

[National Assembly for Wales](#)
[Enterprise and Business Committee](#)
[Inquiry into Tourism](#)

Evidence from Alliance for National Parks Cymru – TOU 06

Submission by the Alliance for National Parks Cymru to the Enterprise and Business Committee's Inquiry into Tourism.

1. The Alliance for National Parks Cymru has recently been established to defend and promote the interest of Protected Landscapes in Wales. The founder members of the Alliance are the three National Park Societies, the Campaign for the Protection of Rural Wales and the National Association for Areas of Outstanding Natural Beauty. Other organisations with an interest in the future of our Protected Landscapes are also involved in the Alliance. The Chair is Paul Loveluck who in his public service career was both Chief Executive of the Wales Tourist Board (for 12 years) and subsequently of the Countryside Council for Wales (for 6 years)

2. Hitherto the voluntary sector's interest in the National Parks in Wales has been coordinated by the Campaign for National Parks (sic in England and Wales). However it has become apparent that given the wide ranging policy and legislative proposals being made by the Welsh Government which could affect the future of our Protected Landscapes, it was necessary for a body based in Wales to take on the mantle of coordinating the voluntary sector's response. As a contribution to the consideration which the Government is giving to a number of policy areas which bear on our Protected Landscapes, the Alliance has produced for discussion 'Protected Landscapes Matter in 21st Century Wales. An Agenda for Government'. This has been sent to relevant Ministers and to all Assembly Members.

National Parks and the Tourism Industry.

3. In the Welsh Government's current strategy for the development of the Tourism Industry, 'Partnership for Growth. The Welsh Government Strategy for Tourism 2013-2029', it identifies the natural environment as one of five areas of competitive advantage, pointing to 'a landscape of high scenic quality, a unique coastline and a diversity of experiences contributing to our visitors' mental and physical wellbeing.' The strategy points to the fact that 'We have three National parks of distinctive character, five Areas of Outstanding Natural Beauty and, since 2012, a 870 mile long Wales Coast Path, the only one of its kind anywhere in the world' and that 'We need to take full account of the major asset represented by Wales Natural Environment and consider how to use its characteristics for growing tourism sustainably;'

4. These unique features of the Welsh environment, with National Parks comprising 20% of the land surface and AONBs another 4% and both together accounting for a much larger % of the Welsh coastline, have not been preserved by accident but through policies, supporting legislation and the work, in the case of the National Parks, of specialist planning authorities. In particular, as the Welsh Government has correctly identified in its tourism strategy, the distinctiveness of our Protected Landscapes has been recognised as a vitally important part of our product offer.

5. Market research over the years has consistently shown that the main attraction of Wales to visitors from its main market, England, is the perceived quality of its natural environment. For the overseas markets, which still form a small part of the whole, it used to be that our cultural and historic difference were key inducements. They are still but the increasing international publicity being given through vehicles such as Lonely Planet Guides and through the undoubted success of the Wales Coast Path means that the attraction of our natural environment is now figuring for overseas visitors too. The fact that the National Geographic magazine voted the Pembrokeshire Coast as the second best in the world is further evidence of the growing international recognition of the quality and attraction of our National parks and AONBs. The National Park Authorities have contributed to this by their espousal of the night skies in Wales and the Brecon Beacons has achieved international recognition in this respect.

6. Recent independent research commissioned by the three National Park Authorities by the consultants Arup and reported in 'Valuing Wales National Parks' advised that the tourism monitoring data showed the National Parks had over 12 million visitors. This equates to an annual injection of spending into the Welsh economy of around £1 billion with the Welsh Tourism Industry general accounting for £4.5 billion. Eight of the fifty most visited Welsh tourist attractions are in the National parks, so the Report fairly claims that visitors to the National Parks represent a sizeable proportion of the Welsh Tourism industry.

7. One other feature of the Tourism Industry in Wales' Protected Landscapes is the concentration of Youth Hostels and Study Centres. The YHA alone has 30 hostels in Wales, of which 24 are in Protected Landscapes. Last year there were 135,000 overnight stays in the YHA Hostels in Wales of which about 100,000 were in the Hostels in the Protected Landscapes. It is these visitors who will be the higher spending visitors of the future, inspired by their experience of our natural environment to return later in life.

8. The Arup report makes another vitally important point, namely that the National Parks have a 'halo' effect on the rest of the tourism industry in widely drawn, adjacent areas. 'In practice the boundaries of the National Parks are porous and people visit Wales with the intention of visiting the National Parks, but will combine visits with other parts of Wales.' Thus major resorts like Llandudno benefit in this way while Tenby has the good fortune to be within the Pembrokeshire Coast National Park. The Arup report quotes the strapline used by the Imperial Hotel in Llandudno 'Discover Victorian charm and first class service in the Queen of Welsh Resorts where Snowdonia comes down to the sea.'

9. The importance of the National Parks and indeed all of the Protected Landscapes to the Wales tourism Brand is vital and has been consistently shown up in the research. It is names like Snowdonia, Brecon Beacons, Pembrokeshire Coast, the Gower and the Wye Valley which resonate with the customers and potential customers in our main market, England, and increasingly in our overseas markets too.

10. The contribution of our Protected Landscapes to Wales' Tourism Brand has to be protected and enhanced. It has not come about by accident. It is the result of careful management, development and promotion by National Park Authorities. Local Authorities, Central government and its agencies and the Private Sector of the industry. National Park Authorities were set up in the 1990's and given planning powers when it was realised that dedicated authorities were needed to ensure the long term conservation of the special values

of these areas. They were given purposes to conserve and of and improving access but they also have a duty to have regard to the socio economic well being of the communities within their areas. Despite perceptions to the contrary, the National Park Authorities approve 85% of the planning applications put to them, a ratio equivalent to the approvals by local authorities. The Park Authorities have supported the development of the industry within the Parks by managing tourism developments through their planning powers in a way which does not damage their outstanding features. They have maintained and improved footpaths and provided infrastructure facilities to support the industry (although it has to be said their ongoing ability to do so will be affected by resource constraints) and have undoubtedly therefore also met their second purpose of improving access. They have also engaged in partnerships to promote the Parks to visitors.

11. The success of the National Park Authorities and the need for such specialist authorities to undertake the role has been recognised in a number of independent inquiries and by a number of organisations. Most recently the Commission on Governance and Public delivery concluded ‘...they act as specialised and valued custodians of important national assets; and have demonstrably succeeded in promoting sustainable access and generating very high levels of tourist revenue. We agree that other less specialised organisations (such as local authorities) would struggle to match this record. We therefore do not propose any change to the status and remit of NPAs’. Significantly too in its evidence to the Commission, the Wales Tourism Alliance which represents all the sectors of the Welsh Tourism industry argue for the retention of the National Park authorities with their present remit. Having said that the Commission did express concern for the need for more leadership for the National Park Authorities and the need to remove duplication and achieve synergies in their work. The Alliance for National Parks Cymru agrees with both of these conclusions and looks forward to working with the Government and the National park Authorities on how greater leadership and efficiencies might be achieved.

Recommendations.

In the light of the above, the Alliance for National Parks Cymru recommends to the Committee:

- That it recognises the contribution of our Protected landscapes to the Welsh Tourism Industry
- That it recognises the contribution that the brand of our Protected Landscapes to the brand image of the Welsh Tourism Industry
- That it recognises the part played by National Park Authorities in developing the Tourism Industry in their areas in a sustainable way, maintaining the distinctiveness of each of the Parks.
- That it recognises the continuing need for specialist and dedicated authorities with planning powers for each of the National Parks.
- That it supports steps to achieve more effective leadership leading to increases in efficiency which will benefit, inter alia, the Tourism Industry