

## Written evidence submitted by Professor Dorothy A. Yen, Dr Ana Canhoto, and Dr Liyuan Wei, Brunel University London (TOU0005)

### Short bio

Our response is a collective effort, compiled by three academics based in Brunel University London. All of us were once international tourists, originated from different countries. We have all visited Wales and fallen in love with it. Hence, we prepared the following responses, integrating our academic expertise with our tourist gaze. Our team consists:

**Dorothy Yen**, Professor in Marketing at Brunel University London. Dorothy takes on a consumer-centric approach to understand and discuss marketing, branding, and tourism matters. She looks at how destination brands could be promoted by tourists for tourists on social media through user-created contents.

**Ana Canhoto**, Reader in Marketing at Brunel University London. She has expertise in the use of digital technology in service contexts. She has advised travel and hospitality organisations on segmentation and positioning, with a particular focus on recovering from the Covid-19 pandemic.

**Liyuan Wei**, Senior Lecturer in Marketing at Brunel University London. Her research focuses on consumer psychology and sustainability and ethical consumption.

### Executive summary

- Wales offers a rich culture and history, dynamic cities, scenic landscapes, beautiful coastline and a diversity of experiences for visitors. Nevertheless, most of these offerings are not exclusive to Wales. As a result, Wales lacks a distinctive association with tourist landmarks, in the mind of international tourists. This makes Wales less attractive than other UK destinations to international tourists.
- Wales should rebrand itself as the “The Land of Dragons and Legends”, capitalising on cultural references such as the Y Ddraig Goch / the Wales Red Dragon and King Arthur.
- This needs to be supported by a campaign that focuses on discovery, shows how tourists can complete many activities in a short amount of time, and encourages locals and tourists to share images of Wales with the hashtag #ilovewales. This is because positive word of mouth is critical in shaping destination perception and intention to visit.
- Sample itineraries, special tourist passes, and transport infrastructure are needed, to help tourists undertake sightseeing efficiently and to reduce the burden associated with planning local trips.

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### 1. Why is the number of international visitors to Wales comparatively low as a share of the UK total?

- 1.1. International visitors usually travel during their annual leave, which is a scarce good. Thus, they want to make the most of their limited time.
- 1.2. Relatively unknown destinations, like Wales (See question 2), are attractive to a small segment of travellers who seek “off the beaten path” destinations.
- 1.3. However, for most international travellers, such destinations are unappealing. This is because it is difficult for those visitors to assess the quality of their future experience

ahead of travel, and, therefore, they perceive it as a risky use of their limited annual leave time (vs visiting a more famous destination for which there is more information).

## 2. Does Wales have a sufficiently strong “brand” internationally and what more could be done to promote Wales as a holiday destination abroad?

- 2.1. Wales offers a rich culture and history, dynamic cities, a scenic landscape, a beautiful coastline and a diversity of experiences for visitors. However, many of these offerings are not exclusive to Wales. As a result, Wales lacks a distinctive association with tourist landmarks, in the mind of international tourists. This makes Wales less attractive than other UK destinations to international tourists.
- 2.2. Britain’s cultural attractions are the top visiting motivation for international tourists, followed by the variety of places on offer. Unlike, for instance, London (e.g., Big Ben, Tower of London, British Museum, etc.)<sup>[1]</sup> or Scotland (e.g., Edinburgh, Highlands, Bagpipes), Wales is less well-known for its distinctive features that are exclusive to Wales.
- 2.3. The exception is the reference to dragons or to legendary figures such as King Arthur and Merlin. None of the other UK nations can own up to these cultural symbols as righteously as Wales.
- 2.4. Following the success of Harry Potter and Fantastic Beasts, magic creatures have become a popular trend amongst not only children but also adults. This is no exception amongst tourists, as evidenced by the large number of tourists visiting the Harry Potter Studio and the Natural History museum’s exhibition “Fantastic Beasts – The Wonder of Nature”.
- 2.5. This presents an opportunity for Wales to capitalise on its existing association with dragons and legendary figures. Specifically, Wales should tap into two legendary cultural heritages (namely, the Y Ddraig Goch – the Wales Red Dragon and King Arthur) and use them to brand Wales as “The Land of Dragons and Legends”. This would reposition Wales as the first and only destination that tells the legendary stories of mythic dragons and King Arthur.
- 2.6. Although the Wales flag already features Y Ddraig Goch, the association with the dragons could be further strengthened through various tourist activities and marketing communications so that dragons and legends become top of mind when international tourists think about Wales. For example, a museum dedicated to dragons, where mysterious dragon legends around the world are documented and retold for exhibitions; or dragon walks around towns and coastal lines. Furthermore, creative theme parks or organised tourism activities could make reference to popular movies, offering unforgettable experiences<sup>[2]</sup>, targeting both children (e.g., “How to Train Your Dragon”; “The Kid Who Would Be King”; or “The Sword in the Stone”), as well as adults (e.g., “King Arthur, Legend of the Sword” or “Monty Python and the Holy Grail.”)
- 2.7. References to the Wales Red Dragon and King Arthur are already being made by Visit Wales. Thus, this repositioning exercise would not be starting from scratch. Rather, it would be about better promoting these two attractions as unique selling points for Wales, by repositioning the country as the land of dragons and legends. Hence, when international tourists are evaluating and choosing their tourist destinations, they consider Wales as a destination with multiple values<sup>[3]</sup> on offer, on top of its beautiful landscapes and outdoor adventures.
- 2.8. In addition, destinations benefit from being the filming locations of well-liked and popular movies and TV shows<sup>[4]</sup>. The dramatic landscape of Wales has been the shooting location of many movies<sup>[5]</sup>. However, either these shows are not well known internationally (e.g., *Gavin and Stacey*), or it is not well known that the shooting was done in Wales (e.g., Netflix’s *Sex Education*). Moreover, destinations also are featured as the backdrop of popular movies and TV shows, such as Oxford in *Inspector Morse*, Shetland in *Shetland*, and many more. However, movies and TV shows such as true crime story, *The Pembrokeshire Murders* (ITV), although rated very favourably (82% on Rotten Tomatoes), are not widely available, and thus do not help promote the brand awareness of Wales as a destination. Building a strong association in the minds of international tourists between popular shows and Welsh sceneries will enhance the

Wales brand as a must-see destination.

- 2.9. The visual images on VisitWales.com<sup>[6]</sup> do not feature prominently non-White tourists. Individuals are more attracted to promotional materials that they can identify with in terms of ethnicity<sup>[7]</sup> or demographics. Future marketing efforts should diversify the imagery used in promotional materials, to enhance the diversity of representation of the tourism visitors, in order to position Wales as a destination that welcomes international tourists from all different markets.

### **3. How has the COVID-19 pandemic impacted the tourism industry in Wales?**

- 3.1. The pandemic has caused tourists to book closer to the date of travel, and only when it is possible and easy to cancel or change their bookings. This explains the increase in tourism within the UK, in the last year<sup>[8]</sup>.
- 3.2. While this is positive for the local economy, last minute bookings create uncertainty for hospitality venues and the need for very flexible operations. This is reflected in avoidance of long-term contracts with suppliers and employees and, thus, increased precarity for those in, or associated with, this industry.
- 3.3. Moreover, as the market is gradually moving into the post-pandemic recovery phase, people are starting to book international travel, again. This presents a risk for Wales, if it continues placing its emphasis on attracting UK-based tourists.

### **4. What would be the potential implications for Wales' attractiveness to international visitors of a tourism levy?**

- 4.1. Tourism levies are, typically, charged separately to the cost of the accommodation, meaning that it is very clear to tourists that they are paying an additional tax, on top of the accommodation cost and associated VAT.
- 4.2. Since tourism levies are a small proportion of the overall cost of accommodations and flights, they are unlikely to deter international tourists from booking. Especially when international tourists are coming to Wales for its unique tourism features, e.g., the dragons and legends, that have not been offered elsewhere.
- 4.3. Moreover, because levies are applied by all hospitality suppliers, they are unlikely to shift demand from one supplier to another within the region where it is applied.
- 4.4. However, the payment of taxes (however small) is likely to have a negative impact on tourists' satisfaction because they feel that they are being taken advantage of (namely, temporary visitors may feel unfair that they are financing future improvements in the destination). In turn, reduced satisfaction reduces tourists' willingness to recommend the destination to third parties, which is a significant disadvantage for a destination lacking distinctive features, like Wales. This is because word of mouth has been shown to be determinant in shaping a destination's image, as well as visit intentions<sup>[9]</sup>.
- 4.5. In other words, the introduction of tourism levy could increase government revenues in the short-term but is likely to have a detrimental effect in terms of creating a sustainable stream of visitors. Hence the timing of the levy introduction is critical. It may be better accepted by international tourists when Wales' unique selling point is well established and is understood in the mind of international tourists.
- 4.6. If the government were to introduce a levy, it should be clearly communicated to visitors how the additional tax is used to improve their current experiences (as opposed to supporting the industry, the local community, or future improvements).

### **5. What steps are needed post-pandemic for the tourism sector in Wales to recover and grow its international appeal?**

- 5.1. Whilst government guidance and resource allocations are critical in reopening safely, supporting businesses and stimulating demand, the route to inbound international tourism recovery is going to face steep competitions from many other countries that have

a heavy reliance on tourism economy[10].

- 5.2. This highlights the importance of repositioning and rebranding Wales as the “Land of Dragons and Legends” for better international appeal and recognition.
- 5.3. The repositioning and rebranding exercise cannot rely on government effort alone. It requires understanding, support, and co-promotion from multiple stakeholders[11], including Welsh tourism board, local tourism and hospitality business, residents, as well as domestic tourists from Wales and other parts of the UK. Together, they can help create, facilitate and promote a new Wales brand image by sharing their own experience of the new land of dragons and legends via social media. Destination brands can benefit from user co-created pro-tourism content because such posts are better appreciated and regraded by tourists for their impartial views and authenticity, compared to marketing message used in tourism adverts or promotion materials. User-created content triggers positive emotions such as amazement, attractiveness, pleasure, preference, enchantment, nostalgia, belongingness and intimacy[12] from both the contributors as well as the viewers. Therefore, tourists and residents should be encouraged to use the hashtag #ilovewales when using Instagram[13] to promote Wales.

## **6. How can the UK and Welsh Governments and bodies like VisitBritain and Visit Wales better work together to make Wales a more attractive destination for international visitors?**

- 6.1. In the short term, these bodies should direct their promotional efforts to the “off the beaten path” segment of visitors, who like to stay away from popular destinations. Such international visitors are likely to want to spend more time exploring Wales, hence the campaign should focus on discovery (for instance, famous movie and series’ settings, as well as places and hiking routes associated with Y Ddraig Goch and the legendary King author and Merlin).
- 6.2. In addition, promotion effort should focus on attracting London-based international tourists to visit Wales as a potential short-trip destination. The promotion should focus on illustrating how international tourists can complete many tourist activities in a short amount of time, making the most of their trip to the UK. An example of such a successful campaign is Visit Scotland’s “A Perfect Day”[14]. For Wales, this could be ‘A Day of Dragons and Legends.’ This needs to be complemented with a campaign to generate user-created content via the hashtag #ilovewales, and superior customer service that delights visitors and instils word of mouth.
- 6.3. In the mid-term, it is necessary to increase the perceived value[15] of visiting Wales by repositioning it as a distinctive destination (namely, through the proposed “The Land of Dragons and Legends” campaign); and by using physical evidence to signal quality, partnering with trusted providers[16] and adopting industry standards, to attract tourists.

## **7. What infrastructure and transport reforms are needed to make it easier for international tourists to reach Welsh destinations and attractions?**

- 7.1. Tourist inflow and transport infrastructure. Evidence suggests that transport infrastructure is a significant determinant of tourist inflow into a destination[17]. The fact that most inbound tourists to Wales must arrive by way of an English city first (e.g., London, Manchester) dictates that the international tourist inflow is funnelled through those destinations and then, naturally becomes a fraction of the initial inflow to London or Manchester. Enhancing the transport connections with these large destinations and promoting the ease of these connections will help increase the inflow especially for international tourists.
- 7.2. Services: It is critical to help international tourists make the most of their time by providing frequent and easy to use public transport. Major tourist attractions such as the North Coast Way, Pembrokeshire, and Snowdonia, which are on many international tourists’ to-see list, are, typically, hard to reach without a car. The transport to and from

these attractions, from the major towns where tourists may be based or staying overnight, is not easy to manage. Sample itineraries should be provided immediately.

- 7.3. Passes: Local transport companies, such as buses operators, should form partnerships and sell time-limited but unlimited use tickets, so that travellers do not have to navigate all the different transit modes, routes, ticket prices, and operators. An example is the Kansai One Pass which allows travellers to use all train and bus lines in the Kansai region of Japan, including the three cities of Kyoto, Osaka, and Kobe[18]. This type of pass greatly reduces the burden for the tourists to plan in advance and enables them to do sightseeing efficiently. The current Explore Wales Pass[19] has several problems that restrict its usefulness and popularity. First, it cannot be purchased online or on the phone; second, there is only one price for one duration (any 4 days out of an 8-day period); last, it is not well known and is not promoted prominently on such websites as Snowdonia National Park's "Traveling Around" section[20].
- 7.4. Special rates: Special rates for international travellers may be provided. For example, only foreign tourists visiting Japan from abroad for sight-seeing, under the entry status of "temporary visitor" are eligible for the low-priced Japan Rail (JR) Pass[21]. Special fares would be appealing to budget travellers especially those independent, backpacking, social media-active young travellers from foreign countries. Their word-of-mouth would be a cost-effective and authentic promotion for such a scheme worldwide and might counter negative effects created by the proposed tourism levy.

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