors and industries, they are probably not people who are in the civil service. I am

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85 Welsh Affairs Committee, Eighth Report of Session 2010-12, *Inward Investment in Wales* HC854-I para 113
86 Institute of Directors Wales (IRW0010)
87 Q335
88 Institute of Directors Wales (IRW0010)
89 Q39
90 Institute of Directors Wales (IRW0010)
talking about people who are right there in the industry—who have their finger on the pulse and know exactly what is happening.\textsuperscript{91}

There were also criticisms of the length of time it took for Welsh Government civil servants to make business decisions. Michael Carrick told us that he experienced different levels of responsiveness among civil servants across the UK; his perception was that, in Wales, the speed of decision-making in Wales often depended on the individual civil servant and their “specific capabilities”. He believed that the delays were due to a culture of risk aversion within the civil service: “we are asking the Government to do things that they are not geared up to do, take risks, share risks and process things that we need done.”\textsuperscript{92} Simon Gibson agreed that risk aversion hampered decision-making in Wales:

It is a very scary place for a civil servant to make a decision when he knows that he might be audited four times for that decision—not just by his own auditors but by another Government’s auditors or European auditors. It is a very complicated environment …\textsuperscript{93}

\textsuperscript{79.} Most witnesses called for the establishment of a dedicated trade promotion agency with the promotion of Wales being “more firmly rooted in Wales”.\textsuperscript{94} IoD Wales believed such an organisations should:

[…\] be constituted on an arms-length basis from the Welsh Government, and have a board of directors in place. While boards should be private sector led, membership should also include those with senior experience in the public and third sector.\textsuperscript{95}

\textsuperscript{80.} In 2012 we recommended the establishment of a dedicated trade promotion agency, either sitting within the Welsh Government or as a private sector vehicle working in collaboration with the Welsh Government to drive inward investment projects into Wales. We believed such a body should have a mix of skills with an emphasis on private sector experience.

\textsuperscript{81.} The then Secretary of State for Wales told us that he favoured the establishment of a new body to further Welsh businesses overseas, which would work in collaboration with UKTI.\textsuperscript{96} The Minister for Trade and Investment contrasted Wales’s situation with Scotland and Northern Ireland, where Scottish Development International and Invest Northern Ireland “punch[ed] stronger” in attracting overseas investment.\textsuperscript{97}
82. We are concerned that Wales has no dedicated trade promotion agency, unlike Scotland and Northern Ireland. The lack of such a body is, in our view, hampering inward investment opportunities.

83. *Modern broadband alongside the prospect of rail electrification means that Wales can increasingly offer a lower cost, lower congestion and better quality of life offer to inward investors than London and the South East. We reiterate our previous calls for the establishment of a dedicated trade promotion agency, either sitting within the Welsh Government or as a private sector vehicle working in collaboration with the Welsh Government to drive inward investment projects into Wales.*

**Overseas trade delegations**

84. Overseas trade delegations, led by the UK Government, are an important way for government and business to seek international business opportunities. Recent trade delegations have been led by the Prime Minister, the Deputy Prime Minister and the Minister for Trade and Industry, and can involve between 40 and 100 UK companies.98

85. The previous Secretary of State for Wales also led a number of foreign trade delegations on behalf of the UK Government, promoting Wales, and the UK more broadly, as a business location. Some examples include North and South East Asia (March 2013), Singapore and Indonesia (November 2013), and Malaysia and Oman (February 2014).

86. Some witnesses expressed concern that Welsh businesses and cultural organisations were not adequately represented on UK trade delegations. David Anderson, Director General of Amgueddfa Cymru (National Museum Wales), said he had never been approached to attend a UK trade delegation.99 Arts Council Wales expressed frustration that previous UK trade delegations had included their England counterpart and told us that “there is a lot of work to be done” to get Welsh representation on such events.100

87. In response to this criticism, the Minister for Trade and Investment argued that many UK trade delegations included a Welsh presence, but accepted that more could still be done: “I do not think, to be frank, that we are good enough about ensuring across the UK and across different types of companies that we are always fully represented”.101 He told us that companies could learn about proposed trade delegations from local Chambers of Commerce and MPs.102


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98 Recent UK trade delegations have included UAE and Qatar (March 2014), Colombia and Mexico (February 2014), China (December 2013) and India (February 2013).
99 Q227
100 Q227
101 Q333
102 Q333
believed the UK Government (particularly the Wales Office) and the Welsh Government could co-ordinate better to promote Wales overseas. Dr Andrew Crawley said it was important for all levels of Government to “sing from the same hymn sheet”:

… [if we] send out different groups of people who have not spoken, have not organised and have not co-ordinated before meetings, we end up having this competition factor, with different levels of Government and different groups trying to show it. […] We all need to sing from the same page and say, “This is what we are doing” – and we must put politics to one side.103

It was suggested that the Secretary of State for Wales and the First Minister for Wales should participate in joint trade delegations overseas. We were told that the Secretary of State for Wales’ presence could add “huge kudos” to a trade mission: “You are showing a UK presence and how Wales fits into the larger picture of the UK”.104

89. When questioned about the possibility of joint trade delegations with the Welsh Government, the then Secretary of State for Wales told us he was in favour of the idea. He said a recent Wales Office trade mission to Japan had included a senior Welsh Government official, in order to attract investment to Wylfa power station. However, he told us that the Welsh Government had refused offers for a UK Government minister to participate in Welsh Government trade missions.105 We note that the Wales Office and the Welsh Government hosted an event together in London on 28 August to showcase Welsh business, education and tourism ahead of the NATO summit.

90. Overseas trade delegations provide a valuable opportunity to promote Wales and Welsh companies overseas. It is therefore vital that Welsh companies are given the opportunity to accompany trade delegations with UK Government ministers. In too many cases Welsh companies are simply not aware of the opportunities available to participate in such delegations.

91. We recommend that UKTI ensures a regional spread of businesses are included on overseas trade delegations and that Welsh companies are given opportunity to participate.

92. We recommend that the Wales Office and Welsh Government, as a matter of routine, inform all Welsh Members of Parliament and Assembly Members about upcoming trade delegations so that they in turn can inform relevant businesses in their constituency. We recommend that such a system be in place by the beginning of 2015.

93. Given the shared interest to grow the Welsh economy, we believe that more could be gained from the Wales Office and the Welsh Government co-operating more closely on trade delegations.
94. We recommend that the Wales Office and Welsh Government seek greater opportunities for joint overseas trade delegations, at both the ministerial and official level, where interests align and to promote Wales internationally as a place to do business.
4 Culture and language

95. Wales has a unique and diverse culture, and all branches of the arts are well represented in Wales in both languages. In this Chapter, we examine how Welsh culture is promoted overseas and the benefits in doing so.

Value of cultural exports

96. The exchange of culture can help foster mutual understanding between countries. It allows people from other countries to have a positive view of a nation, its people, culture and policies. The promotion of culture can also result in economic benefits, through increased tourism, inward investment or trade.

97. Welsh cultural organisations agreed that cultural links could help build relations between countries and also contribute to business and investment opportunities. Amgueddfa Cymru and the Welsh National Opera (WNO) had both worked closely with the Welsh Government in promoting Wales overseas and had attended events which supported the Welsh Government’s relationships with other countries. WNO told us that such partnerships helped the Welsh Government “give a sense” of Wales and build relationships with overseas partners:

If there are ways in which all arts and cultural organisations can build links in different places, once you start opening up these conversations, you never quite know where they are going to end. Some extremely fruitful conversations have come from these meetings.107

98. Wales Literature Exchange told us that a “productive dimension” to Welsh culture was the Welsh language. Welsh books had been translated into a number of languages, including Spanish, Arabic, Chinese and Bengali. It believed that Welsh culture and the Welsh language allowed countries—some of whom had historically difficult relationships with the UK—to engage with the UK “in a different way”.108

99. Some witnesses, however, were unconvinced about the value of cultural exports. Professor John Ball said that:

Certainly the success of individual activities can provide a short term burst of interest—an example is the Welsh language film. It is a matter of great pride that some films produced for S4C have received the accolade of “Oscar” nominations and similar programmes sold to European television stations […] but I’m not sure that it would be of a great magnitude [on the perception of Wales].109

106 Amgueddfa Cymru (IRW0001), Welsh National Opera (IRW0015)
107 Q209
108 Q200
109 Professor John Ball (IRW0004)
International profile of Welsh culture

100. Currently, Welsh culture does not enjoy as high a profile overseas as other countries of the UK, such as Scotland, or Ireland. Dr Crawley believed that this was due to complex historical reasons. Welsh emigrants had tended to assimilate with local communities, whereas other populations, such as the Irish, had kept their networks and maintained a strong identity abroad. Nevertheless a large number of Welsh organisations still existed today in the USA following the emigration there in the seventeenth to the nineteenth century. For example, there is a North American Welsh newspaper, the Ninnau, the North American Festival of Wales, and the Madog Centre for Welsh studies at the University of Rio Grande, Ohio, which supports the preservation of the Welsh language and culture.

101. The Welsh language is spoken in some other parts of the world, most famously in Patagonia, Argentina following Welsh emigration to the region in the late nineteenth and early twentieth centuries (see Box 2). There are an estimated 7,000 speakers of the Welsh language in Patagonia today. The Welsh language is also taught at universities in Poland and Japan.

<table>
<thead>
<tr>
<th>Box 2: History of the Welsh communities in Patagonia, Argentina</th>
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<td>The first Welsh settlers to Patagonia arrived in 1865. In the early years of the settlement and until the 1930s, Welsh was the language of the political and economic institutions. After 1914 the number of Welsh immigrants reduced and contact with Wales decreased. The numbers speaking Welsh began to decline. The 100-year anniversary in 1965 of the emigration prompted those in Patagonia to renew interest in their Welsh heritage and the Welsh language, as well as people from Wales. In 1997, the Welsh Language Project was introduced. It focused on schoolchildren and young adults. The 150 year anniversary will be celebrated in 2015. It is estimated there are currently around 50,000 Patagonians of Welsh descent. Welsh culture and traditions survive in Patagonia, and Welsh is spoken by communities in Esquel and Trevelin in the west, and Gaiman and Trelew in the east of Chubut. The Welsh heritage is also visible throughout Chubut in the names of towns (Trelew, Trevelin, Dolavon, Porth Madryn), place names (Hirdaith Edwyn, Y Clafdy, Afon Eira, Hafn yr Aur), agricultural areas in the valley (Drofa Dulog, Lle Cul and Tir Halen) and street names (Lewis Jones, Michael D Jones). The Welsh settlers built 34 chapels, 16 of which survive. The province of Chubut provided a subsidy equivalent to US $750,000 in 2011 for their conservation.</td>
</tr>
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</table>

102. Witnesses highlighted the “sheer productivity” of Welsh culture, from its authors, poets, singers, musicians, and orchestras to its theatres and festivals. However, the Welsh

110 Q3
111 Q192, Q205
National Opera believed that Welsh culture was currently “undersold” to the international community and that it could be better used to promote Wales abroad. Some Welsh cultural organisations were seeking to promote their work internationally. The Arts Council of Wales, for example, had included international promotion of Wales as one of its 10 key challenges in its strategy, while Amgueddfa Cymru had published an international strategy to prioritise its overseas work.

The work of the British Council

103. The British Council is the UK Government’s principal agency for cultural relations with other countries. Its aim is to enhance the reputation of the UK in the world. British Council Wales, based in Cardiff, works in partnership with institutions, representative bodies, strategic partners and government to “ensure the British Council’s global programmes and locally devised initiatives are attuned to the needs, strategies and expertise of Wales”. Some British Council projects, including the Welsh Language Project in Patagonia, receive funding from the Welsh Government.

Promoting Welsh culture

104. Cultural organisations had different views about the effectiveness of the British Council in promoting Wales. Most believed that the British Council consistently supported Welsh cultural activities. The Arts Council of Wales, for example, said that it had worked with the British Council on cultural projects in India, Australia and China in recent years. Amgueddfa Cymru told us that support from the British Council had enabled it to put on its ‘Wales, Land of the Red Dragon’ exhibition in Chongqing, China. 96,000 people had attended the exhibition during its four-month run, which Amgueddfa Cymru regarded as a “great success” from Wales’s point of view, in terms of tourism, business, and higher education.

105. Some witnesses, however, questioned whether the British Council had sufficient awareness of Wales and its cultural assets. The Welsh National Opera expressed the view that the British Council “ought to be more geographically aware of the potential of the cultural assets right throughout the country”. In particular it expressed concern that there was no full-time representative for Wales on the British Council’s board. Instead, there was one position on the Board which rotated every two years between Wales, Scotland and Northern Ireland.

112 Q205
113 Arts Council of Wales (IRW0023)
114 Amgueddfa Cymru (IRW0001)
115 British Council (IRW0003) para 2.3
116 Arts Council of Wales (IRW0023)
117 Q216
118 Q206
119 Q206
106. Giving evidence, the British Council told us that its role was to promote the UK as a whole, but British Council Wales was an integral part of its global network:

We work very closely with our regional offices across the world and with our partners in Wales to project the best of Welsh education, to develop collaborations and partnerships on the arts side and to ensure that Wales benefits from the British Council’s global education and arts programme.\textsuperscript{120}

The British Council did not believe there was a need for a permanent Welsh representative on its Board of Trustees. It had a Wales advisory committee which it said enabled any concerns to be fed through the regional director to the Council’s management board.\textsuperscript{121}

**Welsh Language Project in Chubut**

107. The Welsh Language Project has been operating since 1997 to promote and develop the Welsh language in the Chubut region of Patagonia. Since 2012, the British Council has been responsible for managing the Project, with funding from the Welsh Government, British Council Wales and the Wales Argentina Society (Cymdeithas Cymru-Ariannin). The main annual activities of the project are:

- Three Language Development Officers recruited from Wales, based in Patagonia from March to December teaching and developing the language in the Welsh-speaking communities;
- A Teaching Co-ordinator from Wales, responsible for the quality of teaching and the Language Development Officers, permanently based in Patagonia;
- A network of Patagonian Welsh language tutors in the region;
- Inward visits to Wales by local tutors to participate in both Welsh language courses and Welsh medium school observation visits.

108. During our visit to Buenos Aires and Chubut, we were impressed by the commitment and enthusiasm shown by the British Council, the Welsh communities in both the east and west of Patagonia and by the Welsh language teachers. The number of Welsh learners in Chubut has grown annually since the British Council took over the management of the project, with 83 classes held and 935 learners taught in 2013. It was clear that the Project was highly valued by the local politicians we met in Chubut, who considered the Welsh link an integral part of their heritage. No project elsewhere in the world compares to the Welsh Language Project in Chubut. The British Council has also been tasked by the Welsh Government with co-ordinating the celebrations for the 150th anniversary of the Welsh emigration to Patagonia in 2015. We heard from the Governor of Chubut that he had plans to increase support from Chubut Province for Welsh language schools in the region as one

\textsuperscript{120} Q228
\textsuperscript{121} Q260
way to mark the 150-year anniversary, as well as issuing a coin and printing stamps celebrating the anniversary.

109. **Wales has a unique and diverse culture, including its own language, but is not widely known around the world. Promoting Welsh culture overseas can help build familiarity with Wales, with subsequent economic, cultural and political benefits for Wales and the UK more broadly.**

110. **The British Council does some good work to promote Wales, most notably with the excellent Welsh Language Project in Patagonia, Argentina. However, there are other parts of the world, including the USA, with a notable Welsh diaspora or where there is an interest in the Welsh language.**

111. *We recommend that the British Council investigate other opportunities where Welsh culture and language can be promoted to overseas markets.*

112. **At the organisational level, we believe that the British Council’s knowledge of Wales would benefit from permanent Welsh representation on its Board of Trustees.**

113. *We recommend that the British Council’s Board of Trustees includes a permanent Welsh representative, to ensure that Welsh interests are represented at the highest level of the British Council.*

114. *We recommend that the UK Embassy in Argentina should have a specific strategic goal to help promote the Welsh language in Patagonia and foster relations between the region and Wales.*

**NATO 2014 Summit in Newport**

115. The 2014 NATO summit took place in Newport in September (following the conclusion of our evidence-taking). It was one of the largest international summits ever hosted in the UK and provided a unique opportunity to showcase Wales to the world. During our evidence sessions, we heard about the close working relationship between the FCO, Wales Office and Welsh Government to plan and organise the Summit. The Summit ran smoothly and was widely considered a success. There were several opportunities taken to publicise Wales during the Summit, including Welsh food, Welsh products and Welsh businesses. The Secretary of State for Wales, Rt Hon Stephen Crabb MP, described the NATO summit as a “massive showcase for so much that’s positive, strong and good about Wales”. President Obama said it has been a “great honour” to be the first sitting president to visit Wales and that he would encourage people from the USA to visit. He praised the country’s “extraordinary beauty, wonderful people and great hospitality”.

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116. In 2010, the Celtic Manor Resort hosted the Ryder Cup. Simon Glover, Director of the Resort, told us that while the Ryder Cup had raised the international profile of Wales, the country had not benefited in the longer-term “as much as [it] should have”:

[…] let us not underestimate the effect the Ryder Cup had on the international profile in Wales. Before that [people] had no conception that Wales was a country and identity all by itself. The Ryder Cup did achieve that for us internationally and has raised the profile, but whether we have followed up on it—and how we follow up on it—on an international basis is another question.124

Both the Welsh Government and Wales Office said it was important to have a legacy from the NATO summit. An international investment conference will be held in Wales in November following the NATO summit.

117. We congratulate all those involved with bringing the NATO Summit to Wales, notably the then Secretary of State for Wales and the Wales Office, the Foreign and Commonwealth Office, the Welsh Government, and the Celtic Manor Resort. The summit helped to increase awareness about Wales around the world. It is important that the UK and Welsh Governments capitalise upon this to bring longer-term benefits to Wales, through investment and tourism opportunities.
Annex: Visit to Chubut and Buenos Aires, March 2014

Participants

Members: David TC Davies MP (Chair), Guto Bebb MP, Stephen Doughty MP, Jonathan Edwards MP, Nia Griffith MP, Simon Hart MP, Mrs Siân C. James MP, Jessica Morden MP, Mark Williams MP

Staff: Marek Kubala (Clerk), Anwen Rees (Committee Specialist)

Monday 17 March

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<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>0905</td>
<td>Arrive in Buenos Aires</td>
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</table>
| 1300  | **Meeting with HMA John Freeman, British Ambassador to Argentina, and Embassy staff**  
*Ambassador’s Residence, Buenos Aires*  
Participants: HMA John Freeman, British Ambassador to Buenos Aires, Ross Matthews, Head Political and Public Affairs, British Embassy in Buenos Aires, Anna Durham, Political Secretary, British Embassy in Buenos Aires, Mary Godward, Argentina Country Manager, British Council |
| 1430  | **Meeting with Argentine parliamentarians**                                
*Palace of the Argentina National Congress*  
Participants: Mara Brawer (Front for Victory), Ricardo Alfonsin (Radical Civic Union), Mario Alfredo Metaza (Front for Victory), Mario Oporto (Front for Victory), Federico Pinedo (Republican Proposal), Carlos Raimundi (Nuevo Encuentro)  
Topics of discussion:  
- The Welsh communities in Argentina and the 2015 celebrations  
- Tackling drugs  
- AMIA bombing and Iran |
| 1630  | **Tea with representatives of Welsh community based in Buenos Aires**      
*Ambassador’s Residence* |
<p>| 1730  | <strong>Meeting with Minister of Culture, City of Buenos Aires</strong>                |</p>
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Participants</th>
<th>Topics of discussion</th>
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</table>
| 0900  | **Meeting with British Chamber of Commerce** | British Chamber of Commerce offices, Buenos Aires | Julian Rooney, President, Argentine-British Chamber of Commerce (CCAB), Monica Mesz, Executive Director, CCAB, Simon di Paola, Partner, HDL Brokers SA, Eduardo Arzani, Head, Chubut Office in Buenos Aires [formerly Minister of Commerce for Chubut Province], Andrew Morris, Head, UK Trade and Investment, British Embassy in Buenos Aires | - Promotion of Welsh businesses and products in Argentina  
- Role of UKTI in promoting Wales  
- Emerging industries in Argentina |
| 1830  | **Briefing by the British Council**         | Ambassador’s Residence      | Mary Godward, Argentina Country Manager, British Council                       | - The British Council’s work in Argentina  
- The Welsh Language Programme in Chubut  
- The British Council’s plans for the 2015 anniversary |
| 1900  | **Private dinner with Ambassador, Embassy and British Council staff** | Ambassador’s Residence      |                                                                              |                                                                                         |
### Reception with members of Welsh community in the west of Chubut and local politicians [in association with the Welsh Society of Esquel]

*Welsh community centre, Esquel*

Participants: More than 70 invitees, including members of the local Welsh community, the Mayor of Esquel and other local politicians.

Speeches were made by Committee Members and members of local Welsh community.

<table>
<thead>
<tr>
<th>1250</th>
<th>Transport to Esquel, Chubut Province</th>
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</thead>
</table>
| 1830 | **Reception with members of Welsh community in the west of Chubut and local politicians [in association with the Welsh Society of Esquel]**  

*Welsh community centre, Esquel*

Participants: More than 70 invitees, including members of the local Welsh community, the Mayor of Esquel and other local politicians.

Speeches were made by Committee Members and members of local Welsh community. |

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**Wednesday 19 March**

| 1000 | **Meeting with Mayor of Trevelin**  

*Mayor’s office, Trevelin*

Participant: Juan Carlos Garitano, Mayor of Trevelin  

Topics of discussion:  

- Size and importance of Welsh communities in Trevelin and west of Chubut  
- The Welsh Language Programme and future education proposals  
- The Mayor’s plans for the 2015 celebrations |
| 1045 | **Tour of Trevelin Regional Historical Museum** |
| 1130 | **Tour of John Evans Museum** |
| 1430 | **Visit to Ysgol Gymraeg yr Andes** (Welsh School in the Andes)—part of the Welsh Language Programme  

Participants: Clare Whitehouse, Coordinator, Welsh Language Programme, Mary Green  

Tour of Chapel and presentations on Welsh Language Programme. Visit to school—saw classes being taught for pupils between 4-5 years old. |
| 1645 | **Visit to School 18, Trevelin**—where Welsh community voted to remain Argentine (and not Chilean) in 1902 |
| 2000 | Informal dinner with prominent members of local Welsh community |
### Thursday 20 March

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>0730–1700</td>
<td>Travel to Trelew by road</td>
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</table>
| 1830       | **Reception with members of Welsh community in the east of Chubut and local politicians**  
*St David’s Association Hall, Trelew*  
Participants: About 85 invitees, including members of the local Welsh community, the Mayor of Gaiman and other local politicians.  
Speeches were made by Chair and members of local Welsh community |

### Friday 21 March

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</table>
| 1000       | **Meeting with Governor of Chubut and Mayor of Gaiman**  
*Governor’s office, Rawson*  
Participants: Martin Buzzi, Governor of Chubut Province, Rosa Gonzalez, Under Secretary of Institutional Relations, Carlos Zonza Nigro, Secretary of Tourism of Chubut, Gabriel Restucha, Mayor of Gaiman,  
Topics of discussion:  
- Economic and cultural relations between Wales and Chubut Province  
- Importance and influence of Welsh communities in Chubut  
- The impact of the Welsh Language Programme  
- The Governor’s plans for the 2015 anniversary celebrations |
| 1130       | **Visit to Ysgol yr Hendre (Trelew School)**  
Participants: Silvia Almeyra, Headmistress, and members of the Board, including Catrin Morris  
Visit to classrooms in the kindergarten (4-5 year olds) and Years 1 to 3 of the primary school (6-8 year olds), which includes 55 pupils in total.  
The Committee then visited a separate part of the school for Years 4 to 6 (9-12 year olds, 45 pupils in total). The pupils performed songs from a recent staged Welsh musical. |
<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>1250</td>
<td><strong>Visit to Coleg Camwy (Gaiman secondary school)</strong></td>
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<tr>
<td></td>
<td>Participants: Gabriel Restucha, Mayor of Gaimnan, Luned Gonzales, former headmistress</td>
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<tr>
<td>1430</td>
<td><strong>Visit to Ysgol Feithrin, Gaiman Kindergarten</strong></td>
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<tr>
<td></td>
<td>Participants: Rebecca White, Welsh Language Programme</td>
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<tr>
<td></td>
<td>The Committee was shown the kindergarten which includes 40-45 pupils of between 3 to 5 years. A mini-concert of Welsh music and dance was provided by the pupils.</td>
</tr>
<tr>
<td>1530</td>
<td>Tour of Welsh Regional Historical Museum, Gaiman</td>
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<td>Participant: Tegai Roberts</td>
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<tr>
<td>1745</td>
<td>Chair gives interview on live local radio</td>
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<tr>
<td>2000</td>
<td>Informal dinner with prominent members of local Welsh community</td>
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</table>

**Saturday 22 March**

<table>
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<tr>
<th>Time</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>0815</td>
<td>Flight to Buenos Aires.</td>
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**Sunday 23 March**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>0900</td>
<td><strong>Debrief at Ambassador’s Residence</strong></td>
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<td></td>
<td>Participants: HMA John Freeman, British Ambassador to Buenos Aires, Anna Durham, Political Secretary, British Embassy in Buenos Aires, Mary Godward, Argentina Country Manager, British Council</td>
</tr>
<tr>
<td>1430</td>
<td>Transport to airport for return flight to UK</td>
</tr>
</tbody>
</table>
Conclusions

Tourism

1. Wales boasts some of the most spectacular landscape in Britain and Europe, has a unique culture, language and history, dynamic cities, and offers a range of activities and a high quality of life. It is therefore a natural destination for the growing market of cultural and environmental tourists. We are therefore concerned that Wales still has a low profile overseas compared to other parts of the UK and attracts the third smallest number of international visitors of any UK region. (Paragraph 23)

2. We believe that a lack of awareness internationally about Wales’s strengths as a holiday destination is a key reason for Wales’ relatively low share of UK-bound holidaymakers. Wales lacks a coherent brand for the overseas market. Wales needs to be marketed much more vigorously overseas, with a strong and clear narrative about the country’s historic and modern aspects and attractions for tourists. For example, whilst Dylan Thomas centenary events have been organised in Wales, London and New York, they have not been used to promote long-term growth in the number of cultural tourists to South Wales, through attaching the Dylan Thomas brand to the Wales brand. (Paragraph 24)

3. While the current number of international tourists to Wales remains below pre-2006 levels, we believe there is substantial potential for growth in Wales’ tourism market if the global economy continues to recover. Tourism bodies responsible for promoting Wales need to grasp this opportunity. (Paragraph 25)

4. We acknowledge the efforts by VisitBritain to promote different parts of the UK to potential overseas tourists. We share concerns, however, that the current emphasis on meeting an overall target for UK visitor numbers may lead VisitBritain to focus disproportionately on promoting more well-known destinations, such as London, at the expense of other areas, including Wales. (Paragraph 31)

5. For many international visitors, “Britain” is often perceived as being England only. It is therefore important that UK government bodies responsible for international promotion reflect the distinct identity of each constituent part of the UK in their activities. (Paragraph 41)

6. The evidence on the effectiveness of the UK Government’s GREAT campaign in promoting Wales is mixed. We remain to be convinced that Wales has benefited much from the campaign. (Paragraph 42)

7. Despite the willingness of VisitBritain to engage with the Welsh Government, we are disappointed with the current levels of engagement between VisitBritain and the Welsh Government. (Paragraph 51)

8. We welcome recent efforts to improve the relationship between VisitBritain and Visit Wales. Both promote Wales in different overseas markets but good co-ordination is necessary to market Wales in a consistent way, to share market intelligence, and avoid duplication of effort. VisitBritain has much greater resources
than Visit Wales and there are clear advantages for Wales to be included under the auspices of the international work of the UK Government. (Paragraph 52)

9. The refusal of the UK Government to reduce the VAT rate for the tourism industry, unlike most other EU states, could be having a detrimental effect on the Welsh tourism industry. (Paragraph 57)

**Inward investment and trade**

10. We accept that UKTI’s role is to maximise the total amount of investment in the UK. While there are specific examples of UKTI promoting Welsh projects overseas, we believe that Wales could still benefit more from UKTI’s expertise, reputation, and international contacts. It is particularly worrying that Welsh companies do not utilise UKTI as much as they could. (Paragraph 72)

11. We are concerned that Wales has no dedicated trade promotion agency, unlike Scotland and Northern Ireland. The lack of such a body is, in our view, hampering inward investment opportunities. (Paragraph 82)

12. Overseas trade delegations provide a valuable opportunity to promote Wales and Welsh companies overseas. It is therefore vital that Welsh companies are given the opportunity to accompany trade delegations with UK Government ministers. In too many cases Welsh companies are simply not aware of the opportunities available to participate in such delegations. (Paragraph 90)

13. Given the shared interest to grow the Welsh economy, we believe that more could be gained from the Wales Office and the Welsh Government co-operating more closely on trade delegations. (Paragraph 93)

**Culture and language**

14. Wales has a unique and diverse culture, including its own language, but is not widely known around the world. Promoting Welsh culture overseas can help build familiarity with Wales, with subsequent economic, cultural and political benefits for Wales and the UK more broadly. (Paragraph 109)

15. At the organisational level, we believe that the British Council’s knowledge of Wales would benefit from permanent Welsh representation on its Board of Trustees. (Paragraph 112)

16. We congratulate all those involved with bringing the NATO Summit to Wales, notably the then Secretary of State for Wales and the Wales Office, the Foreign and Commonwealth Office, the Welsh Government, and the Celtic Manor Resort. The summit helped to increase awareness about Wales around the world. It is important that the UK and Welsh Governments capitalise upon this to bring longer-term benefits to Wales, through investment and tourism opportunities. (Paragraph 117)
Recommendations

Tourism

17. We recommend that VisitBritain and Visit Wales work together to develop a strategy, by February 2015, for promoting Wales as a first choice destination for international visitors to the UK. A key aspect of this should be the use of a distinctive brand used consistently in communications to help raise awareness of Wales internationally. (Paragraph 26)

18. We recommend that VisitBritain sets clear, measurable targets for encouraging international tourists to visit different regions of the UK. (Paragraph 32)

19. We recommend that the UK Government make improvements to its GREAT campaign to better reflect Wales as a distinct location, and report to us on progress made by February 2015. (Paragraph 43)

20. Wales can be reached from London within a few hours yet, unlike Scotland, is often not included in ready-made UK holiday packages offered by tour operators. In developing a joint strategy with Visit Wales to promote Wales as a first choice destination, we recommend that VisitBritain prioritises efforts to encourage tour operators to include Wales in ready-formed UK holiday packages. We expect VisitBritain to report progress to us by February 2015. (Paragraph 45)

21. We recommend that VisitBritain improves its website to better market Wales overseas. VisitBritain should report back to us on progress made by February 2015. (Paragraph 46)

22. We recommend that VisitBritain reports on the impact of the Memorandum of Understanding with Visit Wales by February 2015. (Paragraph 53)

23. We recommend the UK Government review its policy on the VAT rate for the tourism industry, with the ultimate aim of reducing the current 20% rate. (Paragraph 58)

Inward investment and trade

24. We recommend that UKTI reports to us by February 2015 on progress made to improve its profile amongst Welsh businesses and its engagement with them. (Paragraph 73)

25. Nine of the ten poorest regions in Northern Europe are in the UK, including West Wales and the Valleys. The UK also houses the richest—Inner London. The Committee believes that UKTI has a crucial role in helping address geographical wealth inequalities and notes the efforts of German Trade and Investment to reduce disparities within the German state. UKTI should be mandated by the UK Government to perform a similar function. (Paragraph 74)

26. Modern broadband alongside the prospect of rail electrification means that Wales can increasingly offer a lower cost, lower congestion and better quality of life offer to
inward investors than London and the South East. We reiterate our previous calls for the establishment of a dedicated trade promotion agency, either sitting within the Welsh Government or as a private sector vehicle working in collaboration with the Welsh Government to drive inward investment projects into Wales. (Paragraph 83)

27. We recommend that UKTI ensures a regional spread of businesses are included on overseas trade delegations and that Welsh companies are given opportunity to participate. (Paragraph 91)

28. We recommend that the Wales Office and Welsh Government, as a matter of routine, inform all Welsh Members of Parliament and Assembly Members about upcoming trade delegations so that they in turn can inform relevant businesses in their constituency. We recommend that such a system be in place by the beginning of 2015. (Paragraph 92)

29. We recommend that the Wales Office and Welsh Government seek greater opportunities for joint overseas trade delegations, at both the ministerial and official level, where interests align and to promote Wales internationally as a place to do business. (Paragraph 94)

Culture and language

30. The British Council does some good work to promote Wales, most notably with the excellent Welsh Language Project in Patagonia, Argentina. However, there are other parts of the world, including the USA, with a notable Welsh diaspora or where there is an interest in the Welsh language. We recommend that the British Council investigate other opportunities where Welsh culture and language can be promoted to overseas markets. (Paragraph 111)

31. We recommend that the British Council’s Board of Trustees includes a permanent Welsh representative, to ensure that Welsh interests are represented at the highest level of the British Council. (Paragraph 113)

32. We recommend that the UK Embassy in Argentina should have a specific strategic goal to help promote the Welsh language in Patagonia and foster relations between the region and Wales. (Paragraph 114)
Formal Minutes

Tuesday 14 October 2014

Members present:

David T.C. Davies, in the Chair

Guto Bebb  Nia Griffith
Geraint Davies  Simon Hart
Jonathan Edwards  Jessica Morden

Draft Report (International representation and promotion of Wales by UK bodies), proposed by the Chair, brought up and read.

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

Paragraphs 1 to 117 read and agreed to.

Annex and Summary agreed to.

Resolved, That the Report be the Second 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 (Standing Order No. 134).

[Adjourned till Wednesday 22 October at 2.15 p.m.]
Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the Committee’s inquiry page at www.parliament.uk/welshcom.

Tuesday 1 April 2014

Dr Andrew Crawley, Marie Currie Research Fellow, University of Illinois Urbana-Champaign, Professor Jerry Hunter, School of Welsh, Pro Vice-Chancellor, Bangor University, and Professor Annette Pritchard, Director, Welsh Centre for Tourism Research, Cardiff Metropolitan University. Q1-41

Tuesday 14 May 2014

Adrian D. Greason-Walker, Executive Director, Wales Tourism Alliance, Roger Burgess, Chairman, Wales Association of Self Catering Operators, and Mandy Davies, Chairperson, Vale Tourism Association Q42-102

Simon Gibson OBE, Director, and Ian Edwards, Chief Operating Officer, Celtic Manor Resort

Tuesday 12 June 2014

Mike Morgan, Proprietor of Llansantffraed Court Hotel, Abergavenny, and co-owner of Welsh Rarebits, and Justin Albert, Director for Wales, National Trust, and Vice-President, Hay Festival Q103-160

Thursday 26 June 2014

Michael Carrick, Chief Executive, Aventa Capital Partners Ltd., and Huw Roberts, Chair, Institute of Director Wales Q161-227

Geraint Talfan Davies, Chair, Welsh National Opera, Iestyn Garlick, Chair, Teledwyr Annibynnol Cymru, and Dr Sioned Puw Rowlands, Director, Wales Literature Exchange

David Anderson, Director General, Amgueddfa Cymru (National Museum Wales) Nick Capaldi, Chief Executive, Arts Council Wales, and Right Hon. Lord Dafydd Wigley, President, Steering Committee for 150 year Patagonia celebrations, Wales-Argentina Society

Tuesday 1 July 2014

Jenny Scott, Director, British Council Wales, and Simon Dancey, Global Director Cultural Skills, British Council Q228-302

Patricia Yates, Strategy and Communications Director, VisitBritain, and David Bishop, Head of Strategy, VisitBritain

Wednesday 9 July 2014

Rt Hon. David Jones MP, Secretary of State for Wales, Lord Livingston, Minister of State for Trade and Investment, and Dominic Jermey, Chief Executive, UK Trade and Investment Q303-348
Published written evidence

The following written evidence was received and can be viewed on the Committee’s inquiry web page at www.parliament.uk/welshcom. IRW numbers are generated by the evidence processing system and so may not be complete.

1. Amgueddfa Cymru - National Museum Wales (IRW0001)
2. Arts Council of Wales (IRW0023)
3. British Council (IRW0003)
4. Capital Region Tourism (IRW0019)
5. Cymdeithas Cymru-Ariannin (IRW0007)
6. Dr Andrew Crawley and Prof Max Munday (IRW0005)
7. Dr John Ball (IRW0004)
8. Dr John Ball - supplementary written evidence (IRW0032)
9. Edwina Hart AM (IRW0033)
10. Federation Of Small Businesses Wales (IRW0017)
11. Helen Jones (IRW0002)
12. Institute Of Directors, Wales (IRW0010)
13. J.B. Wood (IRW0018)
14. Justin Albert (IRW0028)
15. Michael Carrick, Aventa Capital Partners (IRW0036)
16. Mike Morgan (IRW0025)
17. Professor Annette Pritchard (IRW0027)
18. South West Wales Tourism Partnership (IRW0016)
19. Stephen Bristow (IRW0008)
20. Stephen Bristow - supplementary written evidence (IRW0030)
21. TAC (Welsh Independent Producers) (IRW0022)
22. The Learned Society Of Wales (IRW0006)
23. Vale Tourism Association (IRW0021)
24. Visit Wales, Welsh Government (IRW0024)
25. VisitBritain (IRW0013)
26. VisitBritain (IRW0034)
27. VisitBritain - supplementary evidence (IRW0029)
28. Wales Association of Self Catering Operators (IRW0020)
29. Wales Literature Exchange (IRW0014)
30. Wales Office (IRW0011)
31. Wales Tourism Alliance (IRW0009)
32. Welsh Association Of Visitor Attractions - Southern Region (IRW0031)
33. Welsh National Opera (IRW0015)
# List of Reports from the Committee
during the current Parliament

All publications from the Committee are available on the Committee’s website at [www.parliament.uk/welshcom](http://www.parliament.uk/welshcom).

The reference number of the Government’s response to each Report is printed in brackets after the HC printing number.

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International representation and promotion of Wales by UK bodies

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Second Special Report
Inward Investment in Wales: Government Response to the Committee’s Eighth Report of Session 2010–12

Third Special Report
Broadband Services in Wales: Ofcom Response to the Committee’s First Report of Session 2012–13

Session 2010–12

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Welsh prisoners in the prison estate: follow up: Government Response to the Committee’s Ninth Report of Session 2009-10

Second Special Report
Wales and Whitehall: Government Response to the Committee’s Eleventh Report of Session 2009-10

Third Special Report
Cross-border provision of public services for Wales: follow up: Government Response to the Committee’s Tenth Report of Session 2009-10

First Report
The implications for Wales of the Government’s proposals on constitutional reform

Second Report
The proposed amendment of Schedule 7 to the Government of Wales Act 2006

Third Report
The Severn Crossings Toll

Fourth Special Report
The implications for Wales of the Government’s proposals on constitutional reform - Government’s Response to the Committee’s First Report of Session 2010-11

Fourth Report
The future of the Newport Passport Office

Fifth Special Report
The Severn Crossings Toll: Government Response to the Committee’s Third Report of Session 2010-11

Sixth Special Report
Proposed Legislative Competence Orders relating to Organ Donation and Cycle Paths

Seventh Special Report
The proposed amendment of Schedule 7 to the Government of Wales Act 2006: Government Response to the Committee’s Second Report of Session 2010-11

Fifth Report
S4C

Sixth Report
Pre-appointment hearing with the Government’s preferred candidate for the Chairman of the S4C Authority

Seventh Report
Representation of consumer interests in Wales

Eighth Report
Inward Investment in Wales