

Tourism

Introduction

In Wales, tourism employs approximately 100,000 people (roughly 8% of the entire workforce). Recent figures place tourist spending in the region of £3 billion a year, contributing 3.7% of whole-economy value added in Wales (excluding indirect value added)ⁱ.

The most recent figures show that, in 2007, 8.85 million overnight trips were made by UK residents to Wales (90% of all tourism trips to Wales), with 976,000 visits made by overseas tourists in the same year. The most common origins of overseas visitors are; the Republic of Ireland (20.1% of all overseas tourists in 2007); USA (9.43%); France (9.02%) and; Germany (also 9.02%)ⁱⁱ.

The 2008-09 budget for Visit Wales is £12.56 million. This is broken down into two budget expenditure lines: tourism expenditure (£14.12 million) and tourism receipts (- £1.56 million). The budget for this financial year has been boosted by an additional £4.2 million from EU funds as a result of the sterling/euro exchange rate.

According to the Assembly Government's National Tourism Strategy 2006-2013ⁱⁱⁱ, the future of the tourism industry in Wales is likely to be shaped by factors including; competition/opportunities in an enlarged European Union; green issues; European Structural Funding 2007-2013; rising population age; increasing affluence, and; development of internet and e-commerce.

Notable sporting events that are likely to influence the tourism industry include the Ryder Cup 2010 (Newport, Gwent), and the Ashes Test 2009 (Cardiff).

A Tourism Advisory Panel made up of industry representatives has been established to provide independent, strategic advice on the development of tourism policy, plans and service delivery.

In July 2007 tourism responsibilities were transferred from the Department for Economy and Transport to the Department for Heritage.

Current and proposed legislative competence of the Assembly

Under the *Government of Wales Act 2006*, the National Assembly for Wales can seek legislative competence through Acts of Parliament or Legislative Competence Orders (LCOs) to make a piece of law in the form of an 'Assembly Measure'. Measures can only be made in a specific policy area (or 'Matter') added to one of the 20 'Fields' (or broad subject areas) which are contained in Schedule 5.

As 'tourism' is Field 17 of Schedule 5 to the Act, the National Assembly for Wales can seek Measure-making powers in this area. There are currently no Matters in this field. Further Measure-making powers may also be sought in the related fields; Field 2: Ancient Monuments and Historic Buildings; Field 3: Culture; Field 16: Sport and Recreation.

EU Policy

The renewed EU tourism policy, '*Towards a Stronger Partnership for European Tourism*'^{iv}, proposed by the Commission on 17 March 2006, aims to help the industry meet a number of challenges while promoting overall competitiveness. Those challenges include facing up to Europe's ageing population; growing external competition, consumer demands for more specialised tourism, and the need to develop more sustainable and environmentally friendly practices.

In line with the Lisbon strategy, the revised policy seeks to produce more and better jobs by nurturing conditions that will help tourism grow strongly in the coming years.^v

Key Welsh Government strategy documents and action plans

1). 'Achieving Our Potential 2006 - 2013' identifies five strategic challenges facing the industry; Branding of Wales, Quality of Accommodation and Attractions, Accessibility (in terms of marketing as well as transport), Skill Levels and Partnership.

2). The National Tourism Strategy is implemented through four 'Regional Tourism Partnerships' (RTPs), with each publishing a regional strategy in line with the policies set out in the National Strategy:

North Wales RTP Strategy: <http://www.tpnw.org/docs/strategies/strat7e.doc>

Mid Wales RTP Strategy: <http://www.tpmw.love-media.co.uk/files/map22.pdf>

South-West Wales RTP Strategy: http://www.swwtp.co.uk/files/strat_04_eng.pdf

South-East Wales RTP Strategy http://www.capitalregiontourism.org/business_plan.html

3). Preparation of a '*Coastal Tourism Strategy*^{vi}' was identified as one of the key national actions within the Wales Spatial Plan. The Assembly Government's consultation on the Coastal Tourism Strategy closed on 2 April 2007. The strategy is due to be published in the autumn of 2008.

4). Tourism is recognised as a key driver of the Welsh economy, and is a feature of the Assembly Government's Strategy document; '*Wales: A Vibrant Economy*^{vii}'.

5). In November 2007 the Assembly Government published a '*Sustainable Tourism Framework*^{viii}', with the intention of guiding '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. A 'Sustainable Tourism Forum' was also established.

6). A '*Review of Cultural Tourism in Wales*' was published in May 2008, the result of consultants appraising Cultural Tourism in Wales. The review suggested that 'in comparison with international competitors the cultural tourism experience in Wales is relatively weak', but suggested that the recently created Assembly Government Heritage portfolio was a positive step towards improving this situation.

Useful links

- Welsh Government, Visit Wales: <http://new.wales.gov.uk/topics/tourism/?lang=en>
- UK Government, Visit Britain: <http://www.visitbritain.com/corporate/index.aspx>
- UK Government, Department for Culture, Media and Sport: <http://www.culture.gov.uk/>
- European Commission, Enterprise and Industry Directorate: <http://ec.europa.eu/enterprise/services/tourism>
- Statistics on Tourism and Research (Star UK): <http://www.staruk.org.uk/>

Further information

For further information on any aspect of tourism, please contact Robin Wilkinson, Members' Research Service (Robin.Wilkinson@wales.gsi.gov.uk), 029 2089 8983

ⁱ Visit Wales, 'Fast Facts':

<http://www.industry.visitwales.co.uk/server.php?show=nav.235>

ⁱⁱ International Passenger Survey data for 2007 is provisional at the time of writing (Sept 2008) but is unlikely to change significantly in the process of finalisation by the Office for National Statistics.

ⁱⁱⁱ Welsh Assembly Government; 'Achieving our Potential 2006 - 2013: National Tourism Strategy for Wales':

<http://tpmw.love-media.co.uk/files/map23.pdf>

^{iv} European Commission; 'A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism':

http://ec.europa.eu/enterprise/services/tourism/doc/communications/com2006_0134en01.pdf

^v Further information regarding the Lisbon Strategy can be accessed online:

http://ec.europa.eu/growthandjobs/index_en.htm

^{vi} Welsh Assembly Government; 'Coastal Tourism Strategy':

<http://new.wales.gov.uk/consultations/closed/tourismcloscons/1373048/?lang=en>

^{vii} Welsh Assembly Government; 'Wales: A Vibrant Economy':

<http://wales.gov.uk/topics/businessandconomy/publications/wave/?lang=en>

^{viii} Welsh Assembly Government; 'Sustainable Tourism Framework':

<http://wales.gov.uk/publications/accessinfo/drnewhomepage/leisuredrs2/leisuredrs2007/1928640/?lang=cy>