Meeting:	Education and Economy Scrutiny Committee
Date	4 February 2021
Cabinet Member	Cllr Gareth Thomas Cabinet Member – Economy and Community
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Department	Economy and Community

1. **Title of Item:**
   The process of developing new Visitor Economy Principles for Gwynedd

2. **Why does it need to be scrutinised?**
   2.1. This report is presented for scrutiny at the request of the Education and Economy Scrutiny Committee.
   2.2. The tourism field has been receiving attention from the Council as part of the Gwynedd Plan priorities.
   2.3. A report was submitted to this Scrutiny Committee on the 'Benefiting from Tourism' project on 10 October 2019, and it was agreed that there would be an update on the process of developing principles for the future.
   2.4. Following this, several discussions have taken place to develop new Visitor Economy Principles for the county.
   2.5. The Covid-19 Period and the impact it has on the visitor economy locally has reinforced the need to review and agree on new principles for the future.
   2.6. The Committee is requested to scrutinise the steps taken thus far in developing the principles and the timetable to adopt the principles to guide tourism in Gwynedd in the future.

3. **Background**
   3.1. Prior to Covid-19, the tourism sector had grown to contribute over £1.35bn to the Gwynedd economy and employ over 18,200 people with 7.81m people visiting annually. This is based on data from the STEAM (Scarborough Tourism Economic Assessment Model) model.
   3.2. Although it is an important sector, the STEAM data also highlights that salary levels within the sector are very low in Gwynedd when compared to other sectors and areas of the UK.
   3.3. The Covid-19 period has highlighted matters that require attention, especially in terms of a lack of variety in the county's rural economy with an over dependency on tourism in some areas. In addition, there are concerns in some parts of Gwynedd regarding tourism

imbalance that creates increasing pressure on the main honey pots and the impact of this on communities and the Welsh language.

3.4. Without a doubt, the pandemic will have a significant impact on the industry - with the World Tourism Organisation (UNWTO) estimating that we have seen a 72% reduction in international tourist arrivals worldwide in 2020 compared to 2019. The Organisation also anticipates that Britain will be one of the 10 international countries [1] that will be affected worst by Covid-19 in terms of the visit economy, and believe that 75m jobs will be lost worldwide.

3.5. The draft Gwynedd STEAM figures for 2019-2020 and 2020-2021 suggest that there has been a drop of between 50% and 60% in the value of the sector in the county while Visit Britain suggests that domestic tourism in the UK has declined by 46% in 2020.

3.6. Our discussions on future principles are very timely and offer an opportunity for us to try and assess the visitor economy in Gwynedd and to agree on new principles to guide our long term priorities to support a sustainable sector.

3.7. As part of the process to develop draft Sustainable Visit Economy Principles for Gwynedd, the following activities were undertaken:

- Consideration of examples of tourism priorities and principles in other areas
- Discussions and workshops with the Leadership Team
- Discussions with the sector
- Workshops with Members of the Council and Snowdonia National Park
- Discussions with Visit Wales
- Focus Groups with sector representatives

4. Looking to the future: A definition of Sustainable or Responsible Tourism

4.1. In looking to draw up our principles for the future, consideration was given to the definition of sustainable or responsible tourism.

4.2. The UNWTO define sustainable tourism, simply as:

"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".

4.3. Sustainable or Responsible Tourism should:

- Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity
- Respect the socio-cultural authenticity of host communities. conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance;
- Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-

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1   France, Spain, USA, China, Italy, Turkey, Mexico, Germany, Britain, Thailand

earning opportunities and social services to host communities, and contributing to poverty alleviation.

4.4. Local communities and visitors can benefit from sustainable tourism. It can lead to a better connection between communities and the sector, high quality tourism and natural and built environment that is looked after.

4.5. In Scotland, sustainable tourism is defined as:

- Green and sustainable transport
- 'Greener' businesses supporting local communities and suppliers
- Inclusive tourism for all
- Fair distribution of visitors
- Understanding the impact of tourism on the environment and the local area

4.6. New Zealand has developed a plan to promote sustainable tourism amongst businesses, visitors and communities. The Tiaki Promise (Caring for people and places for now and in the future). The plan focuses on:

- Driving safely
- Showing respect
- Protecting nature
- Being prepared before visiting
- Keeping New Zealand clean

4.7. The new priorities of Visit Wales also try to adopt sustainable tourism principles with 'Bro a'r Byd'- our community and our world, receiving specific attention. Their new Strategy for the visitor economy can be seen here.

5.   Matters highlighted in the Gwynedd and National Park Members' workshops

5.1. Following workshops with Members of the Council and the National Park that took place in February 2020 to consider the threats and opportunities, the matters can be summarised as follows:

- Supporting the Sector to develop as part of the Foundational Economy and strengthen local supply chains
- Celebrate Gwynedd's unique culture and the Welsh language
- Living and sustainable communities with quality infrastructure for all and an appropriate planning system
- Improve the value of the sector and sustainable careers with good salaries for the people of Gwynedd throughout the year.
- Ensure that Gwynedd benefits from the tourists that visit - tax / levy + promote enterprise for the sector
- Ensure that our unique environment and wildlife are protected
- Work in partnership
- Balance of the economy - environment - communities

6.   Developing Principles for Gwynedd

6.1. Having considered examples from other areas, the discussions, the members' workshops and the focus groups with the sector, a draft vision was agreed in order to draw up

principles for the future. This was done with the Tourism Sub Group of the Regeneration Board.

6.2. Draft Vision:

"We want to support a Visitor Economy for the benefit and well-being of Gwynedd residents"

6.3. In order to achieve the vision, Gwynedd Council supports a Visitor Economy that is in line with the Sustainable Tourism principles of the United Nations' World Tourism Organisation. Gwynedd Council will support a visitor economy that:

- celebrates and respects our communities, language and culture;
- maintains and respects our environment;
- ensures that the advantages for Gwynedd communities are more than any disadvantages

6.4. Our principles for a sustainable visitor economy in future can be drawn on the basis of an interdependent model with the well-being of Gwynedd Residents at its core:
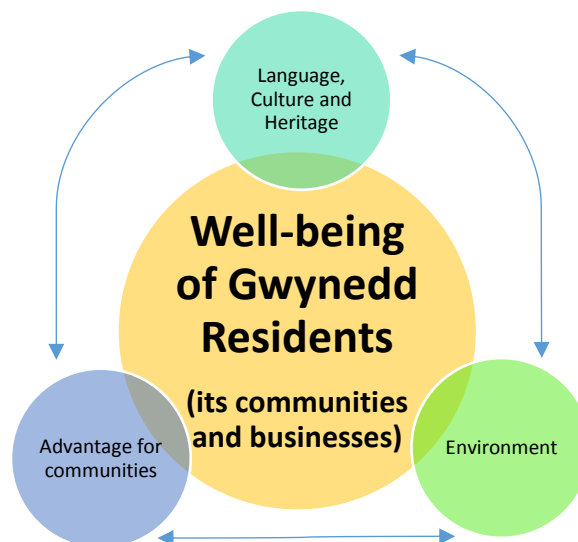
Celebrating and Respecting our Communities, Language, Culture and Heritage

- A visitor economy in the ownership of our communities with an emphasis on pride in one's area
- A visitor economy that leads in Heritage, Language, Culture and the Outdoors

Maintaining and Respecting our Environment

- A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on our environment today and in the future
- A visitor economy that leads in sustainable and low carbon developments and infrastructure.

Ensuring that the advantages for Gwynedd communities are more than any disadvantages

- A visitor economy that ensures that infrastructure and resources contribute towards the well-being of the community all year round
- A visitor economy that thrives for the well-being of Gwynedd residents and businesses and that offers quality employment opportunities for local people all year round

- A visitor economy that promotes local ownership and supports local supply chains and produce
- A visitor economy that improves the quality of the experience and offer for everyone

6.5. The table in <u>Appendix A</u> outlines the Draft Principles and possible activities that can be considered to support the principle.

7. Further considerations

7.1. During the Council meeting on 1 October 2020, it was resolved, in cooperation with Snowdonia National Park, to urgently investigate the possibility of charging tourists who visit parts of the Park, particularly on and around Snowdon itself.

7.2. Consideration of this element is addressed in the principle 'Ensure that the advantages for Gwynedd communities are more than any disadvantages'. One of the possible activities that may be considered under this principle is a 'Tourist Tax'.

7.3. The best way to get benefits to Gwynedd communities from visitors was researched via the 'Benefiting from Tourism' project and a tourist tax was one of those considerations. Unfortunately, the Council does not currently have the legal power to implement such a tax and discussions are continuing with the Welsh Government.

7.4. The letter of response from the National Park to the Council's decision on 1 October can be seen in <u>Appendix B.</u>

8. Next steps

8.1. It is intended to hold a workshop with all the members of the Council and the National Park on 2 March to present the draft principles and to receive initial feedback from Members on the following:
- Do the draft principles reflect the discussions and what was reported in the workshops?
- Is there anything missing?
- Is there something that needs to be improved?

8.2. Following the Members' Workshop, it is intended to submit the principles to a meeting of the Cabinet in order to adopt them in draft form for consultation with Gwynedd residents.

8.3. The consultation will be held with businesses in the visitor economy in Gwynedd, the Gwynedd Destination Management Partnership and the people and communities of Gwynedd.

8.4. Following the consultation with the people of Gwynedd, our intention will be to consider the responses and adopt the principles in order to draw up a Gwynedd Sustainable Visitor Economy Plan by Summer 2021.

9. Conclusion

9.1. The Education and Economy Scrutiny Committee is invited to scrutinise the steps taken thus far to draw up the Gwynedd Sustainable Visitor Economy Plan 2030.

In the following table, see details of potential activities that could be supported as a basis to these principles. These could steer the development of the Gwynedd Sustainable Visitor Economy Plan:

Principle Theme	Principle Details	Potential activity
Celebrating and Respecting our Communities, Language, Culture and Heritage	• A visitor economy in the ownership of our communities with an emphasis on pride in one's area • A visitor economy that is the guide in Heritage, Language, Culture and the Outdoors	• Strengthen the link between communities and the visitor economy and support community-based visitor economy developments. • Sense of Place: Support a visitor economy that promotes use of the Welsh language and Gwynedd's culture and highlight our distinctiveness by encouraging use of the language and culture in attractions and businesses. • Give consideration to the impact of developments on the Welsh Language and opportunities to promote and develop the language - which includes targeting the Welsh market. • Slate Landscape of Northwest Wales World Heritage Site.
Maintaining and Respecting our Environment	• A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on our environment today and in future	• Disperse visitors from the honey pots to other parts in a sustainable manner - e.g. Snowdonia Transport Plan + public transport. • Develop a network of electrical charging points. • Develop a network of water bottle filling stations.

	• A visitor economy that is the guide in sustainable and low carbon developments and infrastructure.	• A plastic-free Gwynedd
Ensuring that the advantages for local communities are more than any disadvantages	• A visitor economy that ensures that infrastructure and resources contribute towards the well-being of the community all year round • A visitor economy that thrives for the well-being of Gwynedd residents and businesses and that offers quality employment opportunities for local people all year round • A visitor economy that promotes local ownership and supports local supply chains and produce • A visitor economy that improves the quality of the experience and offer for everyone.	• Review management arrangements of second homes and promote gaps in serviced accommodation. • Fundamental community infrastructure: bins, recycling, roads, cleanliness, toilets, paths, townscapes, parking, coastal resources. • Information technology (Wi-Fi / Broadband etc.) and respond to the needs of the visitor economy with the latest technology. • Manage wild camping and motor-homes. • Standard and integrated public transport service networks. • Collaborate with the Government to develop a Tourist Tax to support services and communities. • Raise awareness of the sector's profile and job opportunities among Gwynedd residents, schools and colleges in order to promote career pathways for local people to venture. • Training in skills divide and necessary skills. • Provide innovative information and digital marketing. • Target higher value markets that spend more and visit throughout the year by extending the season.

		• Promote contacts and opportunities for 'tourism eco-system' businesses and local supply chains.