

REPORT OF AUDIT WALES

SUBJECT:
AUDIT WALES ON SUSTAINABLE TOURISM

Summary

To receive the report from Audit Wales on Sustainable Tourism.

Introduction

Audit Wales undertakes a programme of performance auditing. For 2021-22 one element of this work focused on Sustainable Tourism, with a focus on **“Is the Authority doing all it can to effectively manage sustainable tourism in the National Park?”**

The work was based on interviews, both internally and externally and a questionnaire.

The high-level conclusion was that:

“The Authority leads on sustainable tourism in the National Park, but needs to communicate its vision, prioritise resources and fully involve communities and businesses in taking forward this agenda.”

Audit Wales have made the following recommendations:

Creating a vision

R1 We recommend the Authority clearly define its sustainable tourism outcomes and revisit planned actions to ensure they are consistent with these outcomes.

Communications

R2 We recommend the Authority review the effectiveness of its existing promotional work to provide assurance it is doing all it can to promote and help deliver its vision for sustainable tourism.

Use of data

R3 We recommend the Authority review its use of data to promote and manage tourism, specifically:

- reviewing existing data sources that provide information on visitor impact on the Park and identifying where there may be gaps in understanding visitor behaviour;
- establishing indicators that allow the Authority to measure the impact of activities to disperse visitors to other areas of the Park; and

- regularly reviewing trends in visitor demographics, visitor behaviour and impact, to enable the Authority to target resources more effectively.

Community involvement

R4 We recommend the Authority review its involvement with:

- local partnerships – working with them to better understand the pressures on specific communities; and
- local communities – working with them to identify and explore solutions to address over-tourism concerns.

Presentation

Officers from Audit Wales will attend the meeting to present the report and discuss this work with Members. A copy of the report is included as an Annex.

RECOMMENDATION:

Members are asked to receive, note and present any views on the Audit Wales report on Sustainable Tourism.

Background documents

(For further information, please contact Tegryn Jones at Tegrynj@pembrokeshirecoast.org.uk)

Sustainable Tourism – Pembrokeshire Coast National Park Authority

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Mae'r ddogfen hon hefyd ar gael yn Gymraeg. This document is also available in Welsh.

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Summary report

Summary

What we reviewed and why

- 1 Wales' three National Parks are well known tourism destinations and their status provides a strong brand image which extends beyond their boundaries. With visitor numbers growing, each of the National Park Authorities has seen an increased need to conserve the special qualities of their areas, given the pressure of growing tourism in the Parks.
- 2 The Welsh Government's priorities for National Parks have long included a focus on growing tourism and outdoor recreation in a sustainable manner, and proactive engagement with tourism providers to identify how they can contribute to achieving the sustainability of the area.
- 3 In a wider policy context also lies the Welsh Government's ambition for the visitor economy to 'grow tourism for the good of Wales'¹. The strategic remit letter issued by the Welsh Government's Minister for Environment, Energy and Rural Affairs in March 2021 reaffirms the National Park Authorities' important role in developing sustainable tourism and outdoor recreation².

Exhibit 1: the United Nations World Tourism Organisation definition of Sustainable Tourism



Source: <https://www.unwto.org/sustainable-development>

- 4 Managing access, tourism and its impact can be a challenge for National Park Authorities. Proportionally, they own very little land within the National Parks, and they do not directly control national or regional tourism and destination

¹ Valued and Resilient: The Welsh Government's Priorities for Areas of outstanding Natural Beauty and National Parks, July 2018.

² Welcome to Wales: Priorities for the Visitor Economy 2020-2025.

management strategies³. The tensions between the two statutory purposes and duty of the National Park Authority came to the fore when visitors flocked to the Parks in unprecedented numbers, once restrictions were lifted.

- 5 Consequently, COVID-19 has highlighted the important role of National Park Authorities in promoting and managing tourism. The local economy of each Park depends heavily on tourism, but it needs to be managed sustainably to ensure the natural landscape, biodiversity and local communities are not overwhelmed and left, on balance, worse off as a result.

What we found

- 6 Our review sought to answer the question: **Is the Authority doing all it can to effectively manage sustainable tourism in the National Park?** We undertook the review during the period October 2021 to February 2022.
- 7 Overall, we found that: **The Authority leads on sustainable tourism in the National Park, but needs to communicate its vision, prioritise resources and fully involve communities and businesses in taking forward this agenda.**
- 8 We reached this conclusion because:
- through the Destination Management Partnership, the Authority is helping to create a vision for sustainable tourism;
 - the Authority collaborates well with others but needs to ensure partners are aligned and are helping to deliver its statutory purpose; and
 - the Authority needs to engage more effectively with communities and businesses to influence visitor behaviour.

Recommendations

Exhibit 2: recommendations

The table below sets out the recommendations that we have identified following this review.

Recommendations	
Creating a vision	
R1	We recommend the Authority clearly define its sustainable tourism outcomes and revisit planned actions to ensure they are consistent with these outcomes.

³ Environment Act 1995

Recommendations

Communications

- R2 We recommend the Authority review the effectiveness of its existing promotional work to provide assurance it is doing all it can to promote and help deliver its vision for sustainable tourism.

Use of data

- R3 We recommend the Authority review its use of data to promote and manage tourism, specifically:
- reviewing existing data sources that provide information on visitor impact on the Park and identifying where there may be gaps in understanding visitor behaviour;
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 - regularly reviewing trends in visitor demographics, visitor behaviour and impact, to enable the Authority to target resources more effectively.

Community involvement

- R4 We recommend the Authority review its involvement with:
- local partnerships – working with them to better understand the pressures on specific communities; and
 - local communities – working with them to identify and explore solutions to address over-tourism concerns.

Detailed report

The Authority leads on sustainable tourism in the National Park, but needs to communicate its vision, prioritise resources and fully involve communities and businesses in taking forward this agenda

Through the Destination Management Partnership, the Authority is helping to create a vision for sustainable tourism

- 9 Embedding sustainability into tourism management requires a clear vision and well-defined plans setting out what the Authority considers to be a sustainable approach and how it will work with partners to reach an agreed consensus. Without careful planning, good intentions to grow tourism can have a detrimental impact on the environment, biodiversity and communities, as well as the Authority's existing commitments and wider plans.

The Authority's plans align with the priorities of the Destination Management Partnership

- 10 The Authority's overarching statutory plan for overseeing its two purposes is the National Park Management Plan 2020-24⁴. A priority of the plan is for the Authority to collaborate effectively with the Destination Management Partnership (DMP) for Pembrokeshire who operate under the banner of 'Visit Pembrokeshire'. The Authority's Management plan is strongly aligned with the Destination Management Partnership's Plan⁵, and its focus on growing the economy of Pembrokeshire in a sustainable way. Over the past two years, however, the ambitions of these plans have been hindered by the pandemic.
- 11 To make these plans a reality, they are supported by a Sustainable Recreation and Visitor Management Action Plan 2020-24. This plan focusses on managing the negative impact of tourism activities and contains 30 actions that the Authority is responsible for delivering. The plan shows clear actions, timescales, delivery lead, resources, status and details on progress. Of the 30 actions listed in the Plan, 15 are underway, 14 are ongoing and one is behind target.

⁴ <https://www.pembrokeshirecoast.wales/about-the-national-park-authority/national-park-management-plan/>

⁵ <https://www.visitpembrokeshire.com/wp-content/uploads/Pembrokeshire-Destination-Management-Plan-2020-2025-English.pdf>

Exhibit 3: Visit Pembrokeshire Destination Management Partnership



Destination Management Partnership – Visit Pembrokeshire

- Formed in November 2020
- Trade-led organisation made up of businesses across Pembrokeshire, and representatives from Pembrokeshire National Park Authority, Pembrokeshire County Council, Pembrokeshire Tourism and PLANED voluntary group
- Ambition is to grow tourism for the good of Pembrokeshire by:
 - Growing the visitor economy
 - Extending the tourism season
 - Increasing engagement with tourism businesses
 - Enhancing the reputation of Pembrokeshire by making it a Top-five UK destination choice
- Took on marketing functions of tourism from Pembrokeshire County Council in 2020
- 16.8,000 Instagram followers/18,000 Twitter followers

The Authority needs to strengthen how it uses data to better manage responses to increasing visitors and measure this impact

- 12 The Authority has acknowledged gaps in data on visitor impact. An internal sustainability appraisal of the National Park Management Plan found in 2019 that visitor number statistics were generally unavailable, and there was a gap in detailed information on numbers participating in recreational activities, and their impact on the environment, residents and other users of the National Park. Since then, the Authority has started to explore more complex data analysis on visitor activities, linking with other partners, but gaps still remain, making it difficult to gain an accurate understanding on visitor intentions. This limits the Authority from being able to effectively direct resources and make better informed decisions. We also heard that gaps in biodiversity baseline data are making it difficult to monitor the scale of losses following periods of increased tourism or changed activity.
- 13 While the Authority has an adopted plan, outcomes are less clear. For example, the plan does not consider the impact of increased footfall and how the new type of visitor post pandemic will be monitored and could better demonstrate how the impact on communities and the environment will be managed. Nor is it clear from the plan what data or performance indicators will be used to measure success.
- 14 Similarly, the Authority has not established a complete baseline on the state of biodiversity, making it difficult to identify the links with increased tourism and biodiversity decline both now and in the future. To address this, the Authority plans

to work with other National Park Authorities on the development of Sustainable Tourism Indicators, focused on considerations relating to regenerative tourism and to identify collaborative actions and share information and resources on sustainable tourism. This is due to be completed by 2022, and will enable the Authority to better demonstrate the impact of its work.

- 15 The Authority has defined its approach to managing sustainable tourism as 'ensuring tourism and recreation activities take into account the special qualities of the national park and are not detrimental to it'. It would be helpful if the Authority explicitly set out how it will promote and manage tourism to positively enhance local communities, and result in a net improvement in wildlife and conservation efforts.
- 16 During our review, we found that generally Authority staff and Members we interviewed understand the broad principles of sustainable tourism but there is some inconsistency in how they and stakeholders view the Authority's sustainable tourism objectives. There are differences in what staff deem as sustainable from one service area to another and whether the Authority realistically has the powers and responsibilities to deliver sustainable tourism. Some staff told us the term is also difficult to define, which consequently makes it challenging for the Authority to monitor impact. Further work is therefore required to promote the Authority's vision, both internally and with external stakeholders.
- 17 Good collaboration has provided the Authority with access to more data held by partners, which is enabling the Authority to analyse and understand tourism and its impact and help shape responses. For example, the Wales Activity mapping project⁶, hosted by the Pembrokeshire Coastal Forum and partly funded by the Authority. The interactive mapping provides site-specific information on type, amount and distribution of recreational activities across the south-west Wales coastline to help understand and manage recreational activities to ensure the long-term sustainability of tourism and the recreation industry. The tool allows long-term comparisons to be made against a 2010 baseline, showing where usage levels have changed. Despite limitations of the tool (the tool has not been updated since 2019), this data has the potential to be effective when layered against other key data, such as traffic trends, wildlife activity and biodiversity measures.
- 18 To effectively monitor how successful the Authority is addressing its sustainable tourism priorities, this needs outcomes to be clearly defined in all relevant policies and communications strategies, so the Authority can measure its performance against them. This is particularly important, following increasing pressures resulting from the pandemic. It would be helpful if plans could be explicit and state how the Authority intends to use tourism to positively enhance local communities, contribute to a net improvement on wildlife and conservation efforts, or whether the actions should simply negate the negative impact of tourism activities.

⁶ [GIS Mapping – Pembrokeshire Coastal Forum \(PCF\)](#)

The Authority collaborates well with others but needs to ensure partners are aligned and are helping to deliver its statutory purpose

- 19 Promoting and managing sustainable tourism requires a strong partnership approach across the National Park. With many well-established public, private and voluntary sector groups in the Park, the Authority has a key leadership role to play in creating a sustainable tourism vision and agenda with its partners and in public messaging.
- 20 Anecdotally, it is clear that many partners believe that Authority is making a positive difference to dealing with the challenges of tourism. Despite increasing visitor numbers, partners we spoke with were mostly complimentary of the Authority's approach and we heard that partnership working is in a better place than previously. Many partners acknowledge that the main challenges lie in balancing creating a flourishing economy and protecting the environment and local communities.
- 21 The DMO is seen by partners as a pivotal group that covers these aligned aims. Despite the DMO ambitions to use sustainability as its unique selling point (USP), this is not the focus of the Destination Management Plan. Despite the plan articulating the challenges facing the National Park area – for instance, the loss of community services from the area, over-tourism and its impact on the landscape - the DMO is primarily focussed on marketing and pursuing the economic benefits of tourism, prioritising its members' interests. While these are important priorities for Pembrokeshire, they do not fully align with the Authority's statutory purposes.
- 22 Consequently, the Authority needs to ensure it continues to prioritise engaging and involving itself with the work of its wider partners, to ensure it can continue to fulfil its statutory purposes and influence all stakeholders throughout the National Park. We found that there are limited resources made available by the Authority and partners to influence the direction of tourism promotion outside of the DMO. The Authority must consider whether existing promotional work is effective and what else it needs to do to promote its vision for sustainable tourism.

The Authority needs to engage more effectively with communities and businesses and influence visitor behaviour

The pandemic has given the Authority greater prominence and a stronger role in helping to influence the future of tourism in its area and it needs to build on this going forward

- 23 The outbreak of COVID-19 in 2020 presented a unique set of challenges to the Authority and its partners. During 2020, much of the work to deliver the sustainable tourism plans had to be put on hold, mainly due to the restrictions on face-to-face

engagement. The pause in activities gave way to a surge in visitors brought on by an increase in people looking to holiday in the UK due to foreign travel restrictions. From speaking with staff and partners, we heard that not only did the numbers of visitors increase, but a new demographic of visitor also chose to visit National Parks like Pembrokeshire Coast for the first time. In some cases, the lack of familiarity with customs in national parks led to increasing anti-social behaviour, littering and illegal wild camping as well as more familiar issues of traffic congestion.

- 24 With the easing of restrictions, the Authority recognised its role in helping to shape messaging and communication to focus on sustainable tourism. In the last 18 months, the Authority has emerged as a trusted national voice communicating the negative environmental impact of increasing visitor numbers on the landscape, natural environment and small coastal communities with limited infrastructure. The Authority also used the reopening of the National Park to outside visitors as an opportunity to focus on sustainability by, for example, refocussing visitor centres to promote biodiversity, conservation and sustainable living messages.
- 25 However, we found that many visitors did not actually realise they are in a National Park with the special qualities that come with it. As well as better targeting of information to visitors, the Authority has an opportunity to use its growing profile to reinforce the importance of sustainable tourism and the responsibilities of the Authority going forward alongside the Destination Management Partnership.
- 26 Despite the pivotal role of the Authority in responding to the impact from the increase in visitors, the Authority needs to strengthen the evidence base on negative impacts of over-tourism on the landscape and on local communities. By quantifying this alongside the positive impact of its activities, the Authority will be in a better position to influence and persuade partners on the importance of sustainable tourism going forward.

The Authority struggles to deal with the impact of social and other media which encourage visitors who have little awareness of their potential impact on the protected landscape

- 27 The Authority communicated innovatively to reach out to people during the pandemic and especially when restrictions on travel were eased. This included using targeted messages to visitors through phone apps, ensuring they get relevant tailored information according to their location in the National Park and the use of celebrity messages to remind visitors to respect the area. Through some successful education campaigns on its own social media channels, and through established groups like the Recreation Access Group and the Outdoor Charter, the Authority is also strengthening its work to influence and educate visitors to ensure they behave responsibly and respect sensitive areas.
- 28 However, the Authority does not have the capacity to counter misinformation and unhelpful messaging on social media. This has become increasingly important when it comes to tackling what some staff label the 'Instagram effect'; where users of the social media apps want to emulate the experiences they see in photos of

secluded spots, and bypass traditional information points like visitor centres or tourist information offices, where the sustainability and expectations on visitors can be more controlled. By encouraging more visitors to areas already experiencing pressure from tourism, this unofficial promotion can result in more damage to sensitive landscapes and intrusion on small communities.

- 29 It is not just social media contributing to this though. Some national news and media outlets, and in some cases local partners, have promoted areas of the National Park that the Authority and the Destination Management Partnership have agreed to avoid promoting. Some staff are concerned this is contributing to the decline in biodiversity with nesting sites being disturbed by campervans and dogs or seal pup sites being disturbed through activities like stand up paddleboarding or coasteering. It must be acknowledged, however, that there are limitations to what can be achieved here – the Authority cannot be expected to control all external promotion of the National Park, and national partners like Visit Wales have an important role to play here too.
- 30 From our research, there are options for the Authority to consider helping strengthen the reach and impact of its communications. These include using visitor centre resources more effectively to promote strategic messages to visitors and the community. Staff at centres can help build the link between the Authority's strategic campaigns and direct messages appropriately, and more should be done to communicate this to centres and to give them the flexibility to direct resources based on the pressures on the ground at the time. The Authority also needs to ensure any promotional activities are targeting the right demographic to appeal to the new type of visitors, helping them to reinforce the do's and don'ts, but also to understand if there is anything the Authority can change in what it offers them. Understanding this requires intelligent use of data.
- 31 However, influencing visitor behaviour is limited to some extent by the infrastructure available in the area. One long-term challenge is to minimise car usage in the National Park, but this is difficult to achieve within the existing transport network. We heard about the limitations due to fragile bus operator contracts and a lack of rail routes through the Park, with some longstanding resource issues limiting expansion of routes and frequency of services. The Authority and its partners need to work together to establish a reliable public transport network before this is a realistic goal. One option the Authority uses to tackle congestion problems in high-demand tourist areas is to disperse people to less-known locations, utilising the space in the National Park to reduce pressure on hotspot areas. This must be carried out with caution though, to ensure the hotspot problems are not replicated elsewhere and to ensure sensitive sights are not negatively impacted upon. There is more to do to measure the impact of dispersal activities.
- 32 Visitors to the Park must co-exist with the Park's permanent communities, and local residents should expect to go about their daily lives without hindrance. With mounting pressures from increased visitor numbers, communities can increasingly find the year-on-year increase in tourism difficult to deal with. The Authority are acutely aware of the general pressures on communities but must do more to map

specific issues affecting individual communities, maintaining open dialogue and providing regular feedback to communities. More must be done to reassure them of how it is working to respond to concerns. It is notable that there is little focus on communities in the Destination Management Plan.

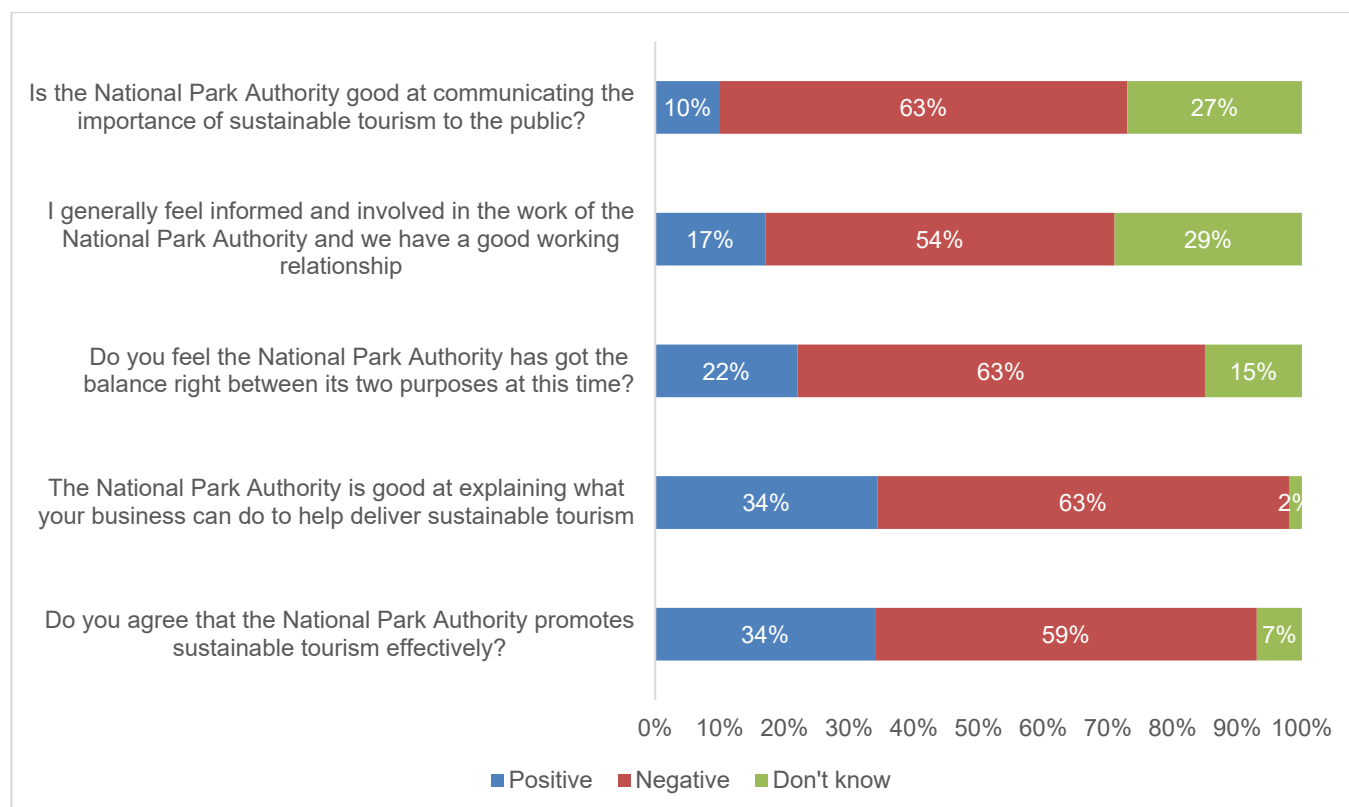
Our survey of tourist businesses highlights that the work of the Authority is not influencing their behaviour

- 33 The Authority has built strong relationships with adventure-tourism businesses and other interest groups such as the Pembrokeshire recreation group, the Pembrokeshire Coastal forum (for example, the Outdoor Charter/Marine Code) particularly in the period when responding to COVID-19. The Recreation Management Group were key to co-ordinating and monitoring the response to the increased visitor numbers.
- 34 There are examples of Authority-funded initiatives encouraging businesses to adopt a more sustainable way of thinking, including a 'Naturally Connected' project⁷, which gives specialist training and information on 'wildlife-friendly' land-management practices. The aim is to improve biodiversity and make tourists more 'wildlife aware' through its activities. This involved seven participating businesses, but if successful could be rolled out wider to other businesses. The Authority also runs a 'Parkwise' programme, providing training to businesses to help promote the Park sustainably, and worked with Pembrokeshire County Council on an 'Events Toolkit'⁸ to help limit the impact of their events, however, activity promoting these initiatives reduced as a result of disruption from the pandemic.
- 35 Importantly, tourist businesses we surveyed see the value and importance of sustainable tourism. For instance, 78% noted that sustainable tourism is helping or will help their business and 76% that preserving natural resources and tourism are compatible. In addition, 85% agreed that a well-managed national park is important to attract visitors to the area and support this business.
- 36 However, businesses we surveyed also felt that they are not as informed as they could be. For example, **Exhibit 2** highlights that 54% of tourist businesses we surveyed disagreed with the statement: 'I generally feel informed and involved in the work of the National Park Authority and we have a good working relationship.' In addition, tourist businesses feel the Authority needs to review its public communications and focus more explicitly on explaining the importance of and contribution key stakeholders can and should play. Roughly a third of survey respondents (34%) agree that the local National Park Authority promotes sustainable tourism effectively. This is below the average across the three Welsh National Parks of 48%.

⁷ Funded by the Authority's Sustainable Development Fund

⁸ <https://www.pembrokeshire.gov.uk/events-toolkit>

Exhibit 4: the National Park Authority has more to do to explain and promote its sustainable tourism vision



Source: Audit Wales survey of tourism businesses, February 2022

- 37 Some pressures from tourism are outside the control of the Authority. Some landowners took advantage of the Welsh Government's change to the planning regulations extending the timescale for permit camping from 28 days to 56 days. This resulted in an increase in visitors often in areas with poor infrastructure and limited tourist services, which had a detrimental impact on local communities and the environment.
- 38 Although a strategic priority, the Authority has limited influence in managing the increase in second homes, which is resulting in local residents being priced out of the housing market and finding it difficult to purchase a home in their local community. In some communities, this also has the knock-on effect of eroding Welsh-language heritage by reducing the use of the Welsh language within these communities, and, over time, the loss of Welsh place names. This issue is largely out of the Authority's control, but the Authority does contribute in other areas, for example, by issuing promotional material bilingually and promoting the use of the language by providing Welsh-medium events at its visitor centres. This helps contribute to the sustainability of many communities and is a topic of national significance and something affecting the three National Parks in Wales.

Appendix 1

Methodology

To inform our overall conclusions we explored the following lines of enquiry:

- Does the Authority have the right vision, resources and systems in place to effectively promote and manage sustainable tourism?
- Is the Authority influencing behaviour of key stakeholders to promote and manage the impact of tourism?

We undertook the review during the autumn of 2021. Our methods included:

- consolidating our cumulative audit knowledge and experience.
- a survey of National Park tourism businesses promoted via Visit Wales. 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 and 41 were based in Pembrokeshire. The data presented in this report focuses on the responses specific to Pembrokeshire.
- reviewing data and key documents.
- interviewing 12 officers and two Members at the Authority.
- interviewing key officers in partner organisations including Pembrokeshire County Council and Visit Pembrokeshire.
- keeping in regular contact with the Land, Nature and Forestry Division in the Welsh Government.

Appendix 2

A national perspective: sustainable tourism in National Parks across Wales

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. 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.

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 on the natural environment. Despite this positive work, in the course of our reviews of sustainable tourism, we found some issues of concern that are common to all three National Park Authorities.

National Parks in Wales have to balance encouraging tourism with conserving the natural environment

The three National Parks 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 5**.

Exhibit 5: the Statutory Purposes and duty of Welsh National Park Authorities

Statutory Purposes	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• To foster the economic and social well-being of communities living within the National Park.

Source: 1995 Environment Act

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

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 Parks 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.

All three Authorities recognised that COVID-19 and COP26 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. Intrinsically, balancing the needs of the two purposes is difficult and all National Park Authorities told us they struggle with this.

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.

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

Tourism businesses we surveyed were also positive about the work of the National Park Authorities. For instance:

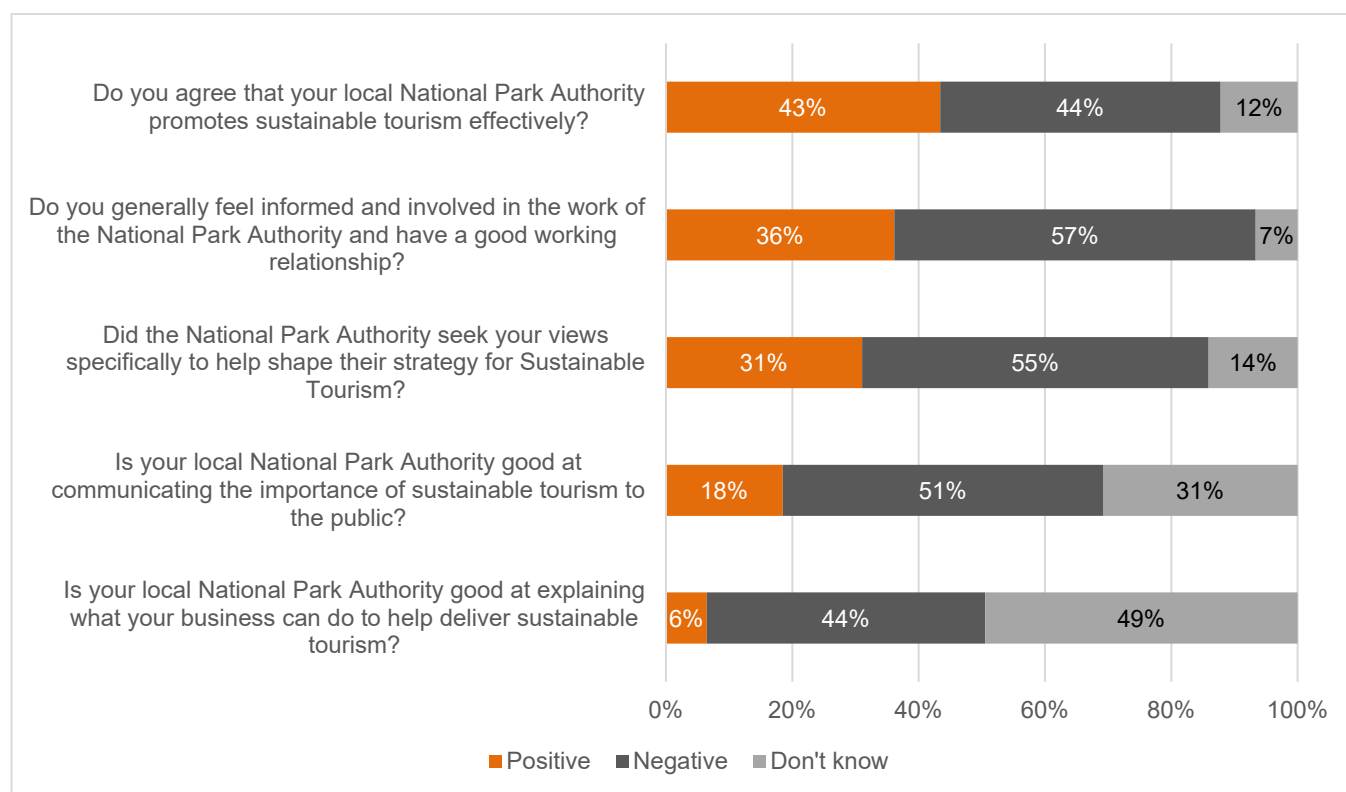
- 95% of those who responded to our survey agree or strongly agree that a well-managed National Park is important to attracting tourists;
- 92% of businesses also agree or strongly agree that conserving and protecting natural resources and tourism are compatible; and
- 72% of businesses think sustainable tourism is helping, or will help, their business.

However, only 29% of survey respondents agree that their local National Park Authority has got the balance right between protecting the natural environment and promoting enjoyment of the National Park at this time.

Our survey of tourism businesses indicates there is room for improvement in how National Park Authorities engage with the private sector (**Exhibit 7**). 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.

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 – **Exhibit 6**.

Exhibit 6: tourism businesses' views on the National Park Authorities' approach to sustainable tourism



Source: Audit Wales Survey of Welsh Tourist Businesses, January 2022⁹

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

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 in the long run. Our survey found that:

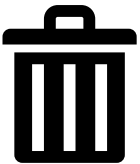
⁹ We received 281 responses to our survey. In respect of these specific questions, 280 responded to the first; 224 the second; 277 the third; 276 the fourth; and 279 the fifth.



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



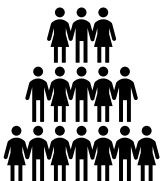
Just under 80% of tourist businesses we surveyed seek to reduce energy use



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 visiting, nor their behaviour and impact

Historically, National Park Authorities have not had a direct role in promoting tourism and marketing their destinations. And proportionally, they own very little land. They are one of many players within their area that has a role in tourism and protecting the environment. Too many of the strategic levers for sustainable tourism are vested in organisations and bodies who do not share the same vision or responsibilities for protecting the environment of the National Parks.

For instance, the funding and remit of National Park Authorities do not cover the direct marketing of tourism within National Parks and only Brecon Beacons National Park Authority is a destination management organisation. 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 Authorities primarily focus on influencing what others do, but this is not easy and often not straightforward.

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, an increased risk of accidents, growing anti-social behaviour and a negative impact on local communities in each of the National Parks.

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 and relevant organisations such as National Resources Wales working together with the three National Park Authorities.

All three National Parks highlighted ongoing and long-standing problems with the local infrastructure in their areas, especially public transport, car parking, integrated active travel routes and responding to anti-social behaviour. Many of the statutory responsibilities for responding to 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.

However, other public bodies are often unable to respond effectively and consistently due to resource and other pressures. And 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 mean 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.

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.