

Priorities for the Visitor Economy

What action is the Welsh Government considering and why?

Tourism is an important part of the Welsh economy. Over 11,500 businesses help bring nearly 11 million overnight visitors to Wales each year.

Those businesses and organisations include accommodation providers, attractions, events' organisers, heritage, sporting and cultural bodies, Local Authorities and other public bodies. Visitors spent around £6.3 billion in the local economy in 2018.

As part of Welsh Government Visit Wales leads on marketing, promotion and investment in tourism, and works to support the tourism sector in Wales. The work of Visit Wales is shaped by the current plan for tourism – Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020 – which comes to an end in 2020.

Before beginning work on a new plan, Visit Wales embarked on an extensive process of review and engagement. This began with a review of the previous plan for tourism. 'Partnership for Growth' set five priorities – promotion, product development, people, profitable performance and place-building. Visit Wales tracked progress against those priorities, in 2016 and again in 2019. [LINK]. Those reviews showed that majority of commitments in the previous plan have been delivered, and Wales is currently on track to achieve the overall target of 10% growth in visitor expenditure, although there are still some challenges for the sector in Wales including issues such as skills.

In preparation for developing new priorities, Visit Wales also reviewed the current evidence base for the performance of tourism and initiated an extensive engagement process with the sector and stakeholders. The new priorities have been shaped by many of the issues that emerged from these activities.

The 'action' is the publication of a new Plan for tourism - Welcome to Wales - Priorities for the visitor economy 2020-2025 {LINK}. This new Plan will guide the work of Visit Wales and inform business planning and the allocation of resources. The priorities in the plan will be delivered in partnership with the tourism sector and others.

In brief, the overall ambition is to, 'Grow tourism for the good of Wales', through the goal of: 'Economic growth that delivers benefits to people and places, including environmental sustainability, social and cultural enrichment and health benefits'. This ambition has emerged directly from the engagement process where stakeholders asked us to take greater account of sustainability and the wellbeing goals.

We believe that what is good for visitors, can be good for people in Wales, so making a difference for the people of Wales is central to the Plan. We will do that

through all of the actions in the Plan, continuing to promote Wales as a great place to live, work and invest, through investing in products and facilities that benefit people in Wales as well as visitors, and through supporting an industry that generates local jobs and contributes to the viability of local places. We will also measure it through capturing the perceptions of residents, as well as businesses and visitors.

The Plan will deliver visitor experiences shaped by two Welsh concepts – Bro and Byd. ‘Bro’ is about delivering wellbeing at a local level and ‘Byd’ is about ensuring that we also meet and respond to international quality standards in doing so. Culture, landscape, adventure and unique food and accommodation experiences are central to the core Welsh tourism offer.

The four main priorities in the Plan are: • great products and places • quality visitor experiences • an innovative Cymru Wales brand • an engaged and vibrant sector.

The Plan will encourage UK visitors to experience high-quality staycations here, and ensure that international visitors discover and choose Wales. The Plan positions tourism as a bedrock for the Welsh economy and a flag-carrier for projecting a positive message from Wales. The focus is on enabling the industry to improve the quality of Wales’ welcome, supporting local supply chains, making our offer fit for international audiences and continuing to market Wales with a confident and distinctive brand in the UK and abroad.

Wellbeing goals will be delivered through each of the priorities – for example new investments will be expected to deliver social or environmental benefits as well as economic ones; our grading system will continue to help businesses reduce their carbon footprint; our new brand will continue to promote an inclusive view of Wales and wider opportunities for outdoor leisure and adventure, whilst our stronger policy focus will involve working with the sector to build links with other areas including social care and promoting sustainable transport.

Note that the priorities in the Plan are an evolution not a revolution – most are not new areas of work, but do represent a clearer focus.

The Plan has been shaped by the five ways of working:

The Plan is ultimately about the long term future of Wales as a place to live, work and invest, as it

- has been informed by responses to the ten questions which specifically asked about the visitors of the future
- seeks to address major long term issues such as overtourism, and the environmental impact of tourism
- tackles long term challenges for the tourism sector including seasonality, spend and spread.

- has been informed by an analysis of the market demands shaping tourism including its future growth prospects and potential.
- is a living, evolving document and emerging data, such as the forthcoming visitor survey, will be used to inform immediate delivery as well as our long term policies.

The plan focuses on **prevention**, including:

- Poverty – tourism represents over 10% of jobs in some areas of Wales; it brings life to high streets, and encourages spend in often remote or rural areas. Tourism jobs are spread across Wales. Growing tourism will therefore contribute to the growth of local economies across Wales.
- Poor Health – Visit Wales contributes to health outcomes by supporting, promoting and improving access to outdoor leisure opportunities. The Plan notes that we will continue to promote adventure as a key platform for the brand, and includes a focus on walking routes such as the Wales Coast Path and Offa’s Dyke Path, as well as other outdoor activities. Our new Brilliant Basics fund will support initiatives that improve access to outdoor leisure activities, including ‘Changing Places’ (fully accessible toilets), as well as car parks and other facilities.
- Environment – although international travel impacts on carbon emissions, in Wales road transport contributes a much higher proportion of transport emissions. We will work with Transport colleagues to promote more sustainable travel and continue to work with sector SMEs to promote our environmental toolkit that encourages them to use less water, reduce waste and be more environmentally sustainable.
- Community cohesion – a new element of the Plan is the focus on place-making and community engagement; through our surveys we will track community views of tourism and we will involve residents in closer working with tourism bodies.

The priorities in the plan are closely **integrated** with, and have been informed by, other Welsh Government priorities including:

- the ongoing consultation on the International Strategy for Wales.
- the Prosperity for All: the national strategy and the supporting Economic Action Plan – tourism is a Foundation sector, and the Plan builds the new economic contract into our working.
- Prosperity for All: a low carbon Wales. • Cymraeg 2050 – the strategy for Welsh Language.
- Action on Disability.
- A Healthier Wales.

This plan is built on **collaboration** and **involvement** through extensive programme of engagement with stakeholders including:

- the sector (businesses, public sector and voluntary bodies and others) through the four regional Tourism Forums (each involving around 20-50 people, many representing wider groups in tourism), each of which met twice to discuss the emerging Plan.
- the four regional Tourism Roadshows across Wales where the priorities have been presented and debated.
- a conversation with the sector, launched at the Tourism Summit in March 2019 which asked for responses to ten questions about the future of tourism. The 386 responses have been independently analysed {INSERT LINK TO WAVEHILL}.
- two internal seminars, one facilitated by the Future Generations Commissioner, involving teams from across Welsh Government including IT, planning, taxation, sectors, environment, museums and heritage, and many others.
- feedback to the Deputy Minister from Cabinet members and Assembly Members.
- meetings with external bodies including Disability Wales and others.
- an active programme of internal staff involvement with a regular working group and open discussions at staff events.

That **collaboration** and **involvement** will continue through the delivery phase. Visit Wales can't deliver this plan alone, so success will mean working with others including the sector, other policy areas such as transport and stakeholders. We also recognise the need to scale the commitments in the plan – depending on funding and resources.

The high level priorities in this Plan are based on our best understanding of strategic impact although some of the more specific actions in the plan are still at the development stage and will need further assessment. We are also committed to evaluating the impact of our investments, alongside our routine programme of research and insights such as the regular 'Tourism Barometer' and other surveys. As noted this is a live document that will need to flex evolve in the light of changing information and available resources.

A. CHILDREN'S RIGHTS IMPACT ASSESSMENT

1. Describe and explain the impact of the proposal on children and young people.

There is potential for indirect positive impacts for the wellbeing of children and young people arising from measures to support tourism as a Foundation Sector to support

prosperity and investing in products that also benefit communities. There are also specific proposals that address the needs of young people including:

- helping as many children in Wales as possible to get a holiday, through working with the industry to establish a festival of free/subsidised experiences for children whilst building a reputation as an inclusive, family-orientated destination that is welcoming to all;
- a formal Tourism Skills Partnership will tackle skills shortages in the tourism sector and a key focus of this Partnership will be working with partners to improve the perceptions of tourism as a future career for young people;
- exploring opportunities to work with similar-sized regions and nations on a youth work and visits exchange schemes providing seasonal work and travel opportunities for 18-25 year olds to develop their skills, and enjoy Wales for the first time.

As the actions within the Plan are high level, and largely impact on the tourism industry and only indirectly on individuals and children and young people, a proportionate approach has been taken in gathering evidence for the CRIA and at this point, children and young people have not been directly consulted. However, the Plan includes a proposal to hold a Youth Summit in 2020 in order to better understand the views of young people in tourism generally and this will feed into future impact assessments.

2. Explain how the proposal is likely to impact on children's rights.

The UNCRC is an international agreement which protects the human rights of children and young people under the age of 18. The action Plan, as part of a wider programme to support employment and prosperity across the Foundation Sectors, will impact **on article 27**. This article requires that children and young people have a right to a standard of living that is good enough to meet their physical and mental needs and that the Government should help families who cannot afford to provide this. The wider evidence base suggests that general government policies to create jobs and increase employment will benefit children and young people, and in general the impacts should be broadly positive.

The Plan will also indirectly impact on **article 31**. This article requires that all children and young people have a right to relax, play and to join in a wide range of activities. Investment made through the Plan will help with the provision of experiences and facilities that will be family-orientated that will maximise the outcomes that can be delivered for children and young people. The proposed Youth Summit will enable evidence to be gathered on how the Plan can be implemented to enable children to participate and take advantage of their rights.