

## EVIDENCE FROM WILDLIFE TRUST WALES – ENTERPRISE AND BUSINESS COMMITTEE

### VALUE OF THE WELSH WILDLIFE ECONOMY AND TOURISM

1. *‘Wales’ nature, land, water and air are our ultimate resource* – the basis on which everything else is possible<sup>1</sup>. With a substantial part of Wales is protected by some form of landscape or conservation designation – the high quality of the countryside and coast is one of Wales’ major assets.
2. Some forms of tourism are particularly dependent on the environment, including sea, game and coarse fishing, those attracted by the wildlife opportunities, and those coming to enjoy walking, cycling, touring, sightseeing, photography, history and culture. The importance of the natural environment to visitors in their choice of location was collected in the Wales Visitor Survey 2013 (GB Staying Visitors) which showed that the natural environment is the major attraction for visitors to Wales. The main reasons for visits to Wales were:
  - a) To enjoy the landscape / countryside / beach (69%)
  - b) To visit places / historical sites / specific attractions / sightseeing (58%)
  - c) To take part in outdoor activities (35%)
3. **The value of this tourism to Wales is £6.2billion (2010 report for 2009 year)<sup>2</sup> with an estimated 206,000 jobs across Wales supported by tourism worth nearly 15% of total employment, which will grow by 30,000 by 2025<sup>3</sup>. Adrian Greason-Walker, Chief Executive of the Wales Tourism Alliance, said : “In terms of jobs and community cohesion the importance of this income, particularly to rural areas of Wales cannot be underestimated”. As the report<sup>4</sup> {VisitBritain / Deloitte} states: ‘tourism’s impact is amplified through the economy, so benefits are much wider than just the direct spending of tourists’. **Therefore, the quality of the environment is fundamental to jobs and the economy in Wales.****

### MAKING THE MOST OF WALES’ CULTURAL, HISTORICAL AND NATURAL ASSETS – UNTAPPED MARKET

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<sup>1</sup> Sustaining a Living Wales, Welsh Government (2012)

<http://wales.gov.uk/consultations/environmentandcountryside/sustainingwales/?lang=en>

<sup>2</sup> Visit Wales (2010) The Economic Contribution of the Visitor Economy: UK and the Nations. Deloitte and Oxford Economics, June 2010

<sup>3</sup> Report into the contribution of tourism to jobs and growth by Deloitte commissioned by VisitBritain

<sup>4</sup> See note 3

4. Spectacular species attract attention from the popular media (e.g. Springwatch), which in turn stimulates the public to visit sites and watch them in new ways. The enduring popularity of spectacular species is reflected in visitor interest and enjoyment by millions of people; and can be manifested as substantial local economic activity<sup>5</sup>. Some specific wildlife tourism examples in/for Wales include;
- i. Visitor numbers to Nant Yr Arian before **red 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) (NRW pers comm).
  - ii. The Wildlife Trusts **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.
  - iii. The Wildlife Trusts and NRW are looking **reintroduce beavers to Wales**. Among the many potential benefits of a beaver reintroduction was as an attraction for wildlife tourism. According to a study by University of Oxford, **a beaver release would bring up to £2 million to the local economy**.
  - iv. A project commissioned by Welsh Government's Sustainable Development Fund and Port of Milford Haven found that **wildlife boat trips were valued at £9.7m per annum** of expenditure and £4.6m respectively per annum of GVA (200,000 activity days), a significant income both for the local and the national economy.<sup>6</sup>
  - v. **Tourism brings around £330,000 per year to the Pembrokeshire seabird islands of Skomer and Skokholm** (estimate based on landing visitors only and not including any other marine tourism operators or ancillary spend on the mainland). The islands international reputation is a major influence on some of the tourists' decision to come to Wales. This means that their economic footprint is much larger than the direct spend associated with their stay.
  - vi. **The Wales Coast Path, attracted an estimated 2.82 million visitors in its first year resulting in an estimated contribution of £32 million to the Welsh economy.**<sup>7</sup> The combination of beautiful landscapes, seascapes and opportunities for wildlife spotting around the Welsh coast are what makes the Wales Coastal Path so attractive to visitors.
5. Wildlife tourism has the potential to attract more visitors in the 'shoulder' months either side of the peak season. The wildlife sector in Wales also represents an inexpensive trip which in some cases can exceed visitor expectations – with many nature reserves and visitor centres offering free entry, refreshments, interpretation and toilet facilities but there is still further room for improvement to capitalise on this potential growth especially in more remote areas with little other economic opportunities e.g. Pumlumon.

<sup>5</sup> I.Dickie, J.Hughes and A.Esteban (2006) **Watched Like Never Before... the local economic benefits of spectacular bird species** - RSPB

<sup>6</sup> Marine Planning Consultants Limited (2013), *Wales Activity Mapping: Economic Valuation of Marine Recreation Activity*

<sup>7</sup> NRW (2013) *The Economic Impact of Wales Coast Path Visitor Spending on Wales*

6. The VisitBritain /Deloitte report found the tourism sector would grow by 48.5% in real terms in that period, faster than manufacturing, construction and retail. But this growth was considerably smaller in Wales. **So is their potential to grow untapped markets?**

### CASE STUDY – SCOTLAND

7. In the UK wildlife tourism is a thriving and significant industry<sup>891011</sup>. Scotland has arguably the most developed wildlife tourism industry within Europe. A 2010 Review of Wildlife Tourism in Scotland<sup>12</sup> stated the **net economic impact of wildlife tourism is £65 million, with 2,763 FTE jobs in existence because of wildlife tourism**. In total, 1.12 million trips are made each year to or within Scotland for the primary purpose of viewing wildlife. 56% of these trips are made by domestic (UK) tourists. £276 million is spent on these trips, with 75% spent by domestic tourists. In the West of Scotland, the gross tourist income from **whale watching alone has been estimated at £7.8 million per annum<sup>13</sup>** (2003). **The reintroduction of white-tailed sea eagles to the west coast of Scotland brought an extra 1.4–1.6 million visitors per year.**
8. Findings on the 2010 Scotland report also show that wildlife tourism has been growing in recent years and that industry opinion is that it will continue to grow in the future. Developments such as the media coverage of wildlife in popular television programmes, increasing environmental awareness and a move away from long-haul destinations is thought to have helped the wildlife tourism sector weather the effects of the recession, but also show its potential for future growth. In Scotland, it was also seen that the profile raising by Wild Scotland<sup>14</sup> was a tremendous benefit to the wildlife sector.

### Wales and Scotland Comparisons

9. Scotland has most of the same species and habitats that Wales for example, both have
  - **Habitats** – Amazing coastline, mountains, lochs and llynau' (lakes), wildflower meadows and wildflower rich, ancient woodlands (temperate rainforests)
  - **Species** – Amazing wildlife rich islands with sea birds (such as gannets, puffins, sandwich terns, razorbills and guillemots), birds of prey (such as red kites, ospreys, peregrines, hen harriers), black and red grouse, and amazing marine and terrestrial mammals (dolphins, whales, seals, otters, water voles, hares, red squirrels)

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<sup>8</sup> A&M, Review of Wildlife Tourism in Scotland: Main Report. 2002, The Tourism and Development Forum.

<sup>9</sup> Martinolli, M., Bereziat, C. and M. Graham, Visits to tourist attractions 2006. Report for Wales Tourist Board. 2007

<sup>10</sup> Dickie, I., J. Hughes, and A. Esteban, Watched like never before; the local economic benefits of spectacular bird species. 2006, RSPB: Sandy

<sup>11</sup> Rayment, M., Spending by Visitors to RSPB Reserves: Results from the Reserves Visitor Survey 1998. 1999, RSPB, Sandy

<sup>12</sup> Scottish Government (2010) The Economic Impact Of Wildlife Tourism In Scotland - Scottish Government Social Research & International Centre for Tourism and Hospitality Research Bournemouth University (obtained at <http://www.scotland.gov.uk/Resource/Doc/311951/0098489.pdf>)

<sup>13</sup> Parsons, E.C.M., et al., The value of conserving whales: the impacts of whale-watching on the economy of rural West Scotland. Aquatic Conservation, 2003. 13: p. 397-415

<sup>14</sup> <http://www.wild-scotland.org.uk/>

## UNTAPPED MARKET

10. We believe that there is considerable potential for growth by investing in, and capitalising on, the high quality natural environment of Wales in order to expand tourism visitors and spending. We believe Wales offers an amazing visitor experience with charismatic and flagship species and can be recognised as a place that offers memorable wildlife experiences. It can be seen as a place that offers additional visitor experiences (unique landscape, history, culture) that augment the wildlife product within an environment that is safe and friendly. It can offer authentic experiences of unspoiled, uncommercialised opportunities to view wildlife.
11. **However, wildlife tourism is still a relatively untapped market in Wales** – primarily because people are unaware of what wildlife wonders Wales has to offer. There is a significant opportunity to further increase the profile of wildlife tourism in Wales as a ‘pull’ to encourage more people to choose Wales as a holiday destination and/or to enrich their visitor experience whilst they are here.
12. Welsh wildlife attractions are more accessible to the large markets within England, Ireland and Europe than Scotland. Wales has a diversity and quantity of species and attractions in close proximity to each other so multiple sites can be visited easily. For example, Skomer Island, Ramsey Island, Welsh Wildlife Centre and New Quay dolphins are located within 90 miles of each other.
13. Therefore, with increased promotion, marketing and support for wildlife tourism providers and investment into the raw material – wildlife – this market could expand significantly rapidly. **But Wales is only beginning to be branded as a wildlife destination.** The Wildlife Trust is working with Visit Wales on developing this market for example we are working on an interactive, web based, innovative and interactive brochure – we believe this is a unique tourism produce.

## **MAXIMISING THE VALUE OF THE TOURISM MARKET**

14. Maximising the value of the tourist market is not just about effective marketing, but about carefully managing and enhancing the natural assets of Wales, so that they continue to attract visitors into the future. **Popular visitor areas such as national parks and nature reserves are in danger of being "loved to death" with product deterioration and a subsequent decline in visitor numbers. This problem is compounded by the fact that little of the money brought in by tourism goes back into conserving the marine or countryside environments.**
15. **Promotion of wildlife tourism should go with careful management to protect the very assets that people come to enjoy**<sup>15</sup>. Organisations such as the RSPB, NRW, National Trust and the Wildlife Trusts have adopted an approach of sharing the spectacle of wildlife, much at their own cost, with as many people as possible.

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<sup>15</sup> Valuing Our Environment: The Economic Impact of the Environment of Wales Technical Summary

They also ensure that the wildlife and habitats are not disturbed through dedicated management, again at their own cost.

**16. The economic benefits must be sustained by investing and reinvesting finance into increased conservation effort to enhance the natural resources that support the industry.** As well as direct benefit to the natural resource that supports green tourism, this helps make Wales appear a more welcoming place that values its natural assets and welcomes visitors to share in our passion for them. There needs to be funding and support for wildlife operators such as the Wildlife Trusts. Not just by NRW but across Ministerial portfolios such as Economy, Finance, Education and Skills, Tackling Poverty etc. This approach is consistent with the Welsh Government's duty to promote Sustainable Development.

17. This was highlighted in a number of reports

- Sustainable Tourism Framework (2007) mid-term review highlighted the importance of the environment to tourism, stating '*The high quality of the natural and built environment in Wales and its distinctive character are of vital importance to the tourism industry. For tourism to prosper in the future it is essential that those unique assets, which visitors come to enjoy are safeguarded and, if possible, enhanced.*'
- Achieving our Potential (2000) strategic objectives including '*To embrace a sustainable approach to tourism development which benefits society, involves local communities and enhances Wales' unique environmental and cultural assets*'. It also identifies Wales' natural landscape and one of the country's strongest tourism assets and highlights the need to safeguard this asset not only for the benefit of tourism but for the good of the nation.
- Natural England has also reviewed the **microeconomic evidence for the benefits of investment in the environment**<sup>16</sup>. This compiles evidence to link 'green infrastructure' with economic growth and regeneration including tourism and recreation. It also indicates that potential benefits and values are often insufficiently recognised and built into public and private decisions.
- **United Nations Environment Programme (2009)** shows investment in avoiding the loss of ecosystems and biodiversity enhancements supports tourism in a wide array of case studies worldwide<sup>17</sup>.

18. Investment will also raise the environmental awareness of the local community, leading to increasing numbers of conservation volunteers. This in turn leads to more social and economic benefits with local people engaged with their environment, improving their health and developing skills for employment.

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<sup>16</sup> Sunderland, T. 2012. Microeconomic Evidence for the Benefits of Investment in the Environment -review. Natural England Research Reports, Number 033.

<sup>17</sup> United Nations Environment Programme (2009) Tourism investing in energy and resource efficiency [http://www.unep.org/resourceefficiency/Portals/24147/scp/business/tourism/greeneconomy\\_tourism.pdf](http://www.unep.org/resourceefficiency/Portals/24147/scp/business/tourism/greeneconomy_tourism.pdf) page 428 onwards

**19. We believe that Wales could compete against Scotland as a wildlife tourism hotspot with investment in the environment which in turn will yield significant economic benefits.**

20. However, the only link to the environmental tourism funding has been through the 'Environment For Growth' theme (ERDF Convergence Priority 4 / Theme 3), which is focused on managing the natural environment to achieve sustainable tourism. Despite recognising the importance of the environment as a stimulus for growth and jobs and seeking to integrate environmental sustainability across the programmes and projects to deliver environmental benefits, the ERDF operational programmes in Wales have failed to provide any funding opportunities for biodiversity protection or enhancement<sup>18</sup>. However, other EU Member States recognised that EU funding is a key driver in delivering biodiversity benefits and grasped the opportunity to invest in their natural capital as a source of economic development through the ERDF. Particularly significant budgets for nature conservation interventions are provided through the convergence operational programmes for the Czech Republic, Murcia and Greece, where upwards of 12.2% of the total convergence budget has been allocated for delivering environmental outcomes.

## Recommendations

1. **Product Development** – investing in organisations such as Wildlife Trusts to develop visitor attractions e.g. nature reserve for tourists, visitor centres, fencing, boardwalks, interactive interpretation, wet weather facilities promotion. Better signage of attractions and better public transport infrastructure in reserves would be useful.
2. **Management** – Ensure that the high environmental quality of tourist destinations is maintained and adverse impacts on the landscape and on fragile environments is avoided. This requires investment into key sites.
3. Opportunities towards a form of Payment for Ecosystem Services should be looked at – called **Visitor Payback Scheme** (VPS) which have been trialled successful elsewhere in the UK<sup>19</sup> (Lake District has raised £1.5m since 1993) and further afield. VPS encourage tourists to make a voluntary contribution towards local environmental improvements money via their bill or fees.
4. A review of **wildlife tourism infrastructure** by Visit Wales would highlight specific cases and ways in which improvements can be implemented. It should also review infrastructure provided by private businesses, such as hides and visitor centres, and determine how, within funding arrangements, to ensure a common minimum quality of visitor experiences.
5. Visit Wales could take a **stock take** of public sector and collaborative private sector activities in wildlife tourism, followed by a strategic plan, with other

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<sup>18</sup> Environment Agency Wales / SURF Nature (2012)- New Opportunities for Investing in the Natural Environment

<sup>19</sup> <http://www.nurturelakeland.org/what-do-we-do/visitorpayback.html>

marketing, funding and support determined by the requirements of that plan.

6. Increased **promotion and marketing** of Wales as a top wildlife tourism destination perhaps including marketing Wales Big Six/Eight/Ten wildlife, mammals or birds – Osprey, Puffin, Red Squirrel, Red Kite, Dolphin, Seal, Beaver, Otter, Bearded Tit, Avocet, Dragonflies, Pied Flycatcher, Gannet, Manx Shearwater and Black Grouse.
7. Develop marketing towards Welsh residents – making Welsh residents more aware of the wildlife possibilities available close to home – inducing people away from long-haul travel.
8. Co-ordination of, and support for, wildlife tourism operators e.g. bus tours, development of a website similar to <http://www.wild-scotland.org.uk/>
9. Greater support and advertisement for **beaver reintroduction** in Wales
10. Visit Wales needs to increase its internal expertise by recruiting and/or seeking advice from wildlife experts.
11. Increase participation at annual trade fair for the wildlife industry i.e. the British Birdwatching Fair.
12. Avoid damaging developments and activities in areas with high potential for wildlife/ environmental tourism e.g. M4 through the Gwent Levels.
13. Visit Wales could consider whether the growing markets in wildlife tourism, such as the post-Springwatchers and ‘activity plus wildlife’ tourists, could be markets where they can get a greater return on marketing spend than some other markets that they currently give greater attention to.
14. The Programme for Government’s aims and indicators of success in relation to tourism should use wider economic data on tourism relating to the natural assets of Wales, for example consideration of the income from visits to wildlife sites and other natural areas such as National Parks and Tourism