



Response to the Welsh Affairs Committee

Inquiry on Wales as a global tourist destination

March 2022

About TAC

1. TAC is the trade association for independent TV and radio content production companies in Wales. There are over 50 companies in Wales, producing programmes and other audio-visual content for the BBC, ITV, Channel 4, Channel 5 and Sky as well as other commercial broadcasters. These creative businesses produce almost all the original television and online media content for the Welsh-language media provider S4C, and a variety of radio productions for UK-wide networks. More information is at www.tac.cymru.

About this Response

2. This response is written from the perspective of the independent production sector in Wales. We therefore have only sought to answer the questions on which we can offer an informed perspective. We have left the other questions to be answered by those involved in the Welsh tourism industry.

Question 3: Does Wales have a sufficiently strong “brand” internationally and what more could be done to promote Wales as a holiday destination abroad?

3. The broadcasting sector in Wales has been working in recent years to promote Wales-made content and in turn this helps promote our nation as a tourist destination. S4C, BBC Wales and other broadcasters and platforms, working with our sector, have been creating new Welsh-made content with the intention of distributing it internationally. In the process the Welsh landscape and culture have been given a higher profile to potential visitors.
4. That TV and film can positively influence tourist destination choices has been evidenced by research, as demonstrated by a 2021 international review of previous academic studies¹:

“Films and TV series have become powerful information sources and tourist motivators. The fact that a destination appears in a film can arouse the interest of a large number of

¹ Domínguez-Azcue, J.; Almeida-García, F.; Pérez-Tapia, G.; Cestino-González, E. Films and Destinations—Towards a Film Destination: A Review. *Information*, 2021, 12, 39. <https://doi.org/10.3390/info12010039>

potential tourists. This is why many destinations try to attract these tourists through a series of secondary elements, such as tours of film locations, souvenirs or museums.”

The study goes on to note that the filming of ‘Game of Thrones’ increased visitors to Dubrovnik in Croatia by 10% between 2012 and 2015. In order to maximise the chances of tourism being increased in this way, the 2021 study points out the need for coordinated steps to be taken prior, during and following the creation of a production to ensure maximum impact to potential tourists:

“...the fact that a destination appears in a film or series is not an advantage per se, and it is the management of the destination that will make the difference. In this management, it is essential that there is a joint strategic approach between all stakeholders: film commissions, public institutions, private agents that develop the tourism offer, and even the residents of the place.”

5. While not every production will provide such opportunities, this should be a consistent approach for every relevant production, involving Visit Wales and local authorities, as well as those involved in productions.
6. The second season of the current production of ‘Lord of the Rings’ will be filmed in the UK this time around. Key members of its cast are Welsh-speakers therefore potentially giving the opportunity to promote the Welsh language and culture to international audiences. On the domestic front, the current season of ‘The Apprentice’ raised interest in North Wales amongst the show’s audience when one episode’s task was to sell tours of North Wales². To an extent productions like ‘Doctor Who’ have done the same for Cardiff and we are seeing examples of how Welsh locations are creating visitor trails for fans of dramas such as ‘Un Bore Mercher / Keeping Faith’. Also the filming of ‘I’m a Celebrity...’ in Castell Gwrych in North Wales, already a tourist attraction, has created a further increase in tourism to the area.
7. TAC is aware of the work Visit Wales does in this regard, in promoting tourism locations and products related to prominent TV series, such as ‘The Apprentice’ and ‘I’m a Celebrity...’, across web and social media channels. Visit Wales also works closely with VisitBritain, where opportunities arise, to present Wales as part of a UK-wide film and TV promotion to international audiences (recent examples being King Arthur, BFG and Paddington)
8. As long as film and TV production in Wales remains strong we can look forward to many more such opportunities to promote Wales. Of course this partly relies on a sustainable base of production and the extent to which it has the workforce capacity. Greater investment in the creative sector in Wales, in terms of training and business development, could lead to the creation of further productions which give international audiences a window onto what Wales has to offer as a tourist destination.
9. TAC encourages film and TV productions in Wales to be made by home-grown indigenous companies, using local production talent and with the whole production, including post-production and visual effects, being produced in Wales. We work in partnership with S4C to deliver a training programme which saw 283 people register for 16 training online sessions in 2021. This year there have already been 95 attendees for three courses. There are also

² See: <https://www.dailypost.co.uk/whats-on/whats-on-news/fans-apprentice-praise-beautiful-north-23059388>.

initiatives such as Ffilm Cymru Wales' 'Foot in the Door' scheme providing 300 training opportunities for people to enter the Welsh film and TV sector.

10. It is important that the Welsh Government looks to invest further in Welsh TV production and training via Creative Wales, so that we have capacity to create content for all commissioners, incl. platforms such as Netflix, which would be compelling to potential international tourists.

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

11. The tourism industry is clearly best placed to answer this question, however we are aware of the impact on general travel and movement in Wales during the pandemic.
12. Following an initial hiatus, our own industry was only ultimately able to continue to be active during the pandemic due to a number of proactive initiatives. These included S4C being quick to introduce additional commissioning, to have topical content on the pandemic and to keep production companies active and freelancers in employment.
13. TAC and S4C moved our training partnership online, providing bespoke Covid-specific risk assessments workshops in addition to our scheduled training, and offered free places to freelancers. UK-wide, TV and film production benefited from the development of the UK TV industry COVID-19 safe working guidelines, and lastly the UK Film and TV Production Restart Scheme.
14. Elsewhere Creative Wales launched in January 2020, shortly before the start of the pandemic. While the pandemic disrupted some of its plans, it was nevertheless quick to react to the situation by providing schemes such as the Emergency TV Development and Digital funds.

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

15. To provide further impetus and as per our reply to Question 3, it is important to recognise enhance the important role of compelling Welsh TV and content, made for an international audience and distributed widely overseas, in making audiences interested in and curious about Wales. Promoting Wales via compelling entertainment, drama and factual programmes provides a dual benefit of growing or native TV production sector and also promoting the nation as a tourist destination.
16. We welcome Visit Wales' creation of the Wales International Inbound Tourism Fund, including its new multilingual campaign to attract overseas visitors. It is important that the Welsh Government continues to invest in such initiatives to attract further visitors, to keep Wales on the map and help our tourism industry to recover post-pandemic and grow.
17. Whenever a major new international production is planned, the relevant bodies and the relevant local authorities and tourism bodies can be co-coordinating with broadcasters and VOD platforms to discuss allocating additional investment in promoting the areas before, during and after the production, which could help to drive up tourism. In some cases this can be

anticipated but in others it is a case of making the production and then seeing where it can be sold internationally post-broadcast.

18. This work is already going on to some extent. Creative Wales works very closely with Visit Wales. With a production such as the TV series 'Discovery of Witches', they track the impact a Wales-based production has in terms of the traffic to Wales' tourism sites during the international screening of shows. Creative Wales receives audio-visual material from the productions it supports and uses these to cross-promote the production and Wales more widely online. Creative Wales and Visit Wales are also working to highlight the Welsh locations used in the forthcoming Disney+ series 'Willow'. Creative Wales also works with other productions such as the Oscar-nominated film 'Affairs of the Arts' to maximise their international, impact.
19. We also welcome the fact that Creative Wales works closely with Film Hub Wales and funds a post to support its Made in Wales project, which celebrates film with Welsh connections.
20. As we emerge from the pandemic there is more that Creative Wales can now do to its international presence and we look forward to seeing it do so from this year. Creative Wales has Memoranda of Understanding between itself and both S4C³ and BBC Wales⁴. These MOUs place an emphasis on seeking to create content which can promote Wales to the rest of the UK and internationally, as well as other aims such as encouraging greater diversity and celebrating up and coming Welsh talent.
21. Overall TAC has seen the setting up of Creative Wales as a highly positive development and would welcome its being given increased resources to expand its work in its various areas of operation. TAC is a member of Creative Wales' Stakeholder Group and we look forward to increasing our level of cooperation with the agency, to ensure our members are working with Creative Wales and Visit Wales to maximise the part any new productions can play in increasing international interest in the nation and its locations and culture.
22. In order that Wales' tourism can grow and develop it is important for there to be coordinated action, including at UK level. TAC would like the UK Government to ensure it works as closely as possible with the Welsh Government, to support and help further promote Wales to the world.

Contact: for more information on TAC or this paper contact Sioned Haf Roberts, General Manager, at sionedhaf.roberts@tac.cymru

³ <https://www.s4c.cymru/en/press/post/47923/2m-fund-at-the-heart-of-s4c-and-creative-wales-support-for-wales-screen-sector/>

⁴ <https://www.bbc.com/mediacentre/2021/bbc-creative-wales-partnership>