

INQUIRY INTO TOURISM: National Assembly for Wales' Enterprise and Business Committee

Written evidence submission from the Arts Council of Wales

Who we are

Arts Council of Wales is an independent charity, established by Royal Charter in 1994. Its members are appointed by the Welsh Government's Minister for Culture and Sport. Our principal sponsor is the Welsh Government. We also distribute funding from the National Lottery and raise additional money where we can from a variety of public and private sector sources.

We are the country's funding and development organisation for the arts.

Working together with the Welsh Government, we are able to show how the arts are helping to meet the Government's policy ambitions.

Our future goals and strategy for the arts are captured in ***Inspire our strategy for Creativity and the arts in Wales.***

The strategy emerged from an extensive period of innovative consultation. It attempts to frame what we and the arts sector see as some of the critical challenges of current times for Wales. Our Council has reaffirmed its mission as working towards a Wales where the arts are central to the life of the nation.

If we address what we set out to do in *Inspire* our strategy concludes that at the end of the present decade:

We might see a Wales where the intelligent management of public investment allows the arts to flourish beyond a dependency on subsidy alone. A Wales where the role of the artist and cultural entrepreneur has been able to develop significantly and is acknowledged and valued. A Wales where the reach of the arts extends across all communities, regardless of wealth, language or locality. A Wales that has transformed

the life chances of our young people, equipping them for adult life. A Wales that is dynamically connected to the rest of the world through the activities of the arts and the networks that they create.

And bringing all these things to life, art that inspires, excites and moves us.

In short, Wales the creative country.

What we do

Our focus currently and in the medium term is on the continued viability and sustainability of what is being achieved in Wales by the creative sector. The years of Devolution have seen growth in cultural achievement and profile for that achievement in the UK and critically internationally. This has been delivered through developing infrastructure from major to modest but all having impact on the offer Wales presents from a Wales Millennium Centre (Wales' leading tourist attraction) to a Galeri in Caernarfon. A vibrant cultural scene can add to the attractiveness of a destination – even if it is not the main draw in itself. Galeri for example was certainly not conceived – or indeed is it now – as operating as a tourist destination per se but it has contributed considerably to a café scene and the sustainability of hotels in the area. It was the cornerstone of the Victoria Dock development and now the whole area is thriving and attractive with plenty of places to browse and pass time. This physical infrastructure has current developments to it...the arrival of Pontio the completion of the Glynn Vivian Art Gallery in Swansea.

But buildings need animating through ideas and creativity. Recent successes have been chalked up by all our national organisations, through to smaller companies and enterprises. They are providing locally recognised value and also on occasion internationally sought after product. Where the marketplace is away from Wales we have sought to attract it here as in the staging of WOMEX last year in Cardiff. What is being achieved culturally in Wales is functioning with relatively and comparatively low levels of subsidy. Put starkly and startlingly in relation to what is being achieved by our arts organisations, this is at a cost of 33p a week to the population of Wales and it represents just 0.23% of the total spend of Government. Overall the creative sector sustains 30,000 jobs in Wales with just under 6,000 of those in the roster of organisations and companies we fund on a yearly basis. It is however a vulnerable and fragile sector.

We know we are entering even more stringent times and that where we partner with local authorities the arts as non-statutory are being hit hard and the quality of life

and Wales's offer will potentially emerge poorer. We know too that we have an unprecedented possibility of working through proposals on the place of creativity and the arts in our classrooms which hold out the prospect of being transformational. We know that where we have made inroads internationally this could be vital for the sustainability of our inventive arts companies. Creative product from Wales experienced abroad is a calling card for the country.

And tourism? We know £146m was spent in 2011 in the Welsh economy by tourists where the principal motivation to visit was a cultural one.

Culture and Tourism

As a Council we have sought good and productive relationships with Visit Wales and Major Events and these have matured considerably in recent times. But the strategic work and commitment to aid and abet in the area of developing tourism can be traced back in collaborative work together with an early focal point being the jointly commissioned research delivered back in 2009 on Cultural Tourism.

Some of the conclusions of that research Strategic Marketing still hold and Visit Wales renewed strategy which we support now aims to address points made here in the executive summary of the report:

The wide definition of cultural tourism used by Visit Wales is in tune with the way that the public thinks and makes choices between destinations. However the public think in terms of a range of things to do and see, not in terms of cultural activities.

2.61 The term cultural tourism does not seem to be helpful from a marketing perspective. Amongst the public, the term cultural tourism appeals to only a very small minority and is typically described as 'high' culture. The alternative, much broader, Visit Wales definition is too wide to help define market segments.

2.62 The public tend to think of cultural destinations as cities rather than countries and Cardiff is not seen as a cultural destination. As a consequence, the concept of promoting Wales as a cultural destination is an inappropriate objective at present.

2.63 Awareness of specific things to do in Wales is a weakness and appears to be no better than it was in the 2003 research even amongst those that have visited Wales. The question needs to be asked whether there is a real weakness compared to competitor regions or whether this is a perception.

2.64 Wales' promotional activities should reflect the way that the public thinks and focus strongly on things to do and see. The public tends to look for things to do and see within a more concentrated area than Wales as a whole. This suggests that the promotional

emphasis should be on smaller recognisable areas. City breaks for example could be considered a prime example of focusing on a small area.

2.65 Within these areas promotion must encompass a range of things to do and see, so that the diverse interests of individuals and groups are catered for. This must include all types of shopping. Accommodation and food, catering for a variety of tastes and budgets are always an important element in the mix. Wales' target customer is the independent traveller and by definition they are not looking for packaged holidays but suggested 'things to do' itineraries would be valuable.

2.66 Cardiff is not perceived as a city break destination but is seen as the only viable contender in Wales. Sporting events and rock concerts have significantly raised awareness of the city since 2003, yet most people do not feel that there is any particular reason outside of an event to visit the city.

2.67 A key activity for Cardiff and other areas would therefore seem to be improving the awareness of things to do with existing visitors when they are in an area through various forms of 'point of sale' material or pre-visit information. Co-ordinated promotional activities between event organisers and other tourism operators should be a priority.

2.68 Cardiff needs to create and promote an identity that is attractive and different from its much larger and well established competitors. The 'city region' concept may have a broader appeal than just Cardiff.

(The full Executive Summary is appended here see Appendix 1)

In between times from this report to the present, Arts Council of Wales continued to be a participant in the Cultural Tourism Partnership, but some of the strategic challenges and the consideration of the overall targeting of the independent explorer has had to wait to the new strategy and the most recent campaigns where this confident alignment of tone and the offer and cultural confidence in what Wales offers is beginning to come through. Our starting position would still be that Wales is not getting its potential market share of day visitors, short break or international visitors. Arts Council is a component part of helping build this...developing the substance and content of the product.

Recent research we have commissioned from Bonnar Keenlyside around a collaborative idea that the National Companies are wanting to advance around an internationally ambitious Festival of art using place and setting, concludes similarly about market opportunity if the ambitious growth strategy for the value of visitors to Wales contribution to National turn-over is to be met:

There are strong indicators of a substantial unmet demand from potential visitors to Wales for cultural activity. Visit Wales has identified over 11m 'cultural explorers' who might visit Wales should the right proposition be available. This would be likely to offer a sense of exploration, a sense of welcoming and contemporary culture and events and activities which would be deemed worth overcoming barriers around*

perceptions of poor weather. A festival could spear-head the development of a new offer to add to the current tourism strategies, reflecting Wales as a vibrant and welcoming contemporary creative nation with a unique product. This could add a cultural tourism strand to the current strategy.

* Barriers to Visiting Wales :Report by TNS December 2012

So the question is where in constrained times can we extract most value and where should we focus?

Talking Shops or Tasks and Active Learning Projects? The case of Music Tourism

Because the overall holistic approach to Tourism is only a recent development in thinking, in recent years the vehicle for dealing with Cultural Tourism was focussed on a partnership but one where the contributions were the accumulation of projects each participating organisation had or was advancing. This had its place but it probably could only marginally effect the inroads into latent markets which the new strategy demands. We can only reflect our experience here.

The Cultural Tourism Action Plan was a compilation of actions individually and in a stand-alone fashion led by various of the partners with now wrap around in a change in presentation of the country as a whole if anything slightly contradictory and Unconfident messages about Wales's contemporary culture. Arts Council of Wales for example combined its strategic work on supporting the development of music with the desire of the Partnership group to see Music Tourism develop and took ownership of this aspect of the plan. Four years ago this was to take the form of a transnational European Project to link music cultures and tourism approaches across several countries on the Atlantic Arc. With changes in the definition of eligibility in the call for projects in the latter part of the cycle, this proved impossible to pursue, but parallel to this we were already developing plans for attracting WOMEX to Cardiff with support from Major Events. This was also taken into the Action plan of the Cultural Tourism Partnership. It was our intention to parallel the development of the WOMEX project with a Digi -Music Tourism project which received research money from Visit Wales but which did not eventually become a fully-fledged project. Timing issues and reporting issues meant we were unable to secure European monies via Visit Wales digital funds in due time to make the project a reality.

Post WOMEX we are now again investigating new European funding routes and partners for a Music /Economic/Tourism project. We would still feel that the music offer of Wales is not being fully mobilised in ways which attract, but that the assets

for building music tourism are there. The analysis of untapped potential is known by Visit Wales and the work with Major Events has been key to date in helping advance this. (For Analysis based on UK research see Appendix 2).

Festivals: present and future building block in the cultural offer

We have maintained close liaison and a sharing of perspectives with Major Events in recent years. We have a shared analysis of the importance of some signature Festivals (Hay, Langollen, Beyond the Border) which bring together place and a distinctive cultural offer, serving to distinguish events from other places or becoming a brand leader in its field (e.g. Green Man). We are joining together in a piece of work to examine the needs of a burgeoning sector and its potential within the cultural offer against the background of both cultural and economic and social returns. Our pattern of investment as an Arts Council through the National Lottery has been transformed since our strategic Investment Review in 2010-11 and the setting up of Festival Funding as a priority strand in Lottery. This is the resulting picture:

ARTS COUNCIL FUNDING FOR FESTIVALS

Situation Pre our strand of Festival Funding

Average annual funding to Festivals **£487,606**, supporting on average 28 Festivals through annual revenue grants and project funding

Festivals Fund – large grants awarded

2012/13

37 projects funded totalling **£1,522,074** – an average of £41,137 per Festival

2013/14

57 projects funded to date totalling **£2,238,877** – an average of £39,279 per Festival

We have surveyed the Festivals and the picture emerging from this research shows:

When asked about the **impact** of the Festivals fund:

- 92% stated that they agreed or strongly agreed that it had enhanced the

quality of their artistic product

- 92% agreed or strongly agreed that it had enhanced the range of artistic product
- 64% agreed or strongly agreed that the quality of marketing had improved with 84% agreeing or strongly agreeing that the reach of their marketing had been improved
- 92% agreed or strongly agreed that they had connected with new audiences
- 56% agreed or strongly agreed that it had supported infrastructure developments with 36% agreeing or strongly agreeing that it had had an impact on their business planning and governance arrangements
- 44% agreed or strongly agreed that funding had increased the Festival's earned income potential with 52% agreeing or strongly agreeing that it had helped to source other funding streams
- 75% agreed or strongly agreed that it enhanced the Festival's networks
- 92% agreed or strongly agreed that it had raised the Festival's profile in Wales with 84% believing that it had raised the Festival's profile in the UK and 76% of the view that it had raised the Festival's profile internationally.
- 92% agreed or strongly agreed that receiving Festivals funding from the Arts Council of Wales had improved the Festival's long term prospects

96% of the Festivals we currently fund stated that they could not survive without funding from the Arts Council of Wales.

The work we plan with Major Events and Visit Wales will be aimed at better understanding the actual and potential economic impact allied to such cultural activity. Some of this needs to be around the messaging of this offer in Wales' cultural calendar. In tandem with the coming on stream of the Festivals Fund and at a time when such messaging wasn't being positioned in Visit Wales material, we decided to convey the idea ourselves in a 2011 bilingual publication (English version attached Appendix 3)

Dylan Thomas 100

We currently have a collaborative project bringing together agencies like ourselves, Government and local authorities a partnership which combines, cultural production, tourism promotion, international recognition and image building. Whilst we are confident of quality and of content in the programme and that the in-year returns will be delivered it is clear that matters will need to be tracked over a longer period as the exposure to Wales is enhanced in 2014 nationally, through Press coverage and the BBC's seasons, and internationally through a programme led by the British

Council. It's proving to be a successful event drawing attention to Dylan's work and the inspiration of place. Aligning the promotional timescales of Tourism campaigns and arts development of content will always prove tricky but other small nations are now ahead of Wales in aligning cultural content and promotion of what the place has to offer. Dylan Thomas 100 signals ways of working and focus building across agencies which could have dividends.

Changing perceptions

What cultural foregrounding of contemporary creativity in Wales can do over time is shift perceptions in the target niche of 11 million would-be explorers of what Wales has to offer. WOMEX generated editorial to a specialist market which is estimated as an equivalent to advertising spend of just under £1m. National Theatre Wales are streaming live events and finding audiences in 70 countries. Artes Mundi now has a very developed international network with over six hundred submissions to its biennial prize. Closer discussions and collaboration is a feature of our current Public value partnership work with the broadcasters BBC and S4C. We are pleased to be part of the steering group currently embarked on a final project of the Capital Regional Tourism organisation focussing on Cardiff's offer. It will be important that the Capital Regional perspective is not lost going forward.

Our cultural events are attracting increasing amounts of broad sheet coverage. Hinterland is taken up particularly in its welsh language version by a whole range of international network broadcasters (...but is it safe to visit Aberystwyth!?).

Culture can create tourism ...but just thinking tourism in isolation will not generate culture. Our tourism can be based on contemporary Wales and its richness and its heritage and contemporary creativity. Markets it has not yet exploited to the full can be further opened up if we can find the right overarching portrayal of Wales and the on the ground delivery of focused projects.



Executive Summary
Cultural Tourism Research

Visit Wales and the Arts Council of Wales

April 2009



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1. Background and Methodology

- 1.1 The national tourism strategy “Achieving Our Potential 2006-2013” identified the need to prepare a cultural tourism action plan for Wales to realise the tourism potential of Wales’ cultural assets.
- 1.2 The Cultural Tourism Steering Group was set up in May 2008 following a review of cultural tourism, with the aims of providing strategic leadership and to drive initiatives. Their initial task has been to produce a costed action plan to take Cultural Tourism forward up to 2011.
- 1.3 The steering group is chaired by Visit Wales and includes representatives from Cadw, Cymal and the Cultural Directorate from within the Department of Heritage, the National Museum, the Arts Council of Wales, the Welsh Language Board, Welsh Local Government Association and the Wales Tourism Alliance.
- 1.4 The steering group has highlighted the need to follow up on research that was conducted in 2003 in order to assess how cultural tourism perceptions have changed. The 2003 research was useful for evaluating cultural tourism, the perception of Wales and its position in the cultural tourism market and the main barriers to visiting Wales.
- 1.5 Visit Wales and the Arts Council of Wales on behalf of the Welsh Assembly Government’s Cultural Tourism Steering Group commissioned focus group research to examine perceptions of Wales as a cultural tourism destination and to gain an insight into the needs and behaviour of visitors interested in undertaking cultural visits and activities.

Research Objectives

- 1.6 The overall aim of the project was to review Wales’ position as a cultural tourism destination in the eyes of key markets. And to show trends in perceptions and cultural tourism habits since the benchmarking research in 2003.
- 1.7 The specific objectives of the study were to:
 - examine perceptions of Wales as a cultural tourism destination;
 - assess Wales position in the cultural tourism market;
 - build on similar research conducted in 2003 in order to access changes in perceptions of Wales as a cultural tourism destination;
 - gain insight into the motivations of visitors interested in undertaking cultural visits and activities;
 - identify the main barriers to visiting Wales;
 - explore the behaviour of visitors in advance of their visit in terms of information.

1.8 Visit Wales has approached cultural tourism from the viewpoint that all tourism has culture as an intrinsic part of the total visitor experience. For the purposes of this research project, cultural tourism was understood as being visits to a destination with the purpose (solely or partly) of experiencing any of the following aspects:

- heritage attractions, museums and art/craft galleries
- craft workshops
- performing arts
- carnivals, festivals and events
- historic and contemporary gardens
- cultural landscape, including many of the rural traditions
- sense of place in towns and villages
- the Welsh language, the people of Wales and their heritage

Sample

1.9 Respondents were selected to be typical of the target market for cultural tourism in Wales, following a similar structure to the 2003 research.

1.10 All were 'Independent Explorers', defined by their agreement with all of the following statements:

- I enjoy discovering new experiences and places to visit within the United Kingdom
- I prefer to be independent and do my own thing when taking holidays and breaks
- I get a real sense of achievement and satisfaction planning and organising my own trip
- I like to learn about the local way of life and culture of the places I visit
- I like to visit places that are still undiscovered by tourists

1.11 Defined by their last UK break, 50% were cultural tourists and 50% general tourists. To be defined as a cultural tourist, respondents had to agree strongly that at least two of the following were very important in their choice of destination for their last UK break or holiday; a general tourist had to agree that at least one was very or quite important:

- Museums/galleries to visit
- Stately homes/gardens to visit
- Specific 'cultural' events e.g. festivals, theatre, opera etc

- Historical, cultural sights e.g. castles, overall architecture etc

1.12 All respondents were decision makers on holidays / short breaks, and had taken at least one overnight trip in the UK in the last year. In each English and Irish group half of those had been to Wales, and the remainder did not reject the idea of going to Wales. All stayed independently in paid-for accommodation (i.e. did not only stay with family / friends). We excluded people who only go on commercially organised packages (e.g. coach trips).

1.13 We had a roughly equal numbers of men & women in each focus group, and excluded anyone employed in market research or tourism.

Composition of Focus Groups

1.14 There were 11 focus groups with 87 respondents present (8 respondents at all except for one group of 7). Fieldwork was conducted between 4th & 24th February 2009.

1.15 The groups were split by location, and by life stage as shown in table below. In Wales one group was in Cardiff, the other in Colwyn Bay in order to pick up any differences in opinion between those living in the north and south.

	Wales	SE	Midlands	North	Ireland
Adults aged 20-40 yrs who travel mainly in parties of adults	Colwyn Bay	Wimbledon	Sutton Coldfield		Dublin
Adults aged 25-45 who travel mainly in parties with children		Wimbledon		Altrincham	Dublin
Adults aged 40-70 yrs who travel mainly in parties of adults	Cardiff		Sutton Coldfield	Altrincham	Dublin

2. Main Findings and Recommendations

Understanding Cultural Tourism

- 2.1 Visit Wales has approached cultural tourism from the viewpoint that all tourism has culture as an intrinsic part of the total visitor experience. This research and that undertaken in 2003 endorses this approach.
- 2.2 In the context of tourism consumers interpret culture as all aspects of a destination that create its special, even unique character. This includes the range of categories defined by Visit Wales and some people say includes almost everything. It was in many ways easier to define what was not cultural – somewhere without a sense of place such as a spa break or sun and sand.
- 2.3 However it is vital to understand that most people do not use the word culture to describe these categories or think of them as cultural. They call them “things to do”, “activities” or “attractions”. The following quotes are typical:

“Culture is “Castles. Museums. Something specific to the area what’s local. History” ...”Local people and what they’ve done in the past” (Sale, families)

*“I think of history, I think of buildings and things which are quite antiquated.”
.... “theatre” “... people as well” “It’s the way of life” ... “what they do and what they eat” ... “culture is just what makes a place a place, like Birmingham culture is ... the curries, ... the Bull Ring, ... the accent. It’s all those things.” (Birmingham, pre-family adults)*

“Heritage is culture. It depends ... on how you define it, but for some of us it is the food, it is going to Rick Stein’s, ... culture’s one of these big words that changes its shape” (Cardiff, post family)

“Wales, that slate mine we went to was fantastic and we got a demonstration of the slates... I suppose culture whatever is going on locally you know. You can find it everywhere you go.” (Dublin, post family)

- 2.4 When the term ‘cultural tourism’ was introduced to groups this usually evoked thoughts of a focus on the performing arts, galleries and possibly museums. Only a small minority would see themselves as a ‘cultural tourist’. People often describe this as ‘high-culture’ and it alienates more people than it appeals to as illustrated by these quotes:

“String quartets ... Shakespeare”... “culture to me ... I would always think of it as being quite middle class and a bit hoity (toity)” (Birmingham, post family adults)

“I’m looking for heritage and things like that ... the term culture tends not to come into play” ... “The word heritage is better than the word culture. ... it puts people off, culture.” ... “heritage you can understand ... (Cardiff, post family adults)

Cultural Destinations

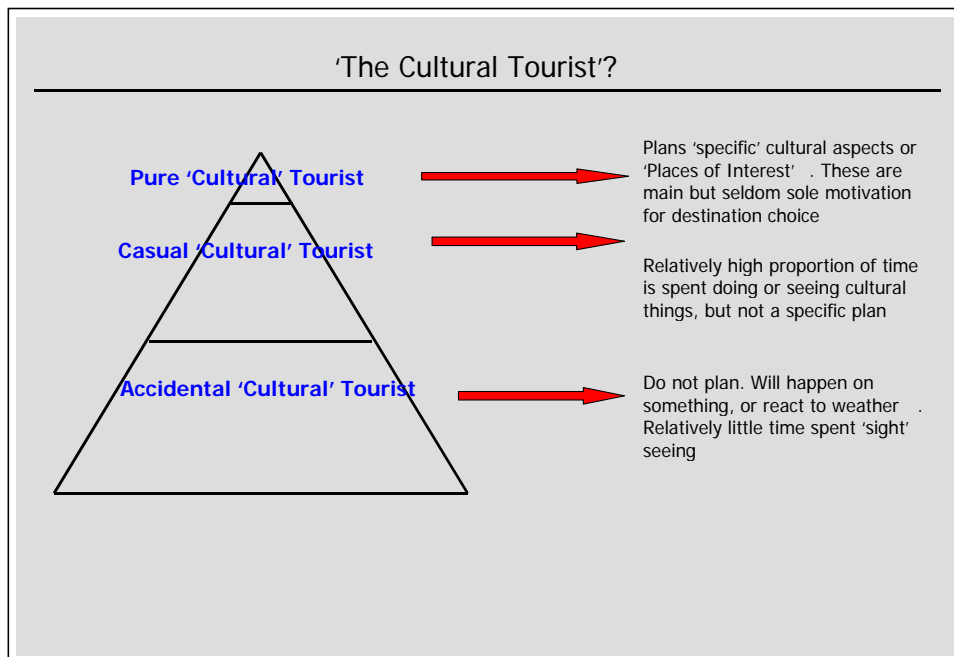
- 2.5 Cities are the first places that come to mind when people are asked about places with a reputation for culture. This is because that’s where cultural buildings and collections of cultural things tend to be, where events are held, and where there is enough to do in one place to sustain a break. The following quote sums this up:

(cities have a) “Higher concentration.” “I think that’s it, there’s more of it, there’s more choice in those areas. Whereas you go and see Beatrix Potter’s birthplace, it’s just in the middle of nowhere.” “It’s only really one thing to see, whereas a city you’re spoilt for choice, aren’t you?” (Sale, families)

- 2.6 Rome, Venice, Barcelona, Florence and Paris tend to be the most iconic European cities. In the UK, cities with a strong reputation for culture include London, Edinburgh, Bath, Chester Stratford and York. No Welsh city was mentioned and Wales was rarely mentioned as a cultural country.

Cultural Tourists

- 2.7 The three types of Cultural Tourist identified in 2003 were clear to see in 2009 and we believe remain largely unchanged in motivation, behaviour or proportion. These three types were defined as:
- The pure cultural tourist – a small minority
 - The casual cultural tourist – the majority in this research
 - The accidental tourist – minority in this research, but probably a majority of the population



2.8 The three groups are described briefly below, but it may be just as appropriate to think in terms of type of trip.

The Pure Cultural Tourist

- 2.9 For these people a specific cultural component is the main, but rarely the only reason for the choice of destination. The trip may be focused on an event – concert, exhibition, festival etc or on a theme/place – heritage, gardens, cultural figures etc. Other possible pure cultural trips could relate to TV and film settings, although whilst groups discussed these, no members had been on a trip like this.
- 2.10 It is important to recognise that the majority of people in this category are at the popular end – they go to see a pop concert or show and have little interest in 'high culture', although there are those that are the opposite.
- 2.11 These tourists are likely to be an adults-only couple or friends and they tend to be older. They are more likely to be taking a short break than a full holiday. Good quality food and accommodation tends to be an important element but not exclusively so.

"I've just booked for a concert in Cardiff ... we fancied going to Pembrokeshire for a holiday on the coast down there, and so we're going to combine the two. Last year we went to the O2 arena for a concert so we spent some time in London" (Sale, post family)

The Casual Cultural Tourist

- 2.12 These people tend to spend a relatively large amount of their break or holiday time seeing or doing cultural things.
- 2.13 They often research thoroughly before they go but make few hard and fast plans. They feel strongly that a break is about relaxation and plans suggest the opposite. Many expect that almost any destination will have enough for them to do to fill their time.
- 2.14 For these people culture gives the destination a context and can be a key reason people choose to visit. Both cultural and non cultural factors play a part and can be of equal importance. For many parties having a range of things available is important so that everyone is satisfied.
- 2.15 Shopping is important for many and argued by some as being particularly important and part of the culture if it has a local flavour.
- 2.16 The Casual Cultural Tourist is more likely to be without children or with older children.

"I'm going to Amsterdam in 2 weeks and all we've done is book flights, accommodation and I said I'm not booking anything (else), I just want to go and see when I'm there, and see what takes my mood" (Birmingham pre-family)

The Accidental Cultural Tourist

- 2.17 The defining nature of this group is that they pay little attention to specific cultural aspects of a destination before deciding where to go. They may well visit places of interest or other attractions if they come across them or if the weather forces them indoors.
- 2.18 Adults-only groups comprise a significant number of Accidental Cultural Tourists including groups of friends just going away to spend time together. Families with older children are also strongly represented in this group.
- 2.19 The generic cultural backdrop still has an important role in deciding which destination

"when we go away, we just want to be away from home. Not bothered about museums, if they're there we'll pop in and see them if we're away. But the

main thing is just getting away and disappearing for a couple of days” (Sale, post family)

Decision Making

- 2.20 Lifestage exerted a strong effect on how people decide on the elements of their trip and the main motivation.
- 2.21 Not surprisingly family groups behaved very differently to adult-only groups and the age of children is a key factor.
- 2.22 Adult only groups were split between those who want more active breaks and the opportunity to experience new things and those that want less active relaxation. Culture has the greatest opportunity to influence those tourists looking for a more active break.

The Decision Process

- 2.23 Broad boundaries for a trip seem to be set fairly quickly by most people through considering who is going, what the trip is for, what they can afford and destinations where they might go.
- 2.24 A range of other factors are then considered before a final choice is made. Amongst these are cultural factors such as setting, things to do, places to see and food and drink – the general cultural backdrop.
- 2.25 For those on a pure cultural trip, the event, exhibition, festival etc. will be the driving force from the outset.
- 2.26 This second stage can take some time and is an enjoyable part of the process for many people.

Type of Tourist

- 2.27 When in a family group, parents want reassurance that a destination has things to do cultural and non cultural if they need them – typical of accidental cultural tourists. This is particularly true of those with younger children but perhaps less so of those with older children who can be more interested in cultural things. For mid to late ‘teens however cultural things are not seen as ‘cool’.
- 2.28 Adults of all ages travelling as couples or in larger groups would seem to be the largest cultural tourist group. Cultural things to do and places to visit can be key to their choice of destination particularly for older, sometimes retired empty nesters. They can be especially interested in history and heritage of all kinds, crafts, houses, castles and gardens.
- 2.29 Young people, pre-family travelling without a partner but often in groups tend not to be interested in culture, but merely in having a good time.

Sources of Information

- 2.30 The internet is now the dominant channel for researching trips prior to departure. This is a major change compared to 2003. Word of mouth, TV and newspapers still have a role in the planning of a trip especially in terms of prompting ideas. People of all ages use the internet although those least likely to use it are the empty nesters.
- 2.31 Leaflets at destinations are very useful and have a key role for casual and accidental cultural tourists who comprise a large proportion of visitors to Wales.
- 2.32 Many people also use the internet to book and pay for accommodation, travel and events. They are of all ages but the most prevalent use is amongst younger people. Apart from some people who have concerns over security and others who are not confident users of the internet, the main reason for not booking on line is where people have complicated requirements and / or want to ask questions.
- 2.33 Everybody uses Google for general web searches, but some accommodation provider sites are known and popular. There is some use of 'tourist board' websites because they provide a good starting point. Independent review sites such as TripAdvisor are widely used and appreciated by many.

Views of Wales

- 2.34 Respondents in the groups had either visited Wales, or were open to the idea of going there. Despite this it was notable how little detail many knew about Wales. The 2003 report described Wales as a relatively "empty" country in people's minds – this perception does not seem to have changed much.
- 2.35 What knowledge there is tends to be limited to places they have been to and has a regional bias. People from the north of England, the Midlands and Ireland tend to know the north best; southerners tend to know the south or mid Wales. The Welsh groups had a broader knowledge, though often with a significant bias to the north or south.
- 2.36 The Irish are notably warm in their attitudes to Wales as another Celtic country, though their knowledge of the country is no better than that of the English. Some particularly respected and admired what Wales has achieved for its language.
- 2.37 Wales is well known for its industrial heritage and history. Its castles and its mining heritage are icons. Other strong associations are rugby, choirs the daffodil and leeks.
- 2.38 Wales is positioned in the mind of tourists as a place for both active and relaxing breaks and holidays in the peace of the countryside or maybe by a beach. It is definitely not seen as a place for city breaks. Most did not know, so could not imagine why they would want to spend time in Cardiff or Swansea.

2.39 The Millennium Stadium has certainly raised Cardiff's profile and many of those that had been to Cardiff for a break had been because of a sporting event or concert. Opinions were divided even amongst these people over its attractiveness for city breaks.

2.40 Typical comments about Wales and some about Scotland are:

"I'm really struggling to think of things that are there" (Sale, families)

"It's more nature that would draw me in rather than (culture) ... like I said before there aren't any big cities or towns really that you know. I don't have at the moment any immediate interest to go and see (Wales)" (Wimbledon families)

"I think the countryside is great, and I don't go there for the culture, I go there because I think Wales is almost like Birmingham's playground in a way, you can go mountain biking, beaches, you've got the walking" (Birmingham pre-family)

"beaches ... hills, black mountains, sheep" ... "it is just peaceful and quiet" (Wimbledon families)

"Wales is ... coal and rugby and male voice choirs" (Cardiff, post family)

"if you go to Spain you know what you're getting ... If you're going to Wales you'd have to look up what you're going to get" (Dublin families)

"I suppose that's another thing ... the Scottish have a very strong identity ... the English in the different regions, because it is so big they have different identities, but they're very identifiable. Whereas in Wales you just wouldn't know what to expect" (Dublin families)

(Scotland's culture is) "Whiskey" "Distilleries" "The castles" ... "Rob Roy ... all the history" "I think the dramatic countryside as well" (Altrincham, post family adults)

Wales as a Cultural Destination

2.41 When asked about Wales, many people say that Wales is rich in culture. They think broadly of its history and heritage, crafts, folklore, festivals and song. However people often do not know exactly what there is to do.

2.42 There is no dominant cultural icon in Wales, awareness of places of interest and things to do is diffused amongst several categories:

- Castles
- Gardens and historic houses
- Industrial heritage sites and steam railways
- Crafts

2.43 There is little awareness of Welsh museums.

- 2.44 Cardiff is universally perceived as the only serious option for a city break. Swansea is the only other city that most people knew, but is thought of as too small.
- 2.45 There is a problem for Cardiff however in that relatively little is known about it. Relative to large cities such as London, Manchester, Edinburgh, Liverpool etc people feel that there is no compelling reason to visit.
- 2.46 Cardiff was best known for the Millennium Stadium, rugby and pop concerts. There was only limited knowledge outside of Cardiff residents of any specific arts venue, company or their programmes. Cardiff at best is:

"just a city ... like any other ... I don't know why I would want to go there?"

And at worst is:

"a bit rough"

- 2.47 The Eisteddfod is the Welsh festival with the strongest profile, but few people knew much about it or had been. This is in contrast to the broad appeal of Edinburgh's festival. The Eisteddfod is generally seen as something primarily for the Welsh.
- 2.48 The general perception was that Wales is focused on crafts rather than arts – this fits with the view of Wales as a countryside destination. We heard nothing about visual arts in Wales.
- 2.49 There are a wide variety of cultural figures that people recalled in relation to Wales. The most often mentioned and by all ages related to popular culture – Tom Jones, Catherine Zeta Jones and Katherine Jenkins. Others mentioned include Shirley Bassey, Max Boyce, Harry Secombe, Charlotte Church, Cerys Matthews and groups such as Stereophonics and Manic Street Preachers.
- 2.50 Amongst the younger audiences TV has generated references to Gavin and Stacey and Glynn from 'Big Brother'.
- 2.51 Richard Burton and Anthony Hopkins are well known for being Welsh and were widely mentioned. Much less well known was Dylan Thomas. Lloyd George was the only political figure mentioned.

The Welsh Language

- 2.52 The language is an intrinsic and strong element of the culture of Wales and provides a sense of place. Welsh on signs, menus etc is accepted.
- 2.53 The Irish in particular respect the language and say they like to hear it. Views are mixed with the English: some feel excluded by the language.

- 2.54 The idea of Welsh music in pubs for instance is fine but Wales is not seen to have a tradition of this like the Irish or to a lesser extent the Scots. Welsh music as personified by choirs is perceived to be more formal and if the singing was in Welsh visitors could not join in.

"I think we actually admire them ... we have tried to revive Irish here ... (but) at the end of the day we're still not speaking it. but they have revived it in a way that they're proud to speak it" (Dublin, post family)

Barriers to Visiting Wales

- 2.55 The main barrier is a lack of knowledge of what Wales has to offer in terms of things to do under the broad Visit Wales definition of culture.
- 2.56 Consumers have a much stronger and better defined image of Scotland or of the south west of England. Wales is not especially famous for any one thing.
- 2.57 Wales is positioned in the mind of tourists as a place for both active and relaxing breaks and holidays in the peace of the countryside or maybe by a beach. This tends to be at odds with large parts of the cultural agenda.
- 2.58 Wales is perceived to have a slower pace of life and is slightly old-fashioned. This is a negative in the context of city breaks and cities as destinations for performing arts, galleries and museums. Neither Cardiff nor Swansea are seen as being large enough to sustain a city break or to have the "buzz" that younger people gravitate to.
- 2.59 In the minds of some the Welsh are not perceived to be friendly, especially in relation to some Welsh speaking areas.

Implications and Recommendations

- 2.60 The wide definition of cultural tourism used by Visit Wales is in tune with the way that the public thinks and makes choices between destinations. However the public think in terms of a range of things to do and see, not in terms of cultural activities.
- 2.61 The term cultural tourism does not seem to be helpful from a marketing perspective. Amongst the public, the term cultural tourism appeals to only a very small minority and is typically described as 'high' culture. The alternative, much broader, Visit Wales definition is too wide to help define market segments.
- 2.62 The public tend to think of cultural destinations as cities rather than countries and Cardiff is not seen as a cultural destination. As a consequence, the concept of promoting Wales as a cultural destination is an inappropriate objective at present.
- 2.63 Awareness of specific things to do in Wales is a weakness and appears to be no better than it was in the 2003 research even amongst those that have

visited Wales. The question needs to be asked whether there is a real weakness compared to competitor regions or whether this is a perception.

- 2.64 Wales' promotional activities should reflect the way that the public thinks and focus strongly on things to do and see. The public tends to look for things to do and see within a more concentrated area than Wales as a whole. This suggests that the promotional emphasis should be on smaller recognisable areas. City breaks for example could be considered a prime example of focusing on a small area.
- 2.65 Within these areas promotion must encompass a range of things to do and see, so that the diverse interests of individuals and groups are catered for. This must include all types of shopping. Accommodation and food, catering for a variety of tastes and budgets are always an important element in the mix. Wales' target customer is the independent traveller and by definition they are not looking for packaged holidays but suggested 'things to do' itineraries would be valuable.
- 2.66 Cardiff is not perceived as a city break destination but is seen as the only viable contender in Wales. Sporting events and rock concerts have significantly raised awareness of the city since 2003, yet most people do not feel that there is any particular reason outside of an event to visit the city.
- 2.67 A key activity for Cardiff and other areas would therefore seem to be improving the awareness of things to do with existing visitors when they are in an area through various forms of 'point of sale' material or pre-visit information. Co-ordinated promotional activities between event organisers and other tourism operators should be a priority.
- 2.68 Cardiff needs to create and promote an identity that is attractive and different from its much larger and well established competitors. The 'city region' concept may have a broader appeal than just Cardiff.



Cyngor Celfyddydau Cymru
Arts Council of Wales

**CERDD CYMRU DIGITAL MUSIC RESOURCE
FOR THE TOURISM INDUSTRY**

TECHNICAL AND COMMERCIAL FEASIBILITY REPORT

Prepared for Visit Wales Digital Project

By **Angharad Wynne**
Angharad Wynne Marketing and Communications

On behalf of
The Arts Council of Wales

2 February 2012

1. EXECUTIVE SUMMARY

- 1.01 There is currently no central point for accessing information about Wales's music scene, either for visitors or nationals. Information is scattered across a broad range of non-geographically specific, genre related sites. It is virtually impossible to gain a snapshot of what music events and activities are available within a region at any given time, and absolutely impossible for the visitor with little or no prior knowledge to 'access' Wales's music scene. After researching the field, we conclude that there is a clear need that we can evidence, for a central resource that captures information about and promotes the music of Wales.
- 1.02 The proposed digital service would be a significant first step in capitalizing on a strong potential market for music tourism, and delivering added value to visitors looking to explore Wales' music culture as a broader aspect of their visit. We are currently under achieving in comparison with other comparable UK and European regions. Developing resource to help drive this engagement is likely to be one of the most effective and efficient means for increasing levels of visitor spending on live music entertainment and related retail. It will also uplift spend on food and drink as secondary spending in entertainment venues.
- 1.03 Visitor numbers to Wales have been down by 3.5% per annum in the past 5 years. We are losing market share. Additionally, the UK as a whole has dropped out of the top 10 country brands for tourism. In part, this is a result in a trend shift away from pageantry and heritage. Future Brand's "National Branding Rankings" states that the UK should invest less on promoting heraldry and pageantry and heritage and spend more promoting contemporary culture. Interestingly, our European neighbours are predicting a growth of up to 6% per annum in the coming years.
- 1.04 Less than 6% of total visitor spending in the UK goes on entertainment. This appears low and offers potential for growth. A key to achieving this is to connect visitors with attractive and appropriate music entertainment and inform them about it effectively. This is essentially what this proposed Cerdd Cymru: Music Wales Music resource aims to address, by gathering and intelligently presenting information to visitors about music events and activities in Wales. This will act either as a catalyst to visit, or provide an important cultural context and sense of place to their visit. Consequently, the project aims to both stimulate the visitor market and make a clear statement about Wales's strength as a musical nation, and stimulate the music economy in Wales.
- 1.05 The national organization UK Music is concentrating on looking at 'twinning' festivals to promote key UK events overseas. Their aim is to advertise the UK as a music destination and recognise that there are people who build their

holidays around key music events and in turn offer Visit Britain unique content. This resource aims to support that strategy by providing a gateway for music experiences in Wales, and so raise Wales's profile within the UK and Europe as a Music destination.

- 1.06 Families and Older Independents are the markets currently in growth in Wales, whilst Pre-nesters are in decline. It is important that Wales promotes a music offer for these three sub sectors, delivering interest and activity that will both satisfy and encourage the market segments in growth whilst also attracting increased visitation, and helping to stem the decline in visits from Pre-nesters.
- 1.07 Visit Wales continues to target Independent Explorers. We know much about their attitudes towards travel and experience. This project aims to support their desires to discover new, authentic cultural experiences, which provide important and valued sense of place context to their visit.
- 1.08 With this resource, we aim to target both music tourists who are driven to travel based on the offered music experience and those for whom music forms a soundscape for their understanding of, and engagement with a place.
- 1.09 Musicians are already involved in submitting their music, information and gigs to a number of web based databases. One of the core concepts of this proposed resource is to gather available information about music, music making and musicians in Wales, past and present and the musical culture of Wales into one place, using in the main, existing editorial, gig and events listings databases. Thus we will make it easy for visitors in particular - and other domestic users - to gather information about our music scene, learn more about the music culture and consume Welsh music.
- 1.10 The BBC, as a firm supporter of the music sector in Wales, and a leading disseminator of news and information in both languages about the scene in Wales, is keen to avoid unnecessary duplication of effort and any associated waste of public funds. It is therefore interested in working with the new portal to agree respective roles and areas of activity and, where possible, to share resources.
- 1.11 Our research into booking patterns clearly demonstrates that a website is the core tool for communicating and gathering this information. However, other more innovative digital applications will be useful for key markets within the 'independent explorer' group.
- 1.12 This resource cannot be developed in isolation, that is, it requires a wrap around of a more considered and strategic approach to promoting Wales as a musical nation. It also requires work to develop the music sector's understanding of how to provide experiences for the visitor market, and

likewise, a profile raising campaign amongst tourism business operators to enable them to better promote and showcase Welsh music.

- 1.13 This process of gathering and presenting music information will inevitably highlight key 'iconic' events that should prove very attractive to the visitor market. Such events are described as those in which an 'iconic' or high profile Welsh artists performs within an iconic or culturally meaningful setting that provides both a high profile event and great sense of place. They might also be events that are simply 'quintessentially Welsh', and offer the visitor an insight into our music heritage and culture. These might be one off events or Festivals and Eisteddfodau. While this project does not aim to create these, it will identify them and help to raise their profile and promote them to the visitor market.

- 1.14 Wales is a musical nation, however we've been shy of shouting about it for too long; too worried that it relates too closely to our choral singing tradition. Wales has a claim to being a musical nation precisely for the wealth of ancient, folk [roots], choral, jazz, classical, and vibrant contemporary music that is produced here (amongst many other genres). Whatever it is, the music that is produced here is somehow inspired by Wales and can support the sense of place we provide for visitors. This project is well placed to enhance the music economy by bringing it to a visitor market, which is actively looking for our music story. With Cardiff set to host WOMEX in 2013, there has been no better time to raise the profile of Welsh music, and to get our house in order.



In Wales not everything happens in a field . . .





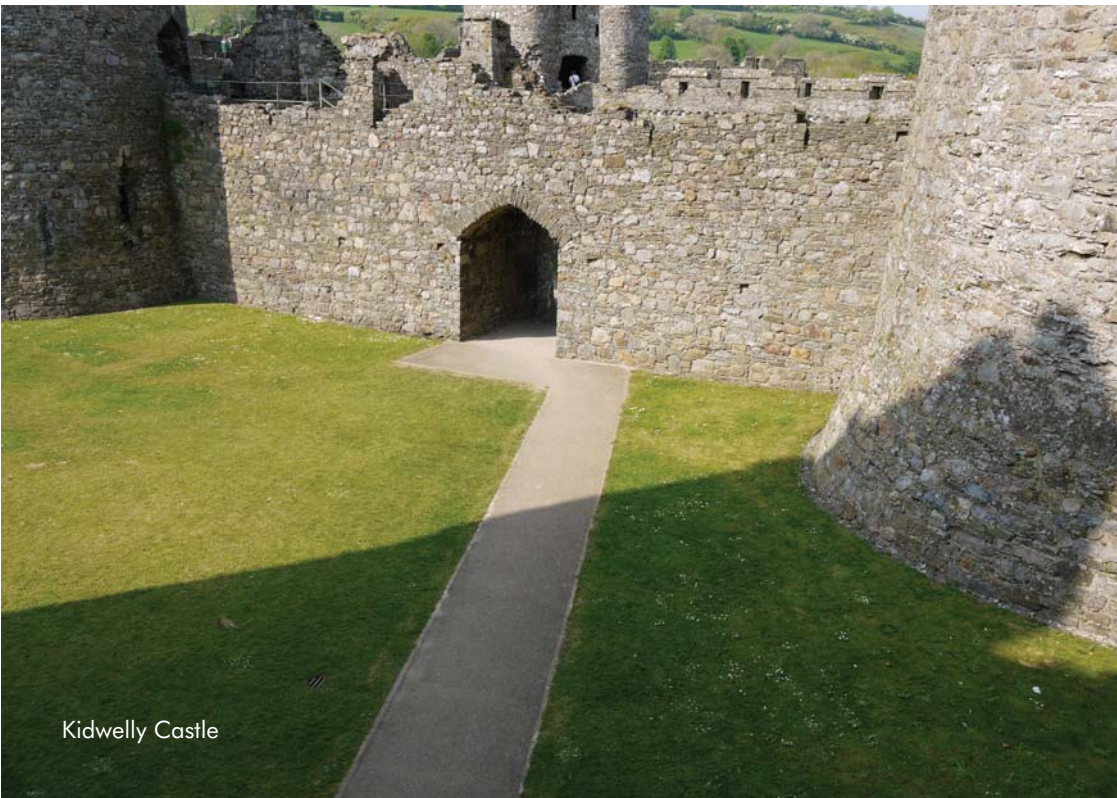
... but a lot that's amazing does

Hay Festival

In 2012 Hay celebrates 25 years of writing, reading, politics, music, comedy, debate, learning, entertainment . . .



photo: Finn Beales



Kidwelly Castle



In 2011 Cadw, the historical environment service for Wales, hosted **Iron** at Kidwelly Castle. For Cadw's current programme visit www.cadw.wales.gov.uk

© Cadw



Eisteddfod maes, Wrexham
July 30th - August 6th 2011

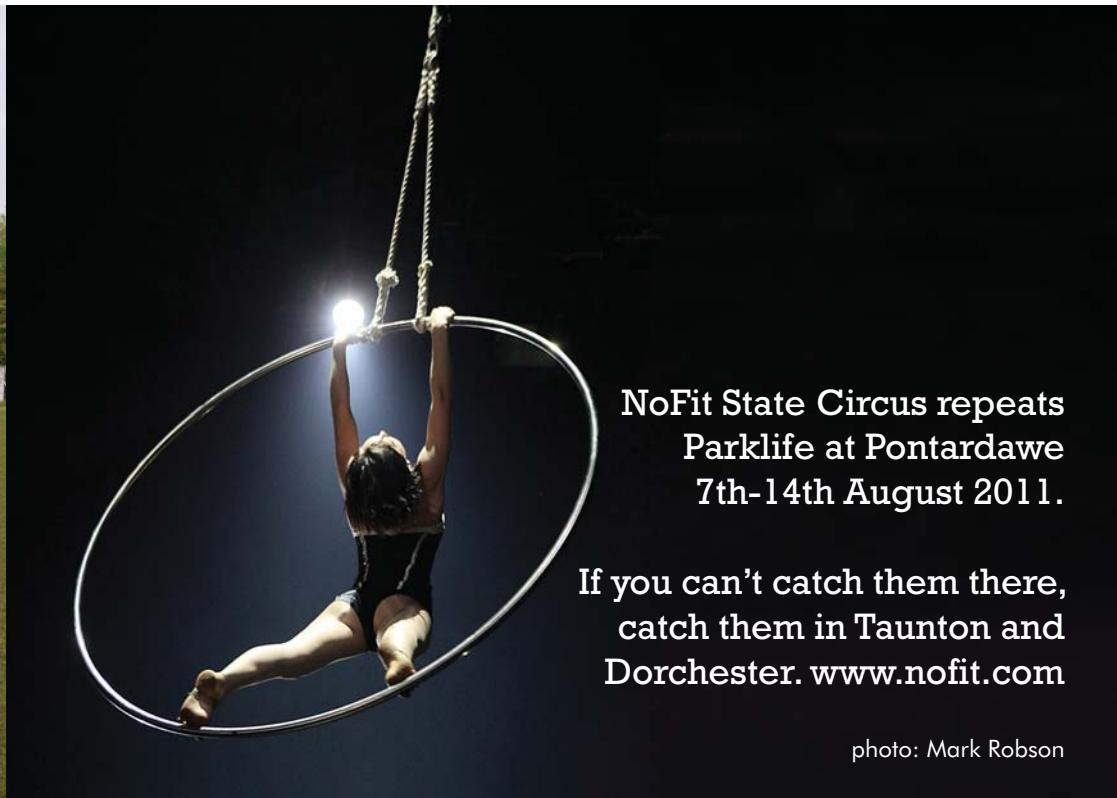


5 miles of toilet paper used during the Eisteddfod week
3 miles of water pipes criss-crossing the Field . . . Europe's
largest cultural festival, and the largest celebration of
Welsh language and culture to be found anywhere.





Pontardawe Recreational Ground



**NoFit State Circus repeats
Parklife at Pontardawe
7th-14th August 2011.**

**If you can't catch them there,
catch them in Taunton and
Dorchester. www.nofit.com**

photo: Mark Robson



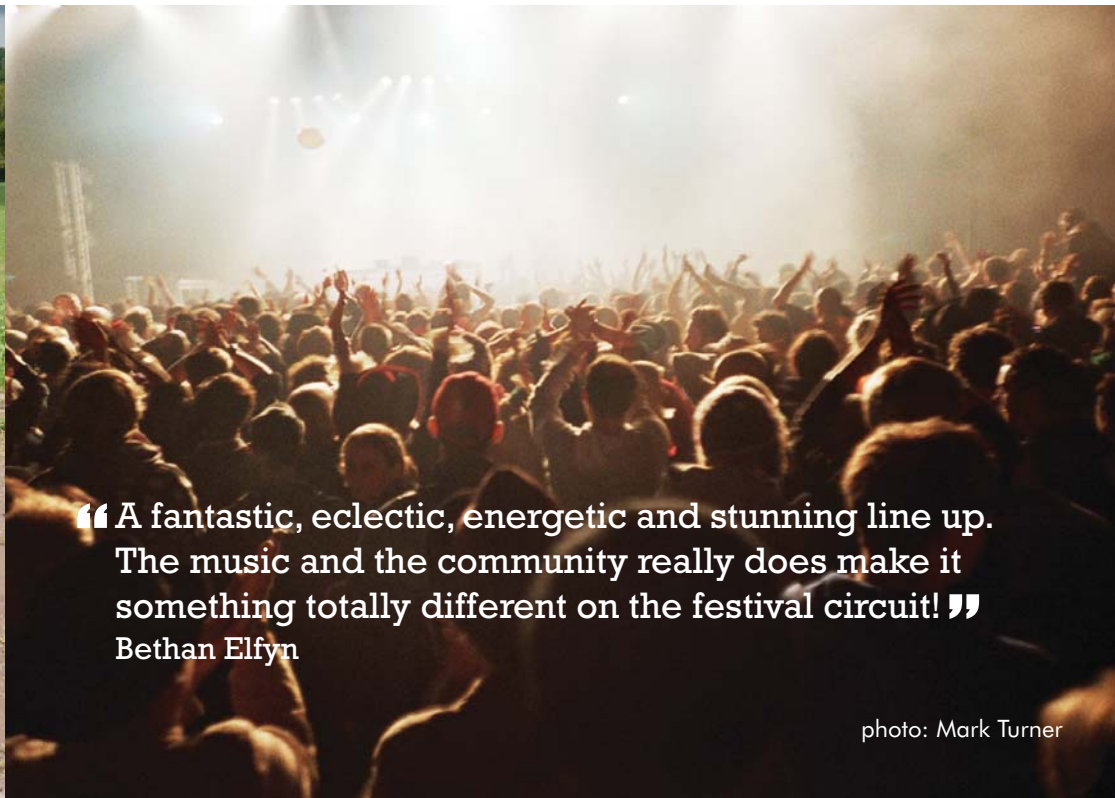
The Vetch Field, Swansea



Adain Avion is Marc Rees' Artists taking the Lead project for the Cultural Olympiad. In Summer 2012 it nests in Swansea, Ebbw Vale and Colwyn Bay. There are plans for the Vetch, watch this space.
www.adainavion.org



Green Man Festival, Usk



“A fantastic, eclectic, energetic and stunning line up. The music and the community really does make it something totally different on the festival circuit!”
Bethan Elfyn

photo: Mark Turner



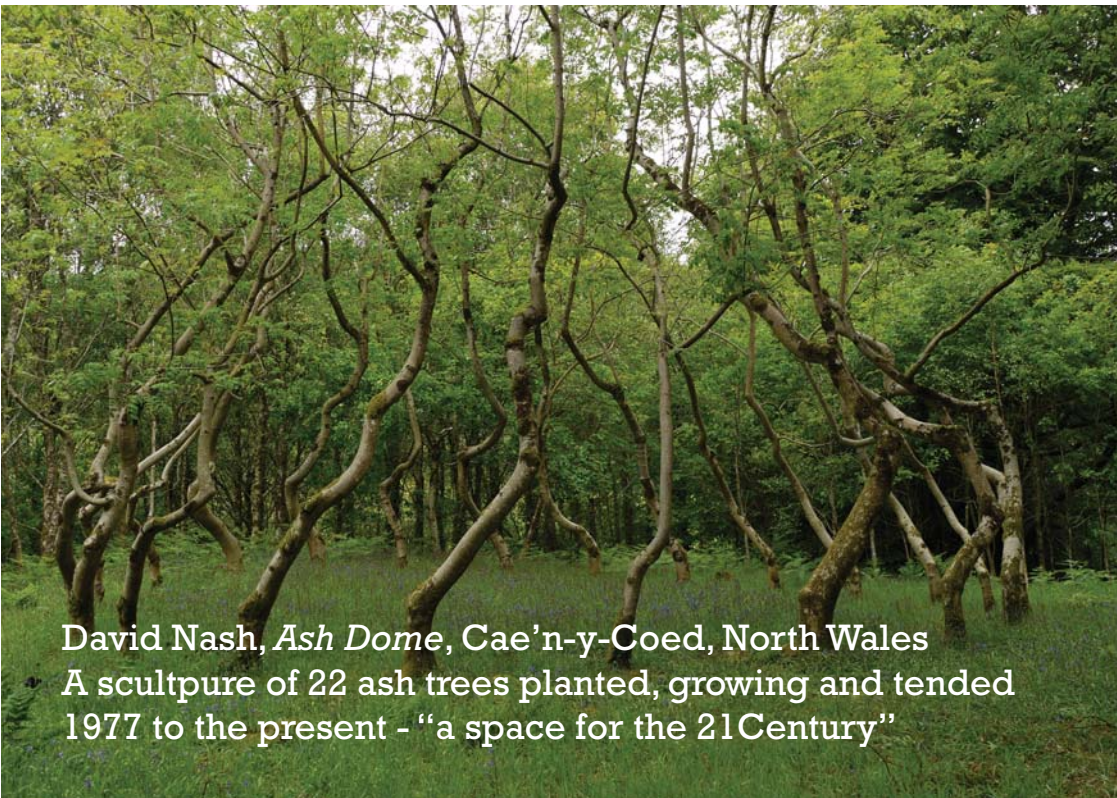
Epynt



Congratulations to Kaitie O'Reilly on winning the Ted Hughes Award for her script for the Persians. After an inspiring first year, National Theatre Wales' new programme is out now www.nationaltheatrewales.org

photo:Toby Farrow





David Nash, *Ash Dome*, Cae'n-y-Coed, North Wales
A sculpture of 22 ash trees planted, growing and tended
1977 to the present - "a space for the 21 Century"



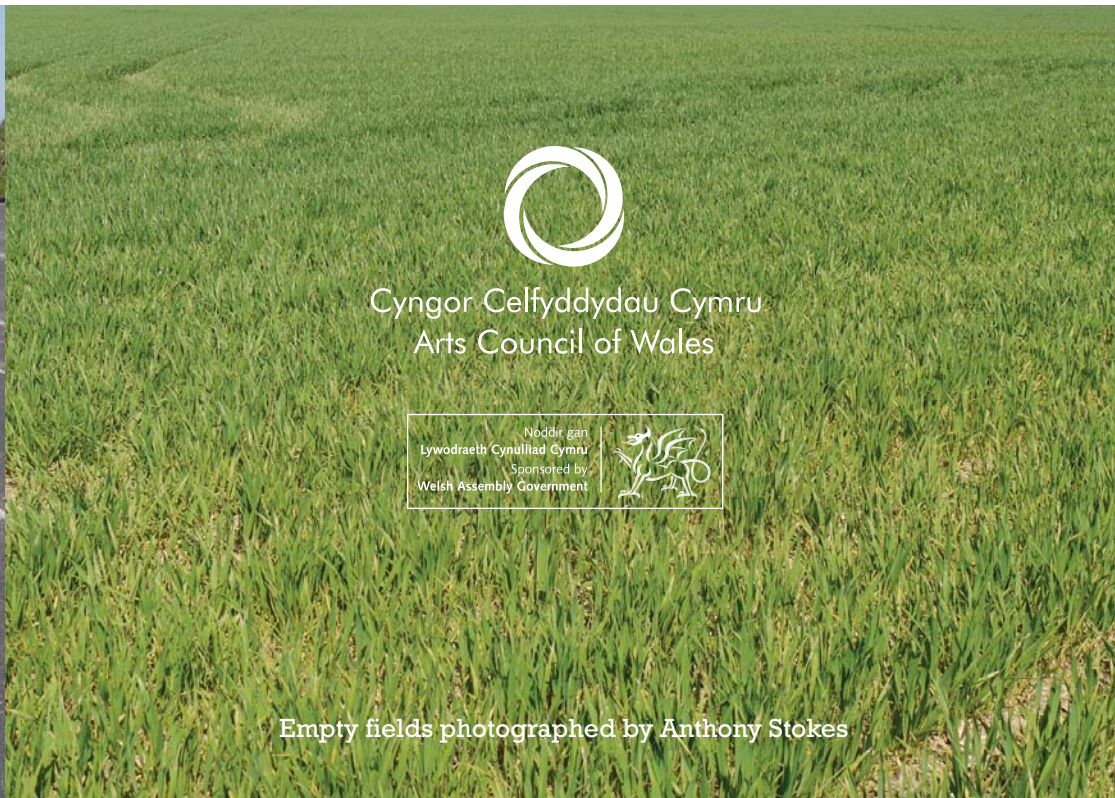
David Nash, *Red Cuts*, 2010, Yew



David Nash' exhibition at
Mostyn, Llandudno
24th Sept - 12th Nov 2011



National Eisteddfod of Wales 2012 maes, Llandow



Cyngor Celfyddydau Cymru
Arts Council of Wales

Noddir gan
Lywodraeth Cynulliad Cymru
Sponsored by
Welsh Assembly Government



Empty fields photographed by Anthony Stokes



In Wales not everything happens in a field . . . there's always the great indoors . . .



For Wales Millennium Centre Summer/Autumn programme visit www.wmc.org.uk

Ilun/ photo: Phil Boorman

