

## **Place-Branding and Product-Branding in a peripheral economy: the case of Wales**

*Nick Clifton*

- **“Place-Branding and Product-Branding in a peripheral economy: the case of Wales”**, in Benneworth, P., Clifton, N., Doucet, B., Goebel, C., Hamm, R., and Schmitz, Y. (eds) *The Regeneration of Image in Old Industrial Regions: agents of change and changing agents*. Gottingen: Cuvillier Verlag. (2009) pp 115-136.

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### **Overview**

In this paper we explore issues around the increasing importance of symbolic value and how these might feed into the concept of regional branding, using Wales as the context. In order to do this we firstly provide a brief review of Welsh cultural and political history, followed by a discussion of the literature on place-branding itself. We then present a range of examples, quotes and imagery from Welsh companies and from the Welsh Assembly Government (WAG) in relation to their recent branding (and re-branding) activities. The hypothesis we seek to develop is of a co-evolving regional product and regional image branding landscape, in which aspects of regional culture are manipulated, reinvented and in turn fed back between the private and public sectors, is the key theme that we develop here.

At present the change described above only involves a relatively small number of companies, but significant in terms of profile, who are consciously stepping away from the past, more 'conservative' images, symbolism and cultural references to become more successful- and in turn these firms are themselves impacting upon and framing the cultural shift, raising the scope for the use of more self-confident, humorous, and self-deprecating symbols and manifestations of regional identity.

### **Wales: Culture and Context**

Distinctive Welsh politics began to (re)emerge in the 19th century, and in the 1900s Wales saw a revival in its national status. Plaid Cymru was formed in 1925, seeking greater autonomy from the rest of the UK, and also protection of the Welsh language. A referendum on the creation of an assembly for Wales in 1979 led to a large majority for the "no" vote. However, a further referendum in 1997 secured a "yes", although by a very narrow majority. The National Assembly for Wales was set up in 1999 and

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possesses the power to determine how the central government budget for Wales is spent and administered (although the UK parliament reserves the right to set limits on the powers of the Welsh Assembly). The Welsh Language Act 1993 and the Government of Wales Act 1998 provide that the Welsh and English languages be treated on a basis of equality. English is spoken by almost all people in Wales and is therefore the de facto main language. However, northern and western Wales retain many areas where Welsh is spoken as a first language by the majority of the population and English is learnt as a second language; 21.7% of the Welsh population is able to speak or read Welsh to some degree.

Thus at the start of the 2000s there were a number of external and internal factors combining to facilitate a re-identification of Wales as a distinctively Welsh entity and space; Howell and Barber (1990) have also listed a range of attitudes (in addition to the Welsh language) which distinguish the Welsh, including: 'Their separate history, instinctive radicalism in religion and politics, contempt for social pretentiousness, personal warmth and exuberance, sociability, and love of music. Defining Welsh identity is, however, very difficult (Bowie, 1993), indeed '...this is the first point to grasp about the history of this people- a country called Wales exists only because the Welsh invented it. Some historians and sociologists have suggested that for many Welsh people these historical and political processes have culminated in the notion that Wales is a classic example of an 'internal colony', for which the union with England marked the beginning of a sustained campaign of cultural homogenization by the central state (Davies, 1987).

### **The Rise of Symbolic Value: competition, consumption and place**

Innovation is a shared obsession among practitioners and academics; this is understandable (justifiable); however, often the biggest impact on a product's success often lies in the post-production phase, through the branding & marketing strategies that are employed. Increasingly, we take this functionality of products for granted, and our consumer choices are determined by the symbolic value of the product or the company behind it. The strength of a brand thus stems from a combination of how it performs

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and what it stands for. When a brand gets the mix right it makes us as consumers believe that it adds something to the idea of ourselves (Olins, 2003; Walker, 2008). Much of the same process happens when we “shop” for places to live and work; this is maybe most evident in the location choices of the ‘creative class’ – an emergent grouping of key knowledge workers who are increasingly seeking places with a reputation for a first-rate ‘people climate’ (Florida, 2002; 2007).

Symbolic meanings have long been related to the consumption of goods and experiences (Veblen, 1949); successful global brands typically originate from places that has a brand image of its own, and the product is quite often strongly linked with that image- whether it is an Italian sports car, associated with the qualities of style, speed and innovative design, French perfume with chic and classiness, or Japanese consumer electronics that associate implicitly with the merits of high-tech expertise and affordable quality. Just as manufacturers’ brands do, places also evoke intrinsic values and associated emotional triggers (Anholt, 2003).

As hinted at above, places and destinations are in many ways also in competition with each other- for highly skilled labour, for inward investment projects, and also for tourists and visitors. As such there are spatial outcomes from the above; i.e. places, nations and cities also promote themselves using immaterial qualities – this leads on to the concept and practice of ‘Regional branding’. It is probably fair to suggest that many find the very notion of nations competing around such ephemeral and even tawdry qualities as ‘perception’ and ‘brand image’ something of an anathema; it is though somewhat naive to believe that this does not actually occur in reality- many brands help to create a sense of identity and belonging, just as the ‘nation’ does (Olins, 2004). It is possible that these views may be just due to semantics (and perhaps experience of clichéd or ill thought-out examples in practice), and as such the word ‘reputation’ might be more appropriate.

### **Wales as a brand?**

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With respect to Wales in relation to the above issues, the country has in recent years seen a clearly increasing sense of distinct identity<sup>1</sup> but simultaneously lacks strong commercial brands (unlike certain other small nations- Scotch Whisky, Nokia, Guinness, Royal Bank of Scotland etc). The Irish for example have also managed to establish over recent years a successful new spirit-based drink – Baileys – and a new brand of cider, Magners, both of which help to project an image of Ireland around the world, as do the many Irish bars to be found in cities on all five Continents. Lack of brand awareness on the national and international consumer landscape is a problem in that it hampers Wales’ ability to control its own economic destiny, regardless of whatever governance arrangements are in place. Much of Welsh production activity is concentrated in the areas of intermediate products, which is in turn largely a legacy of past industrial structure – the heavy industrial past meant relatively few consumer-facing products. Although the majority of these industries have now gone, this single sector and large firm dominance and the weight of its influence on occupational and skill structures has typically left behind a weak local tradition of entrepreneurship and small independent enterprise. Moreover, the replacement employment during the 1970s through to the 1990s was often provided by manufacturing FDI operations, which although providing valuable jobs tended to lack the higher managerial functions such as finance, R&D, marketing and the like. Some more recent FDI industries located within Wales are different- e.g. consumer electronics- but even then the brand is largely associated with the origin of the Multi National Enterprise that produces it, rather than the region the actual production or assembly occurs in.

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<sup>1</sup> Research from the Economic and Social Science Research Council has revealed that some 21 per cent saw themselves as just Welsh, up from 17 per cent in 1997. Around 27 per cent see themselves as more Welsh than British. Significantly, it was among the youngest people that the largest mainly Welsh answers were found. Devolution and Constitutional Change Programme. ESRC London. November 13, 2006. [www.devolution.ac.uk](http://www.devolution.ac.uk).

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Therefore, although there are a number of signs of a strengthening national identity, which have perhaps gone some way towards creating a new Welsh image and several new Welsh brands, authors such as David (2007a; 2007b) suggest that there is something missing that stunts this ongoing effort – the weak Welsh presence in modern commercial fields, and particularly those closest to the consumer. Too much of Wales's image is based on (usually subsidised) artistic, cultural and heritage icons and / or its industrial and sporting past. The brand image of Wales has thus been characterised as “come and visit us and see what we used to do, or come and see what a show we can put on” (David, 2007b). If pressed to name ‘something Welsh’ responses might refer to miners, mail-voice choirs, Tom Jones or Rugby. More ‘modern’ examples might include Duffy, Manic Street Preachers, Stereophonics, Super Fury Animals and the like- but essentially the same principle is at work. This raises issues for both firms and policy-makers alike, i.e. for firms that have in the past been unwilling or unable to use regional association in their branding strategies, and for the policy-makers who are charged with addressing and improving this situation. However, as noted earlier - and despite concerns over the capacity to do so (see for example Cooke and Clifton, 2005) - there now exists at least some kind of scope for policy divergence in Wales, which offers the potential to begin to tackle this issue.

As Pritchard and Morgan (2001) note, imagery is one of the most researched aspects of tourism marketing; much more limited attention has focused on how the marketing of destinations can reflect socio-political, economic and cultural change.<sup>2</sup> Wales has a range of assets which underpin its tourism appeal and its diverse natural environment (particularly its coastline and mountains) is the main factor in attracting UK and European visitors. Wales' other principal tourism asset is that it is a distinctive country with its own language, culture and heritage. Pritchard and Morgan (2001) provide evidence of Wales being separately and simultaneously branded in

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<sup>2</sup> One example is McCrone *et al* on the making of Scottish heritage and how the landscape of that country is a largely cultural product.

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the UK and in its key overseas markets; the promotion of Wales' language and culture used as a marketing advantage overseas where visitors were seeking a new, culturally diverse experience. Conversely in the UK, it is the natural environment which forms the basis of Wales' marketing appeals. This was demonstrated by analysing promotional literature aimed at the USA in comparison to those produced for the UK market. Content analysis of the former revealed that such branding symbols as Celtic heritage, the Welsh language, myths and legends, and Welsh emblems accounted for almost a third of all the images. In contrast, material for the UK tended to be magazine-style collections of articles by celebrities with connections to Wales. Pritchard and Morgan (2001) argue that a combination of cultural and political processes have facilitated this promotion of a more overtly Welsh tourism brand image in international markets. By contrast, however, they suggest that such remains the power of certain negative discourses that a marketing strategy which promotes a distinctively Welsh brand image in the UK is still (at least in the early 2000s) considered problematic by public sector marketers in Wales. Interestingly, moving outside of the tourism sector into the field of international business, other authors have drawn analogous conclusions with respect to inward investment; although generally over performing in the attraction of investment from outside the UK, the Welsh economy has tended to underperform relative to other economic regions of the United Kingdom in attracting British investment (Smith, 1998). This author suggests that Wales does indeed have an image problem in this area too, in that there is a negative perception among those outside the region, and that this is compounded by perceptions of Welshness- of the people, language and culture.

### **Product Branding and the Region: some recent examples**

In this section we present examples of the branding imagery used recently by 3 companies in Wales- SA Brain, Prince's Gate, and Penderyn Welsh Whisky. This is not intended to be a 'representative' group in any statistical sense, rather it is a purposive sample designed to illustrate the issues we raise within this paper.

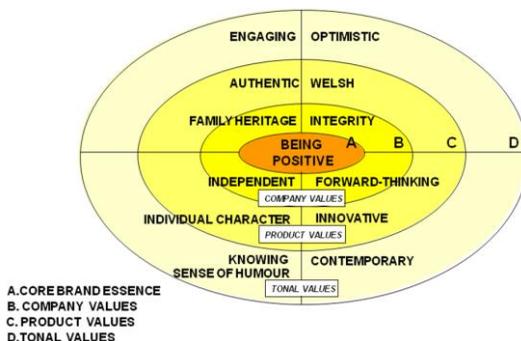
#### **SA Brain- "More Positive Thinking from Brains"**

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Founded in 1882, S.A.Brain is a family owned brewer, with 265 pubs in South East, South West and Mid Wales. The company mission statement is ‘to become the leading independent, integrated drinks and hospitality company in Wales, recognised by consumers throughout the UK.’ In 2001, market research indicated the need to shift consumer and trade perceptions of Brain’s away from its traditional, conservative reputation into a more dynamic, contemporary and innovative brand. To this end, a strategic ‘energisation’ of the company was initiated, concentrating on the ‘cornerstones’ of the Brain’s brand- pubs, drinks distribution and people, with the ultimate aim of becoming a ‘national’ Welsh brand. One of the key factors in this strategy was the sponsorship of the Welsh national rugby team, as was the simple act of turning the dragon in the logo around 180 degrees, so that it now faces forwards rather than backwards (and this symbolically into the future rather than referring back to the past). The company now sells into new areas of Wales (predominantly the north)- as the marketing director put it *“the logistics used to drive the marketing and branding; now the brand drives the logistics”*. Key aspects of the thinking that informed the strategy around the core brand essence of ‘Being Positive’ are shown in the schematic representation below (figure 1) which summarises the relationship between the key company, product, and ‘tonal’ values that Brain’s identified. The marketing director highlights the importance of this internal-external interconnectedness- *“If you want to make a brand work, you need a brand that works internally as well as externally. I.e. it works as a marketing tool, but also is rooted in the cultural within the organisation itself, and helps to reinforce that culture.”* For Brain’s, their Welshness is now a differentiator *“... an essential facet of the product and an important sales story.*

**Figure 1: Desired Brand Map**



The first graphic illustration of ‘positive thinking’ was a pint glass shown with the top half filled, as in figure 2 below. This

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simple device became the expression of positive thinking, supported by market research which asked interviewees how they would describe the picture (without a caption); 79% of respondents identified the glass as 'half full', so the idea both fitted the Welsh psyche and could be owned by Brain's.

**Figure 2: 'Always half full'**



The 'always half full' graphic in combination with 'positive thinking' has continued in usage in advertisements and retail point of sale items to this day. Shortly after the deal was agreed in October 2004 to

sponsor the rugby team, Wales were due to play an away game against France in Paris. France has in place strict laws in relation to the advertising of alcoholic drinks through sporting events, which meant that the 'Brains' logo could not appear on the shirt that the Welsh team would wear at the Stade de France.<sup>3</sup> The solution to this problem involved the use of a one-off alternative design which was in keeping with the wider humorous yet positive Brain's ethos, which proved very successful (see figure 3 below): as the interviewee at the company explained- "*At the time the WRU [Welsh Rugby Union- the sport's governing body in Wales] were thinking of just having a blank shirt- we obviously didn't want to do that.*"

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<sup>3</sup> It is likely that within the relatively near future European law will be made consistent in this area, meaning that any direct shirt sponsorship from producers of alcoholic drinks will be prohibited. This is already the case for international football.

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**Figure3: Brains and Brawn<sup>4</sup>**



*So that's when we came up with the 'Brawn' idea. This whole thing was then was picked up by the media... and so the shirt ended up being featured on the back page of*

*one of the tabloids. And it was also a talking point during the game itself, with the TV commentators explaining what it was all about – which was great coverage for us."*

### **Prince's Gate**

The company was founded in 1992 by two brothers and remain as directors, with private ownership. Prince's Gate employs around 30 people, producing between 30-35 million bottles per annum. Previously the product was associated with a quite conservative (possibly even dull, or non-descript) brand image- see figure 4 below for a representation of this. As a direct response to this issue, which was becoming a limiting factor in market expansion and product differentiation, the board made a conscious decision to attempt to change this perception.

**Figure 4: Previous logo used by Prince's Gate**



As the Communication Director describes the thought process within the company around this re-branding- "...we wanted to appeal to the target market

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<sup>4</sup> For those unfamiliar with it, 'brains and brawn' is English language colloquialism, essentially referring to the combination of intelligence (i.e. brains) and physical strength (brawn).

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which was female bias of between 25 to 34 year old. We did a lot of research with this particular customer in mind and they were all very clear that the mass factor was- we don't like stereotypical emblems of Welshness, we don't think it does what is a savvy culture any justice, it's quite dated, it's a little bit patronising". The director goes on to speculate on nature of the customer, and their (in some ways surprisingly subtle) perception of regional imagery- "I think what has changed is that brands are becoming braver. The communication of regionality was formerly done quite overtly, just 'Wales' and it was really basic...but it didn't give the consumer the justice of their being able to read deeper into other symbols." Interestingly, the company also reported that the most significant barrier they faced in implementing this change was persuaded their retail customers, rather than the actual end consumer, who appeared more likely to actually 'get' what they were trying to do- "The biggest barrier that we had was our customers [i.e. the retailers] -they're the ones who want the dragon etc, and they're the ones you have to drag kicking and screaming into the 21st century".

### Figure 5: An example of imagery now used by Prince's Gate



Figure 5 shows an example of the imagery now used by Prince's Gate, which in comparison to what they were using before can be characterised as being much more

knowing, humorous, quirky, and indeed confident. "The earthiness of the branding was to reflect the fact that we're not a big multinational, we're not a blue chip, we are a small company." This approach is even extended to consideration of the type font now used- "... it is actually from potato carving, we've never found that before. It was meant to reflect or even

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*suggest that we were literally printing them out ourselves. So it's a brave move"*

### **Penderyn (Welsh Whisky Co.)**

Superficially similar to SA Brain in terms of product area, Penderyn is however a much younger company (formed in 1998), and much smaller, with 25 employees. The turnover in 2008 was approximately £2.5m, with production standing at around 100,000 bottles. SA Brain hold a minority stake in the company, taken in lieu of cash payment for supplying barley mash- the raw ingredient of whisky. There was a distilling industry in Wales in the past, but this died out in the late 19th century.

These distillers were small in comparison to contemporaries in Scotland, so there was little scope for the mergers and consolidations that took place there. A company call Welsh Distillers started in the 1970s, but essentially they were producing re-badged Scotch. The Scottish Whisky Association took them to court and the company ceased trading the 1980s. The key aspect of Penderyn is that they have a working still – this uses modern technology derived from the petro-chemical industry, meaning much greater distilling efficiency and thus requiring only single distillation, rather than the double or triple process used in Scotland and elsewhere.

Penderyn produces a niche product which has to appeal within Wales, but also to the important export market. As such the product has to be 'authentic, but not too Welsh'. The styling of the bottle is key- a leading designer within the industry was given the brief to produce something that was Welsh, but modern (see figure 6).<sup>5</sup>

### **Figure 6: Penderyn- 'discovering the pioneer spirit'**

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<sup>5</sup> This individual has subsequently been retained as a non-executive director. Interestingly, an alternative design which could be described as 'faux-Celtic' was briefly used for selected limited edition products; this was seriously mismatched with other aspects of the brand image, and its use was short-lived.  
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### discovering the pioneer spirit.



The following illustrative quotes from the Chief Executive of the company reinforce these points- *“It was vital to differentiate ourselves from Scotch*

*whisky, ‘the best Scotch produced in Wales’ isn’t really much of an angle...”*. To this end, the decision was taken at an early stage *“...not to have Welsh clichés...daffodils and black hats and so on. That way it’s a kind of novelty product you might buy once in a souvenir shop and never drink. We didn’t want just to sell it ‘because it’s Welsh’ ...we wanted people to buy it because it was a good product.”* Linked to this point, there was also a debate around the actual naming the product, with one key stakeholder keen to use ‘Beacon’ as a more accessible name, particularly for the US market, but ultimately it was felt important to use Penderyn (the village in which the distillery is based) in order to be identifiably Welsh and associated with an authentic place of origin. This location has the advantage of providing access to pure ground water from the Brecon Beacons National Park, and the associated symbolic qualities this provides, in combination with qualification for Objective 1 status between 2000 and 2006, and thus the related funding streams which were important in getting the company up and running, and more recently in part-funding a new visitor centre.

### **New Approaches to Branding the Region- Wales as a ‘Challenger Brand’?**

As described earlier, there have been clear problems for policy makers to address within Wales – i.e. a poor brand image, an unwillingness to associate with this for commercial products, and also issues around tourist attraction, particularly in terms of a downmarket ‘last resort’ perception. In the past the Welsh Development Agency (the body charged with regional development in Wales until its absorption into the Welsh Assembly Government in 2006, along with other Quangos including the Wales Tourist

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Board) tended to be more focused on generating 'sales leads' for inward investment than building the reputation of Wales in any coherent way. The job of connecting the 'business climate' and the 'people climate' offer is the current brief for the marketing department of WAG. Although much criticised in many quarters for restricting their freedom of operation, it is possible to argue that the bringing of the activities of the WDA and WTB in-house to WAG has actually facilitated this more joined up approach.<sup>6</sup> Essentially, the role of the department can be summarised as understanding and implementing how 'positive elements of national reputation or regional reputation can be taken and used to add value to the Welsh commercial proposition; skills and infrastructure are fundamentals that all regions have to be able to provide- as such they are 'hygiene' factors, rather than differentiating ones. As WAG is aware, these factors are more increasingly associated with images of place.

However, if not undertaken with due consideration for what is authentic and ultimately believable, a compromised or inconsistent message might reach both sets of the target audience (i.e. business climate and people climate) - essentially the error of attempting to be 'all things to all people'. Statements associated with these resulting bland or generic marketing initiatives have been summarised by WAG itself as the 'evil clichés' of place branding, and would include such phrases as 'best kept secret', 'land of contrasts', 'truly world class', 'a genuine success story' and the like. As the Marketing Director notes- many of the other Regional Development Agencies (RDAs) in the UK have employed similar methods. "*... if you analyse a lot of the RDA type marketing it is very generic, very similar and the one thing that we notice it's also always talking about ...we're great at this, we're great at that.*" This then is essentially where the use of branding techniques by WAG is now centred - creating focus rather than claiming to be 'good at everything'. The concept developed to do this is Wales as a 'Challenger' brand. As a challenger the key requirement is to stand out, to do something

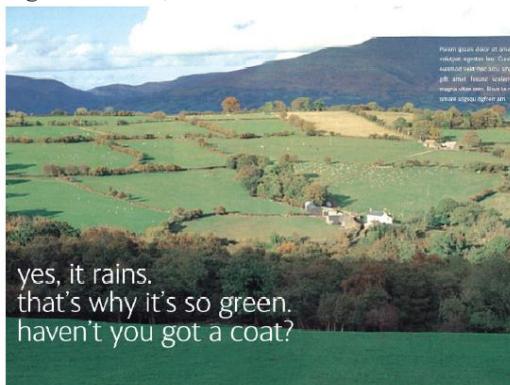
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<sup>6</sup> In the light of the history of the WDA, WTB, and WAG itself, it is significant that the Director of the now integrated WAG marketing department comes from a career background within the WTB rather than from the WDA.

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different from the lead brand. This means focusing on reputation in a more subtle way (avoiding the ‘evil clichés’) than before, using a common starting point to underpin imagery in all sectors that require establishing a presence. This has to be grounded in reality, to be authentic in making use of common cultural traits; for Wales this could be via self-deprecating humour, irreverence, lack of respect for authority and the establishment- *“We felt it was a national trait, whether it be religion, politics... a healthy disregard for authority. That’s a great trait to have if you want to be a challenger brand, and we wanted to use the strategy to get businesses to innovate and to be different ...we’ve got a very strong visual theme in our work, to hopefully reflect that wherever they could.”* – Marketing Director, WAG. Moreover, this approach is seen as the one that will facilitate a self-reinforcing use of positive images of Wales across both public and private, tourism and business sectors. *“The more we improve the reputation of Wales the more businesses will want to use their provenance with Wales and the positive aspects of that as part of their core and it then becomes a virtuous circle, and I think there is definitely more evidence of businesses positively using their Welshness as a way of adding value to their product”*. He adds that- *“...it’s really interesting how a lot of Welsh businesses now are in very similar territory to us, rather than just selling products they’re building brands, and they’re building Welshness into those brands in very similar areas to where we are. So there are two things going on; more businesses understanding the importance of branding to add value to their offers, and finding ways of differentiation through their links with place.”*

**Figure 7: ‘Yes, it rains’s**



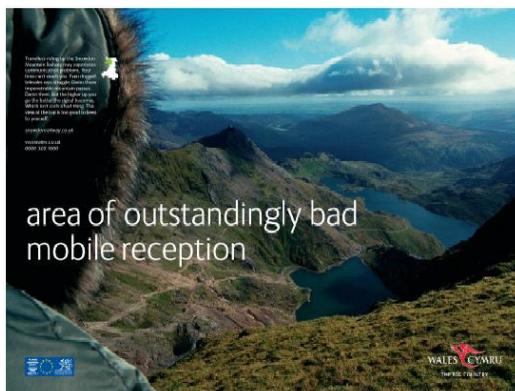
We seek to illustrate this point further by presenting two examples of recent actual brand-building imagery from Wales (figures 7 and 6); these are from tourism campaigns, which as

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noted by WAG themselves tend to be more prevalent simply because they involve more ‘broadcast’ marketing techniques- i.e. more visible in the media.

**Figure 8: ‘Area of outstandingly bad mobile reception’**



We propose therefore that the most interesting aspect of the processes we describe above is the development of Wales as a brand (as manifested by the latest WAG strategy in this area) in connection with the new approaches to branding and use of regional imagery by Welsh products. As such, there

appears to have been a gradual co-evolution of product branding (private sector) and regional image branding (public sector) in Wales. Policy-makers now explicitly reference the branding strategies of certain products as exemplars of good practice (indeed- one of the key people behind SA Brain’s re-branding was commissioned by WAG to work on their strategies as a direct result of this). In turn, other Welsh firms are now becoming more self-confident and less conservative in the imagery and regional cultural references they use to brand and promote their own products.

### **Reframing the Regional Image? conclusions and implications for further research**

We have reported findings from our review of imagery and promotional material used by selected Welsh companies, and by the Welsh Assembly Government, and suggested a hypothesis in which place-branding and product-branding strategies are shaping and influencing each other- between private and public sectors, physical products, tourism and inward

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investment initiatives. This is taking place within both the context of political restructuring of Wales, and more generally the emergence of more sophisticated consumer behaviour, and the increasing role of provenance, post-production innovation and thus of symbolic value.

Fundamentally then, brands have become a key component in economic success; but the relative lack of business and products in international markets that can readily be identified as Welsh has a detrimental effect-being the country that owns top quality products such as Guinness, Scotch Whisky, or Nokia feeds the self-esteem of the inhabitants of these small countries, leaving them with the underlying feeling that they belong to a nation which has something to offer the world (David, 2007a; 2007b). This can help convey an image of a country where businesses and individuals succeed, which in itself can play a role in persuading other businesses to invest there.

One of the potential tensions emerging within the changes we describe is how the relative lack of Welsh language and symbol use within some of the new promotional strategies is received by those within Wales with a more traditional view of what Welsh culture is and should be; on a related theme to this is the debate around the use of different imagery used within international markets vs. the UK, and more to the point within Wales itself. This is an issue that is already recognised in the literature, but by analogy how is this manifested with regard to products? Moreover, something that future research should explore is the (apparently) increasing use of sub-regional aspects of identity and cultural reference- Pembrokeshire (West Wales) for example. Similarly, the companies we focus on here all produce consumer-facing products; it is likely that different issues will apply for companies positioned at other points within the value chain- however valuable it is to have big multinational companies in Wales making largely intermediate products, they only project an image of Wales or of Welsh quality at the margins.

In addition, much of the key literature discussing these issues (which could be termed the 'Wales or Cymru' debate, after Thomas, 1992) was produced in the early 2000s and thus needs to be revisited in the light of new evidence- some of which is of course presented here; indeed Pritchard and

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Morgan (2001) did allude to this when they speculated on the first signs of marketing ‘...involving media imagery that is noticeably of a younger generation, along with a greater pride shown towards Welsh itself as a living language, rather than some kind of cultural curiosity.’ Another issue for further investigation is how the actual people of Wales themselves perceive images and symbols now in use; Brains’ material for example, particularly that focused around the national rugby team has proved popular, arguably becoming part of modern Welsh folk-cultural reference, although some might dispute the ‘glass half full mentality’ of the Welsh people. There could then be research focused on the exact mechanisms for cultural transmission between producer, people and state– how important are certain individuals within this? (the individual shaping some of both Brains’ and WAG’s branding being an obvious example); who else is involved- and what is the exact role of various types of media in this.

Overall, Wales posses brand with a great deal of potential for development– for example in the environment and heritage of the country itself. As we have shown, this has been strengthened and renewed in recent years. But encouraging though they are, the examples we present are selective- a great deal of branding still arises out of Government or quasi-government activity (or from legacies of the past) and thus there is an urgent need to ensure that the image in the world in future is based much more firmly on Welsh companies competing in international markets and producing products that are both of high quality and identifiably Welsh.

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