



Environment, Tourism and Leisure – Policy Briefing

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Economaid, Data a Dulliau Cymru

Introduction – Environment

Over the last 20-30 years, environmental issues have increasingly risen up the political agenda and this is reflected in the prominence placed on the 'climate change' agenda at the devolved, UK, European Union and International levels. The increased salience of the environment and sustainable development was reflected in statutory duty included in the Government of Wales Act 1998 and 2006 which required the National Assembly for Wales to publish a strategy outlining its plans to promote sustainable development. In addition sustainable development was identified in *Better Wales* (NAfW, 2000) and *Plan for Wales* (NAfW, 2001) as one of three overarching guiding principles to underpin devolution in Wales (equal opportunities and social inclusion being the other two).

1. Governance Structures

There is significant WAG interaction with UK and EU governance, over setting and compliance with identified environmental targets, in particular in relation to CO2 reduction; identification and mitigation of climate change impacts, such as flooding; and habitat and biodiversity improvement.

1.1 *European Union - International level*

Over the last twenty years, the environment has become an increasingly important focus for the European Union and wider international community. The Kyoto protocol was introduced in February 2005 and was signed by 182 countries including the UK. The UK government agreed to reduce its emissions to at least 12.5 per cent lower than 1990 levels. At the UN Climate Change conference in December 2009, the EU supported the 'Copenhagen Accord' as a legally binding global treaty to replace the Kyoto Protocol in 2013. The EU made an unconditional commitment to cut its emissions to at least 20% below 1990 levels by 2020 – implemented via binding legislation. At the Copenhagen Conference the EU offered to increase this target to 30% if other industrialised countries matched this commitment to cuts in emissions. The EU has responded to issues around climate change through a range of initiatives, including the emissions trading system – whereby industries and EU states are set a quota and companies/states are able to offset emissions above their quota by buying credits from companies/states with more efficient outputs.

1.2 UK level

Responsibility for environment policy at the UK level sits primarily with the Department for Environment, Food and Rural Affairs (DEFRA), the Department of Energy and Climate Change (DECC) and a network of key delivery agencies, including the Environment Agency and Sustainable Development Commission. The DECC was created in October 2008 to bring together energy policy and climate change policy, which was previously split between the Department for Business, Enterprise and Regulatory Reform (BERR) and DEFRA.

The Environment Agency was established by the Environment Act 1995 and is sponsored by DEFRA in England and the Welsh Assembly Government in Wales. The Agency's principal aim is to protect and enhance the environment and in doing so to make a contribution towards the objective of achieving sustainable development.

The Sustainable Development Commission (SDC) is the Government's independent adviser on sustainable development and reports to the UK Government and devolved administrations. The SDC acts as an independent watchdog, scrutinising the UK Government's and devolved administrations progress in developing and implementing sustainable development policies.

1.3 Wales level

Similarly to its 1998 predecessor, the Government of Wales Act 2006 included a statutory duty stating that the Welsh Assembly Government 'must make a scheme ("the sustainable development scheme") setting out how they propose, in the exercise of their functions, to promote sustainable development.' The sustainable development and environment agenda in Wales has been taken forward as a cross-cutting theme across departments but is primarily driven by the Department for Environment, Sustainability and Housing and the Department for Rural Affairs. The Welsh Assembly Government has adopted a range of initiatives focused on the reduction of carbon emissions, the diversion of waste from landfill and identifying best practice in environmental performance and resource efficiency standards for new buildings.

In addition to the Environment Agency in Wales, which is sponsored by the Welsh Assembly Government, there are a range of other Welsh level organisations engaged in the environment policy sector. As part of the One Wales agreement the Welsh Assembly Government established the Climate Change Commission for Wales in order to provide strategic leadership, direction and a cross-Wales consensus on issues related to climate change. The Commission is chaired by the Minister for Environment, Sustainability and Housing and includes four sub-groups focused on adaptation; baseline, methodology and economics; communication; and emission reduction.

There are also a range of charity and voluntary group organisations involved at the national and local levels in Wales, including the Countryside Council Wales, RSPB Wales and the Campaign for the Protection of Rural Wales. Sustain Wales, for example, is a not-for-profit

organisation which promotes sustainable development across Wales through a range of awareness raising and advisory activities. An overarching body, Environment Wales, administered since May 2006 by the Wales Council for Voluntary Action (WCVA), provides support for voluntary activity focused on sustainable development and the protection of the environment in Wales.

1.4 Local level

Local authorities in Wales are also responsible for implementing sustainable development initiatives at the local level, for example, the Home Energy guidance Conservation Act (HECA) set out energy efficiency targets for local authorities. In addition many of the Assembly Government's strategic aims are delivered or promoted at the local level by the wide range of Assembly Government sponsored bodies and voluntary organisations across Wales.

2. Key Policy Documents

2.1 *Adapting to Climate Change: Towards a European Framework for Action* (EU Commission, 2009) – White Paper published by the European Commission in April 2009. The White Paper proposes a phased framework to reduce the EU's vulnerability to climate change: Phase 1 (2009-2012) based on four core pillars, including strengthening cooperation between states on adaptation policy and the integration of EU policies and Phase 2 (2012) the implementation of the four pillars.

2.2 *European Climate Change Programme (ECCP)* (EU Commission, 2005)– launched by the EU in June 2000 in order to implement the targets set by the Kyoto Protocol and succeeded in October 2005 by a second version.

2.3 *Securing the future: delivering UK sustainable development strategy* (DEFRA, 2005) – published in March 2005 and provides the UK Government's overarching sustainable development strategy within the context of the domestic and international policy agenda – including the devolution of powers to Scotland, Wales and Northern Ireland.

2.4 *One Future: Different Paths* (DEFRA, 2005) also published in March 2005, the framework sets out the common challenges and goals across England, Scotland, Wales and Northern Ireland. The framework stresses the need to work together to respond to common goals without compromising the strengths of diversity. The framework includes five key principles: living within environmental limits; ensuring a strong, healthy and just society; achieving a sustainable economy; promoting good governance; and using sound science responsibly.

2.5 *Meeting the Energy Challenge: A White Paper on Energy* (DTI, 2007), published in May 2007, the White Paper sets out the Government's international and domestic energy strategy. The strategy focuses on four key policy goals: aiming to cut CO₂ emissions by some 60 percent by about 2050, with real progress by 2020; maintaining the reliability of energy supplies; promoting competitive markets in the UK and beyond; and ensuring every home is heated adequately and affordably.

2.6 *One Wales, One Planet: The Sustainable Development Scheme of the Welsh Assembly Government* (WAG, 2009) published in May 2009, the document outlines the Welsh Assembly Government's vision for sustainable development. Includes the commitment to reduce by 80-90% use of carbon-based energy, resulting in a similar reduction in our greenhouse gas emissions.

2.7 *Environment Strategy* (WAG, 2006) launched in May 2006, the strategy sets out the Welsh Assembly Government's long term vision for the environment over the next 20 years. The framework focuses on a range of main themes: Enabling Change; Addressing climate change; Sustainable resource use; Distinctive biodiversity, landscapes and seascapes; Our local environment; and Environmental hazards.

2.8 *Rural Development Plan for Wales 2007-2013* (WAG, 2007) published in 2007 and provides the Welsh Assembly Government's primary mechanism for delivering activities which support the countryside and rural communities – including the sustainable management of agriculture and the environment. The Plan was formally approved by the European Commission's Rural Development Committee in February 2008.

3. Key Data sets

The UK Government and Welsh Assembly Government provide a range of indicators and datasets which accompany the key priority areas outlined within their main strategies and initiatives. These are available via departmental websites and statistical services, such as Stats Wales. In addition many delivery agencies, such as the Environment Agency, and third sector organisations collate data sets of their own.

3.1 *State of the Environment Bulletin*

Published by the Welsh Assembly Government, this bulletin provides a range of environmental indicators which reflect the priorities outlined in the Environment Strategy. The full set of data, analysis, and notes on all of the indicators are available through our Stats Wales website, presented in a series of online reports linked to tables of information which the user can manipulate or download.

3.2 *Sustainable Development Indicators for Wales*

Last published August 2009, this document provides a small number of headline indicators of sustainable development, and the full suite of indicators that measure more specific issues related to sustainable development. The headline indicators, when considered collectively, are intended to give a high level view of progress towards sustainable development – for example, recent headline indicators have included biodiversity conservation and Wales' global ecological footprint.

3.3 *Sustainable development indicators for UK*

The UK Government provides a suite of 68 indicators supporting the National Sustainable Development Strategy, which includes 20 UK Framework Indicators shared by the UK Government and devolved administrations. The Indicators are divided between one or more of four priority areas: sustainable consumption and production; climate change and energy;

natural resource protection and enhancing the environment; and creating sustainable communities and a fairer world. In addition the DECC website includes links to wellbeing measures, international and local indicators.

3.4 *Impacts of Climate Change in the UK*

Provides long term statistics on the impact of climate change in the UK, for example, average surface temperature 1772-2009 and rising sea levels at various sites 1834-2008.

3.5 *Wales Index of Multiple Deprivation (WIMD): Physical Environment domain*

The survey provides data at the Lower Layer Super Output Area, this is another composite indicator/ domain, consisting of the following: air quality; air emissions; flood risk; and proximity to waste disposal and industrial sites.

4. Emerging Themes and Questions

There is significant consensus within both civil society and political/ policy spheres about the existence of man-made climate change and the necessity for environmental sustainability through identified targets, such as CO2 reduction and habitat and biodiversity protection. However, whilst there is an emerging consensus at all levels around setting meaningful targets, differences in approaches may emerge in how these environmental targets are selected and achieved. In terms of the impact of devolution there is the clear potential for divergence in terms of the approach of the UK Government and Welsh Assembly Government in a range of policy areas, including nuclear power, renewable energy, GM crops etc...

In addition the governance of environment policy within the UK has undergone a significant reconfiguration over the past 20-30 years. The development of more complex, 'hybrid' forms of governance have emerged with a range of third sector and delivery agencies engaged with government in the development and implementation of policy. A range of 'green' organisations play key roles in the policy community, such as WWF Cymru and Sustain Wales. However, other more radical green groups remain outside of these partnership arrangements and often combine an 'anti-capitalist' position with a radical environmental agenda.

Introduction – Tourism and Leisure

Tourism and leisure represents a key part of the Welsh Assembly Government's economic development policy agenda but is also linked to concerns around culture and heritage. Tourism in Wales is an important strand of the economy, with visitors to Wales spending an estimated £8 million a day on a trip to Wales and totalling around £3 billion a year.

1. Governance Structures

1.1 *All Wales level*

The policy area of tourism and leisure was fully devolved to Wales in the Government of Wales Act 1998. The responsibility for tourism and leisure policy rests with the Department

of Heritage and the Department of Economy and Transport. In April 2006 the Welsh Assembly Government transferred the functions carried out by the Wales Tourist Board 'in-house' and set-up Visit Wales, the Assembly Government's tourism team, based in the Department for Heritage. Visit Wales is responsible for the promotion and development of tourism in Wales. In addition a range of responsibilities remain with the UK Government.

The Wales Tourism Alliance (WTA) was formed in 2006 and represents some 7000 tourism businesses, covering all the major sectors of the industry. WTA member organisations include pan UK, pan Wales and regional bodies. The primary role of the WTA is to represent the views and needs of the tourism community to different levels of government, including the UK Government on non devolved issues.

1.2 Local and Regional level

The Wales Tourist Board established four Regional Tourism Partnerships (RTPs) in 2002 to lead the implementation of four regional tourism strategies which 'seek to improve the competitive performance of tourism so that it makes a better contribution to the economic and social prosperity of Wales.' The RTPs work in partnership with Visit Wales, local authorities, businesses and other organisations to deliver a range of marketing, product investment and business support activities. The four RTPs are: Tourism Partnership North Wales; Tourism Partnership Mid Wales; South West Wales Tourism Partnership; and Capital Region Tourism.

In addition, all local authorities in Wales support tourism with dedicated budgets and staff, with some able to offer small-scale grant aid as well as coordinating marketing activity. A range of associations and organisations are also involved in the policy sector, including Welsh Association of Visitor Attractions, Youth Hostels Association and the Wales Association of Self-Catering Operators.

2. Key Policy Documents

- 2.1** *Achieving Our Potential: A Tourism Strategy for Wales* (WTB, 2000) published by the Wales Tourist Board in 2000, the strategy provides an overview of tourism in Wales and identifies a range of key objectives and an action plan and targets for the delivery of objectives. Key issues highlighted by the strategy include sustainability, quality, competitiveness and partnership within the tourism industry.
- 2.2** *Achieving Our Potential 2006-2013: Tourism Strategy for Wales Mid Term Review* (WAG, 2006) published by the Welsh Assembly Government, the update of the 2000 strategy identifies five challenges facing tourism in Wales: Branding of Wales, Quality of Accommodation and Attractions, Accessibility (in terms of marketing as well as transport), Skill Levels and Partnership
- 2.3** *Sustainable Tourism: A Framework for Wales* (WAG, 2007) published in November 2007, the framework provides an overview of what sustainable development means for the tourism sector in Wales. It identifies four key objectives which are the focus for a range of actions: promoting local prosperity; supporting community well being

and involvement; minimising tourism's environmental impact; and protecting and giving value to natural heritage and culture.

- 2.4** *Tourism Investment Strategy 2008 -2013* (WAG, 2008) the key role of the tourism investment strategy is to produce a framework to prioritise investment within the tourism industry that will optimise its return in economic and social terms and to meet the needs of key growth markets.
- 2.5** *Tourism Growth Area Review* (WAG, 2008) published by the Welsh Assembly Government in April 2008, the review evaluates the performance of the Tourism Growth Programme and highlights key lessons for future investment. The original programme was initiated by the WTB in 2000 and outlined in 'Achieving the Potential'.

In addition a range of more focused reviews or strategies have been published in recent years including the Coastal Tourism Strategy (WAG, 2008), Review of Cultural Tourism in Wales (WAG, 2008), Sport Tourism in Wales (WAG, 2006) etc...

3. Key Data Sets

3.1 *Tourism Business Survey*

Five surveys are carried out throughout the year to assess business confidence in the Welsh tourism industry and performance over the key holiday periods. In each survey a minimum of 200 telephone interviews reflecting region and sector are carried out. Questions focus on guest/visitor trends, perceived reasons for relative success or failure and future business confidence.

3.2 *Tourism Trends in Wales*

Visit Wales publishes this regular report which provides an overview of the volume and value of tourists to Wales drawing on the United Kingdom Tourism Survey, International Passenger Survey and Visit Wales occupancy surveys, which are published annually for both serviced and self-catering accommodation.

3.3 *Visits to Tourist Attractions*

Surveys of visits to tourist attractions in Wales have been carried out since 1973 and Visit Wales commissions an annual report. The research provides an overview of visits and a comparative analysis of previous years and trends.

3.4 *United Kingdom Tourism Survey/ UK Tourist*

The United Kingdom Tourism Survey is a national consumer survey measuring the volume and value of overnight trips taken by residents of the United Kingdom. It is jointly sponsored by the Welsh Assembly Government, VisitBritain, Visit Scotland, and the Northern Ireland Tourist Board. The survey was first conducted in 1989 and undergone several methodological reviews (thus data is not comparable across all years). The current survey model includes 100,000 face-to-face interviews per annum made up of a weekly sample of around 2,000 adults, representative of the UK population in relation to various demographic characteristics.

3.5 Visitor Survey

In March 2009 Visit Wales commissioned a research study amongst overseas and UK Visitors to Wales, both Staying and Day, between April to October 2009. This replicated and updated similar surveys, conducted amongst Staying Visitors in 2000, 2001, 2003 and 2006. The overall aim of this research was to inform the process of segmentation and visitor satisfaction by improving and building upon Visit Wales' understanding of the motivations, needs and behaviour of visitors to Wales.

4. Emerging Themes and Questions

How will environmental changes affect tourism in Wales?

What can be done to mitigate, potential environmental impacts?

What are the key components of innovation for developing sustainable tourism in Wales?

How will the global recession affect tourism in Wales in the long and short term?