



The National Assembly for Wales' "Enterprise and Business Committee" Inquiry: **Tourism in Wales**

Submission by the Campaign for the Protection of Rural Wales:

1. Context

1.1 The Campaign for the Protection of Rural Wales (CPRW) is Wales' foremost landscape charity. Our aims as a campaigning organisation are to raise public awareness of the value and role of Welsh landscapes as resources which are of national if not international importance.

1.2 We contend that landscapes when responsibly cared for and their management adequately resourced, are capable of delivering **all** the outcomes the Welsh Government seeks to achieve in promoting its sustainable development ambitions.

1.3 We welcome the opportunity to submit evidence to this Inquiry recognising that the issues under consideration are of paramount relevance to our interests. Given this context the representation which follows, is limited to the two specific aspects of the Committee's Terms of Reference, i.e those highlighted in the Appendix which is attached to this submission.

2. Summary

2.1 CPRW recommends that this Committee:

- Publicly endorses the inextricable link between the quality of Wales' landscapes and seascapes and the success and magnetism of Wales as a major national and international visitor and leisure destination.
- Recognises the imperative of linking and branding the stewardship potential of the distinctive sense of place of all Welsh landscapes, in an inclusive manner so as to provide opportunities for new and creative forms of tourism.
- Advises Welsh Government that by adopting a more holistic approach to the use of Welsh landscapes for tourism purposes, this will provide a direct and successful means of achieving most of the elements of its sustainability ambitions.
- Investment in the maintenance and enhancement of the integrity of the fabric and character of Welsh landscapes, will create multiplier opportunities for Green growth and unrealised employment prospects for the leisure and tourism sectors.
- Remind Welsh Government of its responsibility under the European Landscape Convention to protect the inheritance value of the landscape and cultural resources that provide the foundation for the tourism industry in Wales .
- Propose that a landscape stewardship role (especially of our finest landscapes and seascapes) is embedded in the remit of Visit Wales.
- Endorses Wales' Protected Landscapes as fundamental components of the Wales tourism product and encourages the Welsh Government to invest in protecting their integrity and special qualities accordingly.

3. Evidence to support our recommendations

3.1 CPRW strongly believes that Wales' landscapes and seascapes are collectively important not just as attractive views and as scenic backdrops to leisure and tourism activities, but as resources which unmistakably link culture with nature, the past with the present and man with his environment. Landscapes therefore have a multitude of values, not all of which are physically tangible or have a recognisable market value, but all of which are significant.

3.2 The "Sense of place" and belonging, "y Cynefin" which well managed landscapes provide, matter to most people, regardless of whether they are native Welsh living in familiar places, or those who visit the landscapes of Wales for pleasure, leisure and most importantly enjoyment. This strength of opinion respect is repeatedly reflected by numerous public opinion tourism surveys.

3.3 Unspoilt and distinctive landscapes and seascapes are similarly valued in today's modern world not just for their inherent scenic interest, but because of the contribution they make to an individual's personal identity, a community's local distinctiveness and to our collective national pride and identity. Wales' semi natural landscapes are increasingly viewed as places that inspire, provide excitement, offer challenge and provide opportunities for learning and personal development. The public goods and services they all provide when managed sensitively and responsibly and when the protection of their integrity is resourced effectively, are immeasurable. Landscapes provide nothing less than our individual life insurance policies and society's daily life support service centres.

3.4 Although Welsh landscapes past and present were created and have been repeatedly altered by individuals, they are now undoubtedly appreciated by everyone. Many which are well-looked after, cared for and highly valued by society are essential for the personal well-being qualities they offer. Healthy landscapes create healthy nations and an economically prosperous and healthy society.

3.5 Accordingly and given this context, the key focus of this submission centres on the specific role that landscapes and the natural and cultural assets within them play, in underpinning the strength and reinforcing the focus of Wales's tourism "brand" and the image it conveys to the world.

3.6 CPRW believes and trusts that this Committee agrees, **that Wales' greatest economic and social assets are its landscapes and seascapes, be they natural or cultural.** It is an undeniable fact that the quality and diversity of Welsh landscapes is a major economic driver and because of this landscapes are central to the prosperity and value of tourism to Wales.

- 12 million people visit National Parks and their surrounding areas each year spending more than £1 billion in them. It is imperative that the highest quality standards for the care of these areas is ensured if their resources are to continue to provide benefits to their local and regional economies.
- The three Welsh National Parks are home to eight of the fifty most visited attractions in Wales.
- National Parks in Wales attract a high proportion of staying visitors, averaging 2.26 tourist days per visitor compared to 1.59 for National Parks in England and Scotland
- Wales' National Parks account for over half a billion pounds of Wales' Gross Value Added, the equivalent of 1.2% of the Welsh economy.
- The 5000 businesses in National Parks provide direct and indirect employment for 29,000 people, 12,750 of which are dependent on the environment of these special areas.

3.7 Unquestionably CPRW believes Wales' landscapes should be recognised and supported as the "front cover" of our nation's tourism brand. Welsh landscapes provide not only a window into the soul of the nation but are deeply rooted in the country's identity and its global sense of place. These characteristic traits prevails in all landscapes, be they every day and familiar landscapes, those with

symbolic meaning, those which reflect our heritage, or those which are as mentioned, our very finest, the landscapes jewels of our three National Parks and five Areas of Outstanding Natural Beauty. Individually all provide the backdrop to life in Wales; collectively they are powerful symbols of a nation whose natural and cultural environment is internationally recognised as second to none.

3.8 It is no surprise given this context that the Pembrokeshire National Park coastline has received the accolade of the second most beautiful stretch of coast in the world; suitably reflected by the following independent observations by National Geographic

"Magnificent protected coastline from both ecological and geological perspectives. Land-based and marine-based conservation tourism appeals to all ages. Current stewardship practices maintain quality and integrity."

"Wales has done a terrific job of sustainable development, including its coastline. The newly linked coastal walk will be one of the most scenic hiking paths in Europe. Citizens work hard at making sure that their coastal environment remains authentic and unspoiled. The seafood and food grown in the adjoining fields are culinary treats."¹

3.9 These comments and no doubt many similar others, clearly reflect the increasing recognition now being given to the role that Wales' natural environment, its landscapes and seascapes play in today's life styles and our economy and the range of sectors and communities dependent, in some way on them. The quality and diversity of our natural environment gives Wales' a clear competitive advantage and creative opportunities for agriculture, environmental management and sensitive renewable energy generation, all of which can contribute to the enhancement of the country's tourism appeal. The quality of the Welsh environment is paramount to the future of tourism in Wales, be it the retention of unspoilt upland vistas, the promotion of unpolluted Dark skies as unique tourist attraction Wales, or the un-paralleled quality of beaches and wildlife in our inshore waters and coastlines.

3.10 CPRW therefore contends that because landscapes are open to multiple interpretations; they are of greatest value because of their diverse and heterotopic characteristics. As recognised by Sopher², *"Our experience of any landscape through the senses is inseparable from the social and psychological context of the experience"*. Welsh landscapes have a direct and powerful synergy with personal meaning and values.

3.10 CPRW therefore believes that the key locus for tourism in Wales must be the responsible use and sensitive stewardship of all the landscapes of Wales, i.e. "consciously appreciated and sensitively managed destinations."

3.11 If one recognises that all tourism, heritage tourism included, takes place in places valued because they reflect an investment of human skills, traditions and endeavour, then it is inevitable that a continued investment in the integrity of these resources is required if they are to maintain their quality, distinctiveness and public appeal. As the majority of Wales' most appreciated tourist landscapes are manmade and organically evolving living spaces, "y broydd ", by default they are therefore places full of intended and unintended cultural symbolism and clues waiting to be deciphered by those who visit them. Investing in retaining the cultural authenticity and resilience of those elements which provide these places with their individuality is crucial. This is a role which the tourist industry in all its guises must engage with and support more directly and positively.

¹ National Geographic panellist <http://travel.nationalgeographic.com/travel/coastal-destinations-rated/top/wales/>

² Sopher D.E. (1979), The Landscape of Home: Myth, Experience, Social Meaning' in *The Interpretation of Ordinary Landscapes: Geographical Essays*, D.W. Meinig, (ed.). New York: Oxford University Press.

3.12 The economic and social value of Wales' landscapes is both fundamental and more importantly immeasurable to the tourist industry.

3.13 CPRW therefore believes that as all areas of the Welsh countryside matter, greater recognition must be given by Welsh Government and its agencies to the protection and responsible use of all these landscapes and the variety of natural and cultural assets they all contain. Equally as signatories to the European landscape Convention, we believe that Wales PLC must give greater recognition to their importance and increase its investment in maintaining their distinctive qualities and collective integrity. This responsibility should be shared as a priority by all those involved in the development of tourism in Wales. Without such a commitment the quality and individuality of the Welsh tourist offer will be significantly weakened.

Appendix 1

The National Assembly for Wales: Enterprise and Business Committee Inquiry into "Tourism in Wales"

Issues of relevance to CPRW.

Inquiry Terms of Reference:

- To assess progress made by the Welsh Government towards achieving its Programme for Government commitments relating to tourism, as well as the suitability of these aims;
- To assess the ambition and deliverability of the Welsh Government's aim to grow tourism earnings by 10 per cent by 2020, as well as progress made towards this aim;
- To assess the suitability and effectiveness of the structures and support the Welsh Government has in place for the tourism industry in Wales, and its future plans for regional support.

Issues that the Committee is considering as part of these terms of reference include:

- The clarity and strength of Wales's tourism "brand";
- The effectiveness of Welsh Government attempts to maximise the value of the domestic tourism market;
- The effectiveness of Welsh Government attempts to maximise the value of the international tourism market;
- Performance of Visit Wales compared with tourism development agencies in the rest of the UK;
- The success of Visit Wales marketing activities;
- The work of Visit Britain as it relates to Wales, and the extent of coordination between Visit Britain and Visit Wales;
- The sufficiency and effectiveness of Welsh Government resources targeted at promoting tourism and supporting Welsh tourism businesses, and whether it represents good value for money;
- How the Welsh Government monitors and evaluates the effectiveness of its tourism support and marketing activities;
- The use made of opportunities for funding and other support from the EU;
- The success of Welsh Government efforts to increase the quality of Wales's tourism offer;
- The extent to which the marketing and development of tourism in Wales makes the most of Wales's cultural, historical and natural assets;
- The impact of major events on Wales's tourism economy, and the success of Welsh Government attempts to maximise this.