

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Gwerthu Cymru i'r Byd / Selling Wales to the World

Ymateb gan Y Gynghair Cefn Gwlad / Evidence from Countryside Alliance

The Countryside Alliance works for everyone who loves the countryside and the rural way of life. Our aim is to protect and promote life in the countryside and to help it thrive. With over 100,000 members and supporters we are the only rural organisation working across such a broad range of issues.

The Countryside Alliance welcomes this inquiry titled "Selling Wales to the World" by the Economy, Infrastructure and Skills Committee, and the opportunity to submit evidence on the role that local food and drink, and country sports could contribute to the Welsh tourism industry.

Rural tourism provides an opportunity to escape to the countryside for UK and overseas tourists providing recreation, tranquillity, local food and drink, culture and a chance to engage with the natural environment, which can also make a contribution to the people's health and wellbeing by increasing physical activity and outdoor recreation.

Tourism in rural areas has huge potential not only to underpin local economies but also the national economy, while supporting local farmers, producers and making the most of our country's natural assets. The areas for growth should include food and drink tourism and country sports, which can generate a year round tourism offer, bolster local economies and enable people to engage in the natural environment.

However, there are many challenges which are holding back this growth from poor public transport and broadband to business regulations which impact negatively on small tourism businesses as well as a zero marketing spend by Visit Wales on country sports. These major issues must be addressed and are currently forming significant barriers to business growth and a developing rural economy.

Rural tourism, playing its fullest part in the international market, is a huge economic opportunity. With imagination and flair, we can market our heritage and the strength of interest it engenders for the nation's benefit over the long term. Our landscape has been formed by intricate management by our farmers, anglers and gamekeepers over generations thus forming the attractive countryside that we all utilise to attract visitors from all over the world to Wales.

There is a need to grow a "365-day tourism industry" that does not negatively impact on the landscape but offers increased visitor numbers and an enhanced visitor experience all year round. Shooting for example, contributes significantly to 365-day tourism, by maintaining employment in otherwise challenging environments and provides hotels, bed and breakfast establishments and pubs with vital income in the winter months. Indeed, many businesses would not survive without this trade.

People come to Wales from all over the world to shoot and to fish. Marketing of such opportunities is more often than not, undertaken by the hosts themselves. Shooting receives no support from Visit Wales. Angling only receives limited support from the Natural Resources Wales budget. This puts providers of some of the best sporting opportunities in the UK at a severe disadvantage and means Wales falls dramatically behind Scotland in the support it receives from the Government and associated agencies for country sports tourism.

The importance of buying local and supporting small producers has grown significantly over the last few years and this growth in food and drink tourism is also a success story on which we need to capitalise. Food and drink represents a major component of tourism expenditure in rural areas. Promoting local food and drink as part of a tourism strategy can deliver additional economic and environmental benefits; including supporting diversification of farms and producer businesses, creating additional demands for skills and training to benefiting the environment through reduced food miles and carbon emissions.

The promotion of local food and drink also increases cultural identity and community pride, which in turn makes an area a more attractive tourist offer, while also ensuring the resilience of the local supply of food and supporting our farmers and small producers.

Facts and Figures

Value of Shooting and Angling to the Rural Economy

Shooting and fishing have huge potential to contribute to the tourism offer in rural areas, benefitting not only local economies, but the natural environment.

Shooting

- The contribution of shooting to the Welsh economy is valued at £75 million (GVA) according to a 2014 report carried out by the Public and Corporate Economic Consultants (PACEC). The study found that:
 - Shooting supports the equivalent of 2,400 full time jobs in Wales.
 - Shooting is involved in the management of 380,000 hectares of the rural land area.
 - Shooters undertake 119,000 days conservation work annually across the Welsh Countryside.
 - £7.4 million is spent each year on conservation and habitat maintenance by shooting estates in Wales.
 - At least 600,000 people in the UK shoot (live quarry, clay pigeons, targets) and at least 1.6 million people shoot live quarry with airguns.
 - People who shoot spend £2.5 billion each year on goods and services, bringing income into rural areas across the UK, particularly in the low-season for tourism. The research shows that an established shoot generates local economic benefits for businesses in a radius of up to fifteen miles.
- Shooting represents a substantial private investment in the local economy of the uplands and ensures the future of our heather moorland at no cost to the public purse benefiting all those who engage in outdoor recreation in these areas.
- There are around 149 estates with grouse shooting in England and Wales and the Moorland Association estimate that in England and Wales grouse shooting has a turnover of £67.7 million per year and as an industry supports the equivalent of 1,520 full time equivalent jobs.

- The Moorland Association members in England and Wales spend approximately £50 million per year on environmental and landscape management.

Angling

- Angling is worth more than £3 billion to the UK economy and the rod licence raised £1,042,520 in Wales in 2016 (*NRW Fisheries income and expenditure, April 2017*) intended to be used for management of inland water.
- The Environment Agency (*Economic Evaluation of Inland Fisheries*) in 2007 found that “freshwater angler gross expenditure across the whole of England and Wales was £1.18 billion”.
- Research into the economic contribution of sea angling, commissioned by Defra and published in 2004 (*Drew Associates, 2004, Research into the Economic Contribution of Sea Angling*) calculated that the direct spend by recreational sea anglers in England and Wales was £538 million, and the total spend of the sector was around £1.3 billion.
- In 2007 the angling industry generated more than 37,000 jobs in England and Wales. (*Environment Agency, 2007, Economic Evaluation of Inland Fisheries page 5*).
- Market research carried out for the Angling Trust based on lifestyle interviews found that 3.5 million UK adults either occasionally or regularly coarse, game or sea fished. (*Angling Trust, 2012, Fishing for Life, A national strategy for getting people in to fishing 2013 – 2018*).

Value of Local Food and Drink to the Rural Economy

Food and drink plays a significantly important role in attracting visitors to Wales and should be a major factor used for promoting Wales to the rest of the world

- Sales of local food and drink are worth 4.2 billion (GVA) to Wales.
- Food is an important general holiday component however Wales falls behind competitors in terms of the perception of performance.*
- Visitors to Wales rate food as one of the lowest aspects, behind shopping but still a respectable 8.8 out of 10 (UK staying visitors).*
- In 2013, Eating and Drinking out made up 20% of total domestic holiday tourism spend in Wales.*

(**The Food Tourism Action Plan for Wales 2015 – 2010, Welsh Government*)

Recommendations

- Promotion of the natural environment and country sports as part of a tourism strategy to encourage more people, both from within the UK and abroad, to visit more of Wales's rural places, for longer and at all times of the year.
- Tailored support for farmers and rural residents to diversify into tourism and grow their businesses. Including providing support for innovation, training, marketing, funding advice, mentoring and networking - together with integrating new approaches to food and drink production and distribution and country sports tourism.
- Ensure visitors' experiences are balanced with the need to preserve the environment and the character of local communities.
- Review business regulations related to tourism ensuring they are proportionate and reduce red tape to avoid over-burdening small businesses.
- Raise awareness of the benefits of 'buying local produce' amongst visitors. A strong local food and drink offer can enhance the quality of the local tourism product and influence the choice of destination for visitors. It can also enhance the local identity and reputation of areas and offer new recreational shopping opportunities for visitors. This will also attract additional tourism expenditure and encourage greater expenditure per visit, thereby supporting more economically productive jobs, higher added value, and providing support for economic regeneration.
- The marketing and promotion of specialist food products such as game and cheese must be closely integrated into tourism strategies and promoted online through an interactive map.
- Improve broadband infrastructure and digital skills to ensure tourism businesses are making the most of this digital world and ensures that as tourists are becoming more reliant on technology to access information about attractions, travel and book accommodation, that the information is available at their fingertips.
- Public transport must be integrated with tourism attractions in rural areas.
- Extend the tourism season as seasonal unemployment is a major issue in many rural locations. Promotion of country sports and food and drink tourism have huge potential to support year-round tourism as they are less weather dependent and can provide a tourism offer outside of the peak holiday periods.
- The economic contribution of overseas country sports tourists make to rural economies cannot be underestimated. Brexit negotiations must take this into account and ensure no unnecessary or bureaucratic burdens are placed on them through restrictive movement of firearms legislation.