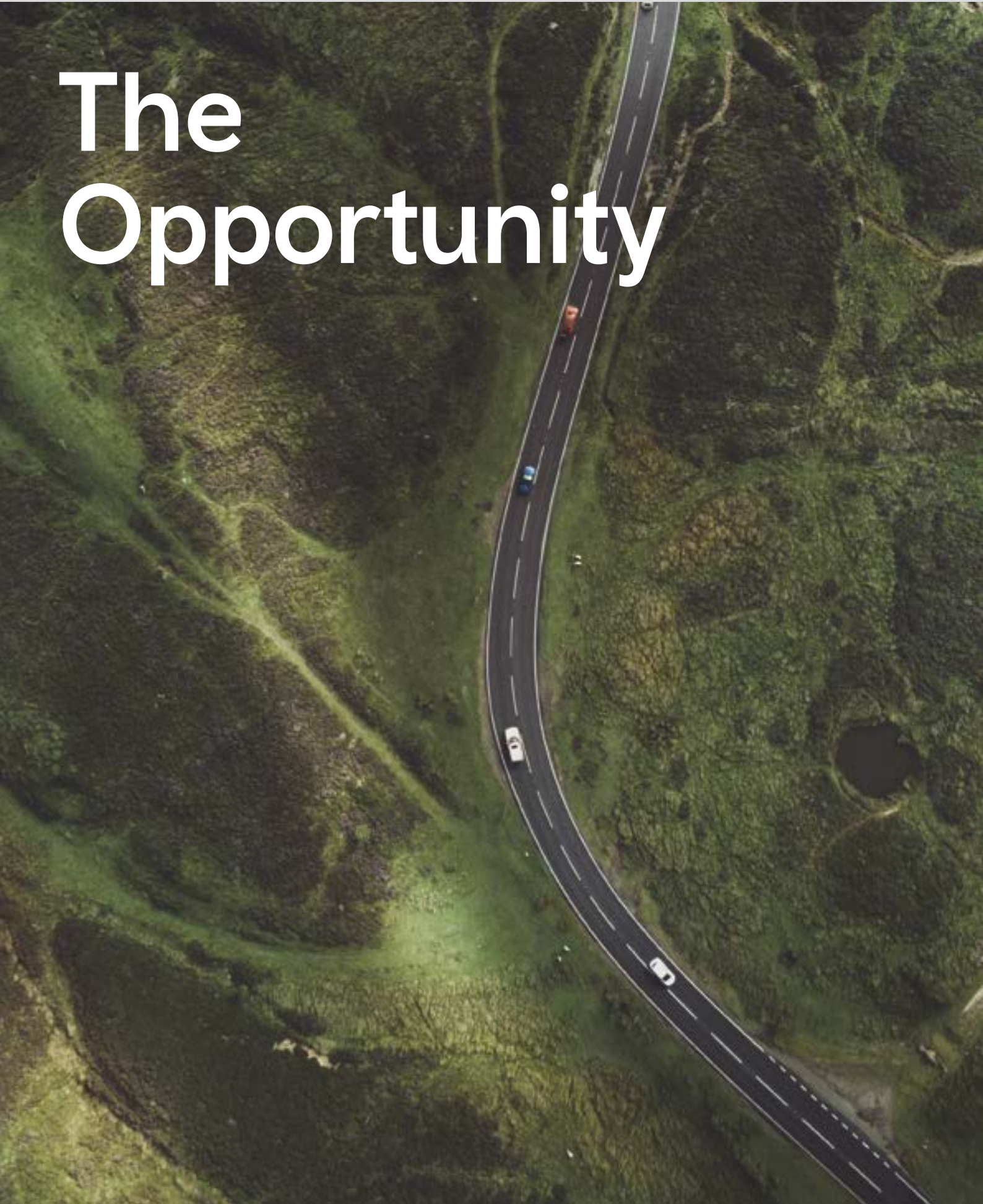




Ffordd Cymru
The Wales Way



The Opportunity



What exactly is “The Wales Way” initiative?

A suite of tourism routes with international appeal launching in late 2017.

The Wales Way will be a family of three routes that emphasise experiences rather than simply the journey from A to B i.e. the routes will encourage visitors to stop and visit product/areas along their way. The core routes are the A55 intersected by 2 vertical tourism routes covering the A470 and the A487.

Official titles for the 3 principal routes are:

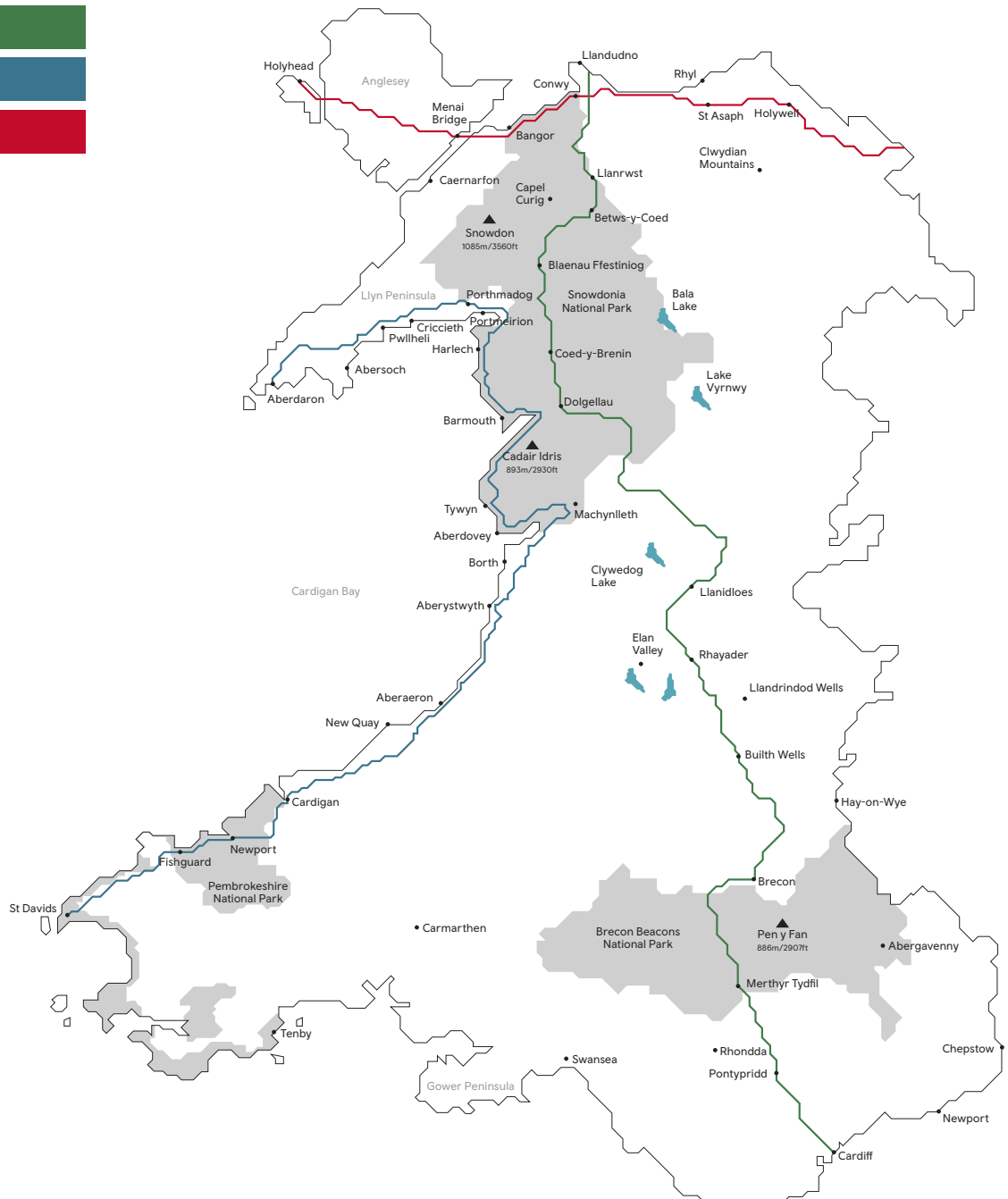
- A55 – The North Wales Way/Ffordd Gogledd Cymru
- A487 – The Coastal Way/Ffordd Arfordirol
- A470 – The Cambrian Way/Ffordd Cambria

The routes will, of course, be open to personal customisation and encourage trips off the main route (e.g. 40 minutes off the main road). They will each seek to represent the best of Wales – from our visitor experience, to our hospitality and our tourism businesses – and will embrace what makes Wales unique.

The Cambrian Way

The Coastal Way

The North Wales Way



Why “The Wales Way” approach – i.e. have other destinations used this approach and has it been successful?

We’re fortunate to have some excellent examples to draw from. This has helped with the creation of the concept giving valuable information such as “lessons learned” as well as an indication of the impact that initiatives such as this can have, particularly in terms of attracting valuable international visitors.

The concept of “National Routes” is a familiar one. Close to home you may be aware of the *Wild Atlantic Way (WAW)* in Ireland (www.wildatlanticway.com); the WAW is a coastal touring route along Ireland’s Atlantic Coast, embracing 9 counties from Kinsale in the South to Malin Head in the north. Originated in 2013 the route is one of the “youngest” examples and is going from strength to strength in terms of not only its popularity but also the capacity it has shown to open the door to destinations/product for increasing visits and thus economic benefit.

In Scotland, the *North Coast 500* (<https://www.visitscotland.com/see-do/tours/driving-road-trips/north-coast-500/>) is a loop-based route that starts and finishes in Inverness, taking in dramatic coastal scenery guiding visitor experiences from attractions to activities.

Further afield, in Norway, the inception and promotion of 18 *National Routes* (<http://www.nasjonaleturistveger.no/en/routes>) has encouraged not simply visits but also commercial development and innovation along their length.

There are of course, many other international examples such as the iconic, well established Route 66 in the USA, 2,500 miles of experiences from Chicago in the east to Santa Monica on the west coast but we’ve obviously looked at the countries and destinations that offer the scale and product that we can compare and contrast with Wales.

One thing that all these routes share is their ability to inspire and encourage visitors, offering suggested blueprints for taking in the best of what each destination has to offer.

Why is the initiative being planned?

The purpose of ‘The Wales Way’ will be to provide a focal point for international marketing, increasing visibility (and marketable images) of Wales in the world. Despite sustained growth in tourism to Wales over the last few years, Wales still lags behind other countries in terms of awareness, particularly in international markets.

The Wales Way aims to create depth to the new, emergent Wales brand, and act as a focal point for industry. It will aim to drive the development of bold and internationally outstanding tourism experiences to inspire visits.

Ultimately, The Wales Way will represent an “international class” family of routes with authentic and distinctive experiences at their core, and aim to bring real and long lasting economic benefits to Wales.

Which visitors will be targeted?

The Wales Way represents great opportunities to target the higher spending international visitor market but will also, of course, add to Wales’ appeal and offer within competitive, core domestic markets.

Visit Wales Target Market Segments share a common attitude towards holiday taking. They are described, in broad terms, as “Independent Explorers”.

If required, further information on Independent Explorers and the way that they breakdown by market segment (e.g. Family Active Explorers, Active Explorers groups and couples, Scenic explorer couples) is available on request.

For how long will The Wales Way initiative run?

This is initially a 10-year programme of activity. It will evolve and develop over the next decade, offering the chance for industry/destinations to work with the concept and gain competitive advantage from it. The 10-year period presents a window of time in which The Wales Way can establish not only a reputation but also crucially, a field of commercial and innovation opportunities for development for the industry in Wales.



Who is the lead body– is it a cross cutting initiative for Welsh Government (i.e. will it include transport/infrastructure, broadband etc.)?

Although The Wales Way will be 'launched' by Visit Wales later this year, it will be underpinned by the long term strategy that calls for wide ranging partnership, tourism industry support, strong leadership from within, cross-portfolio Government engagement and a comprehensive investment approach.

Visit Wales is providing the vision and overarching brand and framework for the programme, but the intention is very much that individual regions, destinations and businesses will leverage this as an opportunity to achieve greater visibility in the marketplace. The Wales Way intends to provide the 'glue' to achieve a level of cut-through that individual destinations and existing routes and trails in Wales would struggle to achieve on their own, offering another dimension to potential promotion in addition to a focal point for an area or products own marketing.

How does a product/destination/organisation get involved?

These are early days for the project and by rolling out information we aim to allow ample time for those who wish to be involved to consider how they may capitalise on the routes.

This could be thinking about not only how they may benefit in the short term (e.g. next 12-24 months) but also how the opportunities presented by such a comprehensive 10 year initiative can be realised via consideration of forward planning.

How is the initial product (for launch) being chosen?

Outlined below are our broad guidelines for product selection for launch.

- Signature and Supporting product will be prioritised.
- Products in line with our national brand vision, values and objectives.
- Supporting product should be ripe and ready to market for Autumn 2017.
- Between 30-40mins drive time from the main spine of the route
- Events should be iconic, established and annual.
- Product that supports the thematic years approach. Year of Sea – 2018, Year of Discovery – 2019
- Product that supports and strengthen unique tourism offer of each route:
 - Culture/Heritage – The North Wales Way
 - Coastal – The Coastal Way
 - Countryside – The Cambrian Way

A framework has been developed to structure the process for identifying the key tourism experiences along the routes and to identify gaps for the development of potential new experiences.

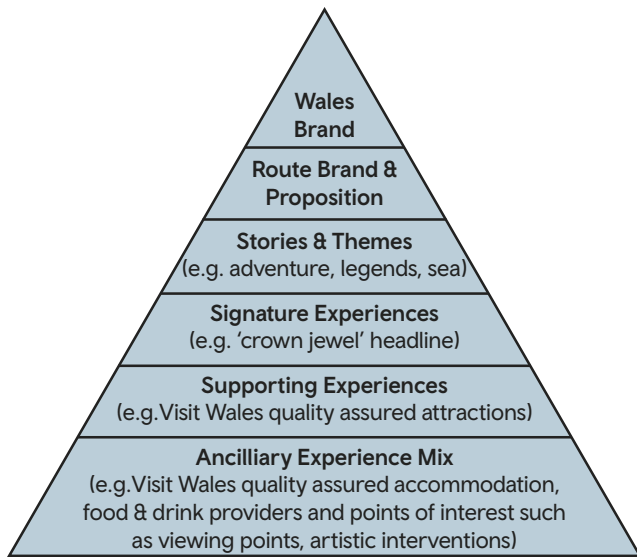
The framework is based on a system of Signature, Supporting and Ancillary experiences selected on the basis of how strongly they reflect the Wales nation brand vision.

For the first 6 months from launch Visit Wales will focus on getting the Signature and Supporting product right. In the first instance with the international visitor in mind we must provide the top level, iconic and must see/do places, product and experience.

Adding more wealth and depth of product including multi-modal routes and itineraries over 2018. A Google map based website hub similar to The National Tourist Routes in Norway <http://www.nasjonaleturistveger.no/en/routes> will be developed within the visitwales.com



The Project Framework



All chosen product, places and experiences will be in-line with the long term brand vision, core values, and objectives.

The Wales Way Brand Vision

The Wales Way will become an inspiring symbol of our confidence, boldness and ambition.

They will represent the best of Wales, from our visitor experience, to our hospitality and our businesses. They encompass what makes Wales unique.

Brand Values

Authentic	meaningful, high-quality with a strong and distinctive sense of place.
Creative	innovative, cutting-edge and highly-contemporary.
Alive	accessible, inclusive and immersive.

Brand Objectives

- Elevate our status
- Surprise and inspire
- Change perceptions
- Do good things
- Be unmistakably Wales

Visit Wales has built a comprehensive database of product that we feel:

- Evokes the Wales brand
- Supports the Route themes and “Years of” Experience theme
- Represents the best of Wales based on our chosen target market segments

That product information has been drawn from not only recognised resources (e.g. destination sites, organisational records) but also, crucially, from research into media attention and focus (e.g. Lonely Planet, Rough Guide and main stream press that appeals to the Independent Explorer) and also by investigating “social proof”.

Consideration of social proof has an ever-increasing role in holiday planning and, put simply, describes the influential role that peer- to-peer recommendation and key channels can play. e.g. The Wild Atlantic Way has achieved great exposure via platforms such as Instagram where images (and by default, often recommendations) of popular product are shared.

We monitor the products across Wales that inspire recommendations and sharing online as “must see” iconic venues and locations and this has been factored into initial choices.

If a product is not included at the start, can it be included at a later date?

Although certain product will be included for launch, this does not mean that additional suggestions will not be included at a later date.

We hope that once the industry/sector have a better feel for the content and scope of The Wales Way routes, this will act as a catalyst for showcasing additional existing and importantly, emergent products and projects that seek to realise opportunities to develop using The Wales Way as a foundation.

How does the initiative fit with the “Years of” experience based approach i.e. Adventure 2016, Legends 2017, Sea 2018 and Discovery 2019?

An important part of product showcasing, based on the framework for selection, is whether that product complements and supports the “Years of...” themes and stories.



Is it only for “big players” and destinations?

Not at all. Product inclusions will be based on the framework and will feature based on fit rather than size.

Will events/festivals also be included?

Events that have appeal to our target markets and that support the Wales brand will feature and, indeed, be an important part of The Wales Way’s appeal for visit planning.

Are there opportunities for tour operators to get involved or new businesses to be established around route product?

Other initiatives that have been rolled out (e.g. Wild Atlantic Way) have proven to be a foundation for the origination of new commercial ventures based around the route and we hope that this will be the case in Wales.

Visit Wales’ travel trade team will be using existing tour operator networks to encourage the take up of opportunities presented by the 3 routes as well as seeking new partners.

Why have the 3 particular routes been chosen?

The 3 routes will unify some of Wales’ most iconic product offering visitors easily identifiable routes that offer them iconic experiences in a reassuring, easy to follow way. The core routes also offer ease of customisation and complement the many loops and links opportunities that exist off the main road.

Whereas the M4 corridor in the south has long been an accepted way of travelling from east to west, many potential visitors may be unaware of the opportunities to explore the country by travelling across north Wales via the A55 and from south to north and vice versa using the A487 and A470.

The concept and positioning (in terms of a brand and marketing proposition) for The Wales Way is focused on creating strengths from what has been called “our own reality” (i.e. we accept that we have shorter routes than many larger destinations, but we have more to do along those routes).

Underpinning the principal of using The Wales Way’s routes to promote personal customisation and zig zagging will be a distinct visual identity which is inspired from the ancient script of Ogam, and the associated Welsh phrase ‘Igam Ogam’ which literally means ‘step to step’ or ‘zig zag’. As the launch approaches this visual identity will be seen in more detail.

How will areas not on those routes also benefit?

There will be very few areas in Wales that are not touched by each route in some way. Even those not directly along each will benefit from the promotion of “zig zagging” and the way that promotional activity will emphasise the ease of travel between locations (and indeed the variety of experiences to be enjoyed in a relatively small area).

The Wales Way will bring increased international profile that will impact positively on visits and spread economic benefit as widely as possible throughout the country’s visitor economy. In the same way that the “Years of” themes have, in turn, offered differing opportunities to locations and product, The Wales Way may initially have a more obvious, direct impact on those immediately encompassed by particular routes. e.g. Wales has only 3 designated National Walking Trails – Glyndŵr’s Way, Offa’s Dyke and Pembrokeshire Coast but the profile of these three trails assist in driving walking tourism across all of the country.

The long-term benefit to all areas, particularly of an increased profile for Wales internationally, will be invaluable.

Is it “only about driving routes”?

Not at all. Although the routes are based around recognised roads, this will not exclude other methods of transport being promoted as part of the experience. We feel that this is not only an essential aspect of long term planning but also a way that Wales can seek further differentiation from existing international tourism routes, many of which involve driving.

It is a recognised fact that over 90% of Wales’ visitor traffic comes by road, usually self drive. However, a core part of the promotion of The



Wales Way will be the encouragement of multi modal transport experiences (e.g. leave your car and take a bike, bus or train).

Promotion – where and how

When will it be launched and to whom?

Late Autumn 2017. The initial launch will be to the travel trade (i.e. those operators looking to bring business into Wales) and media at World Travel Market 6-8 November. The consumer roll out will follow shortly after and fit within national marketing activity as it ramps up in the spring of 2018 and Wales welcomes in the 'Year of the Sea'.

How will it be promoted?

The Wales Way will be mainstreamed throughout Visit Wales' marketing activity. It will also offer the opportunity for all destinations and product involved to capitalise on the theme within their own activity.

Funding

Will funding be available for individual projects along the routes?

Although there is no funding support attached *specifically* to The Wales Way we expect that organisations will take up opportunities afforded by the range of funding schemes already in place to assist them in product development and roll out.

Full details on existing support schemes can be found at <https://businesswales.gov.wales/zones/tourism/finance> and these include:

Regional Tourism Engagement Fund (RTEF)

that focuses on support to destinations across Wales for the promotion and development of distinctive, high quality visitor destinations (through the delivery of their respective destination management plans). It also assists those destinations to maximise the benefits from aligning with Visit Wales' product-led thematic year ('Years of...') approach.

Tourism Product Innovation Fund (TPIF) that aims to encourage closer joint working between tourism consortia, partnerships and trade groups with a view to developing and improving the product offer for visitors. It is focused on projects

that benefit both the tourism sector and local communities and critically, grow the tourism economy in a sustainable way.

Tourism Investment Support Scheme (TISS)

which is open to medium and large businesses (including third sector), with 50 or more full-time-equivalent (FTE) employees. It can also apply to micro/small businesses where funding is not possible through the MSBF fund (see below). TISS is an investment fund, comprising a mix of repayable and non-repayable finance, targeting eligible and priority capital 'Tourism' investment projects. It can be used to either upgrade existing product or create new high quality product.

Micro Small Business Fund (MSBF) is open to micro and small businesses (including third sector) with fewer than 50 FTE employees. MSBF is an investment fund targeting eligible and priority capital 'Tourism' investment projects. Support up to £100k will be non-repayable, but above £100k support may require a repayable element. It can be used to either upgrade existing product or create new high quality product.

Tourism Amenity Investment Support (TAIS) is available to the public sector, third sector and not-for-profit organisations. TAIS is an investment fund targeting small scale infrastructure projects and amenities, in the interests of the 'Tourism' public realm, that do not therefore include economic activity. Support of between £25,000 – £128,000 will be considered, aiming to; develop quality sustainable tourism facilities; add value to visitor experience at the destination level and deliver quality, innovation and a sense of place.



Contacts for further information

Initial Wales Way enquires will be fielded by Lucy von Weber and Gwawr Price who can be contacted via emailing gwawr.price3@gov.wales or calling 0300 062 2550

Also, if you are not already subscribed, keep up to date with developments by signing up to the Visit Wales trade newsletter https://public.govdelivery.com/accounts/UKWALES/subscriber/new?topic_id=UKWALES_10