

**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.
  - 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?**

International visitors usually travel during their annual leave, which is a scarce good. Thus, they want to make the most of their limited time. Relatively unknown destinations, like Wales (See question 2), are attractive options.

However, for most international travellers, such destinations are

mind when international tourists think about Wales. For example, a museum

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

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>.

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.

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.

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

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. 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.

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.

However, the payment of taxes (however small) is likely to have a negative impact on t





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

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<sup>18</sup>. 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<sup>19</sup> 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

Traveling

20.

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