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National Assembly for Wales
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Selling Wales to the World

The Welsh Language Commissioner welcomes the opportunity to make representations on this inquiry.

The principal aim of the Commissioner in exercising his or her functions is to promote and facilitate the use of the Welsh language. In so doing, the Commissioner will try to increase the use of Welsh in the provision of services, and through other opportunities. The Commissioner will also address the official status of the Welsh language in Wales and the statutory duties to use Welsh through the imposition of standards.

Two principles will underpin the Commissioner's work:

- the Welsh language should be treated no less favourably in Wales than the English language;
- persons in Wales should be able to live their lives through the medium of the Welsh language if they choose to do so.

One of the Commissioner's strategic objectives is to influence the consideration given to the Welsh language in policy developments. Representations are made in accordance with these terms of reference, acting as an independent advocate on behalf of Welsh speakers in Wales. Such an approach is advocated to avoid any potential compromise of the Commissioner's regulatory functions and should the Commissioner wish to conduct a formal review of individual bodies' performance in accordance with the provisions made in the Measure.

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In accordance with that, representations are made below regarding the inquiry's terms of reference.

Representations on the inquiry's terms of reference

I corresponded with the Committee recently on the inquiry into Apprenticeships in Wales. At the time, I noted the lack of consideration given to the Welsh language in the inquiry's terms of reference. In its response on 16 May, the Committee explained that it expected to discuss the use of Welsh within Apprenticeships, although this did not form a specific part of the terms of reference. I feel that it would be useful for the Committee to consider highlighting the fact that representations regarding the Welsh language are welcome in future inquiries. For example, in the context of the current inquiry, a reference to the Welsh language in the inquiry's terms of reference would highlight the Committee's recognition of the Welsh language's potential to 'sell Wales to the world'.

The Welsh language as a marketing tool and economic asset

In line with the above, I would like to draw your attention to research that highlights the role of the Welsh language as a core element of strategies to promote the Welsh economy.

The notion that the Welsh language can support business growth and develop innovative products is nothing new. The Innovation Observatory argued in 2005 that linguistic and cultural diversity can be harnessed to develop unique and innovative products in our current creative economy.¹ This was echoed by the conclusions of the Language and Economy Group in 2014. The Group found that '[b]ilingualism and an appreciation of differing cultures are an important part of marketing strategies of successful businesses across the globe strengthening company brands and also making them more relevant to local customers'.²

Similar arguments are seen in other contexts. Research in Friuli (an area in the North East of Italy where Friulian is spoken as well as Italian) concluded that minority languages have an important role to play in terms of marketing produce from their territory and reinforcing the origin of produce.³ Research in Scotland found that nearly 70 per cent of businesses contacted felt that the Gaelic language was an asset to them. Based on the evidence, it was also judged that the Gaelic language contributes

¹ Innovation Observatory, Cardiff Business School, *Elwa economaidd ar Iaith a Diwylliant: Astudiaeth Hyd a Lled: Iaith – Diwylliant – Economi. Adroddiad ar gyfer Menter a Busnes* (June 2005) [Publication in Welsh only].

² *Report of the Welsh Language and Economic Development Task and Finish Group to the Minister for Economy, Science and Transport* (January 2014), p. 3.

³ Sillani (2006) after Robert Michael Lewis, MA (Cantab), MSc, PhD, *Darpariaeth Gymraeg a Dwyieithog yn y Sector Twristiaeth yng Nghymru*, MRes Dwyieithrwydd ac Amlyieithrwydd in School of Welsh and Bilingualism Studies, University of Wales Trinity Saint David (March 2016), p. 10 [<http://repository.uwtsd.ac.uk/653/1/Robert%20Lewis%20-%20Traethawd%20MRes%20-%20terfynol%20-%20%27w%20argraffu.pdf>] [Publication in Welsh only].



between £82m and £149m to the Scottish economy.⁴ A research report in the Basque Country argued that the Basque language contributes up to 4.2% of GDP.⁵

These arguments are particularly relevant in the context of many specific sectors of the economy, such as the food and drink manufacturing and marketing sector; tourism; and the creative industries.

- **The value of the Welsh language to the food and drink sector**

Significant evidence now exists regarding the value of the Welsh language for promotional, branding and marketing purposes in the food and drink manufacturing and marketing sector. The Language and Economy Group highlighted global brands such as Tŷ Nant Water and Penderyn Whiskey that have used the Welsh language as part of their competitive offering to customers across the world.⁶ These messages are echoed by the findings of the Welsh Language Commissioner's research *Value of the Welsh language to the food and drink sector in Wales*.⁷ The research, which involved interviews with food and drink companies from different parts of the country, found that using the Welsh language makes the product stand out; reinforces brand image; offers opportunities to sell in new markets; and is seen as a mark of quality.

Further research by the Commissioner into the use of Welsh in supermarkets reveals a demand for Welsh language services in supermarkets across Wales, from Welsh speakers and non-Welsh speakers alike. According to the research, more than 2 out of 3 people liked seeing the Welsh language being used by supermarkets in Wales. Over 20 per cent of respondents said that they were more likely to shop in a supermarket if it used the Welsh language.⁸

It seems that these conclusions are supported by the initial findings of a piece of research commissioned by the Welsh Government's Food and Drink Department, *The Value of Welshness when selling food and drink*. Although this research has not yet been completed, early findings suggest clear support for brands that use the Welsh

⁴ Highlands and Islands Enterprise (HIE), *Ar Stòras Gàidhlig - The economic and social value of Gaelic as an asset- Executive summary* (May 2014) [<http://www.hie.co.uk/community-support/support-for-gaelic-development/gaelic-research.html>]

⁵ Basque Government, *The Value and Economic Impact of Basque – summary of results* (2015) [http://www.euskara.euskadi.eus/contenidos/informacion/value_economic_impact_basque/en_def/adjuntos/Euskararen%20eragin%20ekonomikoa_Laburpena_English%20AZKENA%202.pdf]

⁶ *Report of the Welsh Language and Economic Development Task and Finish Group to the Minister for Economy, Science and Transport* (January 2014).

⁷ Welsh Language Commissioner, *Value of Welsh Language to the Food and Drink Sector – Research Report* (December 2014) [<http://www.comisiynyddygymraeg.cymru/English/Policy,%20research%20and%20data/socialresearch/Pages/Value-of-Welsh-Language-to-the-Food-and-Drink-Sector---2014.aspx>]

⁸ Welsh Language Commissioner, *Welsh in the shopping basket: customer attitudes to the use of Welsh by supermarkets*. [<http://www.comisiynyddygymraeg.cymru/English/Publications%20List/Archfarchnadoedd%20Saesneg.pdf>]



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language e.g. Llaeth y Llan, Brecon Carreg, Blas ar Fwyd, Henllan, Halen Môn and Blas y Tir - from consumers in Wales and across Britain.⁹

- **The value of the Welsh language to the tourism sector**

The benefits of the Welsh language are not confined to the food and drink sector alone. The Language and Economy Group also commented on the advantages of using Welsh for promotional, branding and marketing purposes in the tourism industry. More recent research also sought to explain the contribution of local languages in general, and the Welsh language specifically, to the holiday experience.¹⁰ This research concluded that approximately 4.5 times more of the general population are positive or neutral regarding the Welsh language's contribution to the holiday experience than those who are negative. The same research also examined business attitudes in the sector towards bilingual provision. The overall conclusion was that the Welsh language is considered an unique selling point which sets products apart from the competition and enriches the visitor's experience.¹¹ The Welsh Language Commissioner also collated much more qualitative evidence to support these conclusions. For example, Huw Roberts, the owner of Gwesty Cymru in Aberystwyth said:

*'In Wales we're extremely fortunate, when thinking of marketing Wales, that we have a living language used by thousands upon thousands of people and that's an attraction, not only to non Welsh speakers – certainly those outside Britain – but also to Welsh speakers who are able to visit places where they know that the language will be used naturally... **this is our USP: Wales' unique selling point is the Welsh language.** We have our landscape, we have all sorts of attractions but, at the end of the day, the language is something priceless.'*

- **The value of the Welsh language to the creative industries sector**

As in the Basque Country, the creative industries sector in Wales maximises the language as a marketing tool and economic asset. In 2014/15, the BBC spent £12.8m on creating programming for Radio Cymru and £24.5m on creating statutory output for

⁹ Welsh Government Food and Drink Department event in the Royal Welsh Show, 25 July 2017.

¹⁰ Robert Michael Lewis, MA (Cantab), MSc, PhD, *Darpariaeth Gymraeg a Dwyieithog yn y Sector Twristiaeth yng Nghymru*, MRes Dwyieithrwydd ac Amlieithrwydd in School of Welsh and Bilingualism Studies, University of Wales Trinity Saint David (March 2016), p. 86 [<http://repository.uwtsd.ac.uk/653/1/Robert%20Lewis%20-%20Traethawd%20MRes%20-%20terfynol%20-%20i%27w%20argraffu.pdf>]

¹¹ However, it must be underlined that the exact results varied depending on the linguistic background of the owners/managers and their views on the Welsh language; linguistic profile of the area; customer profile; and marketing priorities and business brand.



S4C, excluding overheads, distribution costs and so on.¹² In the same financial year, S4C invested £83m in the Welsh and UK economy and according to the most recent research commissioned by S4C, every £1 of that investment almost doubles in terms of its economic value. Therefore, it is estimated that S4C contributed around £170m to the Welsh and UK economy in 2014/15. At the same time, the success of projects such as *Y Gwyll/Hinterland* is testament to the value of the Welsh language in developing unique products of exceptional quality, that receive international acclaim and support the development of brand Wales abroad.

It is essential that strategies to 'sell Wales to the world' maximise the potential of the Welsh language as a marketing tool and economic asset, particularly in the food and drink, tourism and creative industries sectors.

Policy developments

However, we must question to what extent do policy developments in Wales realise the potential of the Welsh language as a marketing tool and economic asset?

- **Promoting the Welsh language as a marketing tool and economic asset**

In January 2014, the Welsh Government responded to the recommendations of the Language and Economy Group. Amongst other things, the Group felt 'that there should be a strategy to encourage and facilitate the use of the Welsh language as a marketing tool and to promote the benefits that bilingualism can bring to business'.¹³ It was also suggested that this message should be reinforced in Visit Wales' marketing activities. In its response, the Welsh Government agreed that '[i]n developing marketing strategies we believe that the Welsh language should not be seen as a restricting factor or burden to business, rather it should be regarded as an additional tool that provides the cutting edge over competitors, both within Wales and internationally'.¹⁴

Later that year, the *Moving Forward* policy statement was published which expressed 'the Welsh Government's commitment to creating the best environment to support the mutually beneficial growth of the Welsh language and economic development'. A commitment was made to put a series of measures in place to promote that vision, including 'invest up to £400,000 in specific projects in the fields of business support,

¹² BBC, *BBC Annual Report and Accounts 2014/15* (2015), p.139 [<http://downloads.bbc.co.uk/annualreport/pdf/2014-15/bbc-annualreport-201415.pdf>]

¹³ *Report of the Welsh Language and Economic Development Task and Finish Group to the Minister for Economy, Science and Transport* (January 2014), p. 3.

¹⁴ *Welsh Government Response to the Welsh Language and Economic Development Report* (July 2014) p. 3.



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research, marketing and governance'.¹⁵ Based on one of these projects, it was judged 'that the Welsh language needed to be interwoven and mainstreamed into programmes, events and training for businesses' and that 'a programme of training should be developed for Business Wales staff on the use of Welsh in business.'¹⁶

As well as these developments, references to the value of the Welsh language can be found in *Partnership for Growth*, the Welsh Government's Tourism strategy for 2013-2020.¹⁷ A commitment is also made to '[en]courage more businesses and destinations to deliver a distinctive sense of place to visitors that utilise the best of our culture, heritage and language'.¹⁸ The value of the Welsh language is also referenced in *Towards Sustainable Growth*, the action plan for *Food for Wales, Food from Wales 2010 - 2020: Food Strategy for Wales* for the period 2014-2020. The plan makes a commitment to 'seek to ensure that all opportunities to promote the Welsh language, through food policy generally and trade through the action plan, are explored and taken up where appropriate'.¹⁹

However, it is not always clear to what extent these commitments are being delivered or coming to fruition. One exception is evidence available regarding the benefits of an intensive marketing campaign by Business Wales to raise the awareness of Welsh speakers of the support service offered to businesses.²⁰ On the whole, there is no clear evidence of progress in other areas. For example, the progress review for the *Partnership for Growth* strategy (2016) does not refer to progress in promoting the Welsh language, apart from noting that Visit Wales have launched a Welsh language website.²¹

More systematic scrutiny is needed in general in terms of the impact of efforts to promote the use of Welsh across different sectors of the economy.

- **Support from the European Union and the impact of leaving the EU**

The Language and Economy Group noted that 'building upon the increasing use of the Welsh language for promotional, branding, and marketing reasons and to consolidate

¹⁵ Welsh Government, *A living language: a language for living – Moving forward. Policy statement* (August 2014), p. 6.

¹⁶ Welsh Government, *A living language: a language for living - Welsh Language Strategy 2012–17. Annual report 2015–16* (2016), p. 4-5.

¹⁷ Welsh Government, *Partnership for Growth: The Welsh Government Strategy for Tourism 2013 – 2020* (2013), p. 20. [<http://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf>]

¹⁸ Welsh Government, *The Welsh Government Strategy for Tourism 2013 – 2020: Framework Action Plan Years 1 – 3*, p. 17 [<http://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?skip=1&lang=en>]

¹⁹ Welsh Government, *Towards Sustainable Growth - an Action Plan for the Food and Drink Industry 2014-2020* (2014), p. 42 [<https://businesswales.gov.wales/foodanddrink/action-plan>]

²⁰ Welsh Government, *A living language: a language for living - Welsh Language Strategy 2012–17. Annual report 2015–16* (2016), p. 5.

²¹ Welsh Government, *Partnership for Growth: Strategy for Tourism 2013 - 2020 Strategy Progress Review* (November 2016), p. 11. [<http://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?skip=1&lang=en>]



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Welsh identity within the wider international community ... consideration should be given to incentivise companies through the use of appropriate European and Welsh Government funds'.²² The recommendation supported the messages contained in *The Potential of the Welsh Language to Contribute to realising the aims of the European Funding Programmes 2014–2020* published by the Welsh Language Commissioner in 2013.²³ The Government did not respond to the recommendation of the Language and Economy Group at the time.

European financial funds contribute to funding some of the main projects that offer support to Welsh businesses and promote Welsh products, such as Business Wales, Food and Drink Wales, and Visit Wales. European funding is also crucial in supporting productions in the creative industries sector, such as *Y Gwyll/Hinterland*. The decision to leave the European Union may have a significant impact on the structure and scale of the support available to these activities in Wales in the future.

It is crucial that reforms arising from leaving the EU do not lead to a decline in the level of support available to the Welsh language in activities to promote Welsh businesses and products across different sectors of the economy. Instead, a conscious effort should be made to ensure that the revised procedures enable us to strengthen the emphasis on the Welsh language in those activities.

I trust that the above representations will be useful as the Committee investigates various aspects of 'Selling Wales to the World'. I would also like to note that, by virtue of my duty to promote and facilitate the use of Welsh, I have information about the use of Welsh by organisations in the private and third sectors and their experience of using the language in their activities. I invite you to watch videos and listen to their accounts [here](#).

Yours faithfully,

Meri Huws

The Welsh Language Commissioner

²² *Report of the Welsh Language and Economic Development Task and Finish Group to the Minister for Economy, Science and Transport* (January 2014), p. 3.

²³ Welsh Language Commissioner, *The Potential of the Welsh Language to Contribute to realising the aims of the European Funding Programmes 2014–2020* (November, 2013) [<http://www.comisiynyddygymraeg.cymru/english/publications/pages/publicationdetails.aspx?publicationid=1d1472ae-a000-4a67-9a27-a5ae1d231458&publicationsearchterm=ewrop>]