

Written evidence submitted by Green Man (TOU0010)

Green Man is Wales' largest arts, science, wellness and lifestyle event. Now in its 20th year, it is an award winning Welsh based, Welsh grown live experience and is one of the five remaining large independent music festivals in the UK. Each year it promotes, showcases and sells the products of freelancers and SMEs. Creative, farming and tourism companies, artists, breweries and food producers generate profit at the festival, and more recently online. Each year, the four-day festival attracts 25,000 people a day, which includes 5,000 people involved in the operation and delivery of the event. Green Man sells out months in advance and tickets for this year's festival sold out in three days in September 2021.

Green Man has a reputation as an innovator and identifier of talent, with many musicians, including Mumford and Sons, Fontaines DC and Michael Kiwanuka, having launched their careers from the festival. The festival also promotes Welsh universities, and their innovations are showcased in the Einstein's Garden science area, the first festival science engagement area. Commenting on Einstein's Garden, the Wellcome Trust stated 'Green Man's influential brand and talent for innovation have pioneered new ways to engage communities with science and health through their science engagement area Einstein's Garden.' Our 'Courtyard' showcases Welsh beer and generates income for many independent Welsh brewers.

The soft power of a brand with an international reach, our guests say Green Man has made them think differently about Wales, and that attending Green Man has made them more likely to visit Wales again. We currently offer a week-long Settlement stay for ticket holders, during which we encourage the audience to explore Wales and its epic landscape. We work with partners including The Brecon Beacons National Park, The National Trust and local tourist information centres to run guided walks, kayaking, mountain biking and horse riding offsite, so people can get out into Wales and spend money locally.

A 2018 report by Bop Consulting found the festival generates an annual £10.37 million into the Welsh economy, equivalent to 185 jobs, not including the thousands of people who are indirectly employed by service providers and contractors at the festival. We want to expand the opportunities Green Man can bring to Wales over the next 10 to 20 years, by securing a permanent site which would support our move to be zero carbon, invest in Wales' economy, nurture Wales' talent and share its unique produce.

Alongside the festival, Green Man runs a separate charitable trust which works with young unemployed people in Wales, refugees, artists, people experiencing homelessness, and supports Welsh communities – we raised over £16,000 for flood victims in vulnerable households and have made 92 grants to create positive change in Welsh communities.

1. How attractive is Wales as a holiday destination for international tourists? *And* 2. Why is the number of international visitors to Wales comparatively low as a share of the UK total?

Wales offers a beautiful and awe-inspiring landscape, with unique communities and heritage to showcase to visitors. We would argue that Green Man perfectly encapsulates a positive tourism experience unique to Wales and the UK which is incredibly attractive to international travellers and can support Wales' potential to

grow and expand its reach to more people from around the world. Given that, we would argue that the links with Visit Wales and VisitBritain are limited, and that it is a missed opportunity in selling Wales abroad. We would very much look forward to working with both organisations to help sell Wales' unique brand to international visitors.

3. Does Wales have a sufficiently strong "brand" internationally and what more could be done to promote Wales as a holiday destination abroad?

Wales' international brand could be made stronger by identifying which Welsh independent businesses have an international brand reach and encapsulate a positive Welsh message. Once identified, it is important to build on their success to demonstrate the unique experiences and opportunities the nation offers for international tourists. Amidst Covid-19 travel restrictions, Wales has received a new crowd of UK domicile visitors exploring more locally. The relaxation of restrictions provides the chance to highlight Wales to the world as travellers from across the globe seek to explore again.

The Green Man brand has a media reach of 6.9 billion internationally, creating a cultural bridge between Wales and the world. Our website attracts 81,000 non-UK visitors each year (14% of total website visitors) and 20% of our audience on Facebook live outside the UK. Four per cent of ticket holders are from outside the UK, with festival goers coming from as far as Australia and the USA, as well as Ireland, Germany and the Netherlands, to our pocket of the Brecon Beacons National Park in South Wales. Australian music exporters have used Green Man to launch Australian artists in the UK, and commercial agencies across the globe also use Green Man for this purpose.

We partner with Welsh talent and producers, alongside international performers and artists, and the Green Man festival is known to attract international tourism, promoting Wales and the Wales brand. With support to secure a permanent venue in Wales, Green Man could expand its offering and welcome international visitors all year-round, providing new live and tourism experiences.

4. How has the COVID-19 pandemic impacted the tourism industry in Wales?

The Green Man festival was unable to go ahead in 2020 due to the coronavirus pandemic. The negative effect of the cancellation was substantial on the 5,000 people who rely directly or in part from the income they achieve from working at the festival, as well as the many thousands more who generate money indirectly from the festival taking place. The range of people affected crosses creative, productivity, tourism, food and beverage, education and the farming sectors who gain from the thousands of visitors, operation support and press Green Man attracts each year.

The following year proved to be an uncertain and difficult period, during which we needed to plan for a 2021 festival, but without the income usually generated at the preceding event. It was also an uncertain time for the huge workforce required to safely hold an event such as Green Man, during which many people chose to enter another, more secure sector for that period.

The coronavirus restrictions, whilst necessary to protect public health, mean tourism businesses are now returning to the new normal on a back foot, with increased debt repayments after loans, a reduced workforce due to people leaving the industry for more stable work, and now facing narrower margins amidst inflation and a rise in VAT.

5. What will be the impact of a return to the 20% rate of VAT from April 2022 for the tourism industry in Wales?

Green Man supports calls for VAT to remain at 12.5% whilst the tourism and hospitality industries recover from the impact of the pandemic. This would help larger businesses such as ourselves, as well as the small businesses we indirectly support through Green Man, to manage costs and remain competitive in the international market. Raising the rate of VAT to 20% too early would put unnecessary pressure on businesses such as Green Man and impact our resilience to potential future restrictions announced in response to a new variant.

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

Green Man is not opposed in principle to a tourism levy in Wales but we need further detail about how it will be applied. The Welsh Government is due to consult on proposals for a local visitor levy in Autumn 2022 and we would expect that officials engage with the full spectrum of tourism and hospitality businesses to capture accurately what impact a levy will have for the economy of Wales and its local economies.

If our attendees were asked to contribute to a levy, we would expect a substantial part of that income to be spent on enhancing their experience at our event, rather than across a wider region.

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

To support our wider industry, the Welsh Government needs to foster young music talent at schools at primary and secondary level across Wales, including lessons on reading music scores, access to a musical instrument and lessons to teach the skill needed to play it.

For example, young people need to be exposed to the wide variety of jobs that exist in the live events industry and shown a real-world view on how rewarding and challenging a career in this industry can be.

Green Man is one of just five large independent festivals in the UK, in what is often a brutally competitive market. Our competition consists of global entertainment corporations which own the majority of live UK entertainment assets. Green Man holds its own against this competition but has experienced three recent takeover attempts. If successful, these would risk the festival's future in Wales and its contribution to the local economy and change the fundamental values which attract 25,000 people each day to our festival.

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

Better collaboration between the UK and Welsh Governments and tourism bodies such as VisitBritain and Visit Wales would prevent duplication of work and enable greater investment in campaigns to attract international visitors.

Given our position as a leading independent festival, we would hope that both organisations would use our success and our international appeal to promote Wales and the UK.

9. Has the UK Government's tourism Sector Deal achieved its aims of making Wales more accessible and improving conditions for domestic and international visitors?

The Tourism Data Hub promised in the Sector Deal could help businesses such as ours to track consumer trends in travel and, if we are able to expand our offering at a permanent venue, better curate our experience for international tourists. We therefore ask that the UK Government proceeds with developing the data hub.

Portions of the Sector Deal, such as the creation of additional apprenticeships and in-work training, are not applicable in Wales.

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

Transport for Wales is well placed, as a central transport body covering Wales, to plan for the influx of visitors using public transport for large events and tourism attractions. This would include additional carriages on trains and dedicated bus transport for more rural locations. For example, Transport for Wales' recent Fflecsi pilot using an electric minibus demonstrates the potential of demand responsive, zero emission transport for international visitors.

Green Man's brand and well-known support of tackling climate change means it is in a good position to promote Welsh green innovations regarding Welsh transport to business and the public if such a partnership was developed. We look forward to working with Transport for Wales to enhance the public transport opportunities to attend our event.

11. How can Wales increase its share of international tourism while meeting the UK and Welsh Governments' respective decarbonisation commitments?

The focus of action in this area by both the UK Government and the Welsh Government should be on encouraging tourists to experience the uniqueness that Wales can offer. This needs to be supported by low carbon, sustainable transport infrastructure, such as the Fflecsi zero emission pilot, alternative power sources and more ambitious investment in decarbonising aviation.

Conclusion

Welsh SMEs and freelancers who rely on face-to-face contact have experienced a very challenging time due to the pandemic. Green Man is optimistic about the future and the opportunities presented by international tourism. We and the wider tourism sector in Wales are experts in delivering world-class tourism experiences. We were able to hold our festival in 2021, to great critical and popular success. The UK and Welsh governments need to continue to support the sector as it recovers from the pandemic and make strategic investments in sustainable growth for tourism in Wales.

Green Man decided to go ahead in 2021 following some relaxation of Covid-19 protections, primarily to support those who rely on the festival for direct or indirect employment. It was incredibly challenging, although it proved testament to the respect and trust held in the Welsh Government and the professionals who operate Green Man. We were the first large event in Wales to open and the only large independent festival to take place in the UK opening months of July and August. Green Man 2021 achieved great critical acclaim, generated confidence for many Welsh businesses to reopen and reached out to the thousands who attended emerging from the psychological and financial turmoil of the pandemic.

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