

Welsh Affairs Committee

Oral evidence: [Wales as a global tourist destination](#),
HC 220

Wednesday 25 May 2022

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[Watch the meeting](#)

Members present: Stephen Crabb (Chair); Ruth Jones; Ben Lake; Robin Millar.

Questions 51 - 93

Witnesses

I: Graeme Farrow, Artistic and Creative Director, Wales Millennium Centre; Camilla King, Executive Producer, Llangollen International Musical Eisteddfod; Louise Miles-Payne, Director, Creu Cymru and Board Member, UK Theatre; Fiona Stewart, Managing Director, Green Man Festival; and Matthew Williams, Policy and Communications Manager, Welsh Sports Association.

Written evidence from witnesses:

- [UK Theatre](#)
- [Green Man Festival](#)
- [Welsh Sports Association](#)

Examination of witnesses

Witnesses: Graeme Farrow, Camilla King, Louise Miles-Payne, Fiona Stewart and Matthew Williams.

Q51 Chair: Good morning. Welcome to this session of the Welsh Affairs Committee. We are continuing our inquiry into Wales as a global tourist destination. This morning we are focusing on cultural and sporting sectors as drivers for international tourism into Wales. We are delighted to be joined by a broad range of individuals representing different parts of those sectors. We are joined in the Committee room by Matthew Williams from the Welsh Sports Association. We are also joined by Fiona Stewart from the Green Man Festival. We are joined virtually by Graeme Farrow from the Wales Millennium Centre, by Camilla King from the Llangollen International Musical Eisteddfod, and by Louise Miles-Payne, Director of Creu Cymru and a board member of UK Theatre, so a broad range of different sectors and organisations this morning.

Could I start the discussion by asking each of you very briefly to describe the importance of the contribution you feel that your own organisation or your own sector makes to attracting international tourists to Wales? Perhaps I can start with you, Matthew Williams, from the sporting side.

Matthew Williams: I guess sport has a lead role in the Welsh visitor economy. The most high profile events are obviously around the Six Nations. We have hosted the Champions League recently and we have hosted the Ryder Cup in recent memory. These have a really key role in promoting Wales in the wider world. They draw visitors into Wales.

Also, Welsh teams and Welsh athletes going abroad and competing are key ambassador roles for Wales. We saw that during the Rugby World Cup in Japan, with the Welsh and UK Governments in Japan promoting Wales. We see similar around the successes of, for example, Geraint Thomas in cycling or other Welsh athletes promoting Wales around the world. Flying the Welsh flag on podiums and so on is a great ambassadorial role for us.

Q52 Chair: Is it possible to measure the contribution that those Welsh stars make? It sounds intuitively correct what you are saying—that Welsh success on an international stage helps promote Wales and attract people.

Matthew Williams: The British Council has done a little bit of work on this—that was published right at the beginning of the pandemic—around sport and soft power in Wales, which I think is very valuable.

Measuring it in strict financial terms is probably quite difficult because the chains of people coming to Wales as a result of that activity are quite difficult to follow. However, we know, for example, the Principality Stadium contributes a significant amount to the economy of Cardiff, as a



concrete example. The WRU has done fairly extensive work on that, and fairly extensive work was done by Cardiff University around the impact of the Champions League on the South Wales economy.

- Q53 **Chair:** I turn now to Camilla King from the Llangollen international festival—the clue is in the name, with your project. The festival, over many years, has brought international artists and performers to Wales. Beyond that, does it play a significant role in attracting and developing the Welsh tourism offer?

Camilla King: Certainly, in terms of north-east Wales and that part of the country, Llangollen is already a popular tourist destination from the perspective of outdoor activities and for the UNESCO World Heritage sites that we have on our doorstep. The Eisteddfod site—the Royal International Pavilion—and the Eisteddfod itself are pretty key in terms of what we offer for the region as a symbol, as a place for tourists to come and as a place where international visitors want to come to take part in competitions and experience Welsh culture. Yes, what we do in terms of elevating Wales around the world, and the awareness of what we do culturally and that tradition of Eisteddfod, is important.

- Q54 **Chair:** Louise Miles-Payne, at the theatrical level in Wales, what contribution do you feel the sector is making?

Louise Miles-Payne: The facts from VisitBritain show that 5% of international visitors visit theatres at least once during their stay, which is higher than for football and festivals, so in a way the facts speak for themselves. As Camilla said, there are some high tourist destination locations around many of the coastal areas, so South Wales and Cardiff as well as West Wales and regions of North Wales. There are some fantastic theatres in all of those locations, so one would hope that they are attracting the tourists as they visit the locations and other tourist attractions.

- Q55 **Chair:** Fiona Stewart, the Green Man Festival has emerged as one of the more newsy brand names in the Welsh cultural sector in recent years and has had a lot of attention. How do you see that festival developing and the role it plays in attracting visitors into Wales?

Fiona Stewart: The Green Man attracts 5% of its audience from outside the UK, mostly from Australia, Europe and Canada. The international line up means that the artists that have been playing there for the last 20 years—it has been established for a very long time—have a fan base in those countries. It has a 6.8 billion media reach, which is an algorithm of TV and other media areas and press and online, which means it has great influence. In the music industry—the contemporary music industry—it is known as the Welsh festival.

I think the messaging from the Green Man to do with its ethical positioning, its independence and the place to find new artists—for instance, Fontaines D.C., who played on the stage last year, came on as



an emerging artist and left as a major player—those are the kind of messages one would hope would be seen as a possibility in Wales.

Personally, I see not so much a culture or sport thing but the Welsh experience, or the UK experience—a joined up experience. I think something like the Green Man, which encompasses culture, music and climate change, embedded in an ethical ethos, is a massive message that is going abroad all the time.

Q56 Chair: Do you think that there is a distinct, definitely Welsh component to the Green Man brand? Everything you are describing could be applied to a number of other festivals in Scotland and England. Do you think it is important to have something that is distinctively Welsh about it, or are these common themes that are important to—

Fiona Stewart: In every country there are cultural points that are particularly to do with that country. I think that is part of the attraction. I would say that our strong independence, our not taking ourselves too seriously, our welcoming spirit and inclusivity are very Welsh. That is a message we like to bring to the world. Green Man is one of only five independent, large festivals left in the United Kingdom. The rest are now owned by foreign agencies. The fact that this can thrive in Wales is a massive message in its own right.

Q57 Chair: I will now bring in Graeme Farrow from the Wales Millennium Centre. Obviously, the Wales Millennium Centre hosts national and international artists and performers from across different fields. What is your perspective on the contribution of the Wales Millennium Centre to Wales's international tourism brand?

Graeme Farrow: You might be surprised to know that we attract 1.6 million visitors a year and around 1 million of those are casual visitors to the building. They come to see the building and find out more about Cardiff and culture in Wales, so we are developing our infrastructure to make it more of a visitor attraction and more of a place where you can dwell and get more information about the cultural life and history of Wales.

We are also home to the BBC National Orchestra of Wales, the Welsh National Opera and so on. We sell over 400,000 tickets a year and we have 1.2 million visitors a year. It is the first port of call for many tourists. They come to look at the outside of the building because it is an architecturally iconic building. For example, when there is an international rugby match in town, we are absolutely heaving with rugby fans. They just come and look, sit and have a drink, have a coffee and explore Cardiff Bay, which is in itself a tourist attraction. It is multi-layered. It is the National Art Centre of Wales and it is more than a theatre. It is a visitor attraction.

Chair: Thank you very much. I am now going to bring in my colleague, Ben Lake.



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Q58 **Ben Lake:** Thank you all for your time this morning. I am interested at the outset to learn a bit more about the VisitBritain campaign Welcome to Another Side of Britain and, in particular, to understand the level of engagement that you might have had with VisitBritain on that campaign. I will start with Mr Williams, if I may.

Matthew Williams: As far as I am aware, we have had no direct engagement with that as a trade association but I would not necessarily expect us to. From speaking to our members, the levels of engagement have been pretty minimal with VisitBritain on that as well.

Fiona Stewart: No, we have had no engagement with that.

Graeme Farrow: No, no engagement either.

Q59 **Ben Lake:** All right. We will go through these questions very quickly, I fear.

Camilla King: I have to confess that until we got the details about this session today, I wasn't aware of that campaign so, no, we have not had any engagement with it either.

Q60 **Ben Lake:** Last but not least, Ms Louise Miles-Payne.

Louise Miles-Payne: Yes—the same, I am afraid.

Q61 **Ben Lake:** I will rephrase that. What level of engagement do you usually have more generally with VisitBritain and also Visit Wales? I will take you in reverse order this time, so I will start with Louise, please.

Louise Miles-Payne: From a Creu Cymru point of view, we currently have no involvement. I can check with colleagues from UK Theatre, but I believe it is fairly low. We consult with them in terms of research but we have not been involved in any campaigns as yet.

Ben Lake: Would I be correct in understanding that, in terms of promotion of events and some activities abroad, to your knowledge, the engagement with VisitBritain and Visit Wales is quite minimal?

Louise Miles-Payne: Yes.

Camilla King: Through Events Wales—formerly the Major Events Unit—and Visit Wales we have quite a lot of contact. We are regularly in conversation with them about our plans in terms of their cultural strategy and international strategy. More generally, obviously they share our press releases. The International Eisteddfod is featured on Visit Wales in its North Wales tourism offering, so it is a pretty good relationship and we are in fairly regular contact with the team there.

Graeme Farrow: The Wales Millennium Centre often finds itself on the front cover of Visit Wales publications and broadly central to campaigns, but we have very little direct engagement with its campaigns. I think that is starting to change again. Like Camilla with Eisteddfod, we have a close



working relationship with the Major Events Unit in Wales to promote a festival that we run. However, I do think that culture doesn't feature prominently enough in Wales's campaigns overseas.

Fiona Stewart: I have had some engagement with VisitBritain over the years but it has been quite sporadic. I have not had any discussion with them since 2017, I think. The Visit Wales group uses pictures of the Green Man a lot, but I don't really have a relationship with Visit Wales.

Matthew Williams: With regard to VisitBritain, we have very minimal engagement across the sector, and I think that has been a fairly long-running theme. Reflecting what others have said, our engagement with the Major Events Unit and the Welsh Government and Visit Wales as a result of that has been generally pretty good. Feedback from our members is that engagement with Visit Wales was around some of the thematic years it was doing in the run-up to the pandemic: the Year of Adventure and Year of the Sea and so on. It was pretty good with some elements of the sector, particularly adventure sport and adventure tourism in West and North West Wales. Generally, that engagement has been good and seems to be improving.

Q62 **Ben Lake:** You may have already answered this in part, but so that we are clear, how would you all describe the level of co-ordination between independent and publicly funded cultural organisations, and the UK and Welsh Governments? Would you typify it as good with room for improvement, desperate need for improvement or abysmal? How would you put it?

Matthew Williams: Engagement with the Welsh Government I think is pretty good. Engagement with the UK Government has a lot of room for improvement.

Fiona Stewart: I think that because the Green Man covers so many sectors—it is not just in culture; it is in food and beverages and training and so on—in a way it is difficult for us to be just in one sector. So I have support from climate change and support from different areas, and I think something like the Green Man is like that. It is very much part of that. However, I would agree that I have much more discussion with the Welsh Government across those sectors than I have with the UK Government.

Graeme Farrow: I would echo the previous comments. I think engagement with the Welsh Government are pretty good. It has not been great but it is getting better. I think that they are centring culture more in their plans for the future in terms of promoting tourism. Our relationship with the UK Government is minimal, similarly to others in the room.

Camilla King: Very similar; a reasonably good level of engagement with Welsh Government Major Events. My impression, being new—as in six months with a Welsh organisation, coming from an English festival—is



that we have a good level of contact and fairly regular contact in Wales with those representatives. It also largely depends on pre-existing contacts and relationships as to how often you might be in the room for conversations, or contacted. Then in terms of the UK Government, so far no engagement. It all goes through Welsh representatives.

Q63 Ben Lake: Thank you very much. So it is not necessarily the case that it is systematically good. There is an element of: once you have built the relationships, they get very good, but if you are a new event or organisation it does take a bit of time to meet those individuals.

Camilla King: Absolutely, yes.

Louise Miles-Payne: Very similarly, we have a great relationship with Events Wales and have consulted on its new strategy. I am wearing two hats, and UK Theatre obviously has a fantastic relationship with the UK Government and has regular conversations with them. My role is to make sure that the voice of Wales is heard through those conversations, but I think there could be some improvement made there and some more joined up thinking. I agree with Graeme. I think culture has a huge amount to offer in terms of tourism in Wales and it is often overlooked for larger, more high profile areas. I think now is the time to reflect on that and see how we can improve how it is seen internationally.

Q64 Ben Lake: Thank you. We know from the results of the Wales visitor survey that overseas visitors very much appreciate and value experiences that are distinctively Welsh, if I can put it that way. I am quite interested to understand a bit more from your own experiences and opinions. What sort of experiences are distinctive to the Welsh offer and brand, and those elements that we should be marketing or promoting more overseas to improve our tourism offer? You alluded to the fact that you think culture is overlooked. Is there something you want to elaborate on?

Louise Miles-Payne: I would look at the homegrown talent that we have, in terms of our national theatres, from a Welsh language perspective, so Creu Cymru and National Theatre Wales as well as Welsh National Opera; I don't want to leave anybody out. There are some amazing producing theatres as well as theatre companies making work. That is by Welsh writers, Welsh directors and Welsh casts, sometimes telling unheard stories in Wales.

Just starting from that, in terms of promotion, it is fantastic that we have venues like the Wales Millennium Centre and Venue Cymru that are showing Olivier and Tony award-winning musicals, but I think focusing on the homegrown talent is unique to our nation, as well as what Camilla is doing at Llangollen, and also the national Eisteddfod. Although predominantly in the Welsh language, it is a fantastic tourist experience. Just because it is aimed at a particular language does not mean that it is not for everybody. I think those are the things that make Wales unique and they are the things that we should be shouting about.



Q65 **Ben Lake:** That is very useful. Ms King, on a similar question, what distinctively Welsh elements do you feel we should be promoting more abroad, and what things are we doing well?

Camilla King: Something that has struck me is the fact that music and the written word are built into the DNA of being Welsh. That appreciation for culture, which comes through events like the Urdd National, which is championing that for people from a really young age and making that part of their educational experience is incredibly impressive. I don't think we have anything like that in England, and it is really exciting to be working somewhere where that is so supported and just part of everyone's cultural experience from a very young age.

That sense of pride in Welsh culture and Welsh tradition is something very exciting and something to be celebrated. That spirit of Eisteddfodau, which is coming together and celebrating Welsh culture, but also the competitive element that is for everybody to take part in, is an exciting thing. We at Llangollen have seen that echoed by the fact that Eisteddfod exists around the world now as a result of Welsh travel over the years, immigration and all those things. It has taken that culture out—the culture of singing and coming together and competing. It is two elements: you have the festival and you have the performances, but you also have that competitive element. That is something very uniquely Welsh that we have shared around the globe over hundreds of years now. Those are things to really be celebrated.

It is echoed at Green Man for me, the sense of the Welsh landscape and how that feeds into and influences the culture. That sense of place is also very key to what we are offering. Telling that story and sharing that with people is something very powerful that we could be doing more of and should be celebrating.

Q66 **Ben Lake:** Thank you, Ms King. I am looking forward to going back to Wales already on the back of that.

Mr Farrow, I want to ask you the same question, but I am also interested in your thoughts about whether there is more that we could be doing to attract international visitors around the language. It is something that has been alluded to by both panellists.

Graeme Farrow: I cannot evidence this with extensive research that I have done, but I think that people are looking for authentic experiences as cultural tourists today. Culture is an expression of who we are, and who we are as a nation and language is part of that expression. I think we could probably do more to promote the language but also, as Camilla said, the landscape, and not separate out culture and events from those things, so it is all intertwined in what Wales has to offer.

Also, I think Wales is a green nation that is very conscious of the environment and climate change, which Fiona has talked about. Much of what it does now is shot through the prism of the wellbeing of future generations. There is a youthful energy and vitality of Wales that we



could promote more strongly. Having come here from Ireland previously—I was exec director of the City of Culture in Derry before I came here—I think Wales is slightly more timid in terms of shouting about its strengths and its culture.

I think we need to be more confident in the expression of who we are and our culture, through the likes of the messaging of Visit Wales. We need to put out the message about all of those things: the landscape, the language and the culture. The music scene in Wales is really exciting right now as well. I think there are a lot of positives that we can promote over the next five years.

Q67 Ben Lake: Thank you very much, Mr Farrow. Ms Stewart, is there anything in particular that you would like to see Visit Wales or VisitBritain concentrating on when they turn to overseas markets and sell the Welsh brand, to put it crudely? What do you think should be the main elements that top the bill when it comes to these marketing and advertising campaigns abroad?

Fiona Stewart: I think that there should be research in those countries, the target countries that we want to reach, to find out what they want from Wales and from the UK. It is great to have these roundtable discussions, but you have to have it in synergy with the particular culture that you have abroad and do positioning exercises.

A lot of the situation in Wales has been making things bigger and bigger and bigger. I think that looking at organisations that are smaller but have a lot of influence, which you can measure via their media reaches, would be a good thing to do and then go from there.

It is the overall thing—I think the Welsh experience is tied up with culture, sport, service and location. What you want is for someone abroad to think, “Oh, I would like to go to Wales or to the UK to experience something very different”. It is putting those things together. I think it is a bit too simplistic to say, “What is the top of the bill?” It is a lot of things.

The Green Man has a wider element. If you go to the Green Man you will drink Welsh beer, and every single fresh ingredient is made in Wales. It can be subtle. It doesn’t have to be this hammer blow. Also, it is the thing of engaging internationally so that you are bringing international artists into Wales. It is not just about export; it is about import. If you bring those people in, they have fan bases in those countries, and they have massive ways of identifying and talking to that country about the visit and the experience they have had. That will also draw people to the country.

Q68 Ben Lake: Thank you. You remind me a little bit of the Other Voices festival, which was hosted in Cardigan, and which I think is a collaboration with a city in Ireland as well. That was very successful in doing exactly what you describe.



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Matthew Williams: I think there is a job of work to be done, and to some extent this needs to be led, in the sports sector, around understanding where our markets abroad are. We have very high performing sports teams and individuals outside of rugby and football and the big obvious sports. Welsh netball is currently seventh in the world.

There are big markets in all parts of the world, so it is about understanding whether there is a contribution we can make to marketing Wales abroad on the backs of those sports. I don't think, even within the sector, we have got to the bottom of that, and it would be wrong to necessarily expect the Government to always lead that.

More broadly, opportunities in sport are perhaps not taken the best advantage of. I think this touches on some of the things that other people have said. Legacy around major sporting events I think is something that we have not cracked. The Champions League was largely delivered by agencies outside Wales. That wasn't kept within Wales. Six Nations is a slightly different beast and that is largely delivered in Cardiff.

We need to get into the space where we are delivering homegrown major sporting events and not importing the delivery of them from elsewhere, either in the UK or within Europe. That is something that, as a sector, we need to work on. I think we need to work on that with both the Welsh and UK Governments to crack that supply chain, to make sure that when we attract visitors, Wales makes the most of it.

Q69 **Chair:** Thank you. I am going to bring in Robin Millar in a moment, but can I just come back to a couple of themes that were raised in previous answers?

A previous expert panel that we had in front of us touched on the city offer in Wales. A lot of key countries that attract many tourists across Europe have a strong city offer. Obviously, a lot of emphasis has been placed in the marketing of Wales on its wilderness and its rurality. Matthew Williams, in one of your previous remarks you mentioned the Year of Adventure, which Visit Wales was promoting very heavily. Do you think that we have the balance right? Do you think that more needs to be done to sell Cardiff as a visitor destination? Perhaps I can bring in Graeme Farrow and, in the first instance, Matthew.

Matthew Williams: Reflecting on the sporting offer in Cardiff and the marketing of that, I think it is broadly pretty successful. During the Six Nations we essentially sell out of hotel beds in the city. During the Champions League a similar thing happened. The city appears to some extent to be running at capacity around some of those major sporting events.

I guess there is a question around what happens in the rest of the year, and how we can attract more visitors and even out that level of visitor numbers so we are not being inundated for six, seven or eight weekends of the year when there are large scale international events.



Q70 **Chair:** If it is so successful, why were we seeing empty seats in the Principality Stadium for matches this year against really top-notch opponents?

Matthew Williams: It is difficult to understand the dynamics going on there at the moment. I think we are at the very beginning of selling events again but, speaking to colleagues in the sector, a great deal of events are just not reaching peak capacity so far this year. Whether that is going to take a bit more time to build back up I think isn't clear just yet. If we accept that Wales was in a version of a Covid lockdown until mid-January, I think there was a great deal of nervousness from the public around buying tickets for an event that may or may not go ahead. That certainly seems to be the indication we have so far.

It would be too easy to read too much into what happened this year in Six Nations where, yes, WRU struggled to fill the stadium on a couple of occasions.

Q71 **Chair:** Mr Farrow, in how we market Wales as a nation, what are your thoughts on the balance between the emphasis on rurality, wilderness and coastline, and the emphasis on the cultural offering, which tends to happen in more urban locations?

Graeme Farrow: I think Cardiff's cultural offer could be more coherent in terms of how it is presented and packaged.

Going back to what Fiona said, this is not about being top of the bill. I think Cardiff has to provide an offer that is an authentic Cardiff and Welsh offer. I do think it needs a signature event that talks to that, which the city council with MEU is developing right now.

For example, even with something like "Lion King", you can come to Wales and have an experience of all of those things, the landscape and everything that Wales has to offer, and then come to see "Lion King" in a theatre with cheaper tickets than you can get in London. It is not in isolation. It is about what the offer of the city is in terms of its food and the provenance of that. Fiona talked about the beer. There is a very good food culture and microbrewing culture and so on. We need to package all these things together. I think that is what Cardiff has to do.

There are a couple of things that Cardiff currently lacks that a capital city should offer. One is a signature cultural event, but that is not Glastonbury or anything. It needs to be authentically grown, based on the strength of the cultural scene and what is growing organically within Cardiff. Again, I go back to that authentic experience and what we can offer that is really Welsh and has Wales's voice at the heart of it.

Cardiff is so reachable as well. Let's not lose sight of the fact that it is often the gateway to the Welsh landscape. People do arrive in Cardiff first before going on to see other places.

Q72 **Chair:** Thank you. Louise Miles-Payne, is there anything that you want to



add to that?

Louise Miles-Payne: I agree with everything that Graeme was saying. I think it is about working together cohesively in terms of Cardiff. We need to look at the National Museum and even the fact that “Dr Who” and all the other filming locations in the area attract tourists—as Graeme will know, the number of “Dr Who” fans who gather outside Wales Millennium Centre on a daily basis is huge—but they are all separate and not enough work together.

Once there are some improved transport links, as Graeme said, you can be in the mountains within an hour. You can be on fabulous beaches within an hour of Cardiff. You could use Cardiff as a base and still explore all of the amazing rural locations. That is what is unique about our capital city and that is why people live and travel and visit here.

Q73 **Chair:** I do not want to go over the same ground, so, Fiona Stewart and Camilla King, is there anything else that you want to add to this discussion about the balance between the capital city and the rest of the nation, and rurality and urban locations, in terms of how we market Wales internationally?

Fiona Stewart: A lot of it is good PR and experience. You have to think positively, “What is the visitor experience?” There are already massive improvements around Cardiff Central railway station, for instance. Coming in, the first view of Cardiff is much improved—much better than it was.

It would be great to see areas that stand out like Dublin, say, or Manchester with its club scene. There isn’t a significant identity. What I would like to see is this. The incredible Welsh food, especially the ingredients—freshness, a lot of organic farming—is a plus, as is the climate change access. Accessibility for people with disability is much improved in Wales, as opposed to the rest of the UK.

At the moment, the Performing Right Society taxes any venue, small pub or whatever. It would be great if that was changed, because the amount of money that is spent on tickets and payment to artists at that level is so minimal that it probably costs more to administer. If there was a situation where there was no PRS levy on anything that, say, had less than 25 covers—a small pub—to allow music to be played, I think it would enrich the culture. It would be very significant to come to Cardiff and be in places with live music, fiddle playing and other playing, obviously within the licensable sound levels. I think it would give us a significant opportunity and it would give the young people and older people of Wales an opportunity to perform.

I am talking about experiences like you get in Havana and Cuba. If you go to Havana and Cuba you know that if you go round to the restaurants, you have nice food and you have music. Those are the things that stand out. It does not have to be big and flashy. It can be constant and



encourage music in those areas. It makes a statement; that is what I am trying to say. Those are the things that the press and PR and experience can get their hooks into.

Chair: That is helpful.

Camilla King: From the North Wales perspective, to put our side across, Cardiff is obviously easily accessible from the south and west of the UK. It has great transport links, as everyone was saying, and gets a lot of coverage in terms of Wales's offering. Those of us who work in Wales are well aware of the north-south divide. There are a lot of strong feelings on both side about what happens in North Wales and what happens in South Wales.

In terms of attracting international visitors and performers of the calibre that we would like to see to North Wales as well as South Wales, things like infrastructure and transport are really key. Wrexham has just this week been granted city status, which is fantastic. However, to get from Wrexham, which is only a 20-minute drive to Llangollen, for example, there is one bus. It is very difficult to do.

Often when people look at the train times from Cardiff to get up to North Wales, they are quite shocked and don't realise quite how far it is. Certainly, from a North Wales perspective, I think there is a lot that could be done about our cities and what we are offering. But if we are going to elevate that and attract more tourism and business in, infrastructure and how that is handled is really key for us.

We have a 1,500 seat venue in Llangollen, but because of the infrastructure and where we are it is hard to get big-name performers, comedians and so on to come there throughout the year. It is easier for us as a festival to attract people but still, once they look at the reality of getting here and then the trains and all the rest of it, it becomes more difficult as part of our ask for getting people to visit.

Chair: Thank you very much.

Q74 **Robin Millar:** I am very pleased to be here today for this session. I am from North Wales, from Aberconwy. We are very fortunate that we have the largest resort in Wales, the queen of resorts, but also the fabulous landscape up the Conwy Valley and many local attractions too. I would just reiterate the point that Ms King has made about North Wales being a cultural centre.

This is going back a few years now, I confess, but I remember many times enjoying the Gŵyl Gregynog, the festival in Gŵyl in Bangor, and enjoying that mix you have spoken of—of landscape, and watching these world class performers on a stage with a backdrop of Snowdonia behind it. That was a very compelling combination. I will return to that in a moment, but the Welsh Government have talked about an intention to co-ordinate with cultural organisations in targeting what they called new or difficult-to-access markets. Which of these markets do you think



should be targeted? Could I start with Graeme, please?

Graeme Farrow: Yes. I don't have research on this in terms of potential markets. We could look at other bilingual nations, for example, and further links with those nations. Some of the nations that Fiona has mentioned, such as Australia, New Zealand and so on, are other markets, as travel restrictions ease up. I have to confess that I haven't dug into potential new difficult-to-access tourist markets for Wales.

Camilla King: Similarly to Graeme, our experience is that there is a strong culture of Eisteddfodau in New Zealand and Australia. That is something that I would certainly like to work on and strengthen and see how we can link with them. Also, we have a lot of American choirs, schools, universities and colleges who are very keen to come over and perform, and to experience the Eisteddfodau culture that I mentioned earlier.

I think that there is more that we could probably do in Europe. A lot of interest that we have specifically comes from Africa and India. We get a lot of people wanting to come over from there, so further afield. I would also like to see how we could strengthen our relationship and our ties with countries in, Europe because there is obviously a lot of strong traditional culture in there that chimes beautifully with what we do in Wales. I think it would be exciting to see what could be developed in those areas.

Q75 **Robin Millar:** Thank you. Ms Miles-Payne, do you have anything to add to that, please?

Louise Miles-Payne: I agree with what everybody has said so far. It makes sense to look at what travel infrastructure is already in place. It makes sense to look at destinations that come in to Cardiff airport, and also at Manchester and Birmingham for the north, and then to work with those countries to promote the idea of not just flying into but staying in Wales, and what those nations have to offer.

Fiona Stewart: We have a relationship with the Australian High Commission. I think they see Green Man as a good place to position new acts. We had King Gizzard and the Lizard Wizard a few years ago. From the point of view of cultural groups in those countries, it is re-engaging. It used to be with Visiting Arts and the British Council. Visiting Arts was developed during the last Cold War—which unfortunately we are kind of experiencing again now—to keep up conversations with countries culturally. I think it is about encouraging and keeping up those conversations and connections with other bilingual nations; I agree with what you were saying. But there is a commercial aspect and a cultural aspect as well. The commercial aspect is that you want to have visitors into Britain and Wales who are going to be spending money, staying and invigorating the economy. In that case, a lot of the time it is about bringing those acts in.



I know that in Wales Week in London, some of the time I am invited to events because the people in certain ambassadors' residences know the Green Man—not me, but they know the Green Man—and we can have a conversation culturally with them. I know Dan Langford, who organises that, likes me to go along in those situations. Having this cool, Welsh situation where people want to talk about things is something that engages with people, especially now. I am older and they are older, and contemporary music has become something that is not just for teenagers. People who are older are still into it. It has become quite powerful as a conversational piece.

It would be good for organisations like ourselves to know what is considered a difficult market. We have much more of an international line-up now. That is very difficult post-Covid and Brexit, but we have a Bangladeshi female artist performing this year and we have opened that up because we want to be more inclusive anyway. That is bringing other cultures into the events scene, which was traditionally very male and very white, quite frankly.

Q76 Robin Millar: Football is the world's sport. Mr Williams, do you have any thoughts?

Matthew Williams: There have been some fairly clear wins around Wales's sporting offer. The promotion of Cardiff City in South-East Asia I think was done relatively well. That is what we want to see more of. To some extent, that is dependent on a very personal relationship between the owner of the club and that part of the world. It has been leveraged to a successful degree and it is whether that can be rolled out with other clubs in Wales.

Wrexham is the current obvious example, with two very high profile owners who are doing an admirable job as ambassadors for the Welsh language at the moment. Also, taking stock of where we have sporting success or sporting offers that we can market elsewhere in the world, we have two cricket franchises, essentially, in Glamorgan and Welsh Fire.

As I alluded to earlier, we have Wales netball and the Celtic Dragons playing in the UK pyramid system. That has quite a following, particularly in Caribbean and African nations. Cricket has a strong following in South Africa, the Caribbean, Pakistan, and India in particular. It is about leveraging those things to make the most of what we have and what we are successful at. I am not sure we do the best job of it as yet, but with help from Welsh Government we could.

Q77 Robin Millar: That is helpful, thank you. I would say as a Gog—a north Walian—that I am very struck with this argument that people will come to Cardiff and use it as a base. I have to challenge that simply because I can get to North Wales from Birmingham, Manchester or Liverpool airports faster than I can get to Welshpool from Cardiff. The arguments of reach simply do not work if we focus on Cardiff. Having said that, I accept the argument for city breaks, and such, but I would be concerned



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if it was to the exclusion of recognising the links to North Wales.

On that basis—recognising that I think we attract about 2% or 3% of the visitors to the UK—are we smarter targeting those visitors who are landing in Birmingham, Manchester and Liverpool, and looking at it that way, rather than trying to reach into difficult countries? Time is short, so I will not ask each of you, but perhaps someone has a particular contribution they would like to make to that.

Matthew Williams: On the sporting economy, I think there is definitely merit in that approach in attracting people particularly for adventure sports and extreme sports in the north and west. The issue that we are constantly going to come up against is public transport connections to the very rural west of the country, where public transport options are quite limited. Then there is the double impact of the fact that quite a lot of the sites where these activities take place are even more isolated. Take Bangor train station, for example. It is another hour's bus ride away from Bangor train station if you want to go to an adventure tourism site in North Wales. Similarly, you can experience similar difficulties around the Aberystwyth Machynlleth area. I think there is a job of work to do on how we can deliver people to those destinations quickly and easily.

Q78 **Robin Millar:** I like to look at challenges as opportunities as well, but I take your point.

Louise Miles-Payne: The optimist in me is going to use some positive words. When Wrexham is awarded our City of Culture later this week, I think that is the opportunity to leverage those airports and destinations for visitors coming towards the north to make the most of visitors of culture within North Wales.

Robin Millar: I must ask Ms King for a comment, being from Llangollen.

Camilla King: Certainly. Whenever I contact an artist or an agency to invite them, or when we are talking to our competitors, we are always hammering home the fact that we are only about 45 minutes away from Chester and Liverpool and an hour from Manchester. North Wales has some fantastic transport links. I would agree that we could probably do more to look at the major transport hubs that are very close to North Wales that can bring international visitors into the country.

I would also agree with Matthew that, once you are there, once you get into North Wales, getting around the north of Wales is tricky unless you have a car. There is definitely some work to be done there. It would benefit all our cultural organisations if that were to improve. Certainly, let's not ignore the fact that north-west England and the Midlands are very close and we could be targeting those visitors.

Q79 **Robin Millar:** I am going to keep moving on, if I may, Mr Farrow. Obviously, and sadly, the Gŵyl y Faenol festival is no longer running. I don't know if Mr Terfel watches these shows but, if he is watching somewhere, there is one fan here who would love to see it return. You



obviously have the festival in South Wales, or in the southern part of Wales, and there was some good news recently in that I believe the Welsh Government have secured the site for the festival.

Fiona Stewart: No, the Green Man is not moving there. Like I said, we cover other things apart from festival organisation. I cannot really talk about it, to be honest with you, so if we could move on from that subject—

Q80 **Robin Millar:** You would rather not answer any questions on it?

Fiona Stewart: What I can say is that the Green Man is not going to be moving there. As a brand, the Green Man is a multitude of things. It is training. It is food and beverages. It is events. It is climate change. It is science. I think the idea, if it goes forward, is that we would be developing those things in that new space.

Q81 **Robin Millar:** I will move on to a final question. There are obviously concerns over the impact of Covid on the cultural sector. I know this has hit the hospitality and tourism sector very badly in Wales. Equally, there are concerns about people movement, Brexit, leaving Europe and what impact that might have had. There is always a battle being fought in the media over, "A survey says this, and a survey says that". I was curious whether any of you had access to hard data or evidence of the impact of any of these things on your sector? Mr Farrow, could I start with you, please?

Graeme Farrow: We cannot lose sight of the impact of Covid and other things, such as the cost of living crisis and utilities. We are looking at rising costs and hopefully temporarily declining income. There is a question about how we sustain some key pillars of culture and cultural tourism in Wales.

There was another question about VAT. For example, VAT tax relief is a huge boon to the theatre industry, partly because it just means we can make more product and employ more artists in the meantime. I think to extend that for as long as possible helps. What we have to do in Wales is tell great Welsh stories.

We were able to produce a play in October, which is a Welsh refugee story. That is transferring to the National Theatre in London. It is also going to become a TV series. It just shows—keep productivity up, and part of that is to incentivise people to make new, exciting content. It was on the list of questions, and I want to support the low rate of VAT for the sector.

Louise Miles-Payne: UK theatre data showed that between 2019-20, the average spend in theatres fell by 78%. That is hard data around spend. We are seeing that increase now, but I suppose we are slightly too early to show where we are going to be from pre-pandemic levels. The impact of Brexit we are yet to see. Because we were shut for so long as a sector it is difficult to see. The one thing I will say is that we have



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definitely seen it with staffing levels and the ability to attract international artists, and also to tour work from Wales internationally. There are less companies doing that now because of the complications around paperwork.

Camilla King: We have certainly seen a huge impact as a result of the combination of the pandemic and the rising costs. For example, in terms of bringing in structures on to the festival sites—canvas and so on—there has been a price increase over the last couple of years just because of inflation, but the transport costs that have been passed on to us by our suppliers are having a very big impact. I know that is affecting the entire industry. Also, increased costs of electricity. It means that we have to pass some of those costs on to our traders who we rely on for a lot of our income. Counteracting that is the fact that during the pandemic a lot of events businesses, including beverage traders, have gone under or do not exist anymore.

Also, a number of hotels in Llangollen have closed down and have not reopened. We have this double whammy of there being fewer suppliers to go around, which means there is more demand for them, and then increased costs of bringing them in. For us, where we have a lot of our competitors coming back and audiences coming back, there are fewer places for them to stay, so we have a struggle with accommodation as well. There is a big impact.

I hear from colleagues across the arts festival industry in Wales and the UK that there is a lot of worry about our audiences coming back following the pandemic, continued caution on the part of older audiences—who tend to be our core—who are concerned about safety precautions, the risk of contracting Covid and that kind of thing. That is also combined now with a huge amount of concern over the cost of living and people starting to tighten belts with the view that this might carry on for a few years. For us, that is a scary position to be in, because if people cannot buy tickets but all our other costs are going up, it makes it very hard to make the finances work.

Certainly, our ticket sales are very low so far. I am hearing from colleagues that there are trends for ticket sales to increase significantly in the final week before an event, and often in the last 48 hours before an event. In terms of forecasting financially and balancing all the other budgets, that is tough for everybody because you have to put the money in and make the investment in the site, the events and the artists and sit tight until two days before we go live, which is quite nerve-wracking for me right now, six weeks out.

Matthew Williams: Our members are reporting that their attendance levels are normally anywhere between 70% and 90% of the pre-pandemic equivalent, so customer numbers are still depressed. There are acute shortages of some materials within our sector. In particular, cleaning chemicals, pool chlorine for anyone who runs a swimming pool—



whether that is a holiday site, a leisure centre—is very difficult to get at the moment and incredibly expensive.

Our sector has been badly hit by energy price increases because of the nature of the buildings we tend to occupy being large, difficult to heat or difficult to ventilate. That is causing ongoing problems within the sector that we are working with colleagues to try to resolve.

Then we are seeing quite a lot of reports around difficulties recruiting staff, particularly in specialised activities. There is a swimming teacher's qualification or a lifeguarding qualification, which is like gold dust at the moment. If you have one you can probably find employment quite easily. We are also seeing the shortages of staff in areas that other sectors are reporting—catering, hospitality, food and beverages—because lots of our member businesses have those kind of businesses attached to them as well. They are struggling to get people in to do jobs at the moment.

Fiona Stewart: The Green Man took place last year to put people back into jobs; 24 businesses would have toppled over if we had not run. We ran without any insurance because it was not available. We were able to run through support from the community around us and from the fact that we work with independent companies, SMEs, like ourselves. Green Man is a Powys small business. It has been for 20 years. We had community connections that helped us do it, but we were able to do it and it was successful and we came out the other side.

Because of that, we had first-hand knowledge of the difficulties for this year so we were able to book contractors earlier and deal with things earlier. The red diesel issue at events has meant that my fuel cost has gone up from £30,000 to £110,000. It costs £4.5 million to put on Green Man and the 5,000 people who are involved in its production are a mixture of part-time, freelancers, full-time staff and so on, and volunteers. It is a big operation.

We have sold out. I do not want to be all kind of, "Ha ha, we have sold out". I think it is very split at the moment. There are organisations that have sold out, some of which have very core fan bases. We have not had difficulty recruiting staff. However, I do think that there is a real problem out there and I do think there is a psychological thing about returning to large events. It will come back and I am sure that once—usually, in my sector, there is a big hoo-ha about Glastonbury selling out. Because Glastonbury rolled over its tickets there was not the usual PR around that, and that is usually a massive stimulus for ticket sales.

There are things that are not there. There is also an issue of people who have rolled over tickets because the income they have in their organisations is not enough for the cost of things right now.

We are getting feedback from food traders. It is a big income for them and a massive part of their business, but food prices are going up. There



is a concern about oil for frying. We could not find frozen chips last year. There are things like that that are costly.

We are a microcosm of what is happening in the rest of the nation. Everyone is feeling this, but it is challenging for people and it should be taken into consideration. The sector was one of the most badly hit sectors after Covid, but the ripple effect of a successful festival is enormous. I am sure my colleagues here in this meeting can tell you the many, many millions that they generate. I would say there is time for support for those organisations—I am not including myself in this—that need support during that time so that they can recover, because a loss of that resource to Wales and the United Kingdom would be horrendous.

Robin Millar: Thank you; I always learn more about Wales with these sessions. Thank you very much for your contributions.

Q82 **Ruth Jones:** Thank you to all of you for coming today; it is useful and helps to build our knowledge of the situation in Wales. Let me start with Mr Williams first, specifically about sports. Which qualities of Welsh sport do you think hold the greatest potential for promoting Wales abroad outside of the UK? Obviously, the WRU and FAW are not here today, and you have already alluded to other sports. Are there any others that you think could be used to strengthen and promote Wales abroad?

Matthew Williams: As you said, I alluded to this around cricket. Netball—there are probably opportunities there. There are definitely opportunities in other sports. To put it clearly, as a sector we need an idea of where VisitBritain, Visit Wales and the Welsh and UK Governments are targeting as markets for Wales, so we can understand within the sports sector where best we believe there are opportunities.

We have the Commonwealth Games coming up at the end of July and into August; there will be Welsh athletes who do quite well at those games. There will be opportunities on the backs of those people. It was probably a shame that we lost some opportunities around the Olympics last year, just because of the nature of the world in 2021. It made it difficult to go around the world and make the best of those opportunities.

High-performing Welsh teams and Welsh athletes are good advertisements for Wales elsewhere in the world, but that does not mean we should neglect the significant offer we have in the provision of family, community and individual activity in sport here in Wales. Whether that is if you want to go to the sailing centre in Plas Menai or to the mountaineering centre in Plas y Brenin or to the Brecon Beacons to go hill walking, these are all things we should be marketing to the world and making the most of.

Q83 **Ruth Jones:** We have talked about empty seats in stadiums. I know it is rugby again, but certainly I was sat in the Principality Stadium for the last Six Nations and there were empty seats around. We were not in the most expensive seats, and they were over £200 for the two. Do you think that



is contributing to people not being able to go to the games?

Matthew Williams: I think there is a real challenge around affordability of sporting activity across the board. Whether that is paying £5 to go to your local swimming pool for a swim with your children, where your children might get in free but you are expected to pay, or whether it is the cost of tickets to an international event, we need to acknowledge that to a large degree the price of sporting activity excludes a significant number of people.

It is challenging at the moment to see a way in the business model to step around that and retain sustainable sporting businesses, given everything that is going on in terms of cost increases. I would certainly accept that we need to do more to try to make things more accessible to people.

Q84 **Ruth Jones:** Thank you. That is helpful. Can I go on to more general things, in terms of forthcoming international cultural and sporting events? Which ones in your particular sectors do you think present the greatest potential for promoting Wales abroad? Thinking back, were there any missed opportunities in the last few years—Covid aside, obviously? I will start with Mr Farrow.

Graeme Farrow: First, to reflect on the difficulties we are all experiencing, it is important to sustain and provide support for existing cultural and sporting events that are part of the fabric of our culture. That includes all of the events around this table.

Music festivals that are authentic and have a distinct Welsh identity should be promoted and have great potential. We need to anchor some of the events, the theatres and so on. There is a real danger that we could see theatres close around Wales. I hate to be too pessimistic, but over the next few years they simply will not be able to trade. Wales Millennium Centre is different. We are facing difficulties as well but we will be able to cope provided we get some support, such as VAT and so on.

I do fear for theatres in more rural locations. They will not be able to trade their way out of this. They just won't. You have a double whammy of decline in income and rising costs. It does not work in any business. Let's ensure that the real key events that we have in Wales survive and flourish. Then I think music festivals are a key driver in the arts sector anyway.

Q85 **Ruth Jones:** Have there been any missed opportunities in the last few years?

Graeme Farrow: I think MEU, for example, has realised that we should focus on growing indigenous events and homegrown events rather than looking to bring in the Volvos of this world, because I am not sure that the ROI is particularly great on those events, and they are not distinctive. They go everywhere. There is nothing fundamentally Welsh about hosting touring events that go everywhere around the world.



Of course, we want Champions League finals. Who doesn't? Let's focus on events that represent our voice in Wales and grow those. That takes time. You cannot magic an event in overnight and expect to knock it out of the park. It never happens. Green Man has been going for 20 years. Llangollen has been going for 50 years. Rather than hunt for the new and shiny and expensive and try to be top of the bill, let's focus on provenance and authenticity in Wales and identify those events.

Anybody who visits Wales wants a taste of Wales, Welsh culture and sport. I am not pinpointing particular events. I think we have to hold our nerve and invest in the homegrown, over time, and talent and skills in Wales.

Q86 Ruth Jones: Ms Miles-Payne, do you want to add to that? Are there any specifics you would like to mention?

Louise Miles-Payne: Graeme summed it up very well. Amazing examples already exist, and it is about enhancing those. Going back to his earlier point about the risk of some theatres in Wales, it is about supporting those theatres to continue by including them or helping them to work with larger events nearer them, and using them as a base that might have been ignored previously. I think that is probably where there have been missed opportunities, where there have been larger events near a venue. There are over 60 theatres of varying scales throughout Wales. On some occasions, there has been large-scale activity very near and there has not been a joined-upness with the venue and the event. That is where the opportunities have been missed, and that is how we will, hopefully, ensure that those theatres exist for the future.

Q87 Ruth Jones: That makes sense. Ms King, do you want to follow on from that and clarify just how long Llangollen has been going for?

Camilla King: It is our 75th anniversary this year. We are trying to learn how we can celebrate our heritage and tradition, but also modernise and be something that represents Wales as a modern country where we interact with the international community as well, and how we can take that spirit of Wales and Eisteddfodau internationally and welcome international cultures to exchange their ideas with us. That is why we were formed.

I completely agree with what Graeme and Louise were saying. It feels to me as if there could be more support or forums for Welsh cultural organisations, whether they are festivals or venues, to work together in a more cohesive way, to share what we are doing and be given support to spread our resources more wisely, perhaps. We are all under a huge amount of pressure at the moment, so there is a bit of a hamster wheel situation of trying to get things done. The long-term planning that we would have had in place a couple of years ago was decimated by Covid. Everybody is running to catch up with themselves a bit now.



Being able to work with other partners and have support to make that happen would certainly benefit the industry. I know that Theatr Clywd, near us, is seeing quite a good return of audiences and some of its touring productions are doing well, but in other theatre venues we see some struggles getting audiences back. There does not necessarily seem to be much specific rhyme or reason why that is happening in some places and not in others. Support for the industry from that perspective in terms of encouraging audiences in those areas back in, helping people to access culture, would be valuable. It is one of the first things that goes when you are trying to make savings and you look at your household expenses, so we need ways to encourage people back.

I cannot quote you any statistics, but we know that communities who engage with culture and have regular cultural opportunities have better mental wellbeing and better social interactions, and therefore require less from the NHS, from intervention services and from social services. The wider benefits of interacting regularly with culture flow through the whole of society, so it is something that we should absolutely be supporting.

In terms of sport, we should not ignore the fact that Wales has this fantastic reputation for a good time and being a nation that loves to celebrate and enjoy themselves. I was talking to a friend the other day who said, "I won't bother going to see the rugby at Twickenham any more, because it has become corporate and boring", whereas if you go to watch the rugby in Cardiff you know you will have a great night out. It is really fun. Everyone is singing. That marriage of music and sport and all the things that make up the Welsh personality and culture that we represent to the world is worth noting, and from a marketing, comms and tourism perspective, worth amplifying.

Q88 Ruth Jones: Yes. At the risk of being partisan, I completely agree with your last comments in terms of Twickenham and Cardiff. Mr Williams, do you want to add anything from your perspective, looking at upcoming potential sporting events that will enhance and promote Wales abroad?

Matthew Williams: There is some interesting work going on among our membership and in conjunction with the Welsh Government. Graeme touched on this a little bit. There are efforts to get a major festival of disability sport off the ground in Swansea later this year. There is a lot of work going on around triathlon and making homegrown triathlon events that are sustainable, bring visitors in and bring money into the Welsh economy.

The real focus now is on making sure that all the sporting organisations in our membership are starting to think about developing that pipeline of homegrown events that ultimately will attract visitors, bring people into Wales and bring money into the economy; but will also help develop Welsh talent and Welsh athletes, who might then go on to be those ambassadors of the future, like Elinor Barker in cycling or Gareth Bale in football. Without that programme of events at home, we will never develop those kinds of people. There is a dual benefit to doing that, and I



think our sector is certainly starting to understand that more. I think the Welsh Government are on board with that kind of idea. They are working with us to try to make sure that we do have that supply chain around those events to make them stand up.

The supply chain around sporting and cultural events is not too different, so it will help all of us. For food vendors, transport of equipment to and from sporting events is not too different from transporting equipment for cultural events. There is a synergy there that I think is just beginning to develop. I am optimistic around the prospects for the future on that.

Fiona Stewart: I think it would be good to open up the opportunity of celebrating smaller events in Wales. With media, there has been a lot of emphasis on numbers at events. There are areas of Wales that are never going to attract big numbers, because of transport and the population. If we reflect on what happened in the northern isles of Scotland, you can see that it is the same thing—there is no population there and people cannot get there—but they build up on the smaller events and experiences and bring them together as one experience.

A fantastic event, which I think should get more support, is Machynlleth Comedy Festival. Comedy in Wales is something that I do not see supported in the same way as music. We have an incredible legacy of comedic art in Wales. It is small and perfectly formed. It is the place where well-known comedians hone their skills before they go to the Edinburgh Festival, and it does not matter that it is small because it is very newsworthy. It is a beautiful location. Instead of thinking that everything must be big with a lot of people attending, we should realise that there is a place for that but there is also a place for a high-impact small event. A way to look at that is through its media reach.

If organisations that are small have a big media reach, they are worth looking at because they have influence. Influence in many ways is everything now in social interaction and sport and getting visitors to places. Try to get away from numbers and more into impact and influence.

Q89 **Ruth Jones:** You have already suggested to my colleague Mr Millar that you cannot discuss certain aspects about the money that has been put in by the Welsh Government, but they have put £4.25 million into Gilestone Farm. Were you asked to provide a business plan for that?

Fiona Stewart: Can you tell me what this has to do with the subject of this group? I understood that I was here to talk about the international impact of Wales abroad. I did not understand that I was brought here to talk about my own business matters with you.

Q90 **Ruth Jones:** I think it is to do with the fact that the Green Man is a very well-known festival within your area, and there were concerns about whether it would continue. We are interested in the fact that the Welsh Government have put in money, because it is part of the Welsh affairs



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that the Welsh Affairs Select Committee look at.

Fiona Stewart: Okay. I think it is incredible that a Government would put in—no one is giving me any money—to an investment in that way to Welsh success in culture. It is a fist-in-the-air situation that any Government would do that. It is great. Mark Drakeford and his team are showing a broadening of what is happening in the future in the rural areas, where they are integrating culture into sympathetic business. Farmers are putting on events all the time on their farms. They are broadening out into other areas, weddings and other things, and that has been going for some time.

The Green Man is successful. We were just nominated for best festival in the world in the NME Awards. It is independent and, in my industry, run and owned by a woman—I think I am the only one who has operational control of a festival. I think they are recognising the success of Green Man and want to build on that, and understanding that a lot of the things that we present are things that integrate with the rural area. We do integrate with farming, food and beverages, and tourism.

We are a place that promotes new ideas and innovations through science. We are one of the very few festivals in the UK that has sold out. They are getting behind success in culture in a major way. I think if they are doing that with me and my organisation, it shows that they will do it with other organisations. That is incredibly forward-thinking. I am full of admiration for them doing that and it is just a wonderful thing that they are doing.

I feel we are being transformational in mid-Wales. I was the chair of the Economic Strategy Group for Mid Wales, which has just brought £120 million into that region, and I had first sight of the problems and the poverty and the issues to do with Mid Wales. As a commercial organisation, the easiest thing for me to do would be to do what other people do: sell it and move away. I am not saying I would or would not, but that is how these things go. What we are doing with this is definitely going to be more challenging, but we are committed to Wales and we want to see the transformational things that happened in Crickhowell and around the area in the last 20 years develop further into Mid Wales and the many businesses that have developed.

As I said, 22 companies would have keeled over if we had not run last year. Believe me, that was very scary, especially if you had no financial support from the Welsh Government. We did it literally because of the morality of the situation.

To answer your question: if this is the policy of helping culture in this way that the Welsh Government feel works so well in the rural community, deals with climate change and the Well-being of Future Generations (Wales) Act, and generates profit and works well, good on them. It is a marvellous fist in the air thing for Wales and I hope that this progresses to other parts of the cultural sector.



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Ruth Jones: Thank you very much for your frank and open answer. That is much appreciated. Are we out of time?

Chair: Not quite.

Q91 **Ruth Jones:** Everyone has alluded to the fact that transport can be an issue. In terms of the venues that you cover and deal with, how well are they served by transport infrastructure? I think only 25% of people get to Wales by public transport, and within Wales only 30% use public transport—those coming from overseas, for instance. I will start with Mr Farrow. It may be easier for you.

Graeme Farrow: It is and it isn't. Transport into Cardiff Bay has been developed by the city council, so we welcome better links into the bay and connecting the bay to the city centre. We talked about airports, but Cardiff Airport is still not well enough served with international connections and flights.

In answer to Robin's point earlier on about north and south, we need both. We do need to promote links into Birmingham, Manchester and Liverpool and so on, but Cardiff is a gateway to the Gower and the Brecons, which are also beautiful locations. There are transport linkages to Cardiff that need some improvement. If we intend to be a global tourist destination, there are some things that we still need to work on, including airport and international flights.

Camilla King: In terms of proximity for us in Llangollen to those major transport hubs in the north-west of England that we have mentioned and the Midlands, we are lucky and we are not far from those. I agree with what was said earlier that perhaps for visitors coming into those transport hubs, more promotion of how close they are to North Wales could be something useful that could be done between Visit Wales and VisitBritain.

It is easy to get to Wrexham from Chester, Liverpool and Manchester. There are decent train services into Wrexham but the problem that a lot of more rural areas in North Wales—and maybe in South Wales also—face is that once you get to those specific destinations where the trains stop, it is very hard to then go on anywhere else unless you have a car and can drive. This has happened everywhere. Bus services and routes have been cut and it is much more difficult to get around. In terms of marketing of how to travel around by public transport, there could be work done on that, to make that easier for people. Also, investing in the public transport infrastructure for tourism would be beneficial.

Louise Miles-Payne: I have two points. When it comes to the airports, it is not just about the flights that arrive, but about how you leave the airport. If you take Edinburgh as an example, you can leave Edinburgh Airport by tram, by train, by bus and by taxi very easily. You come out of Cardiff Airport, and it is a very different experience. Likewise, can we promote opportunities for public transport links from the airports in the north? When it comes to public transport throughout Wales, there are



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several venues that do not have a bus service past 7.00 pm. As we know the majority of theatre performances happen at 7.30 pm, so you have no choice but to get there by car, and that adds additional challenges.

We are doing some research around culture buses and if that can help, but that is more from a local audience base. Hopefully it would help enhance opportunities, but we need to work with Transport for Wales and other services to provide services so that people can go to see shows in their local areas, as well as the tourists. It is ridiculous that you cannot get to a certain venue past 7.00 pm. It just should not be the case.

Fiona Stewart: There is only a possibility. If we compare Wales to Scotland, I have done events in Scotland as well, and Scotland has big population areas in Edinburgh, Glasgow and Newcastle. We do not have this triangle of population in Wales. We have Cardiff, Birmingham and the north of Wales, and the reality is just from a number point of view it is very difficult to put on events when you are in unpopulated areas. It is just impossible.

Getting away from Wales, England and Scotland, if you look at the population base, which is the south-east—and again you get another population base in the north in those areas—if you are analysing where to put an event or a venue or whatever, you take that on board. That is also something that needs to be taken into consideration. It may be impossible to do that. The only thing that is going to change that would be millions and millions of pounds. As I understand from my time in the Economic Strategy Group, one mile of road is £10 million or something. Then we are talking about billions of pounds being put into transport in Wales for that to change.

We must think about the here and now. Climate change is a massive issue to do with transport and moving people around. We have a train station in Abergavenny, and we bring people in with coaches from that. However, some kind of issue to do with electrified transport with larger vehicles is something that we would very much like to look at. With anything, we have to look at the reality of what we are dealing with. It is difficult to get a destination with the lack of a transport system and with big population areas. That is just how it is.

There have been plans in Scotland and North Wales, I believe, to have events, but what they have found—I will give you an example of Festival No. 6 that took place in North Wales—a lot of money was invested by the organisers and by the Welsh Government into that. It was a very well-run event and a great space, but the reality is they did not have any returners. People would go there once or twice, and they would have a core group of returners. To retain any kind of successful event, annual event, you must have returners going there. If you have the choice of the cost and time between going to, say, Festival No. 6, which was in a beautiful location, and then the next year you think how much of that



cost and time could go on a holiday abroad, then that is what you will do. That is the reality of events organisation in Wales.

Matthew Williams: Broadly speaking, access to sporting infrastructure in Wales is largely driven by car-based access, aside from a few notable examples. The Principality Stadium is the obvious one. One of its unique selling points is its proximity to Cardiff Central railway station, essentially. To look at other key parts of Wales's international sporting offer, so the Geraint Thomas National Velodrome in Newport is very poorly served by public transport. There are bus links, but you would not be able to cater for a large incoming audience on the bus link that exists there at present and similarly other sites across Wales.

I think I said earlier that if you are looking at adventure tourism destinations, they are generally very poorly served by public transport, and that—to go back to Fiona's point—is to some degree a matter of the location that they are in. If you want your mountain bike trail to be in the middle of Coed y Brenin in Snowdonia National Park, it is relatively inevitable that it is going to be poorly served by public transport. There is something we need to grasp around that and how we explain to people the best and easiest ways to get to these locations.

Q92 **Chair:** Thank you, Ruth. I am going to bring the session to an end very shortly, but perhaps I could finish with one last quick-fire question to you all. The discussion that we have had this morning has touched on devolved responsibilities for Welsh Government and UK Government responsibilities. If right now we had in this room people from the UK Treasury, the Welsh Government Minister for Finance, Visit Wales, VisitBritain, the UK Minister for Sport, Tourism, Heritage and Civil Society, the Welsh Government Minister for Tourism—if we were to assemble all the key players with the different levers that they have available in terms of money, resource and influence—what two or three key messages or asks would you put to those different officials and Ministers? I will start with you, Mr Williams. What is it that your sector wants to see, in an ideal world?

Matthew Williams: At the moment, the key concern in our sector is depressed level of customer return and increased costs, and grappling with that. I think that is the same across the board. That is probably economy-wide. It is really difficult to handle. We would dearly like to have seen the lowered rate of VAT continue for a little longer than it was. That, coming alongside increases to National Insurance and so on at the start of this financial year, has caused worries for people in our sector and will continue to do so throughout the year.

We are also a little bit concerned around the UK Government's proposals for the online transactions consultation that is out at the moment, potentially adding increased costs to ticket sales in Wales. I think the consultation proposal is that that would help rebase some of the burden of non-domestic rates in England, but it would add a UK-wide levy to online transactions, or a UK-wide tax. That is a worry to people in our



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sector at the moment—that that will again impact some of their costs with depressed customer numbers at the same time.

Q93 **Chair:** Camilla King, from your perspective, what are the two or three asks that you are particularly keen to see at the moment?

Camilla King: As you are probably going to hear from everybody, some help for organisations and the ticket-buying, event-attending public around increased costs and fears of that carrying on for a number of years—so, some sustained support to help organisations through what look likely to be a difficult few years nationally. Another thing for me would be staffing and some support to help around the issues that we are having recruiting, particularly in light of Brexit and a lot of jobs that would have been fulfilled by people coming in from Europe that we are now having trouble fulfilling, which is affecting a lot of the hospitality industry.

Looking longer term, it would be to see plans in place around sustainability of the cultural industry in Wales. To echo what Graeme and Fiona were saying earlier, it would be to support homegrown initiatives, events or organisations who are promoting quality—not just quantity, but quality in terms of artist development and delivery—and supporting those to become even better.

Louise Miles-Payne: There were some great examples of connectivity around the sector because of the pandemic, and I would like to see that continue. We are not just here for the pandemic; we are here for the long term. Joining up organisations from the different event sectors, including sport, business and the arts, was beneficial to hear how similar the challenges were, but I think it is great to look at how we can work together among those sectors and how the Welsh Government and other Governments can support that.

Investment within VisitBritain and Visit Wales should continue, and specifically around culture. I completely agree with Camilla on staffing. I think investment being made into apprenticeships and training schemes that are not just focused on film and television within Wales is important for us. Particularly around technicians, there is a huge shortage around theatres but there is also a great crossover between those who work within theatres and television.

As I said earlier, there is a lot of investment being put into filming within Wales, but not necessarily the connectivity between what happens with the artists involved, the creatives involved, with other sectors within Wales and making sure that they are not just coming in from outside Wales and then leaving again.

Fiona Stewart: Certainly, the support for what is basically going to be a recovery period for an industry very damaged through Covid. There were a range of industries, but this industry was particularly damaged by what was going on.



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There needs to be more learning, on behalf of the people, about our industry. I often hear the word “festival” as if it covers the whole thing. A celebration of the individual positives and challenges of each sector within the whole festival concept would be great. My challenges are different from other festivals, more cultural events. My industry is pretty brutal because I am dealing with contemporary music and entertainment. My challenges are very different—not all; we still have to get tickets and so on, and services, but it is just different. It would be good to understand that, to understand what these smaller events bring, and to value that through influence and promotion of those areas.

With all of this, there needs to be acknowledgement that this sector is a recovering sector. Like hospitality and some of the other organisations that are dealing directly with face-to-face service, it cannot just stop and start at the end of Covid. There needs to be a recovery period.

Graeme Farrow: All of the forementioned things, and support for the sector over a number of years, because I think this will take several years to recover from and is hugely important. Within that, we need support to enable us to change our business models. The ground has fundamentally shifted. Wales Millennium Centre will never be the same again. There will be a percentage of audience that will never come back. Habits have changed.

Louise mentioned this, but events are not our biggest growth area. Our biggest growth area as a business is investment in young people’s skills and opportunity. This sector is not diverse enough in terms of who it employs. I also worry about skill shortages. There are skill shortages right now, particularly in technical areas, but I am worried about whether, in five to 10 years’ time, we will be able to staff up a lot of the events and venues and offers that are key to driving cultural tourism.

Investing in opportunities for training and development, including placements, apprenticeships, mentoring and so on, are key, and I would ask the Government what they are doing to develop skills for the creative industries. We must move away from thinking that investing in those skills is all about artists and people who perform. What business in the world would not want more creative people involved in it? We need to embed creative skills into our curriculums, which we are doing in Wales, but also provide hands-on learning experience for people who are not getting those opportunities in our industries and invest in those.

Chair: Thank you very much. It has been a long, very interesting and wide-ranging session. Thank you to all our panellists for your contributions and for your time this morning. It is appreciated. Thank you to my slightly smaller than usual number of colleagues on the Committee. I will bring the meeting to a close.