

Written evidence submitted by UK Theatre (TOU0011)

Overview

1. The Welsh and broader UK theatre industry have a global reputation for creative excellence and attract visitors from across the world. Inbound tourism is therefore extremely important to theatres and performing arts venues across Wales. The latest data from VisitBritain shows that 5% of all visitors to Wales visited the theatre or attended a performing arts production at least once during their stay.¹ This was a higher percentage than for other key cultural activities like going to a live music event, attending a festival, or seeing a football match. The same research showed that attending the theatre was a key driver for why 15% of holidaymakers chose to visit the UK more generally, a market which Welsh theatres should be supported to continue to tap into.

About UK Theatre

2. UK Theatre represents approximately 240 theatres, concert halls, dance companies, producers and arts centres throughout the UK. We represent some of the most popular theatre companies and performing arts venues in Wales including Theatr Clywd, Venue Cymru, Theatr Genedlaethol Cymru, New Theatre Cardiff, St David's Hall, the National Theatre of Wales, and the Wales Millennium Centre. UK Theatre also operates as a professional association, supporting over 1,400 individuals working professionally in theatre and the performing arts in the UK.

Does Wales have a sufficiently strong "brand" internationally and what more could be done to promote Wales as a holiday destination abroad? What steps are needed post-pandemic for the tourism sector in Wales to recover and grow its international appeal?

3. Wales has historically had a very strong international tourist reputation and its cultural heritage and influence remains world-leading. It is vital that the Governments in Cardiff and Westminster do not rely on this pre-Covid (and pre-EU exit) reputation, however, and assume that inbound tourism will bounce back. Other cultural competitors, particularly the US, France, and other European countries, are investing heavily in promoting their tourism industries and boasting their cultural credentials. It is vital that the Welsh Government and tourism organisations commit enough financially to be able to do the same.
4. The UK Government's decision to stop EU nationals from being able to use ID cards rather than passports to travel to the UK should be revisited given the advances in security that these cards have had since the Referendum and the fact that a reported 75% of Europeans do not have a passport. We would strongly encourage the Welsh Office and the Welsh Government to work closely with the Home Office, DCMS, and other departments to ensure that reforms are made to ensure that

¹ VisitBritain, 2019. *Activities in Britain's nations and regions – Foresight, Issue 165*. https://www.visitbritain.org/sites/default/files/vb-corporate/foresight_165_regional_activities_sep_21.pdf

Wales can continue to benefit from visitors from traditionally popular markets such as France, Germany, and the Netherlands.

5. Failure to properly promote Wales internationally could inflict a further blow on the cultural and hospitality industries after an extremely difficult winter period. 2022 risks being a 'perfect storm' for hard-hit industries if Britons seek sunny overseas holidays while inbound tourism is slow to return. The Government must not view the relaxing of domestic restrictions as happening in isolation – it is vital that Wales's Covid-safety approach is explained to overseas audiences. Failure to provide reassurance that Wales is a safe place to visit risks affecting the sustainability of the tourist attractions which make Wales an appealing place to visit as well as the confidence with which inbound tourists will book.
6. While inbound tourism does not make up the majority of audiences in Welsh theatres it does contribute a substantial amount to the industry – particularly in major cultural centres like Cardiff. Restrictions on overseas visitors, or a slow return to pre-pandemic levels of tourism, would therefore directly impact the revenue of theatres in the capital and elsewhere and would undoubtedly have an indirect impact on related industries such as hospitality and overnight accommodation (and vice versa).
7. It is also vital that Wales (and the UK more broadly) steps up its advertising campaign to ensure that we remain competitive against major cultural destinations such as New York, Paris, and other major cities on both sides of the Atlantic. We would strongly urge both Governments to recognise the importance of properly funding bodies such as VisitBritain and Visit Wales, the former of which has had its core budget cut by 35% in the last decade, to ensure that large-scale coordinated campaigns can be launched to attract visitors throughout 2022.
8. The impact of a difficult year for theatre would go beyond the theatres themselves as productions inevitably involve a large number of companies and freelancers. For example, the touring version of *Everyone's Talking About Jamie* interacted with 58 companies around the UK. According to DCMS figures, just over 70% of the workforce across the UK in 2020 were self-employed / freelancers. As such, when a show is forced to close, cut a run short, or cancel altogether the economic impact is felt by numerous businesses and individuals.
9. In summary, the theatre industry in Wales benefits from a thriving and consistent inbound tourism industry. While theatre was able to benefit from Britons being restricted from travelling internationally in 2021, there is serious concern that the pent up demand for overseas holidays could impact on theatres in 2022 without adequate inbound tourism numbers to make up the difference. It is therefore vital that the Welsh and UK Governments and tourist boards ensure they fund proactive, coordinated, and long-term campaigns to attract overseas visitors in 2022 and beyond.

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?

10. The Government must provide full and proper funding for VisitBritain, Visit Wales, and other arms length tourism bodies to ensure that they can develop, fund, and implement long-term advertising campaigns to attract inbound tourism throughout 2022. Businesses are developing their own advertising activity, but private activity can only do so much and there is limited financial resource available to fund large-scale projects following the impact of the last two years on the culture and hospitality industries.
11. The Government should revisit its decision to prevent EU tourists from visiting the UK using their ID cards. The insistence that visitors from the European Union use their passport – the full impact of which we have yet to realise given that it only came into effect on 1st October 2021 – could be incredibly damaging to the UK and Welsh inbound tourism markets and to cultural institutions like theatres in particular given their popularity with large school groups and cultural exchanges. It is estimated that 75% of Europeans do not own a passport given that they can travel within the EU on an ID card alone. The impact of this cannot be understated given that Europe represents the second largest inbound tourism market for the UK, and four of the top five nations for inbound tourism to Wales are from the EU.²

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

12. As mentioned above, EU countries remain vital for inbound tourism to Wales. The UK's exit from the EU could be an opportunity to engage with other medium and long-distance countries in addition to the already-engaged US and Australian markets. Looking at the latest DCMS figures on key export markets for 'music, performing and visual arts' China and Japan currently sit just behind Italy in terms of how much is exported from the UK to their shores. They could therefore be ripe markets, along with the Gulf states, for further tourism advertising investment given they are already consuming UK and Welsh theatrical content.
13. The 'Soft Power 30' rankings, created by Portland, currently has the UK as a very close second to the USA for cultural impact. France is a distant third, with Germany and Spain making up the top five. While it seems unlikely that the UK will slip out of second place immediately, it is vital that there is continued heavy investment from the Government and its agencies to ensure that our cultural capital remains high and that we are able to continue to compete with – and outclass – our key European competitors.

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² VisitBritain, 2019. *Inbound tourism performance: 2019 snapshot*. Last available full year of data. The other country is the USA. <https://www.visitbritain.org/2019-snapshot>