



## Rural Tourism Inquiry

September 2010

**Wales Environment Link (WEL)** is a network of environmental and countryside 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.

Wales Environment Link values the opportunity to take part in this important consultation.

### 1. Introduction

The United Kingdom Tourism Survey defines rural tourism as visitors staying in the countryside and villages, small towns, and at the seaside. WEL recommends that, in Wales, the 9 predominantly rural counties of Denbighshire, Conwy, Gwynedd, Ynys Mon, Powys, Ceredigion, Pembrokeshire, Carmarthenshire and Monmouthshire should be used as a barometer for rural tourism. 65.7% of UK and international overnight trips were visits to these 9 rural counties,<sup>1</sup> accounting for 62% of rural tourism spend. We do, however, recognise that there is a difficulty in excluding tourism statistics for certain larger towns in these counties, such as Llandudno and Tenby.

WEL believes there is a need to spread the benefits of rural tourism more widely across the country by strengthening the pulling power of the most under-utilised areas, such as the Cambrian Mountains. Ways of doing this need to be explored, but should not exclude the possibility of, for instance, AONB designation.

Tourism is a major economic driver for Wales, and its high quality natural and cultural environment is a major draw for rural tourism: two thirds or more of those who visited Wales in 2009 rated the beautiful unspoilt coastline, countryside and scenery as something particularly Welsh<sup>2</sup>. The Valuing our Environment partnership has illustrated the incredible value of Wales' special places to the tourist economy:

- The quality environment of the three Welsh National Parks supports nearly 12,000 jobs, producing total incomes of £177 million and generates £205 million GDP<sup>3</sup>.
- The richness and diversity of the coastal and marine environment of Wales supports 92,600 jobs and generates £2.5 billion GDP. Tourism accounts for over a

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<sup>1</sup> Based on three year rolling averages 2007-09

<sup>2</sup> Visit Wales Visitor Survey 2009

<sup>3</sup> Valuing our Environment: Economic Impact of the National Parks of Wales 2006

third of these jobs in west Wales and accounts for over half of coast and marine sector jobs in South East Wales.<sup>4</sup>

The total value of tourism to the UK is set to rise by more than 60% to £188 billion<sup>5</sup> over the next decade, and tourism has been promoted by Prime Minister David Cameron as one of the major sectors which will contribute to the recovery of the UK economy<sup>6</sup>. Figures estimated with reference to the Tourism Satellite Account for Wales 2007 show that tourists spent an estimated £4.2bn in Wales in 2007, leading to an estimated £1.7bn in additional Welsh gross value added (GVA). Figures also show an increase in the estimate of tourism-dependent employment, from 59,000 jobs in 2000 to 78,000 jobs in 2007.

This economic value places a strong imperative on the conservation of Wales' natural and historic environment. It also presents great opportunities for the rural economy. Management of the countryside contributes to the tourist economy - the challenge is to identify ways for farmers and land managers to reap some of the financial rewards they generate through caring for the countryside.

As well as being a hugely important economic driver, WEL believes tourism has much to offer wider social and environmental objectives. This includes providing opportunities for education and lifelong learning (by visiting or volunteering at a nature reserve or historic property, for example), underpinning the viability of a large range of often small rural businesses and providing attractive places where businesses and communities can thrive. WEL feels strongly that, despite being under pressure to reduce public spending, the Government should continue to invest in activities which enhance both the Welsh environment and tourism.

## **2. How the Welsh Government can provide improved support for rural tourism**

WEL believes that a quality tourist experience depends upon access to beautiful coast and countryside, which is home to a diversity of wildlife, has well-maintained footpaths, local foods and crafts, historic towns and villages, a lively cultural life or even just a sense of tranquillity, together with good customer service. The value of the natural and historic environment, local and regional character and access to the "real thing" needs to be recognised by the tourism sector as a vital resource that needs to be well managed and cared for. It will be important for the Welsh Government to identify synergies between other funding programmes which could deliver growth in rural tourism, for example Glastir, which has benefits for biodiversity, access landscape and heritage, all of which are crucial aspects that draw visitors to Wales.

WEL would like to see growth in the domestic market prioritised over in-bound tourism. Whilst visitors from overseas represent a significant element of the sector, the domestic market is by far the largest. There is a need to reduce the tourism deficit, which has grown dramatically in the last 10 years, with UK holiday-makers now spending £20 billion more abroad than visitors to the UK are spending here. Moreover, the benefits and burdens of domestic tourism are also more widely spread over the UK, given the focus of international tourists on relatively few locations. Domestic tourism also has the scope and potential to expand more significantly and sustainably. Providing better opportunities to holiday at home, meeting the growing desire for short breaks and extending the tourist season would bring welcome economic and other benefits to rural communities. In addition it would reduce the risks involved with volatility in international tourism and reduce the pressure for further significant expansion of an

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<sup>4</sup> Valuing our Environment: Economic Impact of the Coastal and Marine environment of Wales 2006

<sup>5</sup> In "real terms" (after taking account of inflation at an estimated 2.1% a year) the growth would be 35%. Visit Britain press release.

[http://www.visitbritain.org/mediaroom/pressreleases/deloittetourism.aspx?dm\\_i=FO5,7YMD,20G1JG,K9GE,1](http://www.visitbritain.org/mediaroom/pressreleases/deloittetourism.aspx?dm_i=FO5,7YMD,20G1JG,K9GE,1)

<sup>6</sup> <http://www.number10.gov.uk/news/speeches-and-transcripts/2010/08/pms-speech-on-tourism-54479>

environmentally damaging aviation sector. Wales' commitments to sustainable development should be integral to the Government's support for the tourist industry.

WEL believes there is potential for more effective Government support for rural tourism. It is important to ensure that local authorities are incentivised to invest in tourism development and that performance measures at the local, regional and national levels are co-ordinated in order to provide the maximum return on investment. A key role for Government is to fill gaps in marketing Wales as a tourist destination. We expect Visit Wales' Digital Marketing strategy to aid this given visitors' heavy reliance on web-based information.

It seems that the closure of the Wales Tourist Board may have had negative repercussions for rural tourism, at least in the short term, as responsibility for tourism moved from a focused, single issue body into a large multi-purpose one. Loss of European Funding for Visit Wales' marketing activities has also affected Wales' competitive position. WEL is hopeful that some of this can be addressed by funds arising from the Economic Renewal programme.

### **3. Strategies affecting rural tourism**

WEL believes that tourism policies, plans and strategies, whether local, regional or national, should:

- support, protect and enhance the environmental assets - natural and cultural - on which tourism depends
- promote and support local characteristics and distinctiveness, ensuring visitors have access to the "real thing" - a quality, authentic and inspiring experience
- support local economies and work with local communities
- improve education, training and skills within the sector
- promote opportunities for lifelong learning and access for all
- promote the improvement of public transport and support car-free tourism opportunities, including requirements for Visitor Travel Plans for new tourism developments and their introduction for existing sites
- recognise the wider importance and significance of tourism and the need to integrate tourism into wider planning and policy making
- have sustainable tourism - integrating social, economic and environmental aims – as the primary objective
- be accompanied by a Government target to reduce the current tourism deficit and an assessment of the different ways that this can be achieved
- place greater emphasis on the domestic market, especially in marketing and promotion

WEL would like policies and strategies affecting rural tourism to address the issue of sustainable transport to tourist locations. More than seven out of ten tourism day trips and nearly eight out of ten holiday visits are made by car. In some of the most popular, but also environmentally sensitive areas, such as National Parks, this rises to more than nine out of ten visits. This is problematic for the 25% of Welsh households without access to a car. Current trends and predicted forecasts for leisure travel are a problem, with the following environmental, business and social costs:

- visitor dissatisfaction – congestion and the struggle to park can tarnish the visitor experience and deter other visitors if they perceive that coming to an area will be difficult and less enjoyable
- visual blight – overspill car parking or lines of traffic can spoil the setting of a fine country house, area of wild coastline or mountain
- noise pollution – motor vehicles disturb the peace and tranquillity of the countryside much valued by visitors

- air pollution – traffic growth is the single largest contribution to greenhouse gas emissions which are projected to increase by as much as 23% by 2020, which can also damage sensitive habitats

The need to tackle the causes of climate change is a strong enough motivation to reduce car based visits to rural Wales, but in relation to tourism there are further good reasons to break the link between car traffic and rural tourism. The demands placed on rural roads in popular tourist spots continues to grow, taxing their capacity to both hold and manage a large number of vehicles. A high volume of car traffic on rural roads also discourages other users such as cyclists, walkers and horse-riders, all of whom are significant contributors to the local economy. Walking is by far the most popular activity that visitors to Wales participate in.<sup>7</sup> By sustaining car-based trips and carrying on as normal we risk undermining the assets that attract visitors in the first place, therefore reducing the economic value of tourism.

Within the next 20-30 years it seems likely that car use will cost substantially more in real terms<sup>8</sup>. If the cost of driving does increase, car use will decrease or at least we will see a slower rate of growth. Leisure trips will be disproportionately affected: according to the Department for Transport's National Transport Model the current elasticity is -0.9 for day trips and holiday travel, compared to a figure for all trips of -0.3. This means that for every 10% rise in the cost of motoring, day trips and holiday travel by car would fall by 9% (whereas car travel generally would only fall by 3%).<sup>9</sup> Failure to decrease the car dependence of tourism now will leave the industry vulnerable.

WEL believes that the Welsh Government has a central role in leading, championing and maintaining a sustainable approach to visitor and rural traffic. This will require a more joined-up approach across Government and between the main departments responsible for transport and tourism. To address the problems of car dependent travel for leisure and tourism, and to promote sustainable alternatives, WEL recommends that the Government:

- **recognises leisure traffic as a major cause of congestion** and pollution in some rural areas
- **engages with leisure organisations** to address the issue of leisure travel and encourage them to find solutions – for example, by providing challenge funding for the development and implementation of exemplar visitor travel plans
- **promotes visitor travel planning** as integral to the development of tourism and requires visitor travel plans for planning consent for new and expanded visitor attractions – this should be addressed in planning guidance
- requires Regional Spatial Plan groups to **recognise the importance of sustainable tourism** within their strategies
- requires **regional transport consortia** to recognise the importance of leisure travel schemes for their own sake as well as helping to underpin the achievement of wider social inclusion and regeneration
- **identifies long term revenue funding** to provide stable support for rural and leisure transport schemes which develop alternatives to the car for leisure journeys.

Innovative schemes to reduce car dependency when visiting rural tourist spots should be encouraged, along with a wider range of tours and holiday packages which utilise alternative methods of transport, including bus, boat and train. Ramblers Cymru, for example, support the "Rail Rambles" programme, which encourages people to discover walks that are accessible using the railway network. The following case study from the National Trust illustrates what can be done to reduce the car dependency of visitors to sites.

<sup>7</sup> Aberystwyth University (Midmore 2000)

<sup>8</sup> *Influencing visitor travel behaviour - a report for the National Trust* Mattson et al 2005

<sup>9</sup> *National Transport Model Team*, Department for Transport

## **Case Study- Pembrokeshire Coast**

Barafundle Bay and the coastline around the Stackpole Estate is an incredibly beautiful and popular area of the National Park where increasing numbers of car visits are placing strain on the area. The National Trust car park at Stackpole Quay used to be full on a handful of days a year, but this year it has been full almost daily. Extra car park attendants are required to ensure people park properly, and to turn away traffic at the head of the road - 3/4 mile away - once the car park is full (because the car park is approached by a single lane road with no turning places). This congestion and parking pressure causes visitor dissatisfaction and frustration. It also threatens the quality and amenity of the nearby holiday cottages with associated loss of revenue. Cars are being parked in passing places on narrow roads and in gateways as a result of the car park being full. This creates additional stress and also makes it difficult for the Greenways shuttle bus to complete its route along the single lane road. Wear and tear on car parks and approach roads has increased and leads to costs of at least £1000pa.

The Trust's experience at the sites they manage is representative of a wider problem. Pembrokeshire receives 1.1 million visitor trips per year with 98% of visitors arriving by car. The National Park contains few A roads making the area vulnerable to congestion. The introduction of the Greenways bus services has greatly improved access to the coastal path. It has also set a precedent for use of alternative fuels, particularly important in an environmentally sensitive area. The project is recognised as an exemplar, benefiting both local people and tourists. It is estimated that in 2005 the bus displaced 20,000 car trips. The bus services are carefully tailored to match local markets. For example, the Coastal Cruiser serves a stretch of coastline including National Trust sites at Bosherton and Stackpole and Freshwater West beach, which is very popular with surfers. The bus carries bicycles and wheelchairs, and also surfboards. In 2005 they carried 50,000 people, which is estimated to have avoided around 20,000 car trips. One of the chief benefits of the scheme has been the provision of improved access for the local communities to the beaches and countryside from which they have previously felt restricted due to the high volume of traffic.

## **4. Summary and recommendations**

WEL believes it is essential that the Welsh Government invests for growth in Welsh rural tourism, and in the natural, cultural and historic environment that draws visitors to Wales. We believe Welsh tourism can be developed sustainably and, if so, it will make an increasingly important contribution to the economy of Wales. WEL recommends that the Government takes the following actions to develop a successful and sustainable Welsh rural tourism sector:

- ensure that degradation of Wales' unspoilt rural areas is avoided
- establish a Tourism Innovation Group, which includes stakeholders from the private, public and third sectors
- establish an innovation fund to develop new tourism products, which build on Wales' unique selling points
- develop programmes to help communities engage in innovative new business ventures that capture the increased economic benefits that a large capital project like the All Wales Coastal Path can bring
- develop a strategy to decrease the car dependency of visits to rural Wales
- identify synergies between other funding programmes which could deliver growth in rural tourism, for example Glastir.

**The following WEL members support this document:**

**British Mountaineering Council**

**Cambrian Mountains Society**

**Campaign for National Parks**

**National Trust / Ymddiriedolaeth Genedlaethol**

**Open Spaces Society**

**Ramblers Cymru**

**Sustrans Cymru**

**Youth Hostels Association**

Wales Environment Link unites voluntary bodies whose primary aims include the conservation, protection or quiet enjoyment of landscape, wildlife or amenity in Wales  
Mae Cyswllt 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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