

Sustainable Tourism

A Framework for Wales



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Sustainable Tourism Framework

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1. What does sustainable development mean for tourism in Wales?

The purpose of this sustainable tourism framework is to outline what sustainable development means for the tourism sector in Wales. Its purpose is to guide those involved in promoting and developing tourism in the public, private and voluntary sectors, nationally, regionally and locally to ensure that the tourism industry contributes to sustainable development in Wales.

Sustainability and Tourism

Tourism perhaps more than any other industry relies upon the integrity of the natural environment. In Wales, beautiful landscapes and coastlines are the very foundation of tourism. Realising the potential of the environment will always be a key priority in the development of tourism.

Sustainable Tourism however is more than 'being green.' Unlike eco or green tourism, sustainable tourism addresses social, cultural, economic and environmental issues. To be sustainable, tourism will need to consider the needs and quality of life of local communities, enhance and respect culture and local traditions, contribute to local economic prosperity as well as minimise damage to the environment.

Sustainable Development Guiding Principles

There is a binding legal duty on Welsh Ministers to pursue sustainable development in all that they do. The goals and principles of sustainable development have been agreed by the UK Government, Scottish Executive, Welsh Assembly Government and the Northern Ireland Administration. These are:

Living within Environmental Limits – respecting the limits of the planet's environment, resources and biodiversity – to improve the environment and ensure that the natural resources needed for life are unimpaired and remain so for future generations.

Ensuring a Strong, Healthy and Just Society - Meeting the diverse needs of all people in existing and future communities, promoting personal well-being, social cohesion and inclusion and creating equal opportunity for all.

Achieving a Sustainable Economy - Building a strong, stable and sustainable economy, which provides prosperity and opportunities for all and in which environmental and social costs fall on those who impose them (polluter pays) and efficient resource use is incentivised.

Promoting Good Governance - Actively promoting effective, participative systems of governance in all levels of society – engaging people's creativity, energy and diversity.

Using Sound Science Responsibly - Ensuring policy is developed and implemented on the basis of strong scientific evidence, whilst taking into account scientific uncertainty.

2. Why is Sustainable Tourism important?

Whilst ensuring that tourism is developed in a sustainable way is an important aim in its own right, some broader consumer trends suggest that visitors in future will increasingly opt for more sustainable holiday experiences. Tourism destinations that will be able to demonstrate a clear commitment to sustainability could gain an edge over competitor destinations.

Ethical consumption

Consumers are becoming more ethically aware. In 2004, UK consumers spent a total of £25.8 billion on ethical goods, an increase of 15 per cent on the previous year. Over the same period, UK household expenditure increased by only 3.7 per cent. Market share of ethical consumerism had increased by 40% in the previous 5 years¹.

Other research indicates a growth in awareness amongst holidaymakers of the environmental dangers of tourism, whilst increasing numbers of people believe that travel companies should do more to protect the environment and support local people.

Authenticity of experience

Trend data suggests there is an increasing desire for a more authentic holiday experience and a greater interaction with local people and communities. Local cuisine, the desire to experience different cultures and to get off the beaten track, are becoming increasingly important factors in holiday choice².

Climate Change

Managing and adapting to climate change will be critical to the future of sustainable tourism in Wales. Tourism businesses and visitors will need to contribute to reducing Wales's carbon footprint. Predicted changes in climate across the world may affect the tourism market in Wales, whilst local impacts such as the availability of water supply during periods of drought, increased storminess and risk of flooding, and changes in wildlife distribution will need to be considered carefully when planning tourism developments.

3. What does Sustainable Tourism aim to achieve?

The World Tourism Organisation and United Nations Environment Programme have identified 12 aims for sustainable tourism.

These are:

1) Economic Viability

To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term

2) Local Prosperity

¹ Ethical Consumerism, 2005, New Economics Foundation & Cooperative Bank

² Ethical Holidays, Leisure Intelligence, Mintel, October 2005

To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.

3) Employment Quality

To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

4) Social Equity

To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor

5) Visitor Fulfilment

To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

6) Local Control

To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

7) Community Well being

To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

8) Cultural Richness

To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities

9) Physical Integrity

To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment

10) Biological Diversity

To support the conservation of natural areas, habitats and wildlife, and minimize damage to them

11) Resource Efficiency

To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services

12) Environmental Purity

To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors

European aims for Sustainable Tourism

At the European level the following aims for the sustainability of European tourism have been proposed:

Economic prosperity

- a. To ensure the long term competitiveness and viability of tourism enterprises.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

Environmental protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To contribute to the appreciation and conservation of natural and cultural heritage.

In preparing this framework, we have drawn upon the aims and objectives for sustainable tourism that have been agreed at International and European levels.

The framework's aims and suggested actions have also been developed through a public consultation process, which involved workshops with national, regional and local stakeholders.

4. Vision and Objectives for Sustainable Tourism

Our vision for Sustainable Tourism is

'Wales is recognised internationally as a leading sustainable tourism destination that promotes local economic prosperity, supports community well being and engagement, enhances its natural environment and culture and delivers a high quality experience to visitors.'

There are four key objectives supporting the vision:-

- Promoting local prosperity
- Supporting community well being and involvement
- Minimising tourism's environmental impact
- Protecting and giving value to natural heritage and culture

5. Strategic Framework for Action

1. Promoting Local Economic Prosperity

Aim: To maximise the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally

Overnight visitors to Wales spent a total of £2 billion in 2006, while day visitors spent a further £1 billion. However, these figures reflect the total spend made by visitors during their trip, including money spent outside Wales on goods and services such as petrol, food, and transport. There are various 'leakages' of tourism spend from the Welsh economy, since not all expenditure will be on Welsh goods. Encouraging tourism businesses to use local goods and services reduces leakage of tourism expenditure from the local economy, reduces goods traffic on the roads and helps to ensure that the visitor receives a distinctive, high quality, Welsh experience.

Action to include:

- **Encourage the development of partnerships between local food producers/suppliers and tourism operators**
- **Encourage visitors to purchase locally produced goods through improved marketing**
- **Establish closer links between those involved in tourism and agri-food promotion to enable joint ventures to take place**

Aim: To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

Traditionally, visits to Wales have been very seasonal in nature, peaking in the summer months of July and August. Although seasonal and part time jobs suit the needs of some people, seasonality restricts opportunities for year round full time employment and puts pressure on the infrastructure and services of our resorts and popular visitor destinations. There has been some progress in reducing seasonality, especially in South East Wales which benefits from a relatively high proportion of business visits and major events.

60% of the workforce employed in the tourism, hospitality and leisure sector in Wales is female. Many women are attracted by the part time opportunities offered by the industry, but part time working can have certain draw backs, including fewer advancement opportunities, lower pay per hour and less formal training. There are also implications for tourism employers in terms of providing flexible training and working arrangements and addressing childcare and elder care issues.

Action to include:

- **More emphasis to targeting non-seasonal markets (e.g. business tourism, non-family segments, certain niche markets – cultural tourism and some forms of activity tourism)**
- **Innovative product development, packaging events and promotion in the off-season**
- **Introduce variable pricing strategies during shoulder season**
- **Encourage tourism employers to introduce flexible working practices**

Aim: To ensure the viability and competitiveness of tourism destinations and enterprises so that they are able to continue to prosper and deliver benefits in the long term

A particular challenge for the tourism industry in Wales is to ensure that businesses continuously improve and develop their products to meet the evolving tastes and needs of consumers. Small, local businesses in the tourism sector will continue to require business support and access to finance to address issues of market failure as well as support to overcome skill gaps and improve staff recruitment and retention.

Action to include:

- **Business support/ start up measures/ access to finance for businesses in the tourism sector to improve competitiveness and productivity**
- **Training and skills initiatives, including promoting uptake of ICT**

Aim: To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability, or in other ways

The visitor experience is made up of a wide range of individual elements provided by many different businesses, public organisations and individuals. It only requires a weakness in one or two of these elements to undermine the whole visitor experience. If a destination can meet and even exceed the expectations of its visitors then it will have an advantage over competitor destinations. In order to do this, all destination stakeholders need to understand their market and work together to meet the needs of that market. Various approaches to managing tourism destinations have been developed which focus on an ongoing process of improving visitor satisfaction, while seeking to improve the local economy, the environment and the quality of life of the local community.

Action to include:

- **Encourage more destinations to adopt integrated ways of managing destinations to ensure visitor needs are met**
- **Encourage tourism businesses to meet the needs of disabled people**

2. Supporting community well being and involvement

Aim: To ensure that tourism maintains and strengthens the quality of life in local communities, including social and linguistic structures

Tourism has significant potential to benefit local communities but it also has the potential to significantly change the character of local communities. The challenge is to ensure that tourism is developed in a way that is fully acceptable to the host community and that local residents are not disadvantaged because they live in an area that is attractive for tourism. The local impact of tourism on communities should be monitored and controlled.

Action to include:

- **Ensure that impact of tourism on local communities is monitored at the destination level**
- **Influence the scale, nature and location of development to ensure that tourism development is in keeping with the needs of the local community and its linguistic character**
- **Check that proposed new development is in line with market trends and future demand**

Aim: To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders

Without the support and active engagement of the community, tourism will not flourish. The visitor experience needs to be intimately linked with local people and the place. Communities need to be directly engaged in planning and preparing the welcome for the tourist so that there are mutual benefits for both the visitor and the host.

Action to include:

- **Encourage local communities and the voluntary sector to become engaged in tourism planning at the local level**
- **Ensure that communities and the voluntary sector are consulted on tourism proposals and plans**

Aim: To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services to local people.

Clear advantages can be gained from linking the tourism and recreation agendas. It is therefore highly appropriate to link planning for leisure and tourism together and to develop approaches that ensure that local people are also able to benefit from facilities which visitors come to enjoy. Providing opportunities for local people, especially young people to experience activities that visitors come to enjoy will not only lead to improving health, but will increase employment opportunities for local people in activity related jobs and associated commercial opportunities in the longer term. This will be important in helping to reduce the outflow of young people from rural Wales and in helping farmers diversify.

Unemployment in Wales is at a 25 year low, which poses challenges for recruitment into the tourism industry. The level of economic inactivity, however, in some parts of Wales is high and there is therefore a potential pool of indigenous labour which, with appropriate support and targeted training, could benefit the tourism industry.

Action to include:

- **Promote visitor activities/facilities to local residents as well as visitors**
- **Encourage schools/ youth clubs/ sport governing bodies/voluntary organisations to provide opportunities for children and adults to experience recreational out door activities such as water sports, hill walking, mountain biking**
- **Joint action between tourism employers, tourism training providers and Job Centre plus to enable economically inactive people to take up employment in tourism**
- **Encourage local communities to realise the commercial opportunities that arise from tourism**

3. Minimising tourism's environmental impact

Aim: To minimise the use of scarce and non/renewable resources in the development and operation of tourism facilities and services

The cumulative effect of tourist facilities could damage the environment over time. Tourism infrastructure puts pressure on a variety of resources such as water supply, sewerage and waste disposal systems. The environmental impact of food and drink consumption by tourists is also likely to be greater than the consumption of food and drink by local residents since eating out uses up more resources than eating at home. Where possible, the impact of tourist facilities on the environment should be minimised to recognise the fact that the environment is a finite resource.

Action to include:

- **Introduce environmental awareness campaigns for the industry, including promotion of environmental accreditation, training initiatives and achievement awards**
- **Encourage businesses to minimise energy consumption and water use**
- **Networking and best practice clubs for 'green' businesses/ engagement with trade bodies**
- **Introduce environmental awareness programmes for visitors**
- **Ensure impact on water resources and sewerage systems is taken into account when developing new tourism facilities**

Aim: To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

Due to the ongoing programme of improvements to sewerage treatment works and sewerage systems throughout Wales, there has been a considerable improvement in the quality of our beaches. However, a number of beaches continue to be affected by diffuse pollution (e.g. from agricultural/urban run-off, storm sewerage, private discharges, faulty septic tanks). There are also indications that average beach litter density in Wales is increasing year on year.

Action to include:

- **Continue to support voluntary groups (such as Coast Care groups) to tackle beach litter**
- **Continue to support the Green Seas Initiative in its target to increase the number of blue flag and Green Coast awards**
- **Support the Environment Agency in its work in tackling diffuse river pollution**

Tourism transport contributes 8% of CO₂ equivalent emissions at the European level. 13% of visitors arrived in Wales by public transport in 2006 compared to 22% in the UK as a whole. Reducing the dependency on the car is important not only for the purpose of reducing noise, air pollution and CO₂ emissions, but also to reduce congestion and disruption to local people. Tourists can also contribute towards ensuring the viability of local transport services, especially in the more sparsely populated rural areas.

Action to include:

- **Encourage tourism businesses to make visitors aware of transport options**
- **Active promotion and marketing of sustainable transport options to visitors**
- **Investment in appropriate services/ infrastructure (cycle trails, rail and bus services, coach parking, interchanges) with the needs of visitors in mind**
- **Locating new, large scale tourism development near public transport**

4. Protecting and giving value to natural heritage and culture

Aim: To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment

The quality of the environment in Wales is the main motive for 40% of staying holiday tourists and tourist leisure day trips in Wales, so the economy and the environment cannot be viewed separately. Promoting a tourism product that is based on Wales' assets, the quality of its landscape and distinctive culture will ultimately act as a means of encouraging the sustainable management of

these resources, as it provides the economic justification for protecting and investing in them. Particular challenges to the quality of the landscape include damage from over-use by visitors and specific intrusive activities.

Action to include:

- **Support the maintenance of key environmental sites, notably in the designated areas, beaches, footpaths and the underwater environment**
- **Promote and develop tourism activities that depend on quality landscapes (e.g. walking, activity tourism)**
- **Focus marketing away from sensitive areas**
- **Explore opportunities to ensure that revenue from visitors supports maintenance and restoration of natural and built heritage**
- **Work with developers to ensure that sustainable projects are promoted**
- **Monitor impact of recreational activity on the environment**
- **Influence the scale, nature and location of development to ensure no adverse impact upon the environment**
- **Support agri-environmental projects that meet wider tourism objectives for heritage conservation**
- **Provide better interpretation of the landscape**

Aim: To support the conservation of natural areas, habitats and wildlife and minimise damage to them

The World Tourism Organisation have identified that nature tourism is growing at three times the rate of tourism overall. However, undertaking activities in the countryside can disturb or damage wildlife if done insensitively. At some sites, there may be conflict between a group of activity users and wildlife interests in particular areas or at particular times, for instance, during the breeding season. Voluntary agreements between the main user groups and/or operators to limit any environmental disturbance have been put in place in some instances and there is scope to seek to agree other similar arrangements at other sites with existing or potential conflict. .

Action to include:

- **Develop and promote visitor codes of practice**
- **Promote nature tourism to give an economic incentive to protect and invest in biodiversity**
- **Support conservation activity that increases the area and quality of wildlife habitats**

Aim: To enhance and value historic heritage, authentic culture, traditions and distinctiveness of host communities

Culture and heritage are important factors in differentiating Wales from competing destinations. The 'independent explorer' segment of the market which is the focus of Visit Wales' main marketing campaign, likes to interact with the places they visit to understand the culture and meet its people. The successful promotion of local distinctiveness can add significant value to the tourism product.

Action to include:

- **Local hosts, communities and businesses to be encouraged to explore, present and promote local features (local events, arts, crafts, cuisine, language).**
- **Prepare interpretation strategies for the culture and heritage of different parts of Wales**
- **Develop and enhance strategic and local cultural gateways**
- **Capitalise upon Welsh distinctiveness by promoting Wales as a destination for cultural events, arts and heritage.**

6. How will sustainable tourism be achieved both operationally and in policy making?

Achieving our Potential, the national tourism strategy for Wales, sets out the framework for developing the tourism industry from 2006 – 2013. The strategy is complemented and supported by the four regional tourism strategies. These documents provide a strategic reference point for the more specific aims and action set out in this framework.

It will be important to ensure that wider policies and programmes at the national level relating to the environment, economic development, communities, land use planning and sustainable development contribute to sustainable tourism aims. To this end, we are proposing the establishment of a Sustainable Tourism Forum, involving key stakeholder interests at the national level.

The Forum will facilitate a coordinated approach to the development and implementation of initiatives designed to make Wales a more sustainable destination.

Visit Wales will have a key role in coordinating progress against the actions identified in this framework. A detailed delivery plan has been drawn up to cover the period 2007-2013, and Visit Wales will use its annual business planning cycle as an active means to allocate appropriate resources to support implementation.

Action at local and sub regional levels involving key interests, including tourism businesses, the local community, environmental and cultural heritage bodies, transport and education sectors will be key to delivering this framework. Many local authorities are already taking the lead in establishing structures within which the different stakeholder interests can work together to manage destinations, assisted by process such as IQM. The Spatial Plan will also play a role in facilitating integration between the local, regional and national levels.

7. Arrangements for checking and reporting progress

Appropriate monitoring will be achieved through establishing and reporting on national and regional sustainable tourism indicators.

A wide variety of indicators could be used to measure the sustainability of the tourism industry. The Sustainable Tourism Forum will advise on the most appropriate for tourism in Wales. Indicators could include the following:

1. Promoting Economic Prosperity

For year round businesses, ratio of average occupancy between busiest and least busy 3 months

% of visitors indicating that they are satisfied with overall experience

Membership level of local tourism associations

% of visitors who are on a repeat visit

% of tourism jobs that are seasonal only

% of tourism enterprises participating in quality certification scheme

% enterprises reporting growth in business over previous year

Average hourly earnings in tourism as a ratio of all industry hourly earnings

2. Supporting community well-being and involvement

% of residents indicating that they are satisfied with local impact of tourism

% of school children in Wales who have undertaken an outdoor activity during the previous year

Presence of a destination management approach that involves different stakeholders

3. Minimising environmental impact

% of visitors arriving by public transport

% of visitors using public transport when in the destination

% of tourism enterprises with recognised environmental certification

Measurement of total waste generated directly and indirectly by visitors to Wales using the Tourism Satellite Account.

Measurement of carbon emissions generated directly and indirectly, by visitors to Wales, through the Tourism Satellite Account.

Water quality (sea and freshwater areas)

4. Protecting and Giving Value to Natural Heritage

Environmental state of sites of international, Welsh and local importance that have been designated to support species and habitats

Extent to which visitors feel that they received a distinctive or 'Welsh' experience during their trip

The *Wales Ecological Footprint* measures the amount of land we need to support our lifestyles and can be used to assess the demands we are placing on the environment. The Assembly Government is using the footprint to measure progress towards achieving sustainable development. One of the aims of this framework will be to ensure that tourism contributes towards reducing the ecological footprint.