



Inquiry into Tourism

May 2014

1.0 Introduction

1.1 The Wales Visitor Survey 2013 (GB Staying Visitors) shows that the natural and historic environment (the countryside and landscape canvas of Wales) is the major attraction for visitors to Wales. The top three motivations for visits to Wales were:

- To enjoy the landscape / countryside / beach (69%)
- To visit places / historical sites / specific attractions / sightseeing (58%)
- To take part in outdoor activities (35%)

The same top three motivations also attracted day visitors to Wales, though with attractions / historical sites the top motivation, followed by the landscape / countryside / beach and thirdly, outdoor activities. These findings amply demonstrate the crucial role and importance of Wales' landscapes and the cultural, historic and natural assets they contain, and the inextricable link between the quality of the natural and historic environment and the success of tourism in Wales. In fact the quality of the natural environment was one of the top two reasons for visitor satisfaction with their trip to Wales according to this survey. This has obvious implications for its importance to the Welsh economy.

2 Making the most of Wales' cultural, historical and natural assets

2.1 Visit Wales' marketing strongly features the cultural, historical and natural assets of Wales. In addition to these core attributes, we welcome the promotion of wildlife tourism by Visit Wales to complement their traditional focus on seaside holidays, historical sites and city-based attractions. Tourism which is based on the environmental qualities of Wales, including the diversity of its landscape and wildlife, when undertaken in a responsible and sustainable manner is a significant and powerful stimulus to the tourism industry, bringing economic benefits for rural and coastal areas that are distant from the main economic centres of North and South Wales.

2.2 Specific examples of local economic benefits from wildlife tourism include:

- A RSPB study of the impact of a number of their reserves on local employment found that South Stack Nature Reserve on Anglesey attracted tourist spend of around £570,000 to the local area, supporting 12.9 FTE jobs in 2009. South Stack is a popular tourist destination, especially in spring and summer when more than 7,000 seabirds breed on the cliffs of the reserve, and the report found that 6.4 FTE jobs were specifically related to seabird tourism

(a figure that is likely to have increased following development of new visitor facilities at the reserve after 2009).¹

- Visitor numbers to Nant y Arian before kite feeding (1999) were approximately 30,000 per year. Visitor numbers after 5 years of feeding project (2004) were approximately 110,000 per year (this was before the opening of the new centre and bike trails).
- Dyfi Osprey project attracts 40,000 visitors per year, bring up to £500,000 to the local economy per year and generates over 1.7m unique visits from 50 countries to their live streaming of nesting ospreys.
- A project commissioned by Welsh Government's Sustainable Development Fund and Port of Milford Haven found that the 3rd highest value activity within the St David's area, after beach activities and walking, was wildlife boat trips, valued at £9.7m per annum of expenditure and £4.6m respectively per annum of GVA (200,000 activity days).²

- 2.3 An interesting study by Land Use Consultants (2004) identified, analysed and mapped existing data on recreational activities, and reviewed existing promotional material and guidance on recreational activities in relation to their compatibility with Marine Protected Areas. The audit identified "hotspots" of activities clearly overlap with nature conservation and landscape designations, highlighting the draw of these areas for tourist activities.
- 2.4 The importance of Wales's finest landscapes, the three Welsh National Parks and five AONBs, for tourism is indisputable. Recently published research found that the economies of the three National Parks account for £557m of Gross Value Added (GVA), representing 1.2% of the Welsh economy. Also, public spending on Wales' National Parks costs less than £5 per person per year, representing excellent economic value.³ In Wales 28 million walking related trips are made each year resulting in a £632 million direct spend by walkers.⁴ This accounts for 16% of the total tourism in Wales before accounting for the success of the Welsh Coast Path, which in itself attracted an estimated 2.82 million visitors between September 2012 and September 2013, resulting in an estimated contribution of £32 million to the Welsh economy.⁵ The combination of a diversity of high quality and beautiful landscapes, seascapes, historical attractions and opportunities for wildlife spotting around the Welsh coast are what makes the Wales Coastal Path so attractive to visitors.
- 2.5 Wales' natural assets also attract activities which rely directly on the environment, such as angling. Recreational angling visits to Wales's coasts and inland waterways contribute £150m to the Welsh economy⁶. Around 60,000 licences are bought in Wales each year generating approximately £1.25 million⁷ which represents the main source of income for fisheries projects.
- 2.6 Wales' cultural and historic assets are an important draw for visitors to Wales. Visit Britain markets Wales as the best place to see impressive castles (in 2009/10 Carnaervon castle alone took nearly £900,000 from admission fees and retail sales), but the heritage offering of Wales is far more diverse than this, and there is perhaps some work to do to present a wider and more inclusive interpretation of Welsh heritage in marketing materials outside Wales. For example, the Blaenavon World Heritage Site has increased visitor numbers to the area by 100% in five years, and the economic impact of the Big Pit museum alone is £4.93 million in terms of visitor spend, which supports 140 FTE jobs and contributes around £3.25 million in respect of GVA.⁸
- 2.7 The Programme for Government's aims and indicators of success in relation to tourism are rather narrowly focused on the historic built environment and measurements of visits to Cadw

¹ Natural Foundations – Conservation and Local Employment in the UK. RSPB 2011.

http://www.rspb.org.uk/Images/naturalfoundations_tcm9-291148.pdf

² Marine Planning Consultants Limited (2013), *Wales Activity Mapping: Economic Valuation of Marine Recreation Activity*

³ http://npw.nationalparks.gov.uk/__data/assets/pdf_file/0009/389727/Valuing-Wales-National-Parks-.pdf

⁴ Welsh Economy Research Unit, Cardiff University (2011) *The Economic Impact of Walking and Hill Walking in Wales*.

⁵ NRW (2013) *The Economic Impact of Wales Coast Path Visitor Spending on Wales*

⁶ http://naturalresourceswales.gov.uk/apply-buy-report/apply-buy-grid/fishing/?lang=en#.U2txt_IdUX9

⁷ http://www.fishing.visitwales.com/en/content/cms/news/rod_licences/

⁸ http://cadw.wales.gov.uk/docs/cadw/publications/ValuingWelshHistoricEnvironment_EN.pdf

sites. It does not appear to utilise wider economic data on tourism relating to the landscape, cultural, historic and natural assets of Wales, for example relating to outdoor activity tourism such as walking, cycling, climbing and water sports, or consideration of the income from visits to National Parks, AONBs and wildlife sites. Without a holistic understanding and recognition of the total direct and indirect income generated by all aspects of the natural and historic environment of Wales, it is difficult to know if Wales is making the most of all of its cultural, historic and natural assets, and ensuring that they are adequately resourced, protected and enhanced so that they continue to be attractive for visitors and continue to provide enjoyment and inspiration for the people of Wales.

3 Maximising the value of the tourism market

- 3.1 WEL believes that maximising the value of the tourist market is not just about effective marketing, but about carefully managing and enhancing the cultural, historic and natural assets of Wales, upon which tourism ultimately depends, so that they continue to attract visitors into the future. This requires positive leadership, careful planning and action to ensure an integrated approach, so that tourism is developed in a responsible, positive and sensitive manner and does not damage or degrade the assets it relies upon. It also requires the impact of wider economic activity upon these assets to be carefully managed. This approach is consistent with the Welsh Government's duty to promote Sustainable Development.
- 3.2 With regard to maritime and coastal tourism, an integrated approach to the use of the marine area will help to avoid conflicts over space. The current development of the Wales National Marine Plan (WNMP), due to be completed by the end of 2015, provides an opportunity for Welsh Government to identify the best areas in Wales to strategically expand coastal and marine-related tourism. The WNMP, if fit for purpose, will contribute towards the sustainable and holistic development of tourism-related activities in Welsh waters by creating a framework for consistent decision making using best available evidence. A marine plan that takes all marine activities into account, identifying the link between coastal and maritime activities, and which is developed using the ecosystem approach, should allow greater certainty for Welsh Government and the tourism industry on where to deliver sustainable growth of this sector.
- 3.3 The tourist infrastructure inland should be developed using an integrated approach. The 'area-based approach' proposed by Welsh Government as part of the Environment (Wales) Bill could be a valuable tool in achieving this ambition provided it follows the principles of an ecosystem approach. Just as the protection and regeneration of our historic buildings and scheduled monuments are crucial to the Welsh tourism industry, so is the protection of Welsh wildlife, protected landscapes and the wider countryside. As the economic benefits of the Wales Coastal Path have demonstrated, access to the natural and historic environment is also an important consideration. No matter how effective the marketing campaign, tourists will not continue to visit Wales if its natural and historic assets are degraded or inaccessible. As such, Visit Wales should be provided with a funding pot which can be used to protect and enhance the cultural, historic and natural assets which the tourist sector relies on.
- 3.4 Within the UK, Scotland is currently the top wildlife tourism destination, with a relatively well-developed and organised wildlife tourism industry attracting more overnight and long break visitors and a higher proportion of international visitors. Scotland's wildlife tour operators are highly organised, presenting a fairly cohesive face in the form of the Wild Scotland⁹ website. There does not appear to be an equivalent website for companies operating in Wales. Another example is the Beaver Tourism Toolkit developed by the Heart of Argyll Tourism Alliance and Scottish Beaver Trial which has been developed for tourism operators (hotels, businesses, rangers etc).¹⁰ Wildlife Trusts Wales and NRW are looking to reintroduce beavers to Wales. Among the many potential benefits of a beaver reintroduction, they are an attraction for wildlife tourism. According to a study carried out by Wildlife Conservation Research Unit (University of Oxford), a beaver release would bring between £¾ million and £2 million to the local economy. WEL believes that there is scope for a significant increase in Welsh wildlife tourism, and that

⁹ <http://www.wild-scotland.org.uk/>

¹⁰ <http://www.scottishbeavers.org.uk/about-the-trial/beaver-tourism-toolkit/>

this would have benefits for both the economy and environment of Wales if done in an environmentally sensitive and sustainable manner.

- 3.5 The proposals in the recent consultation, *Positive Planning*, suggest that the Planning Reform Bill may be used to strip Welsh National Park Authorities of their planning powers. WEL believes that such a decision would be highly detrimental to the special nature of these areas, which would in turn be detrimental to tourism. By using their planning responsibilities to ensure successful delivery of the statutory purposes of National Parks, NPAs have delivered significant benefits to Wales, a conclusion which is reinforced by the Williams Commission review into the delivery of public services in Wales. The local economy in Wales's National Parks relies heavily on tourism and many visitors are specifically attracted to these areas because of their unspoilt qualities and the natural beauty of the landscape. The high quality environment in these areas also contributes to a wide range of other objectives by acting as a source of health, well-being and spiritual inspiration. The way in which the NPAs have taken account of their statutory purposes in exercising their planning responsibilities has ensured that these protected landscapes have not been compromised by insensitive exploitation and change, unsympathetic land use or irresponsible development.

4 Recommendations

- 4.1 If the Welsh tourist market is to expand and develop, investment is needed on several fronts:
- Development of new or under-developed sectors, such as nature-based and wildlife tourism, which requires investment in the whole tourist experience to agreed quality standards, including visitor facilities, staff, communications and marketing, and accessibility, including sustainable transport access. Such development is crucial to the economic sustainability of new projects and attractions. The European Charter for Sustainable Tourism provides an excellent example of the approach which should be promoted¹¹ not just in Protected Landscapes but in general across Wales.
 - Enhanced investment in established tourism sectors, such as historic sites and attractions, outdoor sports and recreation, National Parks, AONBs and other protected landscapes and seascapes, recognising that this will bring multiple added value outcomes for the environment, the economy and social wellbeing of Welsh people.
 - Investment in the environment of Wales, providing major and much needed direct and indirect job creation opportunities for the leisure services and land management employment sectors.
 - Investment in the protection and enhancement of the underlying natural and historic environment of Wales to ensure that the cultural, historic and natural assets that both residents of Wales, UK and International tourists value so much are sustained into the future as a central component of the Welsh Government's intergenerational sustainability commitment.

Wales Environment Link (WEL) is a network of environmental, countryside and heritage Non-Governmental Organisations in Wales, most of whom have an all-Wales remit. WEL is officially designated the intermediary body between the government and the environmental NGO sector in Wales. Its vision is to increase the effectiveness of the environmental sector in its ability to protect and improve the environment through facilitating and articulating the voice of the sector.

The following WEL members support this document:

¹¹ <http://www.europarc.org/what-we-do/european-charter-for>

Amphibian and Reptile Conservation
British Mountaineering Council
Campaign for National Parks
Campaign for the Protection of Rural Wales
Marine Conservation Society
Plantlife Cymru
Ramblers Cymru
RSPB Cymru
Salmon & Trout Association

Wildlife Trusts Wales
WWF Cymru
Wye and Usk Foundation
YHA
Ymddiriedolaeth Genedlaethol /
National Trust

Wales Environment Link unites voluntary bodies whose primary aims include the conservation, protection or quiet enjoyment of landscape, wildlife or amenity in Wales
Mae Cyswilt Amgylchedd Cymru yn uno cyrff gwirfoddol sydd â'u hamcanion pennaf yn cynnwys cadwraeth, gwarchodaeth neu fwynhad tawel o dirlun, bywyd gwylt ac amwynder yng Nghymru

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