



Cynulliad Cenedlaethol Cymru The National Assembly for Wales

Y Pwyllgor Menter a Busnes The Enterprise and Business Committee

**Dydd Mercher, 02 Gorffennaf 2014
Wednesday, 02 July 2014**

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Motion under Standing Order 17.42 to Resolve to Exclude the Public from the Meeting

Cofnodir y trafodion hyn yn yr iaith y llefarwyd hwy ynddi yn y pwyllgor. Yn ogystal,
cynhwysir trawsgrifiad o'r cyfieithu ar y pryd.

These proceedings are reported in the language in which they were spoken in the committee.
In addition, a transcription of the simultaneous interpretation is included.

**Aelodau'r pwyllgor yn bresennol
Committee members in attendance**

Rhun ap Iorwerth	Plaid Cymru The Party of Wales
Suzy Davies	Ceidwadwyr Cymreig (yn dirprwyo ar ran Byron Davies) Welsh Conservatives (substitute for Byron Davies)
Keith Davies	Llafur Labour
Yr Arglwydd/Lord Elis-Thomas	Plaid Cymru The Party of Wales
William Graham	Ceidwadwyr Cymreig (Cadeirydd y Pwyllgor) Welsh Conservatives (Committee Chair)
Julie James	Llafur Labour
Eluned Parrott	Democratiaid Rhyddfrydol Cymru Welsh Liberal Democrats
Joyce Watson	Llafur Labour

Eraill yn bresennol
Others in attendance

David Alston	Cyfarwyddwr y Celfyddydau, Cyngor Celfyddydau Cymru Arts Director, Arts Council of Wales
Rebecca Brough	Y Cerddwyr a Chyswllt Amgylchedd Cymru Ramblers Cymru and Wales Environment Link
James Byrne	Ymddiriedolaethau Natur Cymru a Chyswllt Amgylchedd Cymru Wildlife Trusts Wales and Wales Environment Link
John Griffiths	Aelod Cynulliad, Llafur (y Gweinidog Diwylliant a Chwaraeon) Assembly Member, Labour (The Minister for Culture and Sport)
Llyr Jones	Swyddog Cyswllt Parcau Cenedlaethol, Llywodraeth Cymru National Parks Liaison Officer, Welsh Government
Marilyn Lewis	Cyfarwyddwr, Cadw Director, Cadw
Linda Tomos	Cyfarwyddwr, CyMAL: Amgueddfeydd, Archifau a Llyfrgelloedd Cymru Director, CyMAL: Museums, Archives and Libraries Wales
Sian Tomos	Cyfarwyddwr Menter ac Adfywio, Cyngor Celfyddydau Cymru Director of Enterprise and Regeneration, Arts Council of Wales

Swyddogion Cynulliad Cenedlaethol Cymru yn bresennol
National Assembly for Wales officials in attendance

Richard Watkins	Dirprwy Glerc Deputy Clerk
Claire Morris	Ail Glerc Second Clerk
Robin Wilkinson	Gwasanaeth Ymchwil Research Service

Dechreuodd y cyfarfod am 09:31.
The meeting began at 09:31.

Cyflwyniad, Ymddiheuriadau a Dirprwyon Introduction, Apologies and Substitutions

[1] **William Graham:** May I welcome Members and witnesses this morning? The meeting is bilingual. Headphones can be used for simultaneous translation from Welsh to English on channel 1 or for amplification on channel 0. The meeting will be broadcast and the transcript will be published later. May I remind people to turn off their mobile phones? Members and witnesses, there is no need to touch the microphones, they will come on automatically. In the event of a fire alarm, I ask people to follow directions from the ushers. I have apologies from David Rees, Byron Davies and Mick Antoniw, and we welcome Suzy Davies as a substitute for Byron Davies today.

09:32

Ymchwiliad i Dwristiaeth (Sesiwn 6) Inquiry into Tourism (Session 6)

[2] **William Graham:** We welcome our witnesses. We are most grateful for their written paper. Formally, could I ask you to give your names and titles for the record? I will ask the Minister to begin.

[3] **The Minister for Culture and Sport (John Griffiths):** I am John Griffiths, the Minister for Culture and Sport.

[4] **Ms Lewis:** I am Marilyn Lewis, director of Cadw.

[5] **Ms L. Tomos:** Linda Tomos, director of CyMAL: Museums Archives and Libraries Wales.

[6] **Mr Jones:** Llyr Jones, protected landscapes lead.

[7] **William Graham:** Thank you very much. I am going to go straight into questions, and I will ask Eluned to ask the first question.

[8] **Eluned Parrott:** I am grateful, Chair. Obviously, cultural tourism is a huge asset and a source of competitive advantage for Wales in terms of tourism. Can you tell me whether your department, Minister, has had any input into the recent Welsh Government brand evaluation exercise being conducted by Michael Ashton Associates?

[9] **John Griffiths:** We are involved in evaluation in terms of what constitutes a good evidence base for tourism activity in Wales and the role of my department in terms of heritage, the arts and the outdoors. So, at an official level, there would be input from my officials to make sure that what my department has to offer in terms of the product, as it were, is factored into that work. Our officials here could provide you, I am sure, with details of that input, if that would be useful.

[10] **Eluned Parrott:** Yes, please.

[11] **Ms Lewis:** Shall I go first? The branding is, obviously, primarily driven by the department for the economy. Officials, certainly from Cadw, CyMAL and a broad spectrum of bodies, contribute via the cultural tourism partnership as a sounding board. However, our interface with the branding in particular has been very much in terms of support regarding the product. So, it is a question for our areas of activity that what we are seeking to do is to encourage the brand to appreciate and resonate with the product—so, the heritage and the

culture. Secondly, it is for us then to reflect the brand, particularly things like the recent television campaign, which was called, ‘Have you packed for Wales?’, which is very much about lifestyle and the diversity of the cultural, the open spaces and the heritage product. It is a two-way process of seeking to influence the brand so that it reflects the product that is in the Minister’s portfolio, and, secondly, using the brand and running with that brand, really, to make the most of it for the heritage, cultural and outdoor assets.

[12] **Eluned Parrott:** Sorry, I am not really getting a sense here. There is a specific evaluation exercise currently being conducted on the brand of Wales. They want to redevelop the brand of Wales. Yes, that is in the portfolio of the Minister for the economy, but, clearly, there is a very clear link between Wales’s cultural assets and the brand that we wish to put forward. Have any of you, on the panel, met with my Mike Ashton Associates?

[13] **John Griffiths:** I certainly have not, as Minister, Eluned. Have the officials?

[14] **Ms Lewis:** Certainly Cadw officials have met with Visit Wales and with Mike Ashton Associates. I personally have not, but the people responsible for working with Visit Wales in Cadw have certainly met with him.

[15] **Eluned Parrott:** Have you, Ms Tomos?

[16] **Ms L. Tomos:** I personally have not met with them. The two organisations that the Minister sponsors—the national museum, and, increasingly, the national library—are becoming involved in that evaluation, but CyMAL itself has not been involved with direct talks. Clearly, there is a Cadw lead on this.

[17] **Mr Jones:** Neither have the designated landscapes, the national parks, been informed, but they are open to meeting with anyone that would push it forward.

[18] **Eluned Parrott:** Minister, have you met with the Minister for the economy to talk about the branding of Wales as a tourist destination?

[19] **John Griffiths:** We regularly have meetings and discussions in terms of branding and how our historic sites and natural assets, such as the coastal path, the national parks, and areas of outstanding natural beauty, relate to the branding of Wales and how they can help to attract visitors. There is obviously very strong recognition of the value of these assets—the historic sites and natural landscape—and I work very closely with the Minister for the economy to make sure that my portfolio plays its part.

[20] **Eluned Parrott:** Were you aware of this formal brand evaluation exercise?

[21] **John Griffiths:** Yes.

[22] **Eluned Parrott:** When did you become aware of that?

[23] **John Griffiths:** I could not tell you the exact date, but certainly quite recently.

[24] **Eluned Parrott:** Quite recently. Right, thank you very much, Minister.

[25] **Suzy Davies:** Sorry, but could I just add a quick question? It is on exactly that point.

[26] **William Graham:** Yes, please do so, Suzy.

[27] **Suzy Davies:** Bearing in mind what you said about the cultural heritage of Wales being an important source of information in terms of the branding, are you able to tell me how

often Cadw officials have met with members of Mike Ashton Associates? Has it been just one meeting, or has it been a regular series of meetings, being that, obviously, you have set so much stall on heritage as being part of the brand?

[28] **Ms Lewis:** Shall I answer?

[29] **John Griffiths:** Yes, please.

[30] **Suzy Davies:** Only roughly.

[31] **Ms Lewis:** I understand that colleagues have met representatives of Mike Ashton Associates twice, but have had, obviously, complementary and supplementary conversations with people in Visit Wales on a very regular basis. The conduit is primarily through Visit Wales.

[32] **Suzy Davies:** Okay. Thank you very much. Thank you, Chair.

[33] **Eluned Parrott:** It feels like the departments under your control, Minister, are, frankly, at an arm's length from this process, and, clearly, there is, as I say, a very direct link between the value of our cultural assets and what a brand for Wales might look like. If we think about how Wales is communicated abroad, clearly, more than 60% of individuals who come to Wales would talk about going to visit one of our cultural assets. How do you make sure that the work of your department is regularly contributing to a coherent tourism brand for Wales? At the moment it feels like this is something that has been considered only very recently.

[34] **John Griffiths:** I would not say that we are at arm's length in any way. I work very closely with the Minister for the economy in terms of the role that my department can play in the tourism strategy, and making sure that we are joined up. I think that any assessment of our tourism strategy will show that it very strongly incorporates our historic assets in Wales, our culture, and our natural landscape. These are very strong features of our tourism strategy, our branding, and our marketing. I think that that is the result of very close working at a ministerial level and at an official level as well, of course, as a result of involving the sponsored bodies within my department, and they have very strong role to play as well.

[35] **Eluned Parrott:** However, Minister, you said that you had only recently become aware of this brand evaluation exercise, yet, from the evidence that we have received, I think that I am right in saying, Mike Ashton Associates has been meeting with people in the tourism industry for more than a year. Now forgive me, but I would have thought that the Minister responsible for culture, when culture is so much an inherent part of our tourism strategy, ought to have been in at the beginning of that process and helping to frame the debate about what a brand for Wales ought to be. Were you involved in initial discussions before Mike Ashton Associates was appointed to do this work?

[36] **John Griffiths:** I have been involved in discussions and am involved in discussions with the Minister and my officials are involved in discussions with her officials and our sponsored bodies are involved in discussions on an ongoing basis in terms of general tourism strategy, marketing, branding and making sure that our product, the product of the historic sites and the natural landscape, is of a quality that will take forward tourism and attract visitors to Wales. So, of course, there is a generality of joint working and any specific initiative will sit within that general co-operation and collaboration with organisations in the field and within the Welsh Government. That is something that is ongoing and necessary and that very much understands the importance of my portfolio to tourism strategy, promotion and branding in Wales. Particular initiatives, obviously, will sit within that, but some aspects of work are taken forward more at an official level than at a ministerial level.

[37] **Eluned Parrott:** Was anyone in your department involved in setting the terms of reference for this particular piece of work?

[38] **John Griffiths:** Again, I will turn to the officials for that, but not that I am aware of.

[39] **Ms Lewis:** I am not aware of any involvement.

[40] **Eluned Parrott:** Were any of you involved in designing how this piece of work will be carried out and who ought to be spoken to in terms of developing the brand evaluation exercise?

[41] **Ms Lewis:** I personally was not involved, but I would imagine that our lead within Cadw would at least have had conversations with the senior officials in Visit Wales about that, and I am reasonably confident that that took place, yes.

[42] **John Griffiths:** I could perhaps furnish the committee with a note on that, Chair, to confirm the position, if that is useful.

[43] **William Graham:** That would be very helpful, thank you very much.

[44] **Eluned Parrott:** There is just one final point from me. We have had evidence that suggests that, despite the international popularity of our culture, heritage and natural resources, which are incredibly special when it comes to marketing Wales abroad—. Despite that, we have Professor Annette Pritchard saying that Wales lacks a clear brand strategy to harness and build on these key assets. To what extent are your department and your bodies, such as Cadw, involved in developing that brand strategy and why do you think there is a perception that we are not building on them effectively enough? Is it a resource issue or is it a silos-within-Government issue? What is the problem? What is it that is preventing that appearance of coherence in the sector?

[45] **John Griffiths:** I do not think that I can accept that there is that widespread or general perception. You may have had evidence from an individual. You may have had further evidence to that effect that I am not aware of. However, I would not accept that there is a general perception as you stated. I think that the historic environment of Wales, the uniqueness of Wales in terms of that historic environment and our natural landscape and coast, for example, are extremely strongly reflected in terms of the branding and marketing of Wales. Recent campaigns, including television campaigns, clearly demonstrate that. So, I am confident, as the Minister with responsibility for our historic environment, our coast path, our national parks, areas of outstanding natural beauty and so on, that they are clearly recognised within our tourism strategy and our marketing and branding as very important assets for Wales and that they are used appropriately. I am sure that there will be a variety of views as to how strong that branding and marketing are, but, personally as Minister, I feel that my department is very strongly reflected in tourism strategy, marketing and branding.

09:45

[46] **Rhun ap Iorwerth:** I think that we are perhaps in danger of confusing the fact that we love Wales and think that Wales is fantastic with there being a strong Welsh brand that is put together in a strategy to be sold successfully abroad. I can tell you that there has been a lot of agreement among those who have come to give evidence to the committee that there is a problem with getting that strategy right. Do you agree that, whatever we might think of Wales and however positively we look at what we have to offer, there is an issue with the way in which we package that together as a strategy to potential markets?

[47] **John Griffiths:** When we are talking about perceptions, a variety of people and a variety of organisations will no doubt have their own perceptions of how effective marketing, branding and tourism strategy is. These are matters for the Minister for economy and Visit Wales. As far as I am concerned as a Minister, I want to make sure that we have a top-quality product in terms of our historic sites, our coast path, our national parks and areas of outstanding natural beauty, and, obviously, we take forward our funding programmes and our partnerships to improve the quality of that product, which is so important in attracting visitors to Wales, and it is so important for the people living in Wales. Obviously, it does play a big part in tourism. So, as well as improving the quality of the product, as Minister, I work with the Minister for economy, and so do my officials and the various bodies, to make sure that we are part of the branding and the marketing and the promotion. So, you know, it is a joint effort, but of course, ultimately, as I say, responsibility for the tourism strategy, marketing and branding rests with the Minister for economy and Visit Wales. It seems that visitor numbers are often strong in Wales, which presumably shows that those strategies are achieving success.

[48] **Eluned Parrott:** I have a very specific question here. Obviously, cultural heritage is very important to what we are marketing here. May I ask Marilyn Lewis a question? As Cadw, you directly manage a number of sites in Wales, but you also have the responsibility for promoting Wales's cultural heritage. Can you tell me what you do to market sites of cultural interest that you do not directly manage?

[49] **Ms Lewis:** Cadw has statutory responsibilities for promoting access and providing access to the 129 sites in its care. In terms of its connection to the wider historic environment, it certainly is part of the remit, as we see it, to develop connections between the heritage sites that are in Cadw's care and other heritage sites right across Wales. The primary way in which we have driven this in the last few years has been through two interrelated strands. The first one, and the bedrock of all this, is the pan-Wales heritage interpretation plan, which we began developing. It is a framework divided into a series of stories that cover all aspects, and it is thematic, chronological and geographical. It seeks to tell those stories and to provide opportunities for other bodies to weave in and, literally, follow the story, so that it makes connections, for example, between the castles of Edward I and the castles of the princes of Gwynedd, and it makes connections between Cadw castles of the princes of Gwynedd and castles owned by private individuals or other bodies. This has all been energised over the last six years by the EU-funded heritage tourism project, which has provided the pump priming through Welsh Government and EU funding—£19 million—to really push that right across the convergence area. However, because it is a pan-Wales concept, we have also been able to apply the same principles in non-EU-funded areas, through more informal arrangements, either through a Cadw grant or through support in kind.

[50] **Eluned Parrott:** Sorry; the partnerships, I am sure, are very interesting in building those stories, but how do members of the public find out about that? These sites are not listed on your map on the Cadw website, and I have never seen a Cadw leaflet that listed a site that was not under the direct management of Cadw. How are you marketing and promoting non-Cadw sites to the public?

[51] **Ms Lewis:** All visitors to a site that has benefited from the new interpretation will see the Follow the Story logo and the routes are promoted at the sites where they exist, so that the connection will be made, for example, between a Cadw site and a related site on a particular story. We use social media and the website far more now than we use leaflets. Leaflets do include the Follow the Story logos, but we do tend to use social media. We also do two other things. First, our custodians, who are the first port of call, really, in terms of referral, are very strong on the local promotion. That happens not just through Cadw's own print, but through word of mouth, local referral and local networks. We also run quite a lot of collaborative events, which take place at Cadw sites, but we also support events at other sites.

[52] **John Griffiths:** It is clearly the case that, when you have the heritage tourism project in place, the partnerships built around it and the interpretation plan that underlies it, it is an opportunity for other organisations to market themselves as part of that partnership. It is not all down to Cadw.

[53] **Julie James:** Good morning, Minister. I wanted to ask you about the Welsh Government's tourism target to grow tourism earnings by 10% by 2020. Could you tell us how your department contributes to that?

[54] **John Griffiths:** We have our own targets to contribute towards that. So, National Museum Wales has a target for visitor numbers annually, as does Cadw for its sites. Other organisations will also have their own targets. We have a number of big players, of course, that are very important, such as the Wales Millennium Centre, which attracts a lot of visitors and tourists to Wales. I could provide the committee with a list of those targets if that would be useful. However, I would just say that it is always the case that external factors are very important in terms of targets and the achievement of targets. The weather is, I guess, the most obvious example, but Easter is also very important, because sometimes you have a financial year that has two Easters within it, depending on whether Easter is early or late, and sometimes you have a year without an Easter at all. So, obviously, that is very significant in terms of visitor numbers.

[55] **Julie James:** Indeed. When we were down in Pembrokeshire on a visit last week, a lot of tourism businesses and bodies came to speak to the committee. They were all quite vehement that they could make a 10% improvement in their turnover and contribution to the Welsh economy if they had better figures to go on for planning. I do not know, Minister, whether you make the figures that you have just told us about publicly available, or how fast they are made available, but a lot of the businesses made the point that they could not predict what they needed to gear up for, if you like, and that faster access to accurate data would really benefit them. It was quite startling in committee that they were very vehement about it. So, I wondered, Minister, whether at the moment you contribute to any of the data that Visit Wales and VisitBritain put out and whether you can do anything about the speed. We were told that it took nine months, I think, from the end of the year for the accurate figures to come out. The businesses said that those figures are very accurate, but they would be grateful for less accurate but more speedy figures so that they could plan the next year's trade.

[56] **John Griffiths:** Yes, okay. I will bring Marilyn in in a moment on this, if I may, Julie. However, I will say that the destination tourism partnerships that exist across Wales are very significant. I have come across some that seem to be operating very well. They are very strong, and are producing good results. When those partnerships work well, it is very much about good information-sharing and having a common understanding of what the plans are, what is realistic, the extent of progress in achieving those plans through the year and over a longer period of time. So, there are structures there that we can use to make sure that this information is part of that process. Marilyn, perhaps you could give us some further detail.

[57] **Ms Lewis:** I was going to say something very similar, Chair, which is that where the destination management partnerships are now really working, I would anticipate that organisations such as Cadw will be able to give good advance notice to local accommodation providers and the travel infrastructure generally about the events programme that, for example, we would have in place. It would enable us to work with them so that they could plan ahead for when we might have big events coming in that they might want to market for, in terms of having special deals or making sure that they had ratcheted up their own support staff for that.

[58] **Julie James:** To be fair, I think the businesses were saying that the information was

forthcoming for major events that were proximate to them. They were talking more about general figures across the year and the fact that—I hope I am paraphrasing it correctly—basically, the figures were not coming out until they had been audited, peer-reviewed, double-checked and triple-checked, and that was taking nine months. However, tourism operators would be very grateful for ballpark figures a month from the close of the financial year, so that they would have some idea for planning ahead, expansion plans and so on. What they were looking for is trends, really. Minister, I know that you are very keen on activity tourism, which we share a love for, but they would like to know the trends as to how many people came and did that last year, so that they can gear up for it. Basically, what they are saying to us is that those figures come out very late in the year, too late really for the next year, and possibly the trend is already passing by the time they get the figures. However, as to the major events that you are talking about, apart from a slight criticism that they were quite localised in their effect, people seem quite happy with the information that they are getting on those.

[59] **John Griffiths:** We could certainly have a look at that to see what improvements might be made, working with Visit Wales.

[60] **Ms Lewis:** On the heritage side, I am sure that we can talk about that with some of the key bodies and perhaps address it through the cultural tourism partnership. Also, very specifically from Cadw's point of view, we could certainly make that information on trends available on our website. We can do that within a matter of days, I would have thought.

[61] **William Graham:** Suzy, you had a point on this.

[62] **Suzy Davies:** Thank you for those very helpful answers. I wanted to take you back to this 10% target, which has been described as perhaps being a little unambitious in some cases. You have already explained to us that in terms of culture and heritage, it is extremely strongly reflected in branding, such as the branding is, and that you already have a very close working relationship at official and ministerial level. So, can you explain how even more is going to be squeezed out of this fruit in order to meet this target? It sounds to me like you are trying to tell us that you are already doing as much as you can.

[63] **John Griffiths:** It is always possible to do more, and we have a programme of investment in our major sites that is quite substantial. As with most investment, that tends to produce results because if you have a better product, you will attract more visitors. Word of mouth is very important, and when people have a good experience they not only tend to come back, but they tell other people about it as well.

[64] **Suzy Davies:** So, what sort of figures are you talking about then? How much of those figures are allocated to promotion? I am quite happy to take a note on that.

[65] **John Griffiths:** I can provide you with a note, but I am talking mainly about investment in the raw product, as it were, in terms of interpretation, visitor facilities, family activities and events. We are constantly working to improve the product as far as that is concerned. It seems to be producing results, and we would hope that that process will continue; we would hope to get into a virtuous circle, really. If we can attract more visitors, we get more income and that can then be reinvested in the product, and hopefully that will produce greater visitor numbers again.

[66] **Suzy Davies:** Will you be doing a cost-benefit evaluation at the end of those investment periods?

[67] **John Griffiths:** Yes, and evaluation is built into the heritage tourism project as well, which ends at the end of this financial year.

10:00

[68] **Suzy Davies:** I look forward to that. Thank you.

[69] **Keith Davies:** Mi ofynnaf fy nghwestiwn yn Gymraeg. Yn dilyn beth roedd Suzy yn ei ddweud, wrth ddarllen y papurau ar gyfer y pwyllgor hwn, sylwais mai Sain Ffagan sy'n cael y mwyaf o ymwelwyr yng Nghymru gyfan. Roeddwn yn sylwi hefyd rhywle yn y papurau eich bod yn mynd i wario £25 miliwn—

Keith Davies: I will ask my question in Welsh. Following on from what Suzy was saying, in reading the papers for this committee, I noticed that St Fagans receives the greatest number of visitors across the whole of Wales. I also noticed somewhere in the papers that you are going to spend £25 million—

[70] **William Graham:** Keith, can you wait just a minute? Is it the translation—

[71] **John Griffiths:** Mae'n flin gen i; mae'r sain yn iawn rwan. Diolch yn fawr.

John Griffiths: I am sorry; the sound is fine now. Thank you very much.

[72] **Keith Davies:** Sain Ffagan sy'n cael y mwyaf o ymwelwyr yng Nghymru, ond hefyd roeddwn yn darllen yn rhywle eich bod yn mynd i wario £25 miliwn yn Sain Ffagan. Ar beth rydych chi mynd i hala'r arian?

Keith Davies: St Fagans receives the greatest number of visitors in Wales, but I also read somewhere that you are going to spend £25 million in St Fagans. On what are you going to spend that money?

[73] **William Graham:** Can we have a short answer please, Minister?

[74] **John Griffiths:** The short answer is 'greatly improving the product at St Fagans'. St Fagans gets a very impressive number of visitors, and it is obviously an absolute flagship for culture and heritage in Wales. However, it can be improved and there is a very ambitious programme for the National Museum generally in the centre of Cardiff, and also at St Fagan's, to be better in terms of telling the story of Wales; to be more structured and more effective; and to have a better understanding of wider Welsh Government strategies. So, there will be a real emphasis on connecting with our communities and that can be done through the actual procurement and building process as well as the end product. I very much hope that Members will follow the redevelopment at St Fagans, Chair, because it is very significant not just for our tourism project, but for the understanding of what Wales is about in terms of people living here. Linda, would you like to add something?

[75] **Ms L. Tomos:** Os caf ymhelaethu, mae Llywodraeth Cymru yn buddsoddi £7 miliwn yn y prosiect ac mae £12 miliwn yn dod o Gronfa Dreftadaeth y Loteri. O ran y gweddill, bydd yr amgueddfa yn codi incwm ar gyfer ariannu'r prosiect. Felly, cyfraniad Llywodraeth Cymru yw £7 miliwn.

Ms L. Tomos: If I may just elaborate, the Welsh Government is investing £7 million in the project and there is £12 million coming from the Heritage Lottery Fund. On the remainder, the museum will be raising income to fund the project. Therefore, the Welsh Government's contribution is £7 million.

[76] **Keith Davies:** Diolch yn fawr.

Keith Davies: Thank you very much.

[77] **Rhun ap Iorwerth:** A gaf droi at rôl VisitBritain o ran marchnata Cymru? Pa asesiad a ydych chi yn ei wneud, Weinidog, o'r gwaith y mae VisitBritain yn ei wneud wrth hyrwyddo diwylliant, treftadaeth a chefn gwlad Cymru?

Rhun ap Iorwerth: May I turn to the role of VisitBritain in the marketing of Wales? What assessment do you make, Minister, of the work that VisitBritain does in promoting the heritage, culture and rural areas of Wales?

[78] **John Griffiths:** I think that we have had some good joint presence at international travel trade shows. That has been facilitated by VisitBritain and it has been a very useful opportunity for us. Some of the marketing and promotion taken forward by VisitBritain has used these assets that we have spoken about within my portfolio quite effectively. However, the main relationship would be between the Minister for Economy, Science and Transport and Visit Wales as far as VisitBritain is concerned.

[79] **Rhun ap Iwerth:** There has been a suggestion made to us that—how shall I put it—VisitBritain’s understanding of Welsh culture, if you like, is superficial and that it needs, at the very least, a strong guiding hand? Who provides that guiding hand to VisitBritain when it comes to a real understanding of Wales?

[80] **John Griffiths:** I think, again, the relationship is with the Minister for Economy, Science and Transport, with her responsibility for tourism, and no doubt, Visit Wales. However, I am sure that at an official level, there would be contact and communication with VisitBritain, so perhaps I can ask Marilyn to tell us what that might be.

[81] **Ms Lewis:** The pan-Wales heritage interpretation plan has certainly helped with exploding myths and preconceptions. It does not just focus on the predictable and the obvious; it does focus on authentic stories and that has been a real help, both within Wales and outside Wales in getting across perhaps a more rounded and more authentic story about Wales. In terms of our relationship in Cadw with VisitBritain, we have had quite positive experiences over the last few years and it was brokered by Visit Wales. We were involved quite heavily in a far east marketing campaign, mainly focused on castles, which are not something that is particularly common in the far east and, therefore, was of particular interest. It was interesting to see—in terms of the way that you have characterised their perception of Wales—that the two characters that were used to represent Britain in that campaign were a Beefeater, which is perhaps a rather predictable image of an English person, and one of our custodians, who was a Welsh-speaking fresh young Welsh woman, dressed in normal Welsh women’s clothing. So, in fact, we really were quite excited about the fact that we were presenting a rather more contemporary impression of Welsh heritage. Even though we have these amazing heritage assets, the people who visit them and look after them are not necessarily as predictable as a Beefeater and certainly no hats or cloaks were seen on any Welsh representative throughout that campaign.

[82] **Rhun ap Iorwerth:** Back to you, Minister. Do you think that there is more of a leading role that your department could be playing, even though you say that it is the role of the Minister for economy to lead on that? Should there be more of a role for your department in ensuring that the cultural sell is right when it comes to feeding through to VisitBritain, for example?

[83] **John Griffiths:** I think, as I said earlier, that it is very important that, within my department, we get the product right, and that we invest in the product and improve the product. We have these great assets in Wales that are so important in terms of tourism visitors. I believe that that is very well understood by Visit Wales, as it should be, of course, and indeed by the Minister for economy with responsibility for tourism. So, I think that my relationship with this is very much in terms of working very closely with the Minister for the economy, and in terms of our officials working very closely. However, I think that it is very much the responsibility of the Minister for the economy and Visit Wales in terms of this relationship with VisitBritain and making sure that that it is all that it needs to be.

[84] **Rhun ap Iorwerth:** So, would I be right in thinking that you would not have had, for example, direct input to the latest ‘the countryside is great’ campaign by VisitBritain and that that would have been done by officials in another department?

[85] **John Griffiths:** Again, my officials would have had input and there would be joint working, of course, but ultimately I think that it is a matter for the Minister for economy.

[86] **Rhun ap Iorwerth:** I have one last question for Cadw on the cultural tourism action plan and your input towards that and the work that you have done towards helping that action plan to achieve its aims.

[87] **Ms Lewis:** And the question is: what have we done?

[88] **Rhun ap Iorwerth:** Yes. What have you done?

[89] **Ms Lewis:** We are part of the cultural tourism steering group. The work that the heritage tourism project has been doing now for several years has very strongly influenced what is now in the current incarnation of the cultural tourism action plan and the Minister's historic environment strategy and its focus on heritage icons and also on world heritage, both of which feature in the wider historic environment strategy as well as in the cultural tourism strategy. So, there is a very strong element that both looks at spreading the benefit, but also at really making those big heritage sites work for the whole country.

[90] **William Graham:** Remembering that the Beefeaters were Tudor inventions, I suppose that that is something to do with Wales.

[91] **John Griffiths:** Chair, could Linda just add something please?

[92] **Ms L. Tomos:** Mae cyfraniad pwysig hefyd i'w gael y tu hwnt i'r cyrff mawr—y cyrff y mae'r Gweinidog yn eu nodi. Mae CyMAL, yn enwedig trwy weithredu'r cynllun, yn ceisio rhoi ychydig bach mwy o gymhwysedd i amgueddfeydd bach, er enghraifft, gan gynnig hyfforddiant am ddim er mwyn iddynt gyrraedd safon y cynllun sicrhau ansawdd i atyniadau ymwelwyr Cymru ar gyfer darparu gwybodaeth a gwasanaethau i ymwelwyr. Mae honno'n elfen bwysig hefyd; fel roedd y Gweinidog wedi dweud yn gynt, mae'n bwysig bod y cynnyrch yn dda mewn amgueddfeydd mawr a safleoedd mawr Cadw, ond hefyd fod y profiad yn dda mewn amgueddfeydd bach. Mae honno'n elfen bwysig o waith CyMAL, sef hyrwyddo a rhoi cyfleoedd i sefydliadau bach i gyrraedd y safon yr ydym yn disgwyl iddynt ei chyrraedd trwy weithredu'r cynllun.

Ms L. Tomos: An important contribution is also found beyond the major bodies—the bodies that the Minister has mentioned. CyMAL, particularly through implementing the plan, is trying to give a little more competence to small museums, for example, by offering free training so that they can achieve the visitor attraction quality assurance service Cymru standard for providing information and services to visitors. That is also an important element; as the Minister said earlier, it is important that the product is good in large museums and large Cadw sites, but also that the experience is good in small museums. That is an important element of CyMAL's work, that is, to promote and provide opportunities for small organisations to reach the standard that we expect them to reach by implementing the plan.

[93] **Rhun ap Iorwerth:** Mae'n bwysig hefyd gofyn eich barn chi am y cwestiwn y gofynnais funud yn ôl am fewnbwn i'r cynllun 'great' gan VisitBritain, a'r rôl rydych chi wedi ei chwarae. Pa rôl ydych chi wedi ei chwarae?

Rhun ap Iorwerth: It is important to ask your opinion as well about the question that I asked about the input into the 'great' campaign by VisitBritain, and the role that you have played. What role have you played?

[94] **Mr Jones:** Mae'r parciau **Mr Jones:** The national parks and the

cenedlaethol a'r AONBs wedi gweithio gyda Visit Wales trwy'r *designated landscapes group*, a'r wybodaeth rwyf wedi ei chael yw mai dyna sut maen nhw'n rhoi eu mewnbwn i VisitBritain, a wedyn bydd y grŵp yn mynd â hynny ymlaen yn y dyfodol, ond mae hynny o hyd yn y stepiau cynnar.

AONBs have worked with Visit Wales through the designated landscapes group, and the information that I have is that that is how they provide their input to VisitBritain, and then the group will take that forward in the future, but that is still in the early stages.

[95] **Rhun ap Iorwerth:** Felly, dim byd uniongyrchol.

Rhun ap Iorwerth: So, there is no direct engagement.

[96] **Mr Jones:** Na, dim byd uniongyrchol.

Mr Jones: No, there is no direct engagement.

[97] **Julie James:** I want to explore an issue, but I do not know with whom exactly; perhaps it should be with Marilyn, as she was the one who set me off on this trail.

[98] I take your point, Minister, that you are focusing on the product that is then sold by the tourism department and Minister. However, I wonder whether that product includes things such as through-ticketing and so on, because we have had a lot of evidence from small tourism operators about the difficulties of getting a through-ticket type of experience. We had evidence from Visit Wales and VisitBritain about that being the sort of thing that they are trying to sell to international visitors, and so on.

[99] My second point is about the accessibility of the great product that we have. For example, if you have a heritage story trail going on, are you ensuring that somebody can buy one ticket and do the whole of the particular story that you are looking at in one area, for example, or do they have to buy 12 tickets, which, as we all know, is quite off-putting? Likewise, can they buy, through VisitBritain, a ticket for a trip that takes them around the whole thing, including transport from their base in wherever?

[100] Another point that was made to us frequently by people was how very difficult it was to upload information to the Visit Wales and VisitBritain websites. I wonder whether your organisations have that same problem, and if they do not, how can we help the others to overcome it, and if they do, what can we do about it?

[101] **John Griffiths:** I will bring in Marilyn in just a second, Julie, but I think that these are really interesting matters, and they get into wider territory beyond my department in many ways. Obviously, it is very much tied up with the tourism strategy and the efforts of the Minister for economy and Visit Wales. However, we are part of the work of building partnerships that look at how we join up with other big organisations, and how local initiatives through destination tourism management initiatives address these matters. In Conwy, for example, you can purchase a card that gives you discounts on admission charges to various attractions and destinations, which is the sort of thing that we are all familiar with when we travel abroad; you can get a card that either gets you in free to a number of different attractions and destinations, or which gives you a significant discount. I am aware of lots of packages that are being worked up with private enterprise accommodation providers and others that pull an offer together, along the lines that you are suggesting. Cadw is increasingly working closely with other organisations, such as the National Trust, for example, to see what can be done through joint initiatives and efforts, but I am sure that Marilyn could provide a lot more detail on all of it.

[102] **Ms Lewis:** What the Minister said is a very neat summary of the situation. There are always things that we can do better, and the work that we have been doing on pan-Wales heritage interpretation is only the start. There is a lot more that we can do in terms of joint

events and joint ticketing. There are good examples of it. There are examples of cross-promotion, particularly in a local area where we might work, such as in Pembrokeshire, with the privately owned Pembroke castle working with Cilgerran castle, and, hopefully, in the future very soon, with Cardigan castle to tell the story, for example, of the princes of the *Deheubarth*. The ticketing will reflect that, and it will develop that very much from the starting point. There is always more that you can do on that, but that is very much in the ethos of doing that kind of thing.

[103] **Julie James:** What about this point about uploading information, because a lot of people made the point to us that it is all very well, but trying to get their information onto these sites in any coherent way was difficult? I think that it is fair to say that they said so. I do not know whether you find it difficult.

10:15

[104] **Ms Lewis:** We do not particularly upload things ourselves onto the Visit Wales or VisitBritain websites, but it is certainly a point that we could pursue with colleagues, because discussions take place about digital interfaces between ourselves and other cultural providers. We could certainly take that back and explore it.

[105] **Suzy Davies:** Before we lose sight of the issue, I want to go back to the question about maximising the value in tourism of heritage assets. I want to ask you about something that the Cauldrons and Furnaces events exemplify, which is the use of one of our permanent heritage assets for something that is quite ephemeral for a short period of time, and the legacy of something like that for the permanent site. While the Cauldrons and Furnaces events were, in their year, very successful—it was great—what is the ongoing opportunity provided to you for the sites in which those events are held and how can you maximise it?

[106] **John Griffiths:** It is very important that we have a series of events, and, indeed, we have a programme, which I am sure that Members will be familiar with, running across Wales which brings events to our major sites that take a variety of forms. Every time you pull in new people through an initiative or particular event, if they think that it is a good product, they are likely to return. Also, as I mentioned earlier, word of mouth is extremely important. Very quickly, they tell their families, friends and others about the experience, which stands us in good stead in terms of increasing visitor numbers for the future. We have various programmes, events and major themes, but they are never one-off things; it is a continuing series of events and activities. In that light, we are never reliant on any one particular event or theme for a particular period of time. They all play their part and they are all very important.

[107] **Suzy Davies:** So, it is a strategic approach in which you expect to see growth. Obviously, it will be with different attendees; it is not the same attendees every time. If it is a strategic approach, you will have expectations and targets, and I just wonder if you will publish the results.

[108] **John Griffiths:** I would be happy to provide a note to the committee on that.

[109] **Suzy Davies:** That would be fine; thank you.

[110] **Keith Davies:** Rydych wedi bod yn sôn am gael stori fel cestyll Edward I. Rydych chi'n sôn am amgueddfeydd ac adeiladau, ond beth am lynnoedd a stori ynghlwm â llynnoedd? Yn sir Gaerfyrddin, er enghraifft, mae Llyn Llech Owain. Pam ei fod yn cael ei alw'n Llyn Llech Owain? Mae **Keith Davies:** You have been talking about having a story such as Edward I castles. You talk about museums and buildings, but what about lakes and a story related to lakes? In Carmarthenshire, for example, we have Llyn Llech Owain. Why is it called Llyn Llech Owain? We have Llyn y Fan. Are we selling

Llyn y Fan gennym ni. A ydym yn gwerthu'r these lakes, as well?
llynnoedd hefyd?

[111] **John Griffiths:** With regard to the natural environment, we have the national parks, the areas of outstanding natural beauty, and, as Llyr mentioned, the protected landscapes group that comes together. The local authorities are also very much involved with the AONBs. They come together and look at marketing and promotion, and how they can tell the story of our landscape in Wales. What you mentioned, Keith, could be a part of that. In terms of our heritage sites and Cadw, we are not only concerned with the sites themselves, but also with the wider environment within which the sites sit. I am sure that Cadw's interpretation plan and heritage tourism project will draw on a variety of histories throughout Wales in terms of the landscape as well as the sites themselves. I think that Marilyn is eager to come in to provide some detail on that.

[112] **Ms Lewis:** An awful lot of Welsh lakes are incredibly important archaeological sites. Llangorse is well known for that, and Llyn Cerrig Bach is really significant in terms of the prehistory, Origins story strand that we have on Anglesey. It is really hard to separate the natural and historical environments from each other. Most people are relatively rounded individuals, and they will not only look at archaeology or at natural heritage. So, it is about the joining together of these stories and taking a place that looks beautiful in a natural way, and introducing the visitor to the story that it did not look like this that long ago; it looked very different, and this empty landscape was once very full of people and activities. That is quite an important part of the interpretation planning process, and in Wales we are right at the forefront of interpretation planning, internationally.

[113] **John Griffiths:** Chair, if I may, I will just add a very short anecdote, if you will indulge me. I recently attended a performance of *Mametz* by National Theatre Wales, which took place on a farm and in a wood just outside Usk. It told the story of part of the history of the first world war and the Welsh involvement. I think that it was a really good example of using the natural environment, connecting it with our arts organisations and telling the very important history of Wales in the first world war in a very effective way. It was thoroughly enjoyable and a landmark performance. I think it showed how the natural environment can be used in the way that Keith alluded to.

[114] **William Graham:** Keith, do you want to talk about funding?

[115] **Keith Davies:** Sut ydych chi'n **Keith Davies:** How do you ensure that you
sicrhau eich bod yn cael gwerth am arian am get value for money for the money that you
yr arian rydych yn mynd i'w fuddsoddi? are going to invest?

[116] **John Griffiths:** As with all Welsh Government investment, we are moving more strongly towards results-based accountability in terms of our evaluation programmes. Particular programmes have their own evaluation. We have spoken quite a lot about the pan-Wales interpretation plan and how the heritage tourism project sits within that, which has been very significant in a lot of the work that we have discussed this morning. At the end of this calendar year, there will be further evaluation by Cardiff Business School as to the effectiveness of that programme.

[117] We have had various surveys carried out, because obviously we need to know what the visitor experience is, what the visitor levels of satisfaction are and what improvements they would like to see. We have some very positive evidence that we could share with the committee, Chair, if that would be useful, on the results of that evaluation work. It shows that the investment in the product, as I described earlier, is producing results.

[118] **Keith Davies:** Un peth arall rydym **Keith Davies:** One other thing that we have

wedi bod yn edrych arno fel pwyllgor—efallai nad yw'n unrhyw beth i'w wneud â'ch maes chi—yw faint o arian rydym yn ei dynnu i lawr o Ewrop. Rwyf i wedi gofyn cwestiynau am y ffaith ei fod fel pe baem yn edrych ar gronfeydd ERDF ac ESF, ond nad ydym yn gwneud digon i fynd ar ôl yr arian arall sydd ar gael o Ewrop. A oes gennych chi gynlluniau i fynd ar ôl mwy o arian o Ewrop er mwyn hybu twristiaeth yng Nghymru?

been looking at as a committee—it may not relate to your area—is how much money we draw down from Europe. I have asked questions about the fact that it seems that we look at the ERDF and ESF funds, but that we are not doing enough to pursue other funding that is available from Europe. Do you have plans to go after more European funding to promote tourism in Wales?

[119] **John Griffiths:** Unsurprisingly, in the current times of financial difficulty, Chair, we leave no stone unturned in terms of looking at all possible sources of funding, and that very much includes European funding. That is true of all the organisations within my department. Obviously, there are some very significant Welsh Government sponsored bodies and we have regular meetings with them. We have had some recently; we have ongoing meetings where we look at all possible additional sources of income, which very much include European funding, and of course the Welsh European Funding Office is very helpful in terms of the work that is taking place. Therefore, we are very committed to making sure that any possibility of European funding is accessed.

[120] **Joyce Watson:** We have talked at length about castles and heritage, and quite rightly so, but, Minister, how are you and your department seeking to maximise the potential of major cultural and sporting events? We have talked about culture in many ways, so maybe you can talk about sporting events in particular.

[121] **John Griffiths:** Obviously, major events are the responsibility of the Minister for the economy, but they are very significant in attracting visitors and tourists to Wales, such as the WOMEX event in terms of culture. I know that you mentioned sport in particular, Joyce, but that is a prime example of the value of major events. We will have the major European football match coming here in the autumn, which, again, will attract a lot of people. There are ambitious plans to attract further major sporting events, and there are some interesting possibilities. Again, I think that it is an ongoing effort. We have had major success, obviously, that the committee will be very familiar with. The Wales Millennium Stadium is well established as a quality venue for major sporting occasions. I think that there is a product, or a package, there that has worked very well and is very attractive to organisers and promoters of major events. I hope that we will see a lot more major sporting events coming to Wales in the future. We have established a reputation, I think, have we not, in terms of these major events? We are continuing to build on that. From my point of view, it is very important for sport because grass-roots sport feeds off elite performance and vice versa. Having these major sporting events puts these sports at the forefront of people's minds and makes it much easier to widen participation.

[122] **Joyce Watson:** May I ask a question, Chair? One sport that really does meet the environment is golfing. I suppose that fishing does so too. Those sports have been adversely affected quite clearly through the bad weather last year. They bring huge revenue into areas in Wales, particularly my area. What sort of conversation have you had, or have you had a conversation with the Minister for the environment in terms of the spending that he will do to effect the changes that you would hope to realise the tourism benefit for those two examples?

[123] **John Griffiths:** We work across Government, obviously, as Ministers and officials, and we discuss a wide variety of matters at regular meetings and at particular meetings on particular issues. So, we have had conversations in terms of environmental issues and how that can support what I am trying to do within my department and, obviously, again, vice

versa. With golf, I think that we have seen a considerable investment taking place in recent times, some of it on the back of the Ryder Cup, to make sure that there is a legacy there that does take forward golf tourism in Wales. Again, there has been considerable and important progress made. I know that Sport Wales and the governing body have very much been part of this work. So, I think that there is a joined-up effort around golf, and, as I say, much of it, perhaps, has been in terms of the Ryder Cup and the opportunity for legacy following that.

[124] **William Graham:** Eluned, were you going to ask about WOMEX?

[125] **Eluned Parrott:** Yes. Another major event that this committee did a short inquiry on recently—and we thought that it had been a huge success—was WOMEX last year. Can you tell me what the role of the Welsh Music Foundation was in the organisation of WOMEX, please?

[126] **John Griffiths:** I would have to return to the committee on that, Chair, and provide a note. I was involved with WOMEX and was lucky enough to attend and speak during the event. I agree that it was a huge success. Again, major events obviously sit within the portfolio of the Minister for economy. However, I am happy to furnish you with a note and provide you with information in terms of my ministerial responsibilities.

[127] **Eluned Parrott:** Thank you, Minister. In terms of WOMEX, obviously, it brought £3 million into the local economy, according to our inquiry, but one of the important things is to make sure that we then have spin-off benefits from the major events that we have and that we make the most of the economic impact. You are the Minister for culture, so who will be taking forward the industry links that were developed at WOMEX if there is no Welsh Music Foundation?

[128] **John Griffiths:** In terms of how we develop music in Wales, it very much falls to the Arts Council of Wales, as the arm's-length funder of cultural and arts organisations in Wales, to support all aspects of the arts and culture. Obviously, that very much includes music. I had meetings, following WOMEX, with organisations such as Trac, for example, which I think were very useful. They felt that the music scene in Wales had had a huge boost from WOMEX—and not just traditional music, but all aspects of music in Wales. So, as I understand it, the music scene in Wales feels that WOMEX was a massive boost for it. It was very pleased that it had been brought to Wales, and it sees an ongoing legacy in terms of activity in Wales and opportunity. So, I would say that it is massively positive, and I think that that is the general view.

10:30

[129] **Eluned Parrott:** I think the music industry in Wales, judging by press reports today, would also believe that the loss of the Welsh Music Foundation will mean that the legacy of WOMEX will be sincerely and severely damaged over the next few years. Can you tell us what is replacing the Welsh Music Foundation and when it will begin its work?

[130] **John Griffiths:** These are matters for the Minister for the Economy, Science and Transport, Chair, as it sits within the creative industries strand of the Minister for economy's work. I know that a statement has been made in terms of what will follow and succeed in terms of these developments, but they are matters for the Minister for the economy.

[131] **William Graham:** Thank you very much for your attendance today and for being so willing to answer our questions. As you know, the transcript will be available in the next couple of days for you to check for accuracy. Thank you very much for coming today.

[132] **John Griffiths:** Diolch yn fawr.

[133] **William Graham:** Members, I propose that we have a 10-minute break.

*Gohiriwyd y cyfarfod rhwng 10:31 a 10:45.
The meeting adjourned between 10:31 and 10:45.*

Ymchwiliad i Dwristiaeth (Sesiwn 7) Inquiry into Tourism (Session 7)

[134] **William Graham:** I thank our witnesses for their attendance today. Thank you for the written paper. Can I ask you both just to give your name and title for the record?

[135] **Ms S. Tomos:** I am Siân Tomos, director of enterprise and regeneration for the Arts Council of Wales.

[136] **Mr Alston:** I am David Alston, arts director with the Arts Council of Wales.

[137] **William Graham:** Thank you very much. We shall go straight into questions, and our first one is from Eluned.

[138] **Eluned Parrott:** You may be aware that the Welsh Government recently—well, not recently—commissioned Mike Ashton Associates to do a brand evaluation exercise to redevelop the brand of Wales. I am wondering whether you can tell me whether the Arts Council of Wales has had any input into that.

[139] **Mr Alston:** We had the opportunity to input through the cultural tourism partnership about a year ago fairly briefly. Not surprisingly, we have been stressing for some time the need for Wales to present itself in a totally contemporary way. We are about contemporary arts, so we like to feel that the brand can look at the innovative, contemporary side of Wales, and we think that that, in the first fruits of the exercise, seems to be coming through, which we are quite pleased about. The recent campaign, the Have you packed for Wales? campaign, certainly feels like a change in tone, and using people like Cerys Matthews gives a sort of feel to what we are about, as it were, which just changes matters, I think. So, using brand figures like Cerys who link to that contemporary music and culture scene is something that we obviously support. I am not across—and I do not think my colleagues are across—how the brand is going to roll out, unless our chief executive has had presentation about the brand in a bigger form, but the first signs for us are that it is an interesting and fresh departure, and I think that that is good.

[140] **Eluned Parrott:** Do you think that we make enough use, and do you think that we make effective use, of Wales's cultural assets in the work that we do in promoting Wales through Visit Wales?

[141] **Mr Alston:** We would say 'no'. We see that if the business, in the next few years, is to get at 11 million potential visitors who are cultural explorers, then there needs to be a refinement in tactics to get to them. They are the type of visitors who will spend more in Wales—we know that. We also know that we are not getting our market share. Now, as the arts council, we are not across the detail of the economic predictions about what dictates a visit to Wales, but we know that one of the barriers is changing the image of Wales. This moves very slowly in the context of changing people's perceptions. I remember a piece of work that was only about five years ago, in which a vox populi was done in Birmingham—you know, some focus groups were done there—and people felt that there were still coal tips and slag heaps. The actual image making around Wales becomes incredibly critical, and you just have to keep doing that, and contemporary culture can do that for Wales. So, we would

say that you have a market that you want to attract; you are not getting your market share now. The way to attract that market is to keep building up a different image of Wales that is around its contemporary culture, alongside its heritage, and to really enter into that sense of cultural adventure. It has many assets that we feel are probably underplayed at the moment.

[142] **Eluned Parrott:** Can I ask who you talk to in order to get that message across? Do you feel that you have any influence on the direction that Visit Wales is taking?

[143] **Mr Alston:** I would not say that we have influence on the direction but I certainly feel that, in recent years, with the major events unit in Welsh Government and with Visit Wales, we have sought to develop project-based work, in a way—actual things we can do together—that would exemplify, if you like, this change in direction. I think that, over the next five years, that is what we would be seeking to continue to do. The whole business of the economics of tourism is bigger, obviously, than culture, and it is a huge chain of things as well. It has got to be right and really good from how you get to the country and how you stay in the country to what you experience in the country. That whole picture is culture. So, we will continue, I think, to seek to work with our colleagues in major events, in Welsh Government and certainly with Visit Wales to tease out the sorts of areas where we can make the most difference around those markets that they are trying to reach and to work with our clients and the people we support and help to develop in Wales so that the product is also developing over the next few years. That is a major task now, as times really straiten. To be able to keep our cultural product developing, lively, contemporary, happening and perceptible beyond Wales is going to be a real challenge in the next few years.

[144] **Eluned Parrott:** One of the things you say in your paper is that cultural tourism is not helpful from a marketing perspective. Do you think that there is a tendency for us, when we think of the word ‘culture’, to be thinking of high-end products that are expensive and high value—that we have a preserved-in-aspic national museum and a preserved-in-aspic opera company that are going to be doing culture for us? Do you think that we forget about some of the other elements of culture that go to make up who we are?

[145] **Mr Alston:** Well, I do not think that we as an arts council forget about them at all—

[146] **Eluned Parrott:** No, no—

[147] **Mr Alston:** I think that we need a whole range—

[148] **Eluned Parrott:** I mean ‘we’ as a nation in terms of promoting Wales.

[149] **Mr Alston:** Let us just take what you could have experienced, and people were experiencing, in Wales this last weekend: *War Horse* next door in the Wales Millennium Centre and National Theatre Wales doing *Mamet* in a wood in Usk. I spent the weekend in the Gregynog festival and at the Aberystwyth Arts Centre for the EYE festival. The rich panoply of what we have going on, which cuts across high, low, medium, left-field and right-field—that is the mix in Wales. It has the added ingredient of being a lively, bilingual culture that has terrific assets by that very nature. So, I think that there has been a phase when people have been talking in rooms like this saying, ‘We’ve got to advance cultural tourism’, but, as a concept, that has not got anywhere, quite honestly. What we have to advance is tourism, but tourism that is rooted in the authentic and the exciting and the adventurous and the interesting. That, in the end, is cultural tourism. However, as a concept, it cannot be boxed off, I do not think.

[150] **Eluned Parrott:** You also say in your paper that you fear that other small nations are now ahead of Wales in aligning cultural content and promotion of what the place has to offer. Can you tell us which small nations, specifically, you are talking about and what you think we

can learn from those?

[151] **Mr Alston:** There are probably several examples here, but a lot of our experience recently has been around the promotion of music. We have looked very enviously at the way a place like Galicia, for example, positions its music very centrally to its tourism offer. It supports its music to be an attractor, if you like, to experience of the country. That is an example of a small nation doing it. Other nations, like Finland, for example, achieve a platform for their cultural offer, which, if you are going to Finland, particularly in its music scene, you can pick up on very quickly. We think that we are missing those sorts of tools. There are probably other countries that—

[152] **Ms S. Tomos:** Iceland is another.

[153] **Eluned Parrott:** So, who should be doing this? Is this something that should be done between you and Visit Wales? Whose job is it to make sure that this happens and that we are achieving that?

[154] **Ms S. Tomos:** We have just launched a new strategy for arts development, ‘Inspire’. The driving force of that is sustainable development in its true sense—economic, social, artistic and environmental. I think that, if we drive that through properly, it makes all those connections. We want to play a part in that, because we see this potential to do it better, at community level, even. Collectively, even small impacts at community level have a bigger impact and also contribute to the strategy priorities, I think, in terms of place-making and that sense of a vibrant, authentic community, just by investing in making connections. So, I think that we want to play our part in that, and that was a large part of our new strategy, which drives that forward. We need to be more proactive in engaging and driving better value out of every pound, really, through making all of those connections from the bottom to the top.

[155] **Mr Alston:** Key to that is really good partnership working, I think, because you need people to bring different things to the table. So, we would need Visit Wales to bring its sense of how we can talk to the market about this thing called ‘culture’. I think that you can only develop that over time. I do not think that it falls to a single agency to be able to say, ‘Okay, that’s your job.’ We have all got different things to bring to the table. I think that ours is still around the cultural product that is the arts, but we have a real appetite for making sure that those arts are connecting, not just locally, but that they are really getting air space internationally, because that is what changes people’s views about what is going on here.

[156] One of my last discussions with Visit Wales was about trying to persuade it not to buy advertising space, as such—that is a nice large budget there—but maybe to support product that generates editorial. What Theatr Genedlaethol Cymru, National Theatre Wales and Welsh National Opera are generating in the broadsheet press in Britain currently and in the media internationally is giving us far more coverage than the expensive buying of adverts. So, why not invest in the product and then let the product speak for itself? You must have a really hot PR and sense of developing those press relationships, but if you do that and invest in the product, then people will take notice. If you do something in the abstract and portray an image that is not delivered on the ground, then nothing will change. So my argument to it would be, ‘Keep investing in the product.’

[157] **William Graham:** I am conscious of time. Joyce, do you have a comment?

[158] **Joyce Watson:** Change—[*Inaudible.*—]—when we talk about arts, and people’s perception of Wales, it boils down to a few things: that we can sing in large groups and that we can play the harp. Everybody thinks that if you are Welsh, you can sing—big mistake on my part, I have to say. So, it is about this contemporary image. It is about how you are going to move a longstanding view of what Wales offers, and those things are very good, towards

what more it offers beyond very good choirs that are built from the community and harp playing. I think that that is the bit that we need to get underneath.

11:00

[159] **Mr Alston:** Yes, I think that we would agree. I think Government can help there. Government is constantly a shop window into Wales. It is meeting delegations, it is doing trade missions and the type of cultural offer—the type of image it can raise of the country—can be rendered via those. If a delegation comes, what does it get? Does it get Georgia Ruth playing the harp, or does it get somebody else playing the harp? It is a question of surprising people rather than just reinforcing what they already know about Wales. That is the trick, I think.

[160] **William Graham:** Suzy, quickly on this one.

[161] **Suzy Davies:** It is a related question. What assistance and encouragement are you giving to Government to take some of our stars when it goes away on delegate visits? ‘None’ is the reply that I have had in the past when I have asked how many have been.

[162] **Mr Alston:** I think that this is tricky, because if you want to take a symphony orchestra somewhere, it is an expensive business.

[163] **Suzy Davies:** There are things other than symphony orchestras.

[164] **Mr Alston:** Yes. Scotland took an orchestra on a trip to the far east recently; it is a huge calling card in the far east, where there is a huge appetite for western classical music. I think that it will always be a set of choices. We will choose to spend money in some area with the aim of a promotional gain, or we could choose to spend it somewhere else.

[165] **Suzy Davies:** Sorry, you misunderstand; this is not about promoting particular organisations, but taking those artists with business delegations as part of brand Wales, if you like. I am asking why the arts council would even be paying for that.

[166] **Mr Alston:** We have an arm called Wales Arts International. We have very limited resources to do that; that is mostly about creating networks that can work culturally, but we have sought to support artists’ travelling, and we have sought to coincide. For example, there is the Dylan Thomas 100 event currently, and the international side of that is being run by the British Council. There is a moment in India in October when I think the First Minister is visiting. I think that the aim is to try to focus work that the British Council is doing, the support that we are giving to artists within that programme and the First Minister’s visit—to get that as a package. A year ago, it happened totally by accident; it is not happening by strategy.

[167] **Suzy Davies:** My point is that this will be coming from you; it is not coming from the First Minister or the Minister for the economy. How can we make these delegations—

[168] **Mr Alston:** I think the invitation needs—. You have to be around the right tables to be able to say ‘Look, let’s make the most of this visit; how can we make the most of it?’ In a modest way, WOMEX last year developed a terrific relationship with Air India, partly because one of the Welsh acts, Gwyneth Glyn, was partnering with Ghazalaw—a big name within Indian culture. Did we exploit that? I do not know. An Indian artist who was an Artes Mundi prize-winner three or four years ago, N.S. Harsha, gave his £40,000 prize money to a whole lot of artists working in communities in India. That was Wales in India, basically. Have we made the most of that? No. So, I think that we are just not playing the cards that we could play culturally, and saying ‘It is impossible because of the expense’. I know that you could

mobilise some of the people who have connections with us in India, say, and you could make that far more evident around that visit.

[169] **Julie James:** I wanted to ask Siân whether, as part of her work, the regeneration aspects are around bringing tourism into some of the cultural bits of Wales that they are, presumably, trying to regenerate through culture.

[170] **Ms S. Tomos:** Not so much directly; what we are concentrating on at the moment is place-building. So, I suppose that it is indirectly, through getting more attractive places for people to live and work and, ultimately, to host visitors as well. We have just launched a £1 million scheme called 'Ideas: People: Places', which is very much a place-based, place-making scheme. So, we are working with 12 local authorities and organisations such as housing associations and interesting new partnerships for me, which brings me back to the new strategy and the way we want to make different connections and different partnerships to try to grind this value out, like David just described about the Air India example. There are connections all over that we need to try to focus on.

[171] **Julie James:** Do you feel that you are sufficiently connected into the potential for tourism that that also has, or is it more of an inward investment issue?

[172] **Ms S. Tomos:** I think we are growing those partnerships, and we are starting interesting conversations and ways of working with tourism colleagues. I am thinking now of Caernarfon, which is a perfect example of somewhere that is slap bang in the tourism agenda. We are working on a project on the slate quay with regeneration colleagues, local authority colleagues and arts colleagues around creating a really lovely environment there, primarily for the local people, but we know that, if we do that, it will also be attractive to everybody who visits Caernarfon, as well. So, definitely, that it is the direction of travel.

[173] **Julie James:** One thing that you said was about the fact that we did not exploit the opportunity of WOMEX in India—I loved WOMEX, I have to say. One of the frustrations for us is who should be the person who exploits that. Who should be the person who takes your slate quay development and makes it commercially viable as well as a vibrant place for local people? Is that always the Government? Should that be part of what you are trying to foster in the people on the ground?

[174] **Ms S. Tomos:** We are trying to foster very much that sense of resilience and sustainability. Every community has assets, does it not? Again, coming back to the same point, I do not think that we are always exploiting them properly.

[175] **Julie James:** On the point that David made about the fact that we did not make the most of it, who should have made the most of it?

[176] **Mr Alston:** What I am saying is that it is not that we did not make the most of it, but we have a relationship now, which we can build on and keep using.

[177] **Julie James:** Who is the 'we'?

[178] **Mr Alston:** The 'we' for us—. The arts council is not going to stop talking to India or Air India. So, we are an asset, basically. I suppose it is a question of people seeing that that is an asset and that there is cultural capital there that can build the picture of Wales and the image of the country. I am not saying that it is not happening. We will continue to nurture cultural links.

[179] **Julie James:** You obviously feel that something else should be happening. I am not quite sure what you think that is.

[180] **Mr Alston:** It is to do with an overall international strategy that deploys culture in the same way as it is deploying economics and that it is not a sort of nice add-on or a second thought, 'Oh, we'll have one of those', but part and parcel—. We should experiment, at least, with what happens if you go back to the Artes Mundi artist and ask whether he would be part of that visit in some way. I think that we would reap some dividends of cultural investment.

[181] **William Graham:** Keith, are you going to ask your question on funding?

[182] **Keith Davies:** Gwnaf ofyn yn Gymraeg. Un o'r pethau yr wyf wedi sylwi arno, o ran cael cyllid o Ewrop, yw bod Swyddfa Cyllid Ewropeaidd Cymru o bosibl ond yn edrych ar gronfa datblygu rhanbarthol Ewrop a chronfa gymdeithasol Ewrop, ond mae ffyrdd eraill o gael arian. A ydych wedi cael rhyw sgwrs gyda WEFO am dynnu arian i lawr i'r celfyddydau o Ewrop?

Keith Davies: I will ask my questions in Welsh. One of the things that I noticed, with regard to attracting funding from Europe, is that the Welsh European Funding Office is perhaps looking at the European regional development fund and the European social fund only, but there are other methods of getting funding. Have you had any discussions with WEFO about drawing down money for culture from Europe?

[183] **Ms S. Tomos:** Ydyn. Rydym yn cael sgysiaau. Yn amlwg, gyda'r sefyllfa ariannol fel y mae, rydym yn gorfod chwilio am bob math o gyfleoedd sydd allan yno i ddod â buddsoddiad i mewn. Rydym yn bendant yn edrych ar y cynlluniau sy'n dod allan o Ewrop rwan er mwyn datblygu pob math o bethau, o ran y gwaith adfywio, cerddoriaeth a thwristiaeth ac ati. Felly, rydym yn chwilio i roi pecynnau at ei gilydd, yn bendant.

Ms S. Tomos: Yes. We are having discussions. Clearly, with the financial situation as it is, we have to look for all opportunities out there to draw in investment. We are definitely looking at these schemes coming out of Europe to develop all sorts of things, in terms of regeneration, music and tourism and so on. So, we are looking to put packages together, definitely.

[184] **Keith Davies:** A ydych yn gweithio gyda WEFO a Visit Wales ar y pethau hynny?

Keith Davies: Are you working with WEFO and Visit Wales on those things?

[185] **Ms S. Tomos:** Ydyn. Mae gennym swyddog sy'n ymwneud yn uniongyrchol â'r rôl honno.

Ms S. Tomos: Yes. We have an officer who works directly on that role.

[186] **Keith Davies:** Rydych chi hefyd yn sôn yn eich adroddiad—roeddwn i yn edrych arno yn gynharach—am gyllid *digital* a'ch bod chi wedi colli mas oherwydd diffyg amser neu rywbeth. A allwch chi roi mwy o esboniad i ni am hynny?

Keith Davies: You also, in your report—I was looking at it earlier on—mentioned digital funding and that you had missed out because of a lack of time or something. Could you give us further explanation of that?

[187] **Mr Alston:** When we were approaching WOMEX, it was a four-year project—it started off quite a long way back—but one of the elements that we were seeking to build into bringing WOMEX to Wales with our partners in Cerdd Cymru Music Wales, the Welsh Music Foundation and the project partners, was to get to a point where we could have a music platform in some digital form—we were not sure what that would be—so that the 2,000 delegates coming to WOMEX would get an insight into what Wales had to offer. Our contention was that we were ill-serving the music tourist in general and that we could create a platform that would have a longer life and be able to reflect our music scene for any visitor to Wales—. It would be a little portal, probably on a smartphone, that would give you access to

Wales's music. We set off, we got pilot money from Visit Wales's digital fund to do it, but we then ran into the buffers of endless batting back of the proposal, where we would be saying, 'Well, that's in the nature of what we want to find out,' and the people judging the proposal were picking off little bits and pieces all the time, asking, 'Don't you know this already?' Well, we did not. We knew that we were going to have a digital partner, but we were not saying it was going to be a website—it could be through SoundCloud or all sorts of things—but we needed to—. That just went on for months. It did go on for months. The batting backwards and forwards went on for months, and we lost time. In the end, we knew that we were not really going to get something for WOMEX, so we did a deal with S4C and it made an app for us, and it was really good.

[188] **Keith Davies:** [*Anghlyw.*] Pwy oedd yn achosi— **Keith Davies:** [*Inaudible.*] Who was causing—

[189] **Mr Alston:** We still have the ambition that maybe that is something that we could still—

[190] **Keith Davies:** Pwy oedd yn achosi'r holl drafferth? **Keith Davies:** Who was causing all of these difficulties?

[191] **Mr Alston:** Sorry, could you repeat that?

[192] **Keith Davies:** Pwy oedd yn achosi'r holl drafferth? Pwy oeddech chi'n ymladd gyda'n gyson? **Keith Davies:** Who was causing all of these difficulties? Who were you fighting against consistently?

[193] **Mr Alston:** I think that you had, on the one hand, a strategy saying that we need to move into the digital era for tourism, but then you had a scrutiny of those projects, which were, in part, experimental, which was tying down the question of value for money so much—this was a very small pot of investment; it was probably a project that we would have matched around the £120,000 mark. It was a test project. It was a pilot project to try to see where we could get to. It just ran into value-for-money arguments that were unravelling the project and encouraging us to, in the end, just say, 'Okay, the strategy is saying one thing, but, if we have come forward with this proposition, have done the research phase, but you are now not willing to give us a green light over what is going to be a mega event and a platform to try out this technology, we'll find another way of doing it.' So, we found another way of doing it, but it was not a long-term way of doing it, and it did not address the fact that Wales is not getting the music tourists that it could attract at the moment.

[194] **William Graham:** We are just about out of time, but we will have a quick question.

[195] **Suzy Davies:** You may have to tell me a bit more quickly than I anticipated— [*Inaudible.*]—questions—

[196] **William Graham:** We really have not got time, so make it one, please.

[197] **Suzy Davies:** I will ask you a quick one then. VisitBritain is responsible, primarily, for marketing Wales and the rest of the UK abroad. What representation of Welsh culture do you see in that UK offer abroad and how do you think that the arts council can improve the mechanism by which the sorts of things that you have been talking about today can be communicated to VisitBritain? Is Visit Wales the gatekeeper, or have you got some kind of direct route?

[198] **Mr Alston:** No, I think that Visit Wales is definitely, and needs to be, the gatekeeper there. Our relationship is absolutely key. I do not think that we are able to influence

particularly the direct relationship with VisitBritain, when we have a Visit Wales body that, basically, we need the relationship with. That, in turn, will affect the VisitBritain thing. We would always say from Wales—

11:15

[199] **Suzy Davies:** That is fine; it is appreciated. You have answered my question.

[200] **William Graham:** Just one thing, David. You touched on products to generate comments in terms of funding being differently allocated. Would you care to follow that up perhaps with a written note to the committee? We would be most interested to follow that further.

[201] **Mr Alston:** About my idea?

[202] **William Graham:** Yes.

[203] **Mr Alston:** I would be happy to do that.

[204] **William Graham:** Thank you very much. We are most grateful for your answers today, and thank you for your attendance at the committee.

[205] **Mr Alston:** Thank you. Diolch yn fawr.

[206] **Ms S. Tomos:** Diolch.

*Gohiriwyd y cyfarfod rhwng 11.16 a.m. a 11.21 a.m.
The meeting adjourned between 11.16 a.m. and 11.21 a.m.*

Ymchwiliad i Dwristiaeth (Sesiwn 8) Inquiry into Tourism (Session 8)

[207] **William Graham:** Welcome to our witnesses. Thank you for your written paper. For our record, will you please give your names and titles?

[208] **Ms Brough:** Yes. I am Rebecca Brough, and I am the walking policy advocate for Ramblers Cymru.

[209] **Mr Byrne:** My name is James Byrne, and I am the living landscapes advocacy manager for Wildlife Trusts Wales, which is the umbrella organisation for the six regional wildlife trusts, but we are here today representing a wider umbrella of organisations called the Wales Environment Link.

[210] **William Graham:** I will go straight into questions, and the first one is from Eluned Parrott.

[211] **Eluned Parrott:** I wanted to ask about the brand of Wales. The natural environment is important to the way in which we market Wales abroad. Has the Wales Environment Link had any input into the Welsh Government's recent brand evaluation exercise? There is an organisation called Mike Ashton Associates that is doing a re-evaluation of the brand and a refocusing of the brand. Have you had an input into that process?

[212] **Ms Brough:** Not to my knowledge.

[213] **Mr Byrne:** Not directly. I do not know about other colleagues, but I do a lot of work

with Visit Wales. I sit on its sustainable tourism forum and on its wildlife tourism forum. However, I have not been involved in that rebranding exercise. You are quite right to say that the natural environment is very important to Wales. A recent Visit Wales study in 2013 showed that nearly 70% of people come for the landscape, the countryside and the beach. So, it is vitally important to have a good quality natural environment.

[214] **Eluned Parrott:** So, this brand evaluation exercise has not been discussed at either of those fora that you are a member of.

[215] **Mr Byrne:** I may have missed one, but it was not raised in meetings that I can remember, but I might have missed one or two.

[216] **Eluned Parrott:** Can you tell me how well you think we use our natural assets at the moment in the way that we are branding and marketing Wales? Are we doing everything we can to make the most of those assets?

[217] **Mr Byrne:** I think that we could do more. You have seen the adverts and they highlight people walking on beaches and going into castles, showing the historic environment. However, Wales has huge natural capital in terms of its wildlife; it has some of the best wildlife spectacles in Europe, in the world and in the UK. Skomer, for example, is one of the best places in the UK and in the world to see puffins and it has an amazing marine wildlife, in terms of the porpoises, dolphins and seals that utilise it as well. Wales has something like 60% of the world's Manx shearwater population. The UK has Europe's most significant proportion of bluebell woodlands, and Wales has a significant part of that. There is a huge amount of wildlife and diversity that we have, but it is not being as readily used as part of the Visit Wales brand—sorry, I should say 'the Wales plc brand'—as it could be.

[218] **Eluned Parrott:** Clearly, in a 20-second tv advert, there will be the opportunity for some panning shots of pretty natural landscapes, and we would expect that, I am sure. However, taking it down a level from that into how we go about targeting particular audiences, how do we go about targeting audiences that might be interested in seeing Wales's wildlife?

[219] **Mr Byrne:** Well, as I say, I have been doing some work with Visit Wales and I know that it has put some full-page adverts in *BBC Wildlife Magazine*. One advert that I worked up with Visit Wales, and helped by providing a photograph for, was of the Dyfi ospreys. It was a picture of the osprey just south of Machynlleth with a tagline saying, 'This fella has a round trip of 1,000 miles. Can you make it from Birmingham?' or something like that. So, it is doing it to a certain extent, but there are other opportunities, such as going to wildlife trade fairs, for example. One of the biggest wildlife trade fairs in the UK is in Rutland. I am not sure whether Visit Wales has a stand there to showcase wildlife. As I say, I am pretty sure that Scotland has a stand there because it has been doing wildlife tourism, or at least marketing wildlife tourism, for at least 20 years.

[220] **Ms Brough:** May I just say, in terms of the wider countryside and access issues, something like the Wales coastal path, which we mentioned in our evidence, is a good example of how you can take something in Wales that is iconic? It is a world first to have this path around Wales. That has been very successful and it has been well marketed and well branded, I think. Obviously, it is an ongoing thing; it needs that continual investment and continual pushing. However, to come away from that, you must not just focus on that as a brand; you must look at the wealth of wider access, the wealth of countryside out there, our paths networks and how you maximise the benefit of those and that sort of access as well. So, we can do it for these unique products, but there is also some more opportunity for our wider network of paths and open countryside to be promoted very effectively.

[221] **Eluned Parrott:** Thank you.

[222] **Suzy Davies:** You mentioned the word ‘unique’ and, while perhaps I would agree with you that we are not making the most of our wildlife assets in terms of promoting Wales both in the UK and abroad, it is a conclusion that many other countries are reaching as well and they are surging ahead with their wildlife branding, if you like. What is your observation of the way that Visit Wales, and then ultimately VisitBritain through Visit Wales, uses the natural landscape and wildlife heritage of Wales in promoting Wales abroad particularly? Do you think that we are very good at picking out what is unique about Welsh wildlife? You mentioned the coastal path, but there are other things that are unique to Wales that we do not particularly use, and I am wondering how much leverage you have in trying to get that through in the way that the message wanders through several hands, as it seems to me.

[223] **Ms Brough:** I do not know that Wales Environment Link as a body is actively engaged in working on those sorts of messages. I do not know whether James has heard something different. I am quite new to the sector, so I do not know whether James knows any more about that involvement in terms of trying to get those brand messages across.

[224] **Mr Byrne:** I, from the wildlife trusts, and representatives from the RSPB and the National Trust all sit on the sustainable tourism forum and the wildlife tourism forum. We are working with Visit Wales on that. To what extent it filters into the international market, I am not 100% sure—

[225] **Suzy Davies:** Or even the UK market, then. Why Welsh wildlife and nobody else’s wildlife? That is what a visitor is going to be looking at.

[226] **Mr Byrne:** I see wildlife tourism in Wales as having huge growth potential because, at the minute, I believe that it is an untapped resource. There has not been an awful lot of marketing of Welsh wildlife in the last few years and, even without that amount of work and with the very passive sort of promotion that the environment sector does through its members and magazines et cetera, because we are not tourism specialists, because we are primarily nature conservation, and tourism is, really, an add-on to it—

11:30

[227] **Suzy Davies:** May I just check something there? So, you are not part of any sort of greater programme, such as the convergence programme, which has been operating for six years now, talking about things like heritage tourism, communities and nature, coastal tourism and sustainable tourism. That is not something that you have a voice in, particularly, is it?

[228] **Mr Byrne:** No.

[229] **Suzy Davies:** That is fine. Thank you.

[230] **Mr Byrne:** Just to go back, without a great amount of publicity or marketing, the wildlife in Wales already gets a huge number of hits. For example, the Dyfi osprey project in mid Wales gets over 40,000 visitors a year. It is one of the biggest attractions in mid Wales. Those 40,000 visitors bring in somewhere in the region of up to £0.5 million to the local economy. Recently, we launched a 360-degree observatory, which Manon Williams launched as well.

[231] **Suzy Davies:** Yes, I remember.

[232] **Mr Byrne:** The ospreys are only there for three to four months of the year, but the observatory will be there all year around, so the reserve will now be open throughout the year.

We are hoping that that will bring in some additional tourists.

[233] Skomer in south Carmarthenshire is bringing £330,000 in landing fees alone, but that is a relatively rural site, so people have to travel there, stay overnight, have bed and breakfast, a hostel, or a hotel, have some food, and go into restaurants. However, we have no figures because, again, we are not economists. This is not our job to be able to translate that £330,000 of just direct landing fees into what it actually means to the wider economy. One of the things that we want to work with Visit Wales on is to see whether there is a way of getting some economists and some of their colleagues to look at the economics of wildlife tourism, what is currently there, and how that is translated into the wider economy, and then also to look at a potential action plan for wildlife tourism providers—that is, the wildlife trusts, RSPB, the National Trust—to see what is working, what could be improved and what additional products we could bring online.

[234] For example, there is Cemlyn bay in Anglesey. In Anglesey, there are two really high-quality nature attractions and the first is RSPB's south stack cliffs nature reserve, which has a brilliant infrastructure. It is a really beautiful site and it has RSPB on site. It has a lot of tourism infrastructure, while Cemlyn bay is just as beautiful and it is the best site in Wales—actually, the UK—for Sandwich terns. It has hundreds, if not thousands, of Arctic terns and common terns. It is a great wildlife spectacle, but there is just a car park there with a notice board. Having more infrastructure there could actually make it more of a tourism draw.

[235] One of the things that we put in our evidence is that you cannot have wildlife tourism without wildlife, so we would like to see investment from the Minister for the economy's department in nature conservation to be able to maintain and enhance the resource—the wildlife—in order to attract tourists, but at the same time to preserve it for future generations as well, linking in across the board in ministerial portfolios.

[236] **Suzy Davies:** Just to finish on that, do you think that it could be quite difficult to persuade her to do that if you do not have the economic data evidence that I appreciate that you cannot provide? It is a sort of chicken-and-egg situation.

[237] **Mr Byrne:** Yes, it is. As organisations within Wales, we have our own anecdotal evidence. We know what it is on a site-by-site basis, but there is no Wales-wide report. Scotland did a report into its wildlife tourism. It came up with figures suggesting that the net economic impact of wildlife tourism was £65 million in 2010, with 2,000—or nearer to 3,000—full-time jobs in existence because of it. However, it said that £276 million is spent on the 1.12 million trips each year that are made to and within Scotland. That report was a review of wildlife tourism in Scotland, and we would like to see something similar done for Welsh wildlife tourism.

[238] **William Graham:** Joyce is next, then Rhun.

[239] **Joyce Watson:** Do you think that, when we talk about nature conservation, everybody thinks about the portfolio that belongs to another Minister?

[240] **Mr Byrne:** Yes.

[241] **Joyce Watson:** We completely miss the boat on tourism. I am quite passionate about wildlife and photography and walking, and I am concerned, I have to say, that we are missing the boat—quite literally, sometimes, because in Skomer, it will not go if the wind is high. Anyway, that aside, could we not do some simple things about data gathering? Let us take Skomer. If there were a simple questionnaire asking, 'Did you stay? Where did you stay?' that sort of thing might help as a starting point. More critically, however, do you think that it would help you to gather data—both organisations—if there were some investment that

would allow you to put in place a system that would capture the data that then would perhaps be used to show the economic benefit that definitely exists in Wales?

[242] **Mr Byrne:** I think that there currently is a funding programme for that. I have been alerted fairly recently to ‘Partnership for Growth’, where there is some funding for it. However, I have only been alerted to that recently, and I would like to work up something with Visit Wales. As I said, we, as a wildlife trust, do not have economists and people who can do that. Montgomeryshire Wildlife Trust did have an economist. Unfortunately, he retired recently, and he was taken on board to look into peatland processes and whether there is a market in sequestering carbon and carbon credits under the peatland code, but a bit of the extra work that he did was to look at the Dyfi osprey project. He was able to take the visitor numbers and put in a survey, and then, from that, use a standard tourism extrapolator to show how that impacted on the wider economy. So, yes, we would like to work with Visit Wales and perhaps get in some outside economic consultants to work with the wildlife sector, to see if we can come up with a report that would help to show that as well.

[243] As I mentioned peatland, I should say that, with the carbon, if the Minister wants to bring in hundreds or millions of extra visitors, that is going to create a huge carbon footprint. Tourism already creates a large carbon footprint, so we would like to see the Minister offset the carbon footprint of tourism by sequestering carbon in the blanket bogs of Wales. That is, for her ministry to put money into restoring the blanket bogs, and when you restore the blanket bogs, you make the environment nicer. If you make the environment nicer, you will get more tourists coming to that environment. So, in the long run, it would actually help the tourism sector.

[244] **Joyce Watson:** Do you think that there is enough expertise in the Welsh Government that recognises the potential of wildlife? I say ‘wildlife tourism’, but I am talking about walking. I am talking about outdoor activities that might not involve sport, or what people understand as sport. I think that bird watching is a fantastic sport, but others do not.

[245] **Ms Brough:** Obviously, Visit Wales has just very recently done its own study on the economic impact of outdoor activity. Hopefully, that has raised awareness of it and its potential, along with some of the barriers. Even though this report excluded recreational walking and longer-distance walking, it still showed that there is £172 million-worth of value to the economy in outdoor recreation. You can add in the walkers to that. We know that the Wales coast path brought in £32 million in its first year.

[246] I am hoping that the awareness is there. I think that what I have been unable to establish in my brief time with the ramblers is whether there is enough going in to the barriers. What is stopping the huge market of people out there who are not coming to Wales? Is enough work being done on the barriers stopping people from coming here? Why are they choosing to go to the Lake District or the Peak District or anywhere else? So, we would like more clarity around how they test those markets to find out what is missing from Wales and on whether it is about perceptions or facilities, or what.

[247] There is also an issue that is very much identified in this Visit Wales report around outdoor activity, which is the access issue. This report says that some people are put off coming to Wales because of access concerns—whether that is access to land or to water—and it is sending people elsewhere. So, there is this issue of joining up the different departments that are responsible for widening access. We would have hoped to have seen a Green Paper on this imminently, but I do not think that it will be quite the wide-ranging Green Paper that we had hoped for. Therefore, there is an opportunity to have Wales quite literally open for business to more tourists and more activities on its landscape, while protecting what we have in terms of wildlife and nature. The expertise is there, but the different bits of Welsh Government policy have just not been joined up to get as good an impact from our landscape

and tourism as we could. So, we would certainly like to see more done on the access front.

[248] **Mr Byrne:** I know that the Countryside Council for Wales at the time—it is now Natural Resources Wales—was given the responsibility for the coast path. NRW has a recreational agenda and it works in tourism as well, through some of its sites, such as Coed y Brenim, for example, and Afan Forest, which are beautiful landscapes, but they are bringing in the recreation in terms of mountain biking et cetera. So, I know that, in terms of recreation, NRW and therefore, Welsh Government has the expertise. NRW obviously has expertise in nature conservation and wildlife; I do not know how much it interacts with Visit Wales. As I said, I do a lot of work with Visit Wales. In fact, we are working with Visit Wales to create this online interactive brochure to highlight the 80 best sites in Wales for wildlife tourism. That will come on stream—hopefully, we will launch it at the Royal Welsh Show.

[249] However, I know that, internally, Visit Wales does not have wildlife experts, so it has to go externally and work with us. We would like to perhaps see Visit Wales looking to get more wildlife expertise, either within NRW, or coming out and making formal arrangements with organisations such as Wildlife Trusts Wales to provide that expertise. Tourism is just a very small proportion of my role, so neither I nor my colleagues can give as much time to it, because our job, for the main part, our charitable remit, is nature conservation.

[250] **William Graham:** Rhun is next, please.

[251] **Rhun ap Iorwerth:** I will say at the outset, having been walking in South Stack over the weekend and with my wife's family coming from Cemlyn, I fully endorse your earlier comments. *[Laughter.]* Just to summarise in our minds, I think that what we have heard is a series of frustrations that you have the ideas in many areas, but somehow, you are not able to get those ideas through to being implemented by Welsh Government, or Visit Wales. What do you think it is that causes those frustrations? Is it a lack of flexibility in the way that it works and that, 'We have a way of working and nature or wildlife does not really feature, but we are doing okay as it is'? Is it a lack of expertise, as has been suggested? Lack of funding is an obvious one. Also, perhaps there is a superficial equating, somehow, of nice views with nature and wildlife. I do not know what your thoughts are on what the blockage is in the system.

11:45

[252] **Mr Byrne:** As I said before, tourism is a bit of an add-on to my job. I have not spent an awful lot of time looking into it. So, coming up to this inquiry, I have put a bit more effort into it by reading around the subject. In the evidence that we have submitted, we have looked at a few blockages. The frustrations have started to come now that I have started to look into it. I have not had a chance to sit down with Visit Wales and say, 'Okay, now I've got a clear idea; can we come up with an action plan?' So, during the next weeks and months, I will be having a chance to sit down with Visit Wales.

[253] Funding is an issue. As I said, you cannot have wildlife tourism without wildlife. Previously, funding went into infrastructure. In fact, there is a European report here by 'SURF-nature' undertaken by the Environment Agency, INTERREG and the European Union about new investment opportunities for investing in the natural environment. That was specifically about European regional development funding. That funding was about putting money into some very good infrastructure projects in terms of nature conservation, but it did not put money into the wildlife element of that. By infrastructure, I mean the paths, the centres and that sort of thing. The report says:

[254] 'The only link to the environment has been through the 'Environment For Growth' theme...which is focused on managing the natural environment to achieve sustainable

tourism. Despite recognising the importance of the environment as a stimulus for growth and jobs and seeking to integrate environmental sustainability across the programmes and projects to deliver environmental benefits, the ERDF operational programmes in Wales have failed to provide any funding opportunities for biodiversity protection or enhancement.'

[255] **So**, I think investment is an issue and, as I say, you cannot have wildlife tourism or nature tourism with beaches, countryside and landscapes without putting money back into it. So, we would like to see some investment going into nature conservation, landscape conservation and access issues to create that sustainable base for not just the people of Wales, but also for tourists and future tourists.

[256] **Rhun ap Iorwerth:** So, it is about getting the product right, not so much the marketing. What about your thoughts?

[257] **Ms Brough:** In terms of partnership working, it might be something that needs to be taken forward now. Members of the Wales Environment Link would be happy to have conversations and maybe more contact with Visit Wales; I know that individual organisations within Wales Environment Link would be, because we have some expertise in products and influence over things that we could help it with. However, I do not know whether that communication linkage has been set up with the umbrella body or with the individuals themselves, particularly in terms of ramblers, for example; walking is one of the top areas of priority for Visit Wales, but at the moment there is not that much contact, apart from around the coast path issue, on the wider scale of walking. So, there are certainly opportunities there to take things forward in partnership and sharing ideas and expertise.

[258] **Mr Byrne:** In the framework action plan, through years one to three, while it says that we want to facilitate more food tourism and cruise visits, et cetera, the action plan does not state 'wildlife tourism'. I know that Visit Wales is working on it—as I say, I am working with it on it—but wildlife tourism is not in the Welsh Government action plan.

[259] **William Graham:** Thank you very much for answering our questions and for your attendance at committee; we are most grateful. The record will be published and you will be able to correct any factual inaccuracies. Thank you very much for coming today.

[260] **Mr Byrne:** Sorry, Chair; could I make an offer to the committee? If it would like to come out to see some of the amazing wildlife tourism sites that we have to offer, get in touch with me and WEL, and we will take you.

[261] **William Graham:** Have you left your contact details with the clerk?

[262] **Mr Byrne:** The clerk should have my contact details. Whether it be Skomer island, Ramsey island, Washington lakes—. In fact, Pembrokeshire would be good, because one of the things we say is that, in Wales, we have some very good infrastructure, and it is all in really close proximity. So, if you parked in one place, then went to the next place and parked, within an hour and a half, you could visit five amazing sites in Pembrokeshire.

[263] **William Graham:** That is what we are trying to tell people. Thank you very much for coming today.

11:50

**Cynnig o dan Reol Sefydlog 17.42 i Benderfynu Gwahardd y Cyhoedd o'r
Cyfarfod**
**Motion under Standing Order 17.42 to Resolve to Exclude the Public from the
Meeting**

[264] **William Graham:** I move that

the committee resolves to exclude the public from the remainder of the meeting in accordance with Standing Order 17.42(vi).

[265] I see that the committee is in agreement. Thank you very much.

Derbyniwyd y cynnig.
Motion agreed.

Daeth y cyfarfod i ben am 11:50.
The meeting ended at 11:50.