



Llywodraeth Cymru
Welsh Government

PUBLICATION, DOCUMENT

Visitor Accommodation (Register and Levy) Etc. (Wales) Bill: Welsh language impact assessment

Welsh language impact assessment of a Bill giving local authorities the choice to introduce a levy on overnight stays in visitor accommodation in their area.

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Overview

The Welsh Government is introducing legislation to enable local authorities to introduce a visitor levy in their areas, which is a priority commitment within the Programme for Government. The levy will be a fair contribution made by visitors and applied to overnight stays in visitor accommodation. It will raise additional funds for local authorities to reinvest in the public services and infrastructure that make tourism a success. Each local authority will have the power to decide to introduce a visitor levy in its area, meaning this will be a new, local levy designed in a way that works for residents, businesses, and visitors. [Details on the Bill can be found here.](#)

The levy has been kept simple but fair in design to help minimise any potential negative impacts; we anticipate it will have a positive impact for local areas that choose to use a levy by generating revenue to support local areas, thereby enhancing the reputation of the destination and supporting the visitor economy.

A statutory register of visitor accommodation providers, covering all defined visitor accommodation in Wales, will support the introduction of a visitor levy and enable better understanding of the sector to help inform future policy interventions.

We undertook a [public consultation for the visitor levy proposals](#) from September – December 2022, the details and outcomes can be found here, alongside [consumer insight research](#) to seek the views of Welsh residents and UK domestic holiday consumers here.

This impact assessment relates to the draft Visitor Accommodation (Register and Levy) Etc.(Wales) Bill and should be considered alongside it.

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Definitions

Exemptions

Accommodation types that will not be subject to a visitor levy.

Local authority/ local authorities

The 22 principal councils in Wales, also referred to as unitary authorities.

Nil-rates

A stay in visitor accommodation which is levied at a rate of £0.

Refunds

When the visitor levy has been passed on to a visitor and the legislation permits them to have the amount subsequently refunded.

Sustainable tourism

Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. ([United Nations World Tourism Organisation](#)).

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Visitor

A person who stays in visitor accommodation.

Visitor accommodation

Visitor accommodation that is defined in the Bill that is subject to a visitor accommodation provider registration.

Visitor accommodation provider

A person/ business who provides or offers to provide visitor accommodation at premises in Wales in the course of trade or business.

Visitor levy

An additional charge on overnight visitor accommodation. This is also referred to in other countries as a tourism tax, accommodation tax, or hotel tax.

Indicative timeline

2024 Introduction

Bill is introduced to the Senedd for scrutiny. Impact assessments published.

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2025 Senedd vote

If the bill passes, receives Royal Assent.

2025 Local discretion

A local authority can commence local consultation and assess the impact of a visitor levy.

2026 Notice period

Likely a 12 month notice period if a local authority decides to introduce a levy.

2026 Registration

Accommodation providers begin registration in areas where levy is to be introduced.

2027 Implementation

Indicative date for visitor levy to be introduced by a local authority.

1. Introduction

Cymraeg 2050 is the Welsh Government's national strategy for increasing the number of Welsh-speakers to a million by 2050 and to:

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- raise the percentage of the population that speak Welsh daily, and
- increase the proportion of those that can speak more than just a few words of Welsh, from 10 per cent (in 2013–2015) to 20 per cent by 2050.

The Welsh Government is fully committed to the strategy, with the target of a million speakers aimed at reversing the decline in the number of Welsh speakers over the twentieth century. A thriving Welsh language is also included in one of the 7 well-being goals in the Well-being of Future Generations (Wales) Act 2015.

The Welsh Government has a statutory obligation to fully consider the effects of its policies on the Welsh language and those who speak it. The Cymraeg 2050 strategy has 3 interrelated themes:

- Theme 1: Increasing the number of Welsh-speakers
- Theme 2: Increasing the use of Welsh
- Theme 3: Creating favourable conditions - infrastructure and context

2. The visitor economy in Wales: key facts

2.1 The visitor economy is an important source of employment in many areas of Wales. The tourism industry accounted for 11.8% of employment (159,000) in Wales in 2022 ([Wales Visitor Economy Profile: 2021](#)). 77% of tourism employment (123,000) was in hospitality.

2.2 2022 saw £4.7 billion of associated expenditure on tourism trips within Wales: £2.4 billion on tourism day visits from GB residents, £1.9 billion on overnight visits from GB residents and £0.4 billion from inbound visitors.

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Table 1: Trips and spend by region visited 2022 (GBTS)

Total trips 2022	Trips (millions)	Nights (millions)	Spend (millions)
Mid Wales	1.14	3.02	£194
North Wales	2.43	9.23	£600
South East Wales	2.95	7.12	£573
South West Wales	2.14	5.80	£479

([Domestic GB tourism statistics, Wales overnight tourism: annual report: 2022](#))

2.3 According to the [Census 2021](#) relating to the accommodation and food service Industries: North Wales has the largest number of bedspaces of the 4 regions of Wales (298,095), equating to almost half (49%) of bedspaces in Wales. Over 4 in 5 (82%), 243,328, are caravan and camping bedspaces. South-West Wales has the second largest share (26%), with 160,245 bedspaces. Two thirds (107,997) are caravan and camping but over a fifth, 35,914, are in self-catering ([Accommodation bedstock: as at June 2022](#)).

2.4 If the visitor levy boosts economic resilience in areas with relatively high rates of overnight stays where Welsh-speakers are prevalent, it could help support the delivery of one of 'Cymraeg 2050' objectives: creating favourable conditions for the Welsh language to thrive.

2.5 Guidance will be provided to local authorities, stating that revenues raised from the levy are required to support sustainable destination management. Local authorities will be required to evidence how their investment demonstrates this in

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an annual report following introduction. The guidance will include recommendations by Welsh Government that local authorities assess potential impacts on their local communities, including on the Welsh language, and other sectors such as businesses and vulnerable groups. The visitor levy will be a local tax which gives local authorities the autonomy to decide how the revenue is reinvested according to local needs.

3. Welsh-speakers in accommodation and food services industry

According to the **Census 2021**:

3.1 Of the population aged 16 years and over living in Wales and working in the accommodation and food services industry, 11,120 (15.6%) were able to speak Welsh.

3.2 Of the population aged 16 years and over living in Gwynedd and working in the accommodation and food services industry, 2,340 (52.9%) were able to speak Welsh.

3.3 Of the population aged 16 years and over living on the Isle of Anglesey and working in the accommodation and food services industry, 960 (47.7%) were able to speak Welsh.

3.4 Of the population aged 16 years and over living in Ceredigion and working in the accommodation and food services industry, 730 (33.8%) were able to speak Welsh.

3.5 Therefore, were a visitor levy to be introduced in areas where relatively high proportions of Welsh-speakers work in the accommodation and food services industry, those areas set out above, it could potentially impact the Welsh

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language.

3.6 For example, should the levy boost the local economy through the use and deployment of the revenue raised, and in turn increase employment opportunities in the tourism sector, it could be argued that more employment opportunities could in turn be linked to an increased opportunity for the use of Welsh in workplaces, services and socially. This could also have a positive impact on the facilitation and promotion of Welsh language by providing non-Welsh speakers exposure to the language.

3.7 Equally, the impact that those areas with fewer Welsh-speakers could be positive as the revenue could stimulate opportunities to increase the promotion of the Welsh language.

3.8 According to the February 2024 wave of the **Tourism Barometer**, a survey of approx. 900 tourism businesses in Wales (run by Visit Wales several times a year), 55% of tourism businesses in Wales employ at least some Welsh-speakers. North and Mid Wales report the highest number of Welsh-speakers (54% each), with South West and South East Wales both reporting 46%.

3.9 Two in five businesses (40%) have at least one person using Welsh regularly in work. This proportion is much higher in North Wales (60%) and Mid Wales (40%) than in South West Wales (26%) and South East Wales (21%) (**Tourism Barometer: February Wave, 2024**).

3.10 The Barometer subdivides the sample into categories of business type:

- Serviced Accommodation
- Self Catering
- Camping/Caravan
- Attraction
- Activity Operator
- Restaurant

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- Hostel

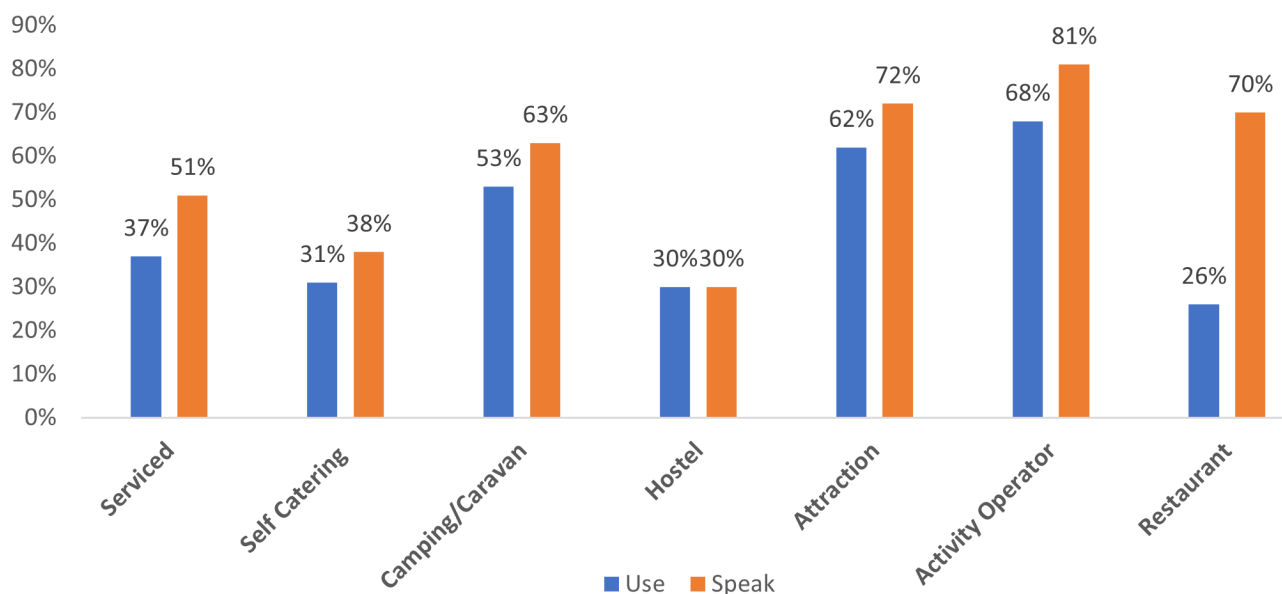


Figure 1: The graph above shows these categories and the percentage of businesses that have staff who use and speak Welsh (Tourism Barometer February 2024 wave).

(‘Use’ refers to those who use Welsh regularly in day-to-day work and ‘speak’ is defined by those who speak Welsh as a first language).

3.11 The graph shows a disparity between sectors with some (for example, attractions, activity operators and restaurants) having significantly higher numbers of Welsh-speakers in their employ than in others.

3.12 Almost all sectors report a higher percentage of Welsh-speakers than would be expected to occur in line with official statistics reporting the percentage of Welsh-speakers in Wales, suggesting the tourism industry in general and these sectors specifically, employ disproportionately more Welsh-speakers than average. This could be due to differences in definition of speaking Welsh across the surveys.

3.13 As the tourism industry is likely to employ younger people on lower wages, it could be inferred that this subset of the Welsh-speaking population is may be more impacted bey a visitor levy, especially in those regions with larger numbers of Welsh-speakers, concentrated in the North and Mid Wales regions.

3.14 However, the revenue raised could be used to support the benefits offered to Welsh culture by tourism; for example, through supporting the tourism industry and employment opportunities or initiatives in Welsh-speaking regions.

3.15 As noted above in paragraph 3.6, official guidance provided by Welsh Government will include recommendations for local authorities to assess potential impacts on their local communities, including on the Welsh language.

4. Consultation and engagement

4.1 Officials have undertaken extensive engagement with stakeholders throughout the development of the legislation to help inform the design and scope of the levy. Over 1200 responses were received to the formal consultation in 2022 (**Discretionary visitor levy for local authorities**). 58 responses were received through the medium of Welsh. A summary of key findings relating to the Welsh language are included below at paragraph 14.

4.2 Throughout the legislative process, we will continue to engage with our key partners to understand differing views to design a levy that will work for everyone in Wales. Additionally, those local authorities that should decide to apply a levy in their area will also be required to monitor the impact of the levy on their communities.

5. Reference number

Welsh Language Impact Assessment reference number: 02/06/2024

6. Does the proposal demonstrate a clear link with the Welsh Government's strategy for the Welsh language?

Cymraeg 2050 A million Welsh-speakers and the related **Work Programme for 2021-2026**

6.1 There is a link with one of the main themes of Cymraeg 2050 Strategy - 'Creating favourable conditions – infrastructure and context.' Revenues raised from a levy could be used to help support the creation and maintenance of favourable conditions for the Welsh language to thrive. An aim of the Cymraeg 2050 Strategy is to support the socioeconomic infrastructure of Welsh-speaking communities. This correlates with the aim of the visitor levy - to support communities by reinvesting in the conditions that make tourism a success, including supporting local infrastructure.

6.2 Local authorities will have the power to decide how best to achieve this in ways that are appropriate for their communities.

6.3 The intention of the visitor levy is to promote sustainable tourism, support local communities and empower local authorities to choose to introduce a visitor levy on behalf of their residents. These link to our wider ambitions outlined within the Programme for Government, namely to:

- Push forward towards a million Welsh-speakers, and enable our tourism, sports, and arts industries to thrive.

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- Develop further effective tax, planning and housing measures to ensure the interests of local people are protected.
- Strengthen the autonomy and effectiveness of local government to make them more successful in delivering services.

7. Describe and explain the impact of the proposal on the Welsh language and explain how you will address these impacts to improve outcomes for the Welsh language

7.1 The visitor levy will be discretionary, therefore, impacts by local area, including possible impacts on the Welsh language, will be variable according to the size, nature, and scale of tourism within local authorities. Destinations across Wales will have variable elasticities of demand which are unknown. Therefore, impacts on consumer demand and how this could impact the visitor economy and the Welsh language may be variable by destination. This is not possible to discern given the lack of data and evidence to make any conclusive statements.

7.2 Current research relating to the impact of tourism on the Welsh language is sparse and empirical evidence is limited. Respondents to the consultation provided little or no factual evidence on this topic.

7.3 There is one piece of **research undertaken in 2001 by Dylan Phillips and Catrin Thomas** which considers the effects of tourism on the Welsh Language in North West Wales. It outlines how the Welsh language as a living community language has been impacted, particularly in tourism hotspot areas where high levels of inward migration have occurred as a direct link to the tourism industry. It notes a significant effect on the number and percentage of Welsh-speakers in those areas.

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7.4 A 2020 article by Dr Dyfan Powell discusses the effect of tourism on the language in Gwynedd. He states that:

“ ‘During the last twenty years, there has been a relationship between employment in the sector and the language’s growth and sustainability. It is a positive relationship, which suggests that the employment within the sector has supported the language.’ ”

(The Effect of Tourism on Language in Gwynedd)

7.5 Based on the research noted above, a visitor levy could support the aims of Cymraeg 2050 in creating favourable conditions for the Welsh language particularly within Welsh-speaking communities where tourism is considered a significant contributor to the local economy.

7.6 Welsh Ministers may revise the policy via regulations which would need to be approved by the Senedd should adverse impacts materialise.

8. Potential positive economic impacts

8.1 The levy aims to promote local authority autonomy on financial decision making. The revenue will be broadly hypothecated for supporting innovative and sustainable destination management. As it is a discretionary levy, we do not yet know how many local authorities will choose to introduce a levy, and as such we cannot discern any particular proportion of revenues being used to support the Welsh language either directly or indirectly.

8.2 A positive impact on the Welsh language could be achieved if local authorities use the revenue from the levy to fund initiatives that improve the infrastructure and services in areas which currently have (or until recent decades have had) a relatively high percentage of Welsh-speakers. This could promote

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the visibility, vitality, and viability of the Welsh language, as well as increase the awareness and appreciation of visitors and residents alike.

8.3 Guidance will be given to local authorities on hypothecation of the revenue. The revenues from a visitor levy can be used to sustain and enable tourism in destinations that use a levy. This is because tourism is reliant on public investment to be successful, and the visitor levy revenues provide an additional source of income for this investment.

8.4 Revenue from the levy could support local areas and communities through creating the enabling conditions for success and supporting local visitor economies, which could indirectly support the promotion of the Welsh language or Welsh language initiatives.

9. Potential negative economic impacts

9.1 We can however consider impacts from the perspective of whether there would be a fall or rise in tourism from use of a visitor levy. The **economic impact assessment** (EIA) estimates changes in employment and GVA as a result of the visitor levy based on three scenarios ranging from a weak, medium and strong behavioural response to the levy.

9.2 However, the range of behavioural responses to a visitor levy are more nuanced and visitors may change their behaviour in varying ways, such as reducing secondary spend within a destination or opting for lower cost visitor accommodation. These behavioural shifts are not well understood and there is a paucity of evidence available to understand this in more detail.

9.3 There is also potential impact on overnight trips that aims to support the Welsh language and in particular Welsh-medium education, in that there would be a marginal increase for the cost. This is discussed further below.

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10. Potential impacts for educational and cultural impacts

10.1 Revenue raised from a levy could be reinvested in tourism projects to promote the Welsh language and increase the opportunity for visitors to be exposed to and raise awareness of our language and culture.

10.2 A visitor levy could marginally increase the cost of overnight educational trips, including visits to Urdd residential centres and for those attending the Urdd National Eisteddfod and the National Eisteddfod of Wales (if they are held in areas with the that have introduced the visitor levy). Overnight stays with these centres and activities would be in scope of the levy.

10.3 The rate at which a levy is set will determine the extent of any behavioural impacts. Following feedback from the consultation exercise, we have also set lower rates for hostel style and campsite accommodation. This is because this type of accommodation offering is generally more affordable in comparison to other types of accommodation. This will help reduce any cost increase and therefore reduce any potential negative impacts on overnight educational trips, given the Urdd have 5 residential centres across Wales, predominantly hostel style accommodation and some camping facilities.

10.4 According to a [report on the economic value of the Urdd to the Welsh economy](#), the Urdd's residential centres in Llangrannog, Glan-Ilyn and Cardiff provided accommodation for over 103,000 visitor nights and generated a total economic value of £7.9 million within their local areas.

10.5 With regards to the National Eisteddfod, visitors attending can stay overnight in the pop-up caravan site and campsites. On average, there are around 1,200 caravans present for the Eisteddfod week and 300 tents. The cost to stay overnight is separate to the cost of a ticket to enter the Eisteddfod Maes (Information shared by National Eisteddfod for Wales, 2024). Approximately

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4,000 people camp at Maes B. The fee to camp is included in a weekly pass along with access to Maes in the day and concerts at night.

10.6 In addition, the National Eisteddfod rents approximately 120 hotel rooms or short-term lets per year for staff, judges, and artists. A visitor levy would apply to this accommodation, if the Eisteddfod is held that year in a local authority area that has implemented the levy.

10.7 As noted elsewhere in this impact assessment, the visitor levy is optional for local authorities to apply. Taxes provide revenues which can be invested in vital local services and infrastructure, therefore providing for the public good.

10.8 Should the costs of residential visits to Urdd centres increase, this may adversely impact visitor numbers and use of this accommodation. This may negatively impact the Welsh language as the Urdd centres provide opportunities for conversing and socialising in Welsh. Given that residential accommodation is one cost element only of an overall trip cost, it will be challenging to identify that a visitor levy by itself has driven any potential behavioural change, as other linked costs may rise or fall.

10.9 Provisions have been included within the Bill for Ministers to revise the policy via regulations which would need to be approved by the Senedd should adverse impacts materialise, and to nil rate certain stays or provide for additional scenarios where refunds can be provided to taxpayers, via draft affirmative regulations. This will support an ongoing approach of review and monitoring to identify and reduce any negative impacts.

11. School residential trips

11.1 School residential trips can provide an opportunity for students to immerse themselves in the Welsh language, enhancing their linguistic skills and cultural

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understanding through real-world experiences. A review of school spending in Wales undertaken in 2020 by Welsh Government found that primary schools spend 5% of their budgets on other non-staff costs and secondary schools spend 7%. This covers costs such as transport to school trips and office expenses ([Review of school spending in Wales](#)). Schools are permitted to charge for boarding and residential lodging costs however the guidance is clear that they should consider affordability and make it clear that those in receipt of certain benefits are relieved from paying ([Charging for school activities: guidance for governing bodies and head teachers](#)). The cost of the levy could potentially increase the costs of a visit should a residential trip take place within a local authority area that charges a levy. Schools may in turn pass that additional cost on to families. However, the totality of cost would need to be factored into affordability considerations as part of normal planning considerations for these types of visits.

11.2 As stated in the children's rights impact assessment, a levy is discretionary for local authorities, this does not necessarily mean the costs of school residential trips would increase for all visitors to Wales. Tourism is substitutable and visitors will determine where to stay, for how long, how they may travel and when they may visit. These factors may predominantly be influenced by budgets (levels of disposable income, income elasticities) and costs (e.g. total trip cost, price elasticities). Therefore, it would be challenging to ascertain that a visitor levy in isolation would change visitor behaviour, which would include those trips booked by educational authorities.

12. Reliefs for education providers

12.1 Overnight stays that are supplied by education providers (schools, further education or training providers and higher education institutions) as part of the supply of a course of study offered to pupils or students e.g. halls of residence or residential accommodation at a private school) are out of the scope of the levy.

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These overnight stays would have a significant educational component - defined as a full-time course and subject to inspection by Estyn.

12.2 Provisions have been set out in the Bill for Welsh Ministers to create, amend or remove nil rates in the future via draft affirmative regulations, which would be approved by the Senedd. Should there be emerging evidence of negative impacts on certain groups from use of a visitor levy, the legislation provides for flexibility to reduce or remove these.

12.3 The children's rights impact assessment states that a visitor is defined as a person who undertakes an overnight stay, and a person is an individual of any age (as per the definition of the term) as the intention is that all visitors (including children of any age) will be subject to paying the visitor levy. This is because all visitors have an impact on an area in which they are staying, regardless of age.

13 Impact on Welsh language: evidence from consultation responses

13.1 Whilst most respondents did not have specific views concerning the impact of the visitor levy on the Welsh language, a small number of respondents expressed concern that any decline in tourism resulting from a levy could reduce opportunities to use the Welsh language, as well as having a potentially negative impact on Welsh-speaking communities. On the other hand, some respondents highlighted that revenues raised through a levy could be used to promote and facilitate the use of the Welsh language.

13.2 The Deputy Welsh Language Commissioner (DWLC) expressed the wish to see steps taken to strengthen Welsh-speaking communities, including those that are tourist destinations. The DWLC supports the Welsh Government's intention to provide a fairer basis for funding local services and infrastructure between residents and visitors and links the levy to the Cymraeg 2050 strategy. The

response stated that the levy could support the creation and maintenance of favourable conditions for the Welsh language, as well as the benefits offered by tourism to Welsh culture.

13.3 The DWLC called on the Welsh Government to ensure that the levy revenue would be collected and used in the most effective way to bring economic benefit to Welsh-speaking communities, contributing to the creation of jobs that require Welsh language skills. In addition, DWLC supported the principle of using levy revenue to bolster organisations providing Welsh-medium educational services, as a way of strengthening Welsh-speaking communities and ensuring the viability of Welsh as a community language.

13.4 A similar view was shared by a Wales-based community enterprise who were of the opinion that the visitor levy should not have a negative impact on the Welsh language if the revenue raised is used to support the objectives of the local authority's Welsh Language Promotion Strategy. Income from the levy should complement efforts to support and develop Welsh-speaking communities, by supporting interventions that develop the economy and create local employment opportunities.

13.5 In their consultation response, a Welsh language organisation recognised the importance of the economy and strengthening it to reverse the fall in the number of Welsh-speakers and the number of Welsh-speaking communities. They also noted the important contribution made by the tourism industry to the Welsh economy in general and to the economy of many communities. However, they believed that the tourism economy should not have a detrimental impact on the Welsh language and our communities. They supported the notion of sustainable tourism which considers the economic, social, and environmental impacts of tourism, and the needs of visitors, the industry, the environment and host communities. They expressed the view that a levy could help mitigate the negative impacts of tourism and support local development if the levy is used for the benefit of communities. They noted that tourism puts pressure on local services, resources, and infrastructure, and creates a dependence on low-paid

and seasonal jobs. They also believed that the tourism industry is extractive and prioritises visitors and people who do not live in the area permanently, while local people bear the burden of the costs associated with the impact of tourism.

13.6 Another consultation response pertaining to the Welsh language linked tourism and the Welsh language. They used **2021 Census data** as an example - over the last 20 years, the percentage of the Welsh-speaking population in Llanberis has decreased from 80.4% in 2001 to 74.7% in 2011 and down further to 69.7% by 2021. They expressed their concern that a Welsh community such as Llanberis is one that the language cannot afford to lose.

14. How will the proposal affect Welsh-speakers of all ages (both positive and/or adverse effects)?

These issues are addressed above.

15. How will the proposal affect the sustainability of Welsh-speaking communities (both positive and/or adverse effects)?

These can be close-knit rural communities, dispersed social networks in urban settings, and in virtual communities reaching across geographical spaces.

15.1A visitor levy would mean visitors from Wales and elsewhere would make a contribution to help sustain local services and infrastructure, encouraging equity between residents and visitors in how these are funded. Net proceeds from a levy may be used towards activity which promotes and/or supports Welsh language efforts. Local services and infrastructure are important not only to

those visiting, but also residents and businesses alike. Local areas and regions need public funding to keep infrastructure and services working for local communities and visitors.

15.2 The Welsh Government's ambition is to further develop tourism by supporting local communities in a way that is sustainable for the land and environment, developing a framework which is mutually beneficial to both visitors and local citizens. The visitor levy is intended to contribute to these goals by investing in destination management and improvement, which could include:

- mitigating the impact of visitors
- maintaining and promoting use of the Welsh language
- promoting or supporting the sustainable economic growth of tourism and other kinds of travel
- providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

15.3 The benefits and costs of hosting visitors will vary across Wales. Some areas of Wales experience large volumes of visitors at peak times (i.e. during the summer period), which can cause a strain on local services and infrastructure.

15.4 Some of these areas with high numbers of visitors include Welsh-speaking communities.

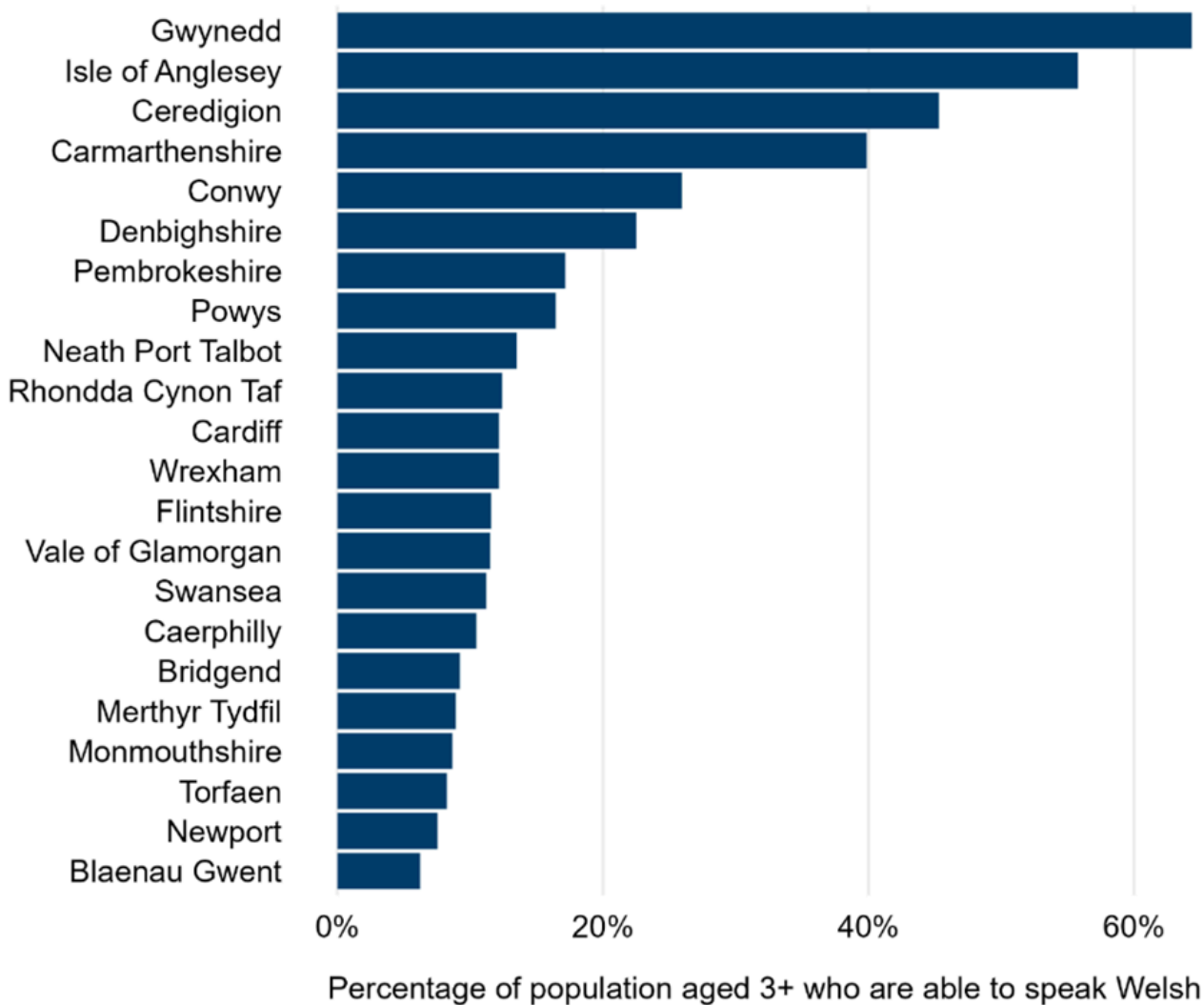


Figure 2: Percentage of population aged 3 years and over who are able to speak Welsh, Census 2021

Source: Census of population 2021 (Office for National Statistics)

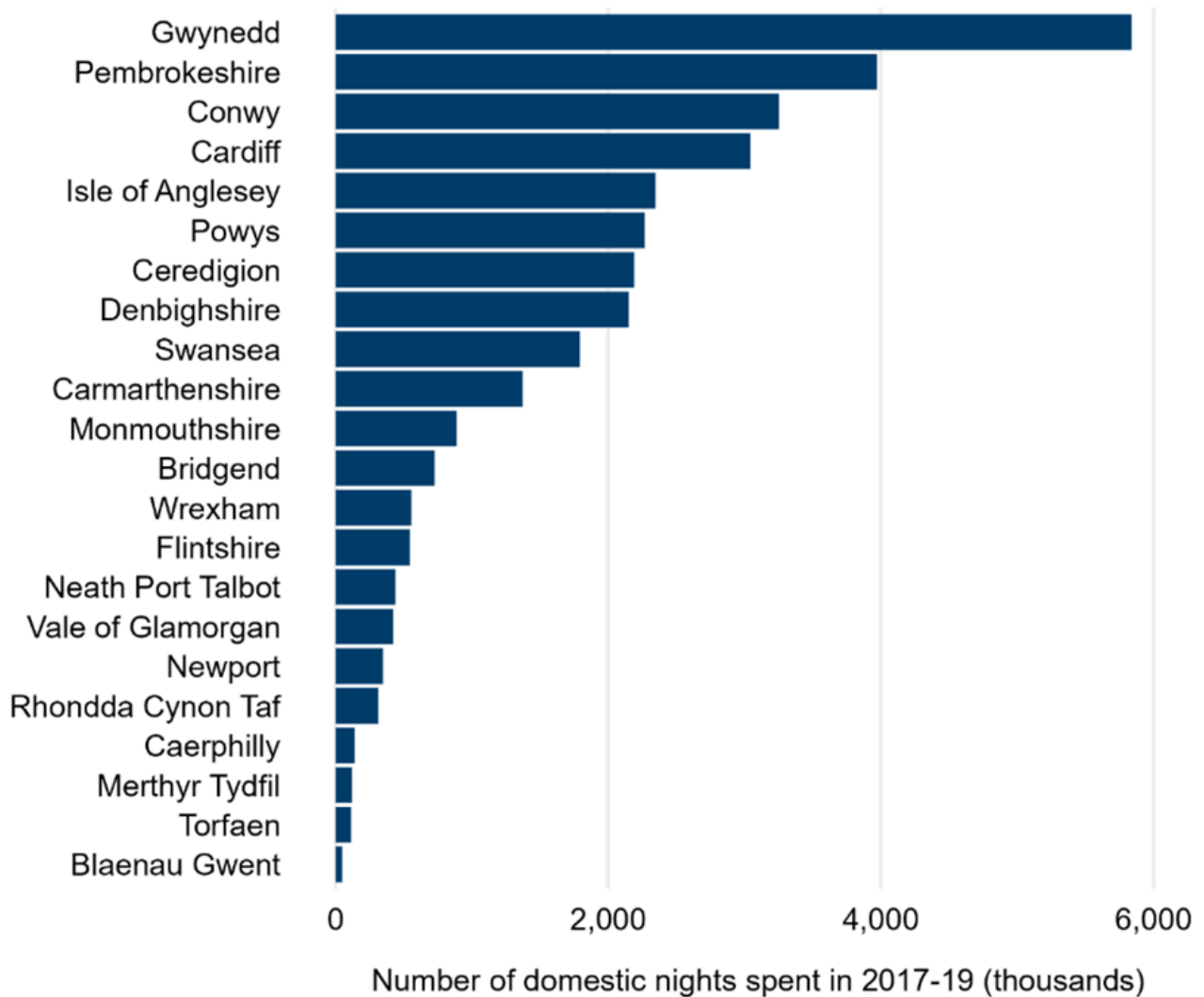


Figure 3: Number of domestic nights spent in Welsh local authorities in 2017-2019

Source: Great Britain Tourism Survey

15.5 The 2 bar charts above show that Gwynedd has both the highest proportion of Welsh-speakers and the highest number of nights spent by domestic visitors.

15.6 Were a visitor levy to be introduced in Gwynedd and as a result, the levy impacts on the Welsh language, the impact could therefore be greater in

Gwynedd when compared to other local authorities.

15.7 The ARFOR Programme is a collaborative economic partnership between Anglesey, Gwynedd, Ceredigion, and Carmarthenshire, funded by the Welsh Government to support Welsh-speaking communities. In the 2021 report [Evaluation, Conclusions and Recommendations](#), the independent evaluators discuss the traditional heartlands of the Welsh language:

“ ‘The counties of Gwynedd, Anglesey, Ceredigion, and Carmarthenshire are often referred to as the heartlands, although several counties or areas within other counties share similar characteristics such as the Conwy Valley, North Pembrokeshire, and areas of Clwyd and Powys. There is a general consensus that these traditional Welsh-speaking heartlands share similar social, economic and cultural characteristics, including:

- “1. A large percentage of Welsh-speakers
2. In-migration of older people, out-migration of young people
3. Rural, with a relatively high prevalence of agriculture, food and tourism
4. Market towns and university towns
5. A large percentage of public sector jobs
6. Relatively low wages.

“ Whilst acknowledged as areas where Welsh has historically been the main language of community and work life, there is a further consensus that economic processes have been a factor in and a reason for the decline of the language in the area. Moreover, there has been an interest and, more recently, political will to develop economic interventions that can support the language and enable it to thrive in these areas. The four local authorities also share and support a desire to work in partnership to establish an economic development and language planning framework to respond to the challenge.’ ”

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15.8 As set out in the Cymraeg 2050 Strategy, the importance of sustaining and growing communities with a high density of Welsh-speakers is important for several reasons:

“ ‘These communities contain the higher percentages of Welsh-speakers who describe themselves as fluent speakers as well as higher percentages of speakers using the language most frequently. While each community is unique, there are some common characteristics to these communities. They include high population mobility – young Welsh-speakers leaving, and an influx of mainly older people. A number of these areas are rural, and largely dependent on the agricultural industry, the food industry and tourism. These areas also contain market towns, and university towns with high reliance on the public sector, e.g. health services and local government. These areas also contain pockets of deprivation and rural poverty, with average salaries among the lowest in the United Kingdom.’ ”

15.9 The policy intent is that a visitor levy will encourage sustainable tourism. Enabling local authorities to introduce a visitor levy will provide additional funds for maintaining services and infrastructure that are integral to both residents’ and the visitor’s experience. Potential positive impacts on the Welsh language will be dependent on how the revenue is invested by local authorities.

16. Impact on Welsh-speaking communities: rural areas

16.1 The [rural proofing impact assessment](#) outlines potential impacts of a visitor levy on rural communities in Wales. The levy would likely not impact on the use of the Welsh language other than potentially realising there would be less opportunities to use Welsh if there was a loss in demand, noting that there

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is likely to be a smaller proportion of Welsh-speaking visitors out of the total visiting population.

16.2 There is no available evidence showing that people would leave their communities specifically because of a visitor levy. There may be a range of complex factors that drives such behaviour such as: declining government financial support, increased costs of doing business, and loss of employment prospects, for example. Any displacement impacts of the levy refer to potential demand loss for tourism in one area but a gain for another. It is not possible to ascertain exact behavioural change as this will likely be more nuanced than simply demand loss. There is likely to be minimal/no measurable impact because of the levy on the use of the Welsh language other than potentially realising there may be less opportunities to use Welsh if there was a loss in demand.

16.3 The nature and specificity of the benefits realised from the revenue generated, will depend on the specific projects the revenue supports. Local authorities will be required to report on how much revenue is spent and where it is spent, on an annual basis. It will also be expected that they monitor the impact of the levy in their own areas. Implementation of a visitor levy will give local authorities valuable real-time data on trends in visitor movements and spend on accommodation in their area. If supplemented by further surveys, it could improve local authority understanding of their visitor economies and the motivations of visitors to travel to their area, which would form part of ongoing monitoring and evaluation of the impact of a visitor levy.

17. How will the proposal affect Welsh medium education and Welsh learners of all ages, including adults (both positive and/or adverse effects)?

Covered above.

18. How will the proposal affect services available in Welsh (both positive and/or adverse effects)? (e.g. health and social services, transport, housing, digital, youth, infrastructure, environment, local government etc.)

The Welsh Language Strategy aims to increase the range of services offered to Welsh-speakers, and to see an increase in use of Welsh-language services.

18.1 Should the visitor levy demonstrate positive impacts through the use of the revenue to strengthen sustainable destination tourism (for example, by investing in local services and infrastructure), then it could have a marginal beneficial impact on the ability to provide services in Welsh. However, given the scope of the policy, it is unlikely to have a significant impact on the provision of Welsh language services in the realms of health, social services, transport, housing, digital, youth, infrastructure, environment and local government.

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19. How will you ensure that people know about services that are available in Welsh and are able to access and use them as easily as they can in English?

19.1 As part of the design and creation of the visitor levy service the Welsh Government and the Welsh Revenue Authority (WRA), will have the Welsh language at the heart of its development.

19.2 The visitor levy presents an opportunity to increase or promote and facilitate use of the Welsh language, for example through marketing or using Welsh terms for the levy.

19.3 The WRA will be developing the systems and content in both languages and working with users to make sure the services are fit for purpose. The WRA operates its customer facing services such as, calls centre functions, correspondence, guidance, and events bilingually to allow people to use their services in their preferred language. The WRA will continue to promote their existing and future services bilingually.

20. What evidence / data have you used to inform your assessment, including evidence from Welsh-speakers or Welsh language interest groups?

20.1 Many of the sources of information quoted in this document highlight the impact of tourism on the Welsh language rather than considering the impact of taxation measures on areas that have Welsh speaking communities. Therefore,

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there are limitations to how much may be inferred from the evidence that is available.

20.2 We undertook extensive engagement ahead of the consultation to help shape our thinking and to understand some of the potential impacts of a levy. The consultation allowed a wider range of responses to be considered before any final decisions were taken about the design and operation of the tax.

20.3 Through engagement and consultation, we have met with colleagues in the Cymraeg 2050 Division within Welsh Government to understand potential impacts of the visitor levy on the Welsh language. We have also undertaken extensive engagement with all local authorities in Wales and a Welsh language tourism network, Fforwm Eryri, to capture their perspectives on the proposals.

20.4 In our consultation events, we ensured our facilitators were bilingual and that simultaneous translation was available. Consultation responses submitted included several individuals and Welsh language organisations such as the Mentrau Iaith and Cymdeithas yr Iaith.

20.5 A detailed summary of responses received from external organisations relating to the Welsh language is set out below.

20.6 In addition to 4 in-person consultation events across Wales, an awareness campaign was launched with the public consultation to share information and encourage involvement. Activity included sharing content via the bilingual corporate Welsh Government, Welsh Treasury, Trysorlys Cymru and Visit Wales social media channels, a WG Blog, press articles including one in Welsh language magazine, Golwg and two bilingual digital films. Officials ensured the consultation was accessible to a wide audience by producing a community and youth version along with an easy read format.

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21. Consultation responses

21.1 The public consultation received over 1200 responses with 58 of them in Welsh. It sought views on the effects of the proposals on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh no less favourably than English. Results from questions pertaining to the Welsh language are included below.

21.2 The most frequently mentioned theme raised by respondents was the view that the proposed introduction of a visitor levy would not have a discernible impact on the Welsh language.

“ “We have not identified any direct effects (either positive or negative) on the opportunities available for individuals to use the Welsh language or for treating the Welsh and English languages on the basis of equality, from the proposed introduction of a visitor levy in itself.” ”

(Land management organisation)

“ “Does not think the introduction of a visitor levy would have an impact on a business’s ability to operate using the Welsh language so long as any reporting could be conducted in Welsh.” ”

(Accommodation industry body)

21.3 Another theme raised in the consultation responses was the view that a visitor levy would have an indirect effect on the Welsh language through the visitors’ perception of Wales. Specifically, the respondents expressed concerns that visitors would be dissatisfied with the introduction of the levy as it would increase the cost of accommodation, leading to them having a negative view of

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Wales and the Welsh language by extension.

“ I do not see how the introduction of a tourist tax will have any positive impact on visitors' views on Wales, the Welsh people and/or the Welsh language. There could indeed be a negative perception [...].” ”

(Resident)

“ I can't imagine that an unfair tax applied to tourists wishing to visit and spend money in Wales is likely to enhance views of Wales and the Welsh Language” ”

(Accommodation provider)

21.4 The last prevalent theme raised was concerns that Welsh families would be displaced, leading to fewer people learning and speaking Welsh. Specifically, the respondents highlighted that the introduction of the levy would have adverse effects on local economies and on accommodation providers, leading to many families relocating to other countries. These responses then suggested that families will attend schools not teaching Welsh and will therefore have limited opportunities to practice Welsh.

“ Consideration needs to be given to what alternative work is available should both primary and secondary visitor economy jobs disappear or reduce in value. That is an issue for Welsh-speakers or, indeed, English speakers whose own young families would have been attending Welsh-medium schools had they not had to leave to find work. A lack of work is itself a lack of opportunity to use Welsh every day.” ”

(Tourism industry body)

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“ “The overall effect of a tourism tax will result in fewer tourists to Wales, resulting in less income for local businesses and so make people unemployed. Due to the lack of alternative jobs people who currently speak Welsh will not have work and will move away to find it. This will lead to a decline in Welsh-speakers and fewer children in the schools learning Welsh.” ”

(Local authority)

21.5 The most common suggestion on increasing the positive impacts identified was ensuring the levy would support the tourism sector. The respondents raising this theme viewed that accommodation providers are an integral part of maintaining and spreading the Welsh language, so they should be supported.

“ “Rework the proposal in a way that supports the Tourism industry that employs Welsh-speakers at the moment” ”

(Local authority)

21.6 The next suggestion most frequently mentioned was the use of bilingual material in Welsh and English. It was proposed that any material handed to visitors, and all reporting conducted as part of the levy, should use of Welsh as well as English.

“ “Communication material should be bilingual” ”

(Local authority)

“ “More bilingual signs in accommodations, most are just in English. More promotion of the Welsh language by accommodation owners.” ”

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(Anonymous response)

21.7 The last prevalent suggestion was using the revenues raised through the levy to directly promote and facilitate the Welsh language. The respondents raising this theme suggested that apart from supporting local services and tourism, the revenues raised should be invested in institutions promoting Welsh language and culture.

“ “levy used to increase funding for Welsh language and culture awareness” ”

(Local authority)

“ “We call on the Government to ensure that the levy revenue would be collected and used in the most effective way to bring economic benefit to Welsh-speaking communities, contributing to the creation of the good jobs.” ”

(Anonymous response)

21.8 Overall, there were few responses to how negative impacts could be mitigated. The most common suggestion for mitigating the negative impacts identified was ensuring the levy would support the tourism sector. As previously mentioned, some respondents viewed that the tourism sector is critical in maintaining and promoting the Welsh language. As a result, these respondents typically suggested that by promoting the tourism industry, the negative impacts on the Welsh language would be mitigated. One respondent also provided specific suggestions on how the tourism sector could be supported.

“ “Create a 52 week a year Tourist and leisure industry with added tax breaks for investment which in turn brings in the much needed income per

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capita and improves the Welsh GDP.” ”

(Resident)

21.9 Suggestions proposed by respondents on increasing potential positive impacts of a levy on the Welsh language included:

- Setting as a spending priority ways of using Welsh to improve the visitor experience or relationships with hosting communities.
- Bilingual campaigns for promotion, marketing, or awareness rolled out in conjunction with introduction of a visitor levy.
- Investments in visitor attractions focused on Welsh history or language.
- Rebates for visitors who booked Welsh language courses.
- Supporting interventions that develop the economy and create local employment opportunities (such as the ARFOR Programme).
- Enabling local people to secure affordable housing in Welsh-speaking communities, by buying or renting them (such as the Welsh Language Communities Housing Plan).

21.10 These points will be considered further in guidance to be issued by Welsh Ministers to local authorities and accommodation providers in Wales.

22. Conclusions

22.1 A visitor levy in Wales could have both positive and negative impacts on the Welsh language, depending on how it is designed, implemented, and applied.

22.2 A positive impact could be achieved if the visitor levy revenue is allocated to support Welsh language initiatives and enhancing cultural and heritage activities which can create favourable conditions for the Welsh language to

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thrive.

22.3 A negative impact could occur if the visitor levy has a negative economic impact which could result in a potential loss of jobs. Insecurity of work may increase outwards migration of young people (which the industry predominantly employs) thereby further impacting the sustainability of our Welsh-speaking communities.

22.4 The impact of the visitor levy on the Welsh language could vary across different regions, sectors, and groups, depending on the level of the levy, the reliefs and discounts, and the distribution of the revenue.

22.5 The Welsh Government aims to balance the interests of visitors, residents, and businesses and to support sustainable tourism and local autonomy.

22.6 The Welsh Government has sought to avoid, reduce or mitigate any negative impacts by taking a cautious approach to setting the initial rate of the levy and will monitor its impact over time. We will continue to work with stakeholders to understand potential impacts.

22.7 It is anticipated that the wider benefits of introducing a visitor levy in Wales will help to improve local areas that adopt a levy. For example, the levy will be providing local authorities with a tool they can use to develop, support and sustain facilities and services which are substantially for, or used by, those visiting a local authority's area for leisure purposes. This may be particularly relevant in the context of pressures on such facilities and services that may arise or be exacerbated by high numbers of visitors, because currently these visitors will generally not directly contribute to the revenues of local authorities. The discretionary nature of the power will equip local authorities with a new fiscal power to raise revenues to support local visitor economies in the future.

23. Monitoring and evaluation

23.1 The visitor levy is a local tax. Those local authorities which choose to introduce a levy will be responsible for reviewing the impact of the levy in their area.

23.2 Setting out a timeline for formal post implementation review is difficult as it may take several years for local authorities to sign up for the scheme. Therefore, evaluating the efficacy of the scheme will evolve over time.

23.3 The Bill sets out a requirement for local authorities to prepare and publish a report on the amount of revenue generated from the levy and information on how the levy has been used towards sustainable destination management purposes, on an annual basis.

23.4 Officials will develop guidance for local authorities setting out advice and best practice for monitoring and evaluating the impact of the levy.

23.5 The outcome of the legislation will be monitored on an ongoing basis, with a combination of methods, including monitoring the Welsh economy and supply/demand indicators. Use of existing data gathered from the relevant Visit Wales surveys, Tourism Barometer and additional engagement with local authorities and the tourism sector to understand the effectiveness of the legislation. The Welsh Ministers have the ability to revise the rates should adverse impacts materialise.

23.6 It is anticipated that the Welsh Revenue Authority will continually monitor and review the effectiveness of the levy administration through regular engagement with local authorities and tourism businesses. Alongside this, they will consider what data to report on, such as the amount of revenues collected.

23.7 The Welsh Government will evaluate the impact of the legislation and

continually monitor for any adverse impacts. Regulations may be laid in the future should negative or disproportionate impacts materialise and be identified.

24. What other evidence would help you to conduct a better assessment?

24.1 Local authorities will be required to undertake their own consultation exercise and impact assessment including Welsh language, to meet their legal obligations under the Well-Being of Future Generations Act and Equality Act.

25. How will you know if your policy is a success?

25.1 The legislation will be successful if local authorities opt to use a visitor levy and utilise the revenues to successfully enhance sustainable tourism in Wales.

25.2 Local authorities will be required to produce an annual report to demonstrate how funds from the levy have been invested. This will make it possible to assess the tangible, long-term benefits of additional revenue for local authorities to invest in local communities and the extent to which it has contributed to the Cymraeg 2050 Strategy.

25.3 We estimate the earliest date a visitor levy could be introduced by a local authority, following local impact assessments, consultation, and a formal notice period, is 2027. It will take a few years for a levy to be in place to effectively evaluate the impact of the visitor levy on the Welsh language in a local authority area.

Annex A: Sources of information

1. **Compliance notices** - Welsh Language Commissioner
2. **The Green Book** - GOV.UK
3. **Wales Visitor Economy Profile: 2021**
4. **Domestic GB tourism statistics, Wales overnight tourism: annual report: 2022**
5. **2021 Census Profile for areas in England and Wales** - Nomis
6. **Summary of Wales bedstock data: situation as of June 2022**
7. **Ability to speak Welsh by industry** - Office for National Statistics
8. **Tourism Barometer**
9. **Tourism Barometer: February Wave, 2024**
10. **Discretionary visitor levy for local authorities**
11. **The Effects of Tourism on the Welsh Language in North-West Wales**
12. **The Effect of Tourism on Language in Gwynedd** - Arsyllfa
13. **An assessment of the economic value of Urdd Gobaith Cymru 2023**
14. **Evidence review of elasticities relevant to a visitor levy in Wales**
15. Information shared by National Eisteddfod for Wales, 2024
16. **Review of school spending in Wales**
17. **Charging for school activities: guidance for governing bodies and head teachers**
18. **Welsh language in Wales (Census 2021)**
19. These can be close-knit rural communities, dispersed social networks in urban settings, and in virtual communities reaching across geographical spaces.
20. **Regional and local tourism profiles: 2017 to 2019**
21. **Evaluation of Arfor - final report - final** - October 2021
22. The Welsh Language Strategy aims to increase the range of services offered to Welsh-speakers, and to see an increase in use of Welsh-language services.

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Other sources

- [Commission for Welsh-speaking Communities: position paper](#)
- [Welsh language Communities Housing Plan](#)

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