

Sustainable Tourism in Wales' National Parks

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Sustainable tourism in Wales' National Parks

Drawing on its recent work on sustainable tourism, Audit Wales considers some of the challenges faced by National Park Authorities in delivering their statutory purposes and duty

- 1 While people visit the National Parks for many reasons, typically recreational use and admiration of natural beauty, these Parks also house irreplaceable ecosystems and living, breathing communities. Tourism is often therefore described as a problematic contradiction; where tourism attracts visitors, economic benefits, and educates the public, but their presence can pose a risk to the protection of the cultural and natural sites in a National Park.
- 2 Wales' three National Parks are well known tourism destinations, and their status provides a strong brand image which extends beyond their boundaries. With the growing rate of tourism in National Parks, sustainable tourism – finding ways to encourage tourism growth while still preserving the culture and biodiversity of these areas – has become ever more important.

Exhibit 1: the United Nations World Tourism Organisation definition of 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.** 

Source: unwto.org/sustainable-development

- 3 In 2021-22, the Auditor General published three reports on how each of Wales' National Park Authorities are responding to the challenge of managing and helping to deliver sustainable tourism. Each of these reviews identified some difficulties faced by National Park Authorities and their partners in implementing their responsibilities. The remainder of this paper highlights some important common issues emerging from these reports.
- 4 These are:
 - a the three National Park Authorities play a vital role in managing the environment and encouraging visitors to enjoy the outdoors;
 - b National Park Authorities in Wales have to balance encouraging tourism with conserving the natural environment but find this difficult to achieve;
 - c tourist businesses mostly value the work of the National Park Authorities but do not think they have the balance right between their two statutory purposes;
 - d most tourist businesses seek to work sustainably and recognise the value of sustainable tourism; and
 - e national park authorities do not have the resources or powers to control or influence the number of people who visit their areas, nor their behaviour and impact.
- 5 The Welsh Government should consider these findings when developing and setting their priorities for National Park Authorities, in order to assist the effective implementation of national policy.

Key findings

The three National Park Authorities play a vital role in managing the environment and encouraging visitors to enjoy the outdoors

- 6 It is estimated that the three Welsh National Parks are visited by 12 million people each year. Annually, three quarters of the population of Wales make a visit to a National Park benefiting from the great outdoors. Recreation and tourism are important for both the local economy and for people's health and wellbeing. In addition, the National Park Authorities also need to balance these requirements with their responsibilities for the preservation of land, animals, and habitats. If there is a conflict between these two purposes, greater weight is given to conservation than recreation.
- 7 The Welsh Government's ambition for the visitor economy is to 'grow tourism for the good of Wales'¹. And the strategic remit letter² issued by the Welsh Government's Minister for Environment, Energy and Rural Affairs in March 2021 reaffirms the National Park Authorities' key role in developing sustainable tourism and outdoor recreation, but in a sustainable manner. There is an expectation that each of the National Park Authorities will engage with tourism providers to identify how they can contribute to achieving the sustainability of the area³.

National Park Authorities in Wales have to balance encouraging tourism with conserving the natural environment but find this difficult to achieve

- 8 Through our work we know that the National Park Authorities collectively possess many years' experience of managing large numbers of visitors. They employ a range of staff who engage with visitors on a day-to-day basis, enhancing visitors' experiences, and helping to promote the importance of people enjoying but not adversely impacting the natural environment.

1 [Welcome to Wales: Priorities for the Visitor Economy 2020-2025.](#)

2 From May 2022 the 'remit letter' has been changed to the 'Strategic term of Government letter'.

3 [Valued and Resilient: The Welsh Government's Priorities for Areas of outstanding Natural Beauty and National Parks, July 2018.](#)

- 9 All three Authorities recognised that COVID-19 and COP26⁴ have brought the nature crisis into sharp focus – National Parks are now visited more than they ever have been in the past, but increased visitor numbers damage the biodiversity and unique environments of National Parks. The three National Park Authorities have two statutory purposes and a statutory duty. The purposes and duty form the basis of all the work undertaken by each Authority and are the starting point for the plans and strategies they develop – **Exhibit 2**. Intrinsically, balancing the needs of the two purposes is difficult and all National Park Authorities told us they struggle with this.

Exhibit 2 – the Statutory Purposes and duty of Welsh National Park Authorities

Statutory Purposes

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park.
- To promote opportunities for public enjoyment and understanding of the special qualities of the National Park.

Statutory Duty

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park.

Source: 1995 Environment Act

- 10 Managing access, tourism and its impact can be a challenge for National Park Authorities. Proportionally, they own little land within the National Parks, and they do not directly control national or regional tourism and destination management strategies. The delicate balance between the two statutory purposes and duty of National Park Authorities⁵ was highlighted when visitors flocked to the Parks in unprecedented numbers during their re-opening in 2020.
- 11 Given this, each National Park Authority seeks to work in partnership and collaborate with all those with a responsibility for the National Park area. Each of the National Parks has established a Management Plan⁶ to help coordinate their work to tackle the most critical issues over the next five years. The Plans are a way of ensuring that the many organisations and individuals who contribute to the National Park Authorities purposes of conservation, enjoyment and understanding support the work of each Authority.

4 COP26 was the 26th meeting of the Conference of Parties, where governments, NGOs, trade unions, businesses, and everyone else with any interest in climate change came together to review and negotiate global action. The event took place from 1-12 November 2021 in Glasgow.

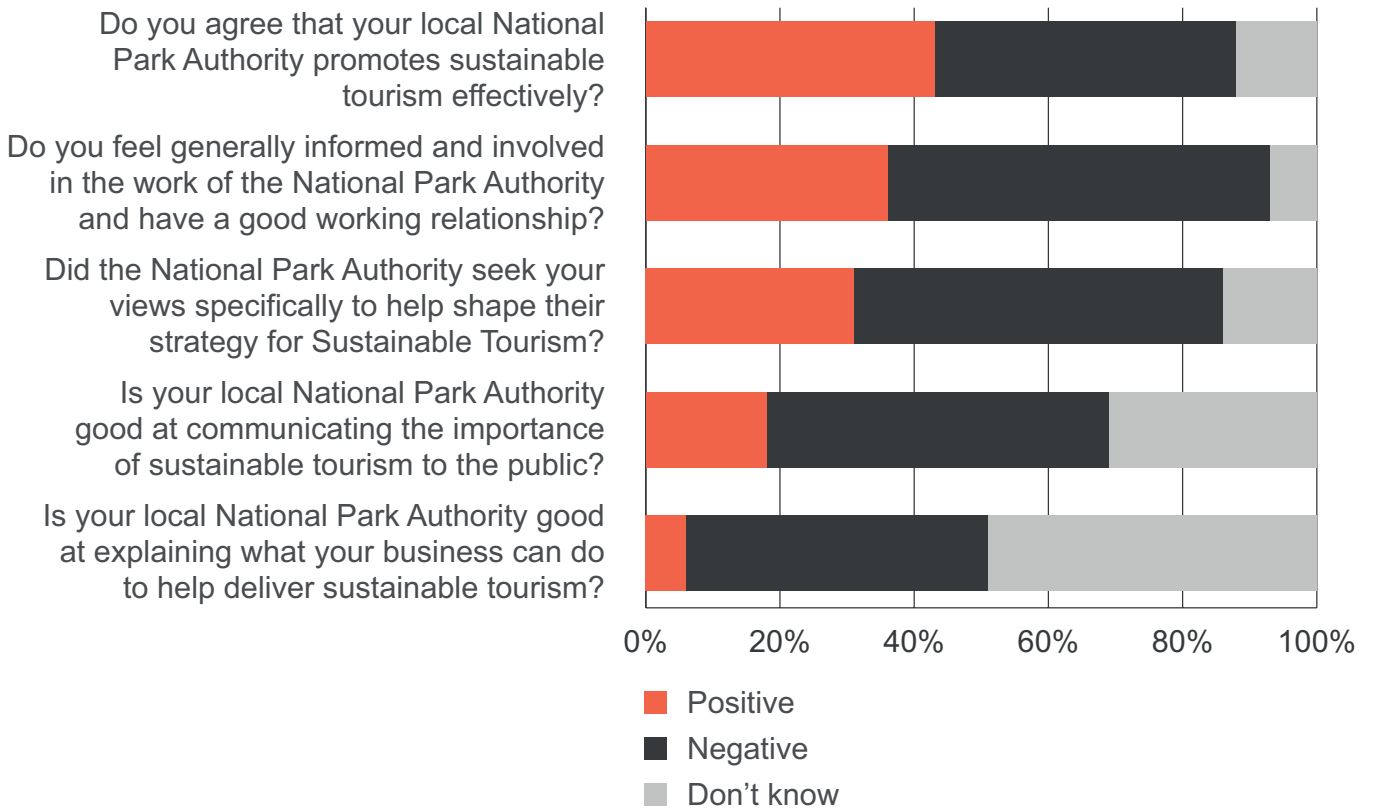
5 [Environment Act 1995](#)

6 Under Section 66 of the Environment Act 1995, each National Park Authority is required to prepare and publish a National Park Management Plan for their Park.

Tourist businesses mostly value the work of the National Park Authorities but do not think they have the balance right between their two statutory purposes

- 12 Respondents to our survey of tourism businesses located within Welsh National Parks told us that Authorities have some clear strengths. These include conserving and protecting the natural environment; promoting the 'national – Welsh' role of Parks; and promoting activities and options when visiting the National Park area such as walking routes. Tourism businesses we surveyed were also positive about the work of the National Park Authorities. For instance:
 - a 95% of those who responded to our survey agree or strongly agree that a well-managed National Park is important to attracting tourists;
 - b 92% also agree or strongly agree that conserving and protecting natural resources and tourism are compatible; and
 - c 72% think sustainable tourism is helping, or will help, their business.
- 13 However, our survey of tourism businesses also indicates there is room for improvement in how National Park Authorities engage with the private sector (**Exhibit 3**). Just 31% of businesses responding to our survey stated that their local National Park Authority sought their views specifically to help shape their strategy for sustainable tourism. Around a third of businesses feel informed and involved in the work of the National Park and have a good working relationship with their local National Park Authority.

Exhibit 3: tourism businesses' views on National Park Authorities' approach to sustainable tourism



Source: Audit Wales Survey of Welsh Tourist Businesses, January 2022

14 In addition, roughly half of businesses do not think that their local National Park Authority is good at explaining what businesses can do to help deliver sustainable tourism. Only 43% agree or strongly agree that their local National Park Authority promotes sustainable tourism effectively. Just 18% believe that their local National Park Authority is good at communicating the importance of sustainable tourism to the public. Finally, only 29% of survey respondents agree that their local National Park Authority has the balance right between protecting the natural environment and promoting enjoyment of the National Park at this time. See Appendix 2 for further information on our survey findings.

Most tourist businesses seek to work sustainably and recognise the value of sustainable tourism

15 As well as promoting sustainable tourism, it is important that businesses also work in a sustainable way. Today's tourists are more aware of their actions and the environmental and social impacts they can have. So they want to see more businesses actively doing something. Sustainable practices will also save money overall. Our survey found that:



Over 80% of businesses we surveyed promote visitors' understanding and awareness of the special qualities of the National Park



Roughly 70% of businesses we surveyed promote local culture and heritage – eg encouraging use of the Welsh language



Over 80% of tourist businesses we surveyed seek to reduce landfill waste and increase recycling



Just under 80% of tourist businesses we surveyed seek to reduce energy use



Just under 60% of tourist businesses we surveyed seek to reduce or conserve use of water



Just over 30% of tourist businesses we surveyed generate their own green energy



82% of tourist businesses we surveyed hire mainly (50%) local people (by local we mean people who live within 15 miles of the business)



60% of tourist businesses we surveyed source the majority (75%) of their supplies from local producers (by local we mean within 30 miles of the business)

National Park Authorities do not have the resources or powers to control or influence the number of people who visit their areas, nor their behaviour and impact

- 16 Historically, National Park Authorities have not had a direct role in promoting tourism and marketing their destinations. And proportionally, they own little land. They are one of many players within their area that has a role in tourism and protecting the environment. Many of the strategic levers for sustainable tourism are vested in organisations and bodies who do not always share the same vision or have the same responsibilities for protecting the environment of the National Parks.
- 17 For instance, the funding and remit of National Park Authorities does not cover the direct marketing of tourism within National Parks and only Brecon Beacons National Park Authority is a destination management organisation (working alongside [Brecon Beacons Tourism](#)). Traditionally, this involves greater emphasis on engagement with the business community and this positive engagement is reflected in the views of businesses in the Brecon Beacons (eg survey responses regarding the levels of involvement and influence to promote sustainable tourism – page 16). Both Pembrokeshire Coast and Eryri work with the local bodies who lead on this agenda: [Visit Pembrokeshire](#) and [Gwynedd Council](#) respectively. To be successful therefore, the three National Park Authorities primarily focus on influencing what others do, but this is not easy and often not straightforward.
- 18 After two years of lockdowns and restrictions, tourist businesses are naturally keen to encourage visitors and benefit economically from an increase in tourism. This can, however, stress local infrastructure and create unintended problems of fly tipping, irresponsible car parking on verges, increased risk of accidents, growing anti-social behaviour and a negative impact on local communities in each of the National Parks.
- 19 All three National Parks highlighted ongoing and longstanding problems with the local infrastructure in their areas, especially public transport, car parking, integrated active travel routes and responding to anti-social behaviour. Officers described some significant infrastructure improvements needed to better manage the impact of visitors travelling by car, especially around the most popular attractions within each National Park and during the peak seasons.

- 20 However, the Authorities have neither the power nor capacity to directly control or solely deliver the significant infrastructure changes needed to help achieve sustainable tourism. Many of the statutory responsibilities for responding in these matters are, however, vested in partners, most notably local authorities and/or the Police, or private landowners, and there is often little that Authorities themselves can directly do.
- 21 However, other public bodies are often unable to respond effectively and consistently due to resource and other pressures. Authority officers and members we interviewed across the three National Parks told us that issues are 'falling in-between the cracks' of the different agencies and are not being effectively tackled. Yet, through the [Environment Act 1995](#), it is the three National Park Authorities that are charged with conserving and enhancing the natural beauty, wildlife and cultural heritage of the National Park, so doing nothing is not an option.
- 22 Our reports on sustainable tourism in all three National Park Authorities in Wales emphasise the importance of each Authority communicating responsible use of the Parks to the public. To be most effective, this should be supported at a national level by the Welsh Government through Visit Wales⁷ and the three National Park Authorities working together collectively through National Parks Wales as a brand.
- 23 In addition, many private landowners focus as much, if not more, on generating income rather than managing the impact of tourism on the local environment. The limitations in the statutory responsibilities of National Park Authorities means that these matters often go unchecked and continue to cause problems particularly in local communities. With year-on-year growth in tourism it is clear that this problem will be exacerbated.
- 24 All three National Park Authorities told us that the Welsh Government's annual funding cycle does not allow for long-term planning of, and investment into, infrastructure which supports sustainable tourism. Equally, all three National Parks continue to source additional funding from elsewhere and this is likely to grow yet further going forward.

7 [Visit Wales](#) is based within the Welsh Government and is responsible for the development and promotion of the visitor economy in Wales.



A way forward

- 25 Drawing on this set of reviews, it is clear that there are some common and critical issues for the Welsh Government to consider when framing future priorities for the three National Parks in Wales. With this in mind, we believe that the Welsh Government needs to consider these findings in setting its priorities for our National Park Authorities in the Strategic term of Government letter.



Appendices

Appendix 1 – Methodology

We undertook the review during the winter of 2021-22. Our methods included:

- consolidating our cumulative audit knowledge and experience;
- a survey of national park tourism businesses promoted via Visit Wales;
- reviewing data and key documents;
- interviewing officers and elected members in each National Park Authority;
- interviewing key officers in partner organisations including tourism officers from Councils within each of the National Park areas; and
- keeping in regular contact with the land, nature and forestry division in the Welsh Government.

Appendix 2 – Tourist businesses survey – headline findings

We undertook a survey of national park tourism businesses promoted via Visit Wales and local National Park Authorities. Across Wales, 281 businesses responded to our survey. Of these, 204 were located within, or operate mainly within, the boundaries of a Welsh national park.

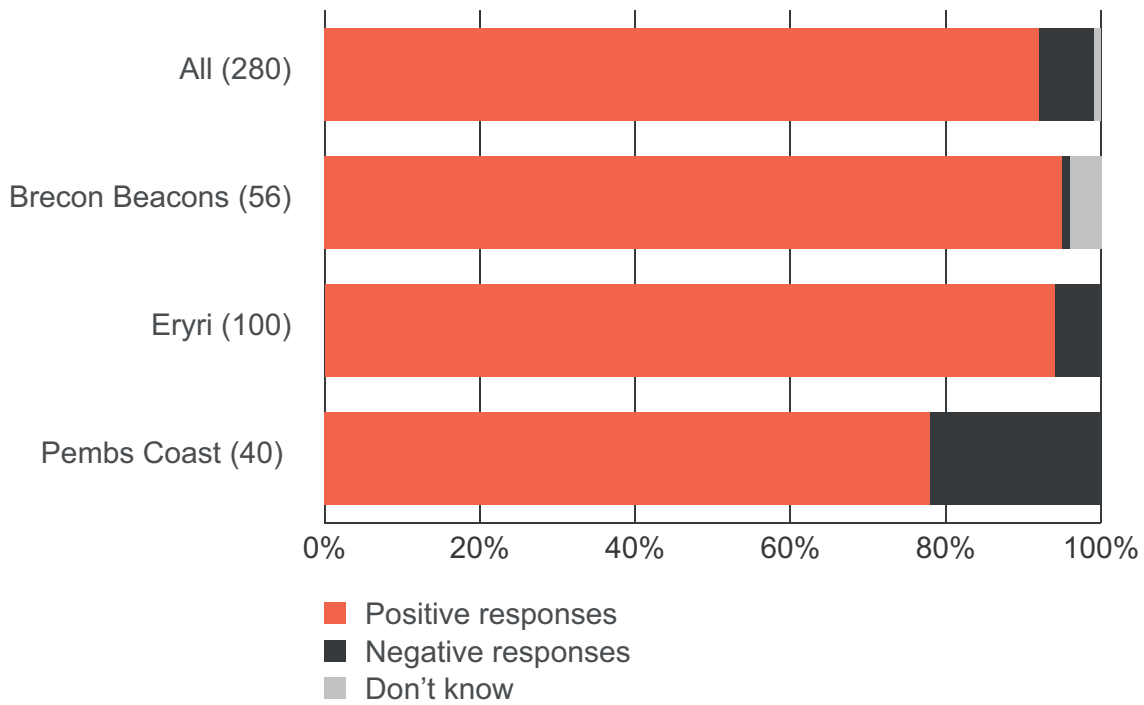
The data is presented at two levels: combined responses for all three national parks; and responses to each specific national park (named).

While we received a total of 281 separate responses, not every question was answered by every tourist business submitting a survey. This accounts for some difference in the totals reported under each question. The number of responses to each question is noted in the graphs below. The analysis is grouped into three sections:

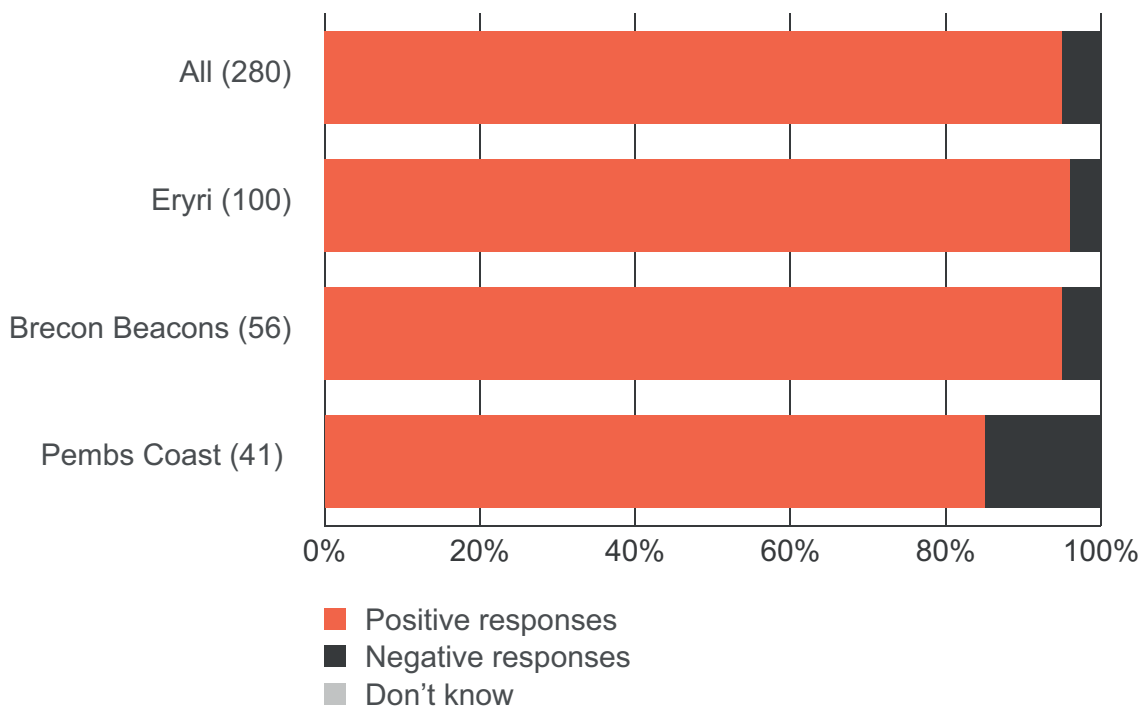
- businesses' agreement with the principles of sustainable tourism;
- the effectiveness of National Park Authorities in promoting sustainable tourism; and
- levels of involvement and influence to promote sustainable tourism.

Businesses' agreement with the principles of sustainable tourism

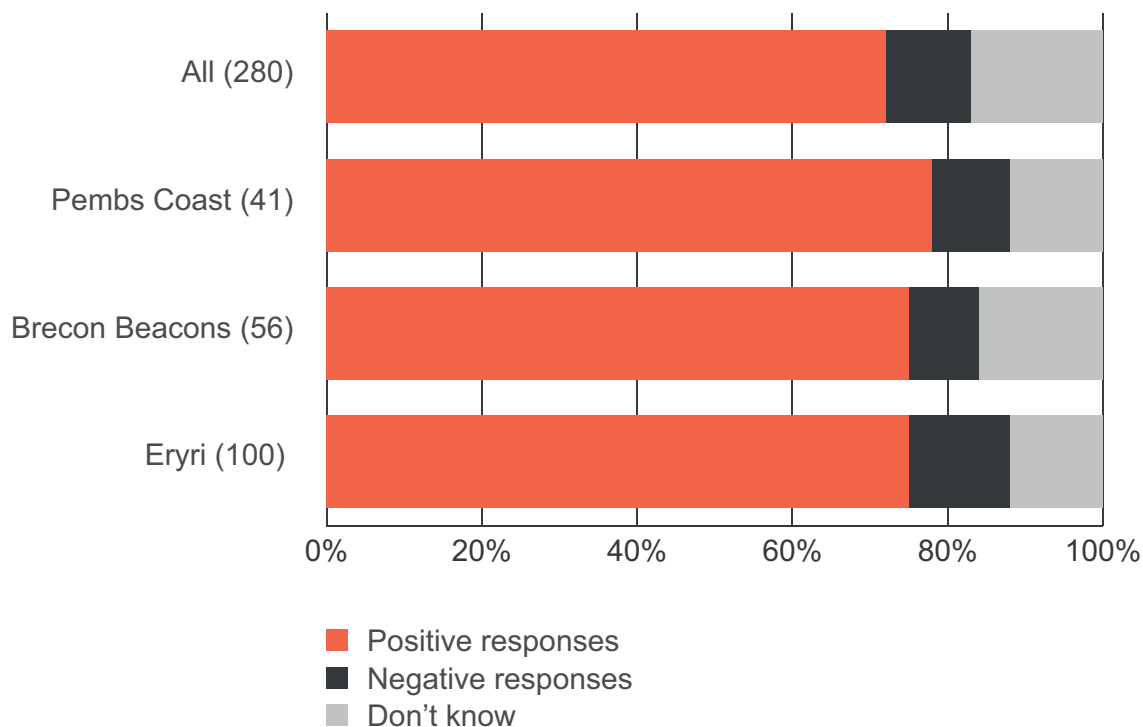
Do you agree that conserving and protecting natural resources and tourism are compatible?



Do you agree that a well-managed National Park is important to attracting tourists?

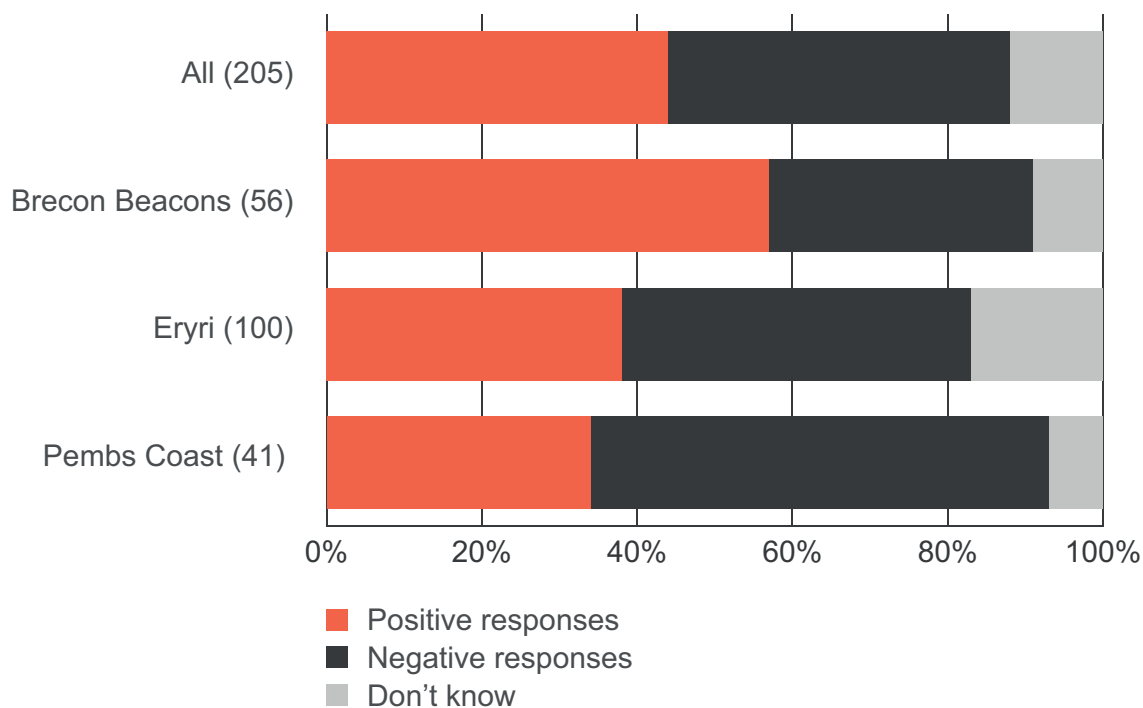


Overall, do you think sustainable tourism is helping, or will help, your business?

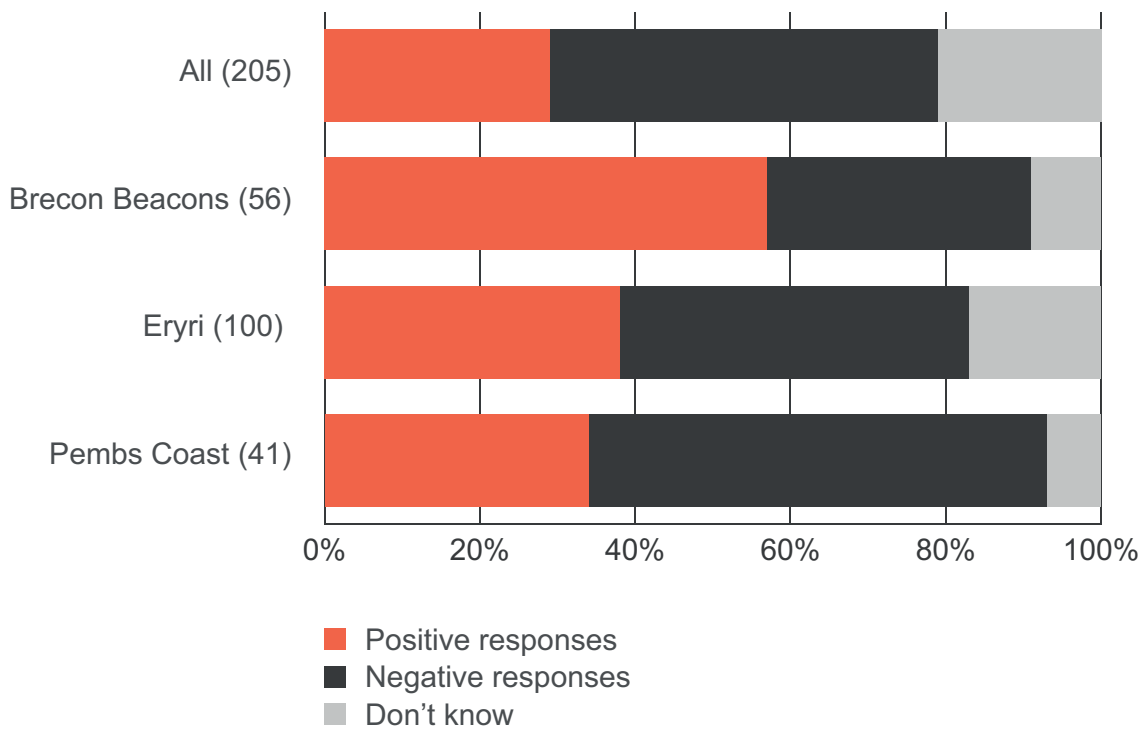


The effectiveness of National Park Authorities in promoting sustainable tourism

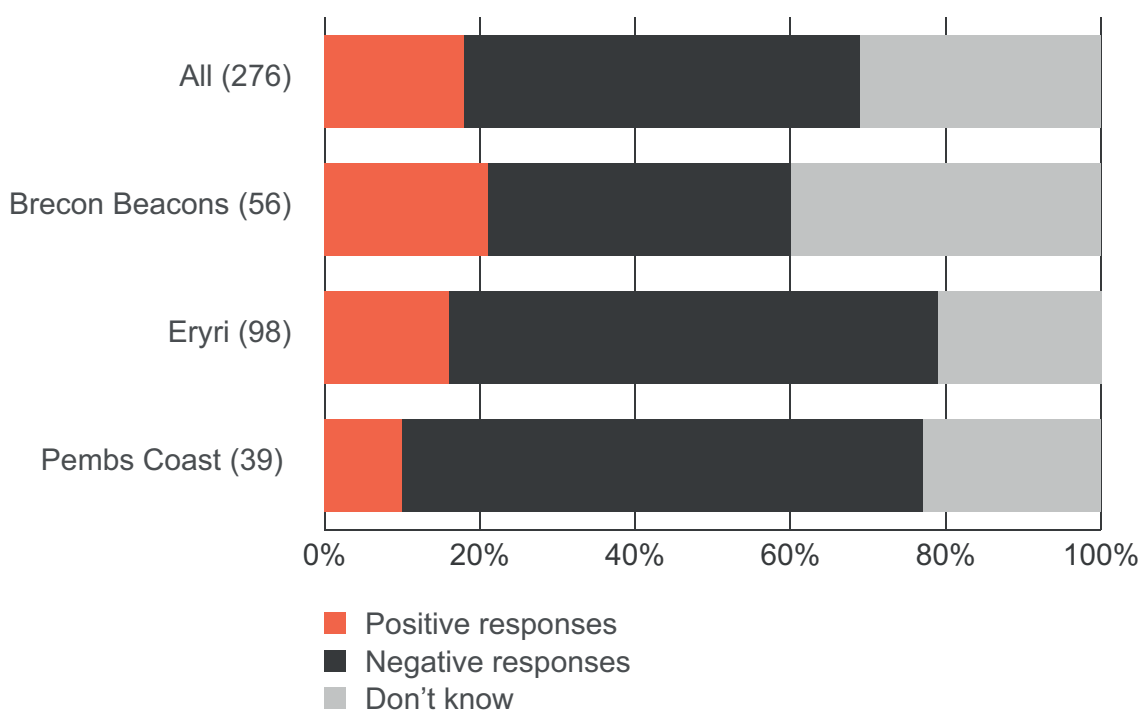
Do you agree that your local National Park Authority promotes sustainable tourism effectively?



Developing sustainable tourism requires National Park Authorities to strike the right balance between protecting the special qualities of the Park and promoting the understanding and enjoyment of the National Park. Have they got this balance right?

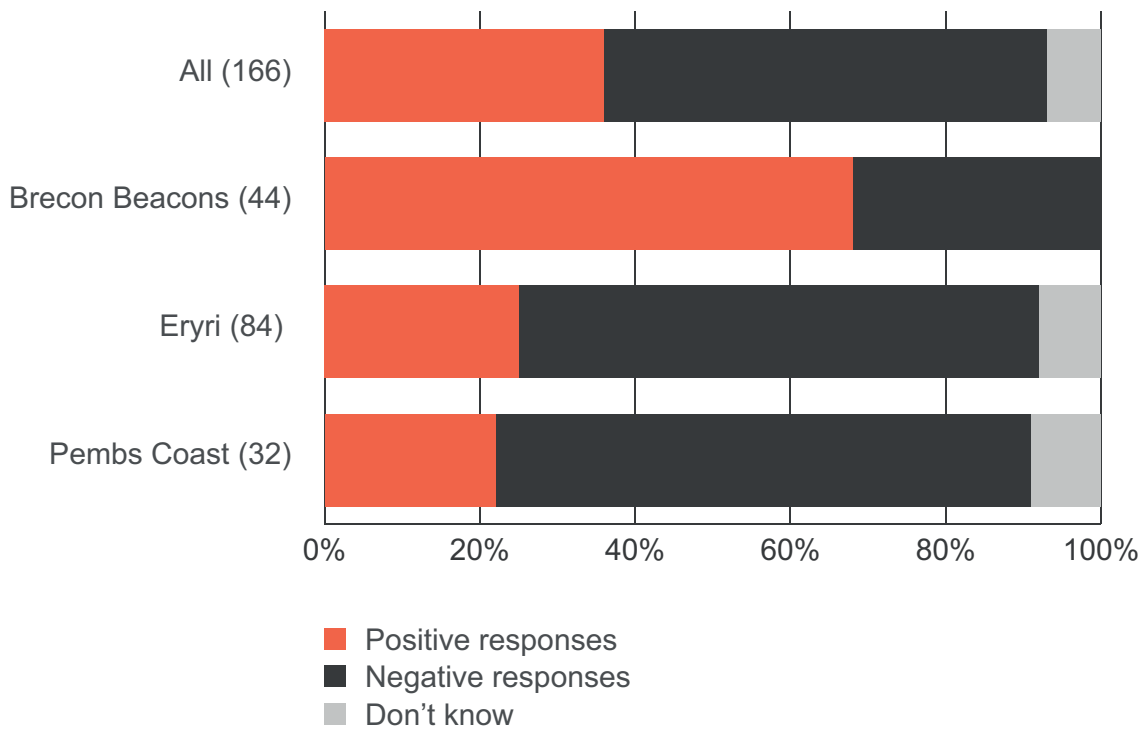


Is your local National Park Authority good at communicating the importance of sustainable tourism to the public?

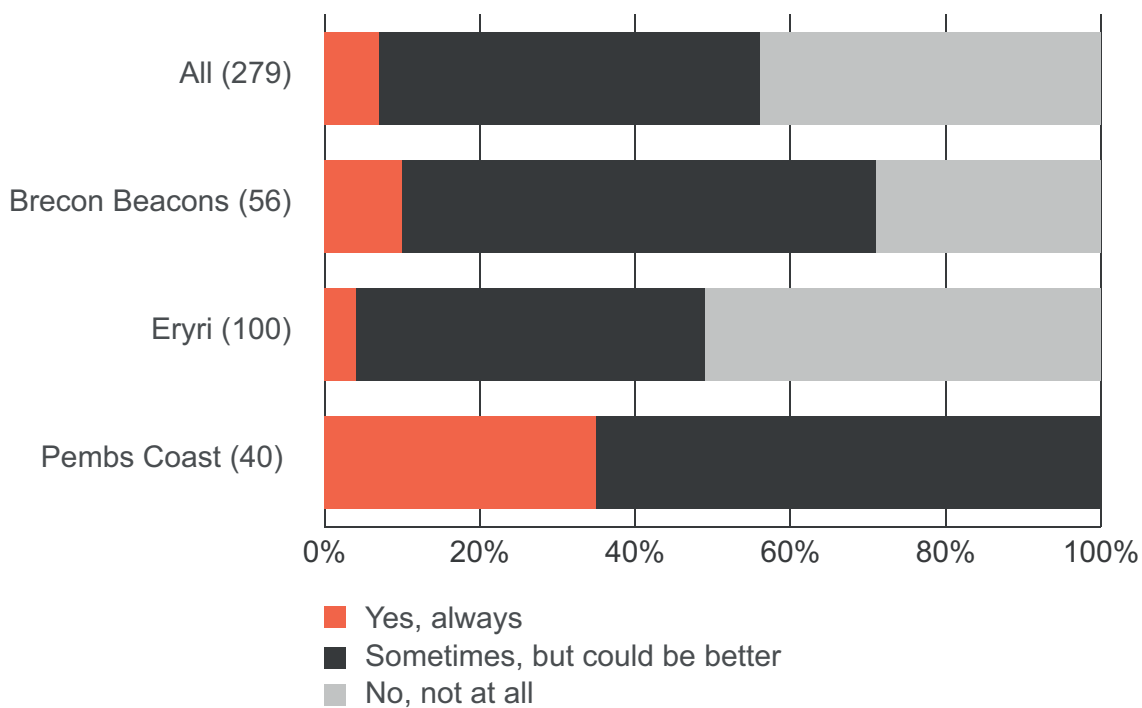


Levels of involvement and influence to promote sustainable tourism

Do you generally feel informed and involved in the work of the National Park Authority and have a good working relationship?



Is your local National Park Authority good at explaining what your business can do to help deliver sustainable tourism?



Appendix 3 – Case study: Sustainable tourism in Cairngorms National Park Authority

Cairngorms National Park Authority places great emphasis on boosting visitor experiences in its National Park Partnership Plan 2017-2022⁸ as part of a wider drive towards promoting sustainable tourism. The Partnership Plan clearly sets out the big challenges for the Authority in improving visitor experience:

- enhancing the quality of the Park as a tourism destination;
- increasing and broadening participation in outdoor recreation and physical activity; and
- engaging more people across Scotland in making the most of the Cairngorms National Park through learning and recreation.

Its Partnership Plan is underpinned by a Tourism Action Plan⁹ which supports the delivery of its overall ambitions to promote sustainable tourism. The Action Plan was developed by the Cairngorms Tourism Partnership (CTP) which brings together the key organisations, including Destination Management Organisations, wider public sector partners, businesses, and community groups. Delivery is coordinated by CTP and overseen by CNPA.

The Action Plan has five key themes:

- **leadership** – recognising the importance of strong leadership through effective partnerships in ensuring the delivery of sustainable tourism and a growing visitor economy in the Cairngorms National Park.
- **skills** – the Action Plan recognises that people are at the heart of the visitor economy and by increasing people's knowledge and skills there is a considerable opportunity to enhance the visitor experience. This theme addresses the difficulties faced by tourism businesses with employment in the sector often perceived as being poorly paid, unskilled, and short term. Over its five-year cycle the Action Plan sought to promote skills through staff training and support.
- **enhancing its assets** – the Action Plan recognises the importance of conserving and improving the very things that make the environment and biodiversity within the National Park unique and special, and links this to the visitor experience.
- **engaging and inspiring** – over its life cycle the Action Plan sets out how the Authority and its partners seek to develop the potential of the National Park brand to attract visitors, encourage them to stay longer, to enjoy the Park without damaging it and to invest in the area.

8 [Cairngorms National Park Partnership Plan 2017-2022](#)

9 [Tourism Action Plan for the Cairngorms National Park 2017-2022](#)

- **international** – the Authority has identified the potential for international visitors to be more likely to stay longer and spend more money than domestic visitors, therefore, growing the visitor economy without necessarily growing the visitor numbers and pressures. International markets are a key component in the growth strategy for Scotland, and the Action Plan seeks to strengthen linkages to National Parks.

Importantly, the Authority has prioritised activities against just four key goals. These are clearly set out in the Action Plan and are well integrated demonstrate the contribution to the achievement of wider ambitions in the National Park Partnership Plan. The key goals are specific, measurable, achievable, realistic and time-bound (SMART):

- over the period 2017-2022, visitor spend and visit duration will grow in excess of the Scottish average;
- increase the economic impact of visitors to eastern and southern Cairngorms from 21% to 25% of the total visitor economy;
- off-peak months will see stronger growth in visitor numbers than peak holiday months, with 71% of visits in the core summer months of July and August; and
- visitor satisfaction will further increase so CNP becomes a leading destination for visitor experience and customer satisfaction.

Engaging and addressing tourism challenges head-on has seen Cairngorms becoming one of only two national parks in the UK to be awarded the European Charter for Sustainable Tourism Award¹⁰. The Charter is based on five principles that should govern how tourism is developed and managed in protected areas, by giving priority to protection; contributing to sustainable development; engaging all stakeholders; planning sustainable tourism effectively, and pursuing continuous improvement. Investing in this accreditation every five years provides an accountability framework which helps to drive momentum in key partnerships involved in promoting sustainable tourism.

Looking ahead, CNPA have just submitted their next National Park Partnership Plan to Scottish Ministers and development of a new Tourism Action Plan is underway for submission to Europarc later this year. Additionally, the Heritage Horizons: Cairngorms 2030 project, currently in the development phase, has ambitious plans for transformational change, putting the power to tackle the climate and nature crises into the hands of those who live, visit or work in the National Park. This project will act as a Destination Climate Action Plan, with which CNPA has signed up to the Tourism Declares a Climate Emergency initiative. Similarly, both CNPA and the Cairngorms Business Partnership have also recently signed up to the Glasgow Declaration on Climate Action in Tourism.

10 European Charter for Sustainable Tourism



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