

National Assembly for Wales
Rural Development Sub-Committee

Inquiry into rural tourism in Wales

February 2011



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Rural Development Sub-Committee

The Rural Development Sub-Committee is established by the National Assembly for Wales to consider and report on issues affecting Rural Development. It is a sub-committee of the Sustainability Committee and its remit is to scrutinise the Welsh Government on the Government's areas of responsibility that the sub-committee considers impact on rural development.

Powers

The Committee was established on 5 July 2007 as a Sub-Committee of one of the Assembly's Sustainability Committee. Its powers are set out in the National Assembly for Wales' Standing Orders, particularly SO 12. These are available at www.assemblywales.org

Committee membership

<i>Committee Member</i>	<i>Party</i>	<i>Constituency or Region</i>
Rhodri Glyn Thomas (Chair)	Plaid Cymru	Carmarthen East and Dinefwr
Joyce Watson	Labour	Mid and West Wales
Brynle Williams	Welsh Conservative Party	North Wales
Kirsty Williams	Welsh Liberal Democrats	Brecon and Radnorshire

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Chair's foreword

The Rural Development Sub-committee was established to scrutinise Welsh Government policies which impact on rural Wales, and we have tried to consider a range of issues within this remit. We decided to undertake our final major inquiry into rural tourism as we believe this is a key economic sector within rural Wales and as a Committee, we were keen to explore the opportunities to develop this important industry.

Tourism is a key industry in Wales, in 2009, tourism in Wales had an overall economic impact of £5.9 billion. In particular, rural Wales is vital to the tourism industry. Figures from the regional tourism partnership show that rural counties account for some 62% of Wales' overall visitor economy

Tourism is particularly important in rural Wales, not just because of the income it generates but also because of the wider role it can play. It helps keep communities together through job creation; it allows farm diversification; and the provision of services for tourists can also be used by local people.

What we heard throughout the inquiry was that successful rural tourism is about making the links between the different sectors, and utilising these to the best advantage. The different tourist policies must link up, and must reflect rural aspects of Wales; the different organisations involved must work together to deliver for all of Wales; new tourist attractions must be complemented with greater amounts of access; and links from urban Wales must be available to rural Wales to capture as wide an audience as possible. Our recommendations are aimed at making it easier for those involved in the tourist industry to provide a first class service to Wales's tourists.

I would like to thank Andrew RT Davies AM who substituted for Brynle Williams during this inquiry and provided a valuable contribution to the report. We would also like to send our best wishes to Brynle, whose presence in the Assembly has been missed by all.

Finally I would like to take the opportunity to thank everyone who took the time to provide written or oral evidence to this inquiry. We are grateful to everyone who contributed and their comments and observations formed an important part of our discussions and deliberations.

The Committee's Recommendations

The Committee's recommendations to the Welsh Government are listed below, in the order that they appear in this Report. Please refer to the relevant pages of the report to see the supporting evidence and conclusions:

Recommendation 1. The Committee recommends a complete review of the effectiveness of all policy relating to Rural Tourism is undertaken to inform the review of Achieving Our Potential in 2013
(Page 16)

Recommendation 2. The Committee recommends that coherence is brought to the policy framework for Rural Tourism through the development of a central area on the Visit Wales website for relevant policies
(Page 16)

Recommendation 3. The Committee recommends that the Minister for Heritage allocates resources to promote rural Wales as a destination for sporting events in order to increase tourism.
(Page 16)

Recommendation 4. The Committee recommends that at least one action is included in the remit letters of relevant Assembly Sponsored Public Bodies encouraging collaborative working amongst the organisations to promote tourism
(Page 18)

Recommendation 5. The Committee recommends that an audit of available information published by Government and relevant organisations about rural tourism is undertaken to ensure that all the necessary connections between policies and departments are transparent
(Page 19)

Recommendation 6. The Committee recommends that the Minister for Heritage works with the tourism advisory panel to develop effective information sharing practices between organisations involved in delivering rural tourism as well as by Government. This should include information on initiatives and funding.
(Page 19)

Recommendation 7. The Committee recommends that Visit Wales publishes information about the key contacts points within the organisation to increase transparency.
(Page 21)

Recommendation 8. The Committee recommends that the Tourism Investment Support Scheme is evaluated in July 2012 to ensure that it is delivering the necessary support for the tourist industry.

(Page 25)

Recommendation 9. The Committee recommends the Minister for Heritage works with the Minister for Economy and Transport to ensure that the additional pastoral support previously provided by FS4B is available, and delivered in a method appropriate for rural tourism businesses.

(Page 25)

Recommendation 10. The Committee recommends that assessments on applications to Sustainable Development Fund should give due regard to potential tourism benefits.

(Page 25)

Recommendation 11. The Committee recommends that given the current poor broadband service many parts of rural Wales have and the importance of this to tourism, rural Wales is prioritised in the broadband roll out with the aim of catching up with competitors such as Cornwall

(Page 28)

Recommendation 12. The Committee recommends the Welsh Government should continue to lobby the UK Government around the electrification of the London to Swansea rail line to help ensure Wales is viable tourist destination.

(Page 30)

Recommendation 13. The Committee recommends that Visit Wales should produce a comprehensive guide to the public transport which is available to and within Rural Wales including initiatives such as Beacons Bus and Snowdon Sherpa

(Page 30)

Recommendation 14. The Committee recommends that Visit Wales works with colleagues in the Department for Heritage to produce a year round schedule of events in Wales, with the aim of combatting issues around seasonality and to provide greater co-ordination

(Page 35)

Recommendation 15. The Committee recommends that the Minister for Heritage works with the Welsh Local Government Association, National Park Authorities and CCW to produce e-trails for all parts of Rural Wales.

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1. Introduction

Background

1. The Committee decided to look at the issues around rural tourism, as this is a major driver for the rural economy. We agreed the following terms of reference for the inquiry:

- what progress has been made on the actions contained within the *Action Plan for the Countryside Experience*;
- what efforts have been made to update the action plan in light of a number of organisational and policy changes;
- how support for rural tourism is being coordinated by the Welsh Government and;
- whether the proposal contained within the Farming strategy for a reinvigoration of the Adfwyio type of approach to rural tourism should be considered.

2. The Committee gathered written and oral evidence from a wide range of witnesses, which forms the basis of this report's conclusions. This Committee report seeks to ensure rural tourism becomes a central part of Welsh Government policy, as one of rural Wales' key industries.

Definition of Rural Tourism

3. The Committee took a broad view of rural tourism, which was wider than the traditional nine rural counties. Tourism is not restricted by county boundaries, and a great deal of support is provided on a regional basis. Furthermore, the Committee was aware that rural tourism could not be considered entirely in isolation from urban tourism as many policies impact on tourism as a whole.

4. The Minister's paper outlined rural tourism as:

“... generally understood to include tourism activities that take place outside urban areas in the countryside or along the rural coast. It is by its nature difficult to define statistically because

it does not comply easily with administrative boundaries that are used to collect statistical data.”¹

The Importance of Rural Tourism

5. Tourism is vital to the Welsh economy and in particular to the rural economy. According to the final report of “The Economic Case for the Visitor Economy” published in June 2010, the total contribution for tourism (including impact through the supply chain, capital investment and Government Expenditure) accounts for 13.3% of the Welsh economy.

6. . Tourism is an area which must be considered important across Government, and not just in the department for heritage. The Committee heard a range of evidence around the importance of tourism, particularly for the rural economy

7. Peter Cole from the Regional Tourism Partnership suggested tourism is so important because:

“... a Welsh tourism experience cannot be outsourced—it cannot be off-shored; you can only have a Welsh holiday in Wales. That sounds very trite, but, compared with the other sectors that we put our faith in from time to time, it is remarkably solid.”²

8. Peter Cole also told the Committee that alongside the clear economic benefits like increased employment, tourism also has a role in keeping communities together:

“... you may get enormously important supplements to family incomes on places like farms, which are perhaps more hidden. On the face of it, there may not be a new job, but there is a family that is able to stay where it has always lived, which is also pretty important”³

9. Rob Hanna, from the Wales Environment Link suggested that tourism needs to be considered alongside other industries:

¹ [Rural Development Sub-Committee: RDC\(3\)-15-10 p1: Evidence from Minister for Heritage, 2 December 2010](#)

² RoP [para 56] 21 October 2010, Rural Development Sub-Committee

³ RoP [para 72] 21 October 2010, Rural Development Sub-Committee

“One of the clear things is communicating the value of the tourism industry to the Welsh economy, giving it status alongside the other industries. ... One of the things that I have been saying to the NFU recently is, ‘Access onto your land should be seen as a positive thing. How better to communicate to your customer the quality of the food production and the landscape than to let them walk it and see it? It is like going to the factory to see your car being made’.”⁴

10. Through this report, we want to stress the importance of tourism as an important industry to rural Wales. We hope therefore that our recommendations can be used for the 2013 review of ‘Achieving our Potential’ and can help raise the profile of rural tourism across the Welsh Government.

⁴ RoP [para 70] 18 November 2010, Rural Development Sub-Committee

2. The Welsh Government's Strategies and Policies

11. Although tourism is predominately led by the private sector, Government support is essential to ensure the full potential of the sector is achieved in a sustainable way. Government has a role to play in planning, managing and developing tourism in order to maximise tourism's economic benefits and to minimise any adverse socio-cultural and environmental impacts. The Committee therefore considered the effectiveness of Welsh Government strategies in this area.

Identifying Key Priorities

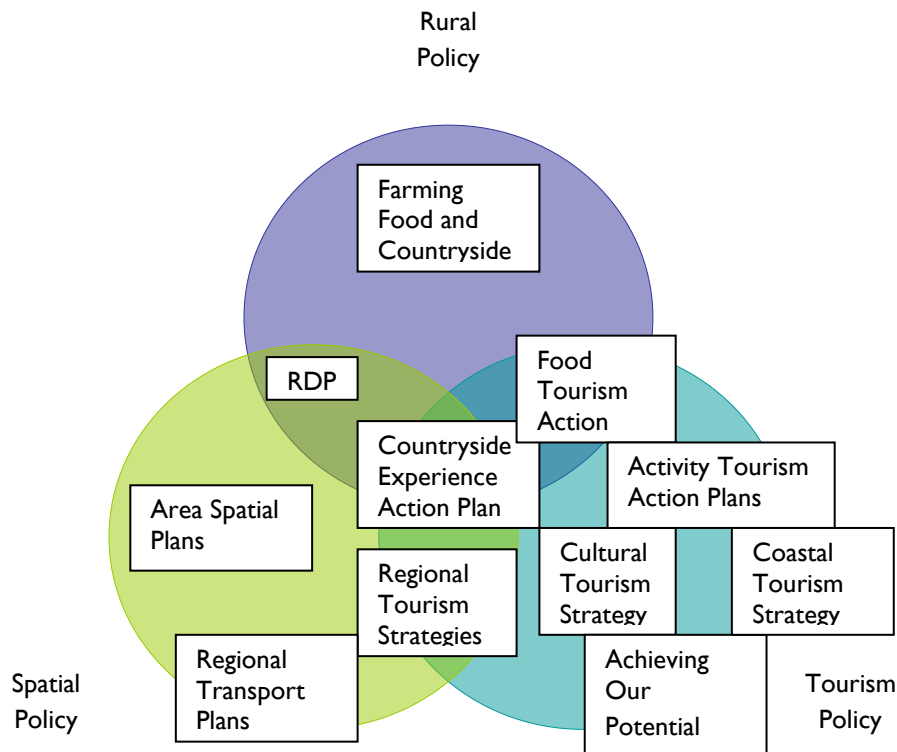
12. Written evidence from the Minister for Heritage outlined the structure for delivering tourism in Wales. The Minister outlined five departments within the Welsh Government which have a role in delivering tourism, along with a number of public bodies. In addition to the national level, there are also partners involved at a regional and local level.

13. As a Committee, we identified two major tourism strategies for rural tourism, the *Action Plan for the Countryside Experience*⁵ which aims to promote and develop rural tourism in Wales and '*Achieving Our Potential*'⁶ which sets out actions for the Welsh tourist industry for the period 2006-2013. In addition to these, there are a number of other government policies which could be considered relevant, or contain actions pertaining to rural tourism.

14. Evidence from a number of witnesses highlighted the sheer number of policies which could be considered relevant to rural tourism, and the difficulty in identifying these. The illustration below, produced by the Regional Tourism Partnerships, shows the relevant policies they identified and the cross cutting nature of these.

⁵ Working Party on Countryside Tourism, *Action Plan for the Countryside Experience*, July 2004

⁶ Welsh Assembly Government, *Achieving Our Potential 2006-2013*, 2006



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15. The Committee heard concern from several witnesses that there was a proliferation of Welsh Government policy relating to rural tourism, and that it was difficult to identify priorities emerging from this. Peter Cole from the Regional Tourism Partnerships told the Committee:

“With regard to the strategic area in which we are operating, it is fair to say that there is no shortage of strategies for rural tourism. There is any amount, piling up on shelves”⁸

16. Witnesses told the Committee that the number of policies and strategies often lead to confusion, and that there was a lack of clarity about which policy was supposed to take precedence and how all the policies worked together.

⁷ [Rural Development Sub-Committee: RDC\(3\)-12-10 p1: Evidence from Regional Tourism Partnerships, 21 October 2010](#)

⁸ RoP [para 7] 21 October 2010, Rural Development Sub-Committee

17. Dr Barry from the Campaign for National Parks expressed concern about the cohesion of the policies:

“When I was researching the paper, I read through many Welsh Assembly Government documents—I think that I counted 11 or 12—that related in one way or another to rural tourism. I was trying to find some joined-upness or threads running through those documents, but, unfortunately, I failed. ...

“the connections are not there to the external person. I understand that communication may take place within the office, but, for someone from the outside looking in, there is a plethora of strategies, which all impinge on rural tourism in one way or another, but there is no clear view.”⁹

18. Adrian Greason-Walker from the Wales Tourism Alliance told the Committee:

“...I could not find any overall structure in which I could place these, particularly on the Welsh Assembly Government’s website, with all these strategies put into one position so that you can see how they interrelate”

He went on to further say:

“...some of the actions can be a bit vague, and they are more like policy statements. If some of those actions are tightened up in future, that would be a great help

“...action plans and the strategy seem to get mixed up when they are being written. Sometimes they are action plans, and sometimes they are strategies, and in one example, the food tourism action plan was written before the ‘Food for Wales’ strategy, which is being written this year”¹⁰

19. Written evidence from the Farmers Unions Wales suggested that Rural Tourism was lost amongst other priorities for the department:

“...actions highlighted in the ‘Action Plan for the Countryside Experience’ seem to have made little progress and, indeed, rural tourism seems to have made little impact within the wider

⁹ RoP [para 130] 2 December 2010, Rural Development Sub-Committee

¹⁰ RoP [para 13] 30 September 2010, Rural Development Sub-Committee

tourism priorities for investment outlined in the Welsh Assembly Government's Tourism Investment Strategy 2008-13, which seem to focus on golfing developments, the business sector, and high-end hotel accommodation"¹¹

20. Given the large number of policies strategies and action plans which have been produced over the last few years, we agree with the suggestion made by the Community Rail Partnerships of Wales in their written evidence that:

"It appears in recent times resources have disproportionately been allocated to the development of strategies and plans. Few resources have been made available for their implication."¹²

21. We think that in the current climate, where the emphasis is on doing more with less, that the Government ought to review the vast number of policies in this field with the aim of streamlining and creating a clear hierarchy of policies in order to ensure that resources are available for implementation in time for 2013, when Achieving our Potential is due to be reviewed.

22. The Committee would like reassurances from the Government that there is coherence to their policies, and that an effective system is in place to make sure that the connections are being made. We would like connections between policies to be explicit as opposed to implicit, as we believe that this will help external bodies trying to work within the Government framework.

23. In reviewing the policy document Achieving Our Potential in 2013, the Committee would like to see a great consideration given to the links with the different aspects of tourism and we would like this policy to provide a clear direction for the future in particular with regards rural tourism.

24. Witnesses told us that there was a need to make sure commitments to rural Wales were properly resourced. Huw Jones, from Sports Wales put forward the argument that the major events strategy:

¹¹ [Rural Development Sub-Committee: RDC\(3\)-RuralTour 14: Evidence from Farmers Union Wales](#)

¹² [Rural Development Sub-Committee: RDC\(3\)-RuralTour 9: Evidence from Community Rail Partnership of Wales](#)

“...makes it clear that this is about attracting major events not just to Cardiff and the Millennium Stadium but also to rural areas. If that is to become a reality, specific consideration will need to be given to that objective. I do not think that it will just happen. Big organisations such as the Welsh Rugby Union are going to go out and attract activities to the Millennium Stadium because it is good business. However, who is doing that for rural areas in Wales? There are no obvious people to do that job, so that probably needs to be given specific consideration.”¹³

25. The Committee was pleased to hear that rural Wales has been considered in strategies pertaining to tourism such as the major events strategy. However, we would like to make sure proper support is given to ensure this happens. Due to the dispersed nature of the population in Rural Wales, consideration must be given to how opportunities can be shared among and delivered effectively to communities. We do not believe that this will require a significant financial investment, but rather the allocation of staff resources and a commitment from government to deliver this.

The Committee recommends a complete review of the effectiveness of all policy relating to Rural Tourism is undertaken to inform the review of Achieving Our Potential in 2013

The Committee recommends that coherence is brought to the policy framework for Rural Tourism through the development of a central area on the Visit Wales website for relevant policies

The Committee recommends that the Minister for Heritage allocates resources to promote rural Wales as a destination for sporting events in order to increase tourism.

Joined Up Working

26. In addition to the vast number of policies, witnesses told us about the difficulties created by a lack of cohesion amongst the various organisations and departments involved in delivering rural tourism. A number of witnesses put forward suggestions of areas where synergy between Government departments would be beneficial.

¹³ RoP [para 149] 18 November 2010, Rural Development Sub-Committee

27. Adrian Greason-Walker from the Wales Tourism Alliance told the Committee:

“It seems to me that some of the departments work to their own specific agenda, and perhaps the move should be more towards cross-cutting themes, such as cultural tourism. Perhaps tourism needs to see a culture change take place in a bit more detail in future. An example of that can be found on the rural affairs section, where there is very little mention on the website of tourism, and yet it is an integral part of rural affairs.”¹⁴

28. In addition to the departments and delivery agencies, witnesses told us about the need to develop better relationships with the voluntary sector. Rowland Pittard from the Youth Hostel Association told us effective tourism was:

“...about synergy and getting departments within the Welsh Assembly Government to appreciate the role of voluntary organisations and the work that they do, and, secondly, to be able to use those organisations to deliver the kind of policies and strategies that the Welsh Assembly Government would like to see being delivered in Wales.”¹⁵

29. While Rob Hanna from Wales Environment Link told the Committee they would like:

“...opportunities to work more closely with delivery agencies. We would like to see a lot more cross-departmental working between Assembly Government-sponsored bodies, such as Cadw, the CCW and the Royal Commission on the Ancient and Historical Monuments of Wales. They could each have a tourist champion to pick up and recognise the opportunities in different programmes.”¹⁶

30. Much of the evidence received by the Committee suggested simple actions would improve the service to tourist providers, and have a significant impact. Rowland Pittard from the Youth Hostel Association told the Committee about the frustration of finding out about projects which were being undertaken where they could share

¹⁴ RoP [para 15] 30 September 2010, Rural Development Sub-Committee

¹⁵ RoP [para 112] 18 November 2010, Rural Development Sub-Committee

¹⁶ RoP [para 34] 18 November 2010, Rural Development Sub-Committee

their experiences, such as one within the Valleys initiative. He suggested what was needed was:

“...a database of organisations such as ours and other voluntary organisations so that the departments can be fully aware of the work that we are doing and the areas that we are interested in, and so draw from this database and make us aware of consultations that are relevant to our organisation, make us aware of developments with regard to grants that could be of interest to our organisation, and also areas where our organisation can help with Government policies and strategies”¹⁷

31. The Committee are keen to see greater collaboration across Government departments to deliver on rural tourism. Furthermore, in the current economic climate we believe more collaborative working with bodies in the third sector will be efficient in delivering the objectives of rural tourism.

32. Whilst we are sure that there is lots of positive work going on within departments, we are concerned that the necessary connections are not being made. Tourism is a cross cutting policy, which is delivered by numerous departments within the Government. However, the internal division of responsibilities within government are not immediately apparent to external organisations, and steps must be taken to rectify this information gap.

33. We would like to see the Government bring forward ways of effectively sharing information with organisations involved in delivering rural tourism. As many of these organisations are often based within the voluntary sector, we would like to see this be as straightforward as possible, to minimise the time needed to make the connections.

The Committee recommends that at least one action is included in the remit letters of relevant Assembly Sponsored Public Bodies encouraging collaborative working amongst the organisations to promote tourism

¹⁷ RoP [para 111] 18 November 2010, Rural Development Sub-Committee

The Committee recommends that an audit of available information published by Government and relevant organisations about rural tourism is undertaken to ensure that all the necessary connections between policies and departments are transparent

The Committee recommends that the Minister for Heritage works with the tourism advisory panel to develop effective information sharing practices between organisations involved in delivering rural tourism as well as by Government. This should include information on initiatives and funding.

Visit Wales

34. As part of the restructuring of Assembly Government Sponsored Public Bodies in 2006, the Wales Tourist Board was merged into the Welsh Assembly Government. The Committee heard conflicting information about whether this merger had had a positive or negative impact on the industry.

35. Chris Osbourne from the Wales Tourism Alliance suggested that one organisational change that was needed was the re-establishment of the Wales Tourist Board:

“I can think of one instantly, and that would be the re-establishment of the Wales Tourist Board, rather than the assimilation of the Wales Tourist Board into the Welsh Assembly Government as Visit Wales. One of the reasons why the Wales Tourism Alliance is so critically needed at the moment is because what used to be the tourist board, having been assimilated into the Welsh Assembly Government, is in more of an ivory tower and is more remote from the industry.”¹⁸

36. This was supported by Rowland Pittard from the Youth Hostel Association, who commented:

“...the Wales Tourist Board was far more active. We had more consultation with it and it was seen as the provider and as a

¹⁸ RoP [para 107] 30 September 2010, Rural Development Sub-Committee

sister organisation of the other organisations in the tourist industry in Wales.”¹⁹

37. However the Committee heard contrary opinions from other witnesses, Richard Tyler from the Brecon Beacon National Park suggested that:

“The political accountability has been a plus, actually, in the sense that the Ministers have been much closer to the operation of the organisation”²⁰

38. From the information received, the Committee would be unable to evaluate the impact of the move of Visit Wales into the Welsh Government. We feel that this would be more suited to a full inquiry by an Assembly Committee, which we will recommend in our legacy report. However, the Committee did hear from a number of witnesses that Visit Wales needed to be more accessible and show greater leadership.

39. Rowland Pittard from the Youth Hostel Association suggested that:

“Given the nature of our business across Wales, we would like to have a one-stop shop, and we would like to think that that one-stop shop could be Visit Wales, pulling all of these threads together for us, rather than us having to approach each local authority”²¹

40. Rob Hanna, speaking as a representative of Ramblers Cymru called for greater leadership from Visit Wales to help organisations and agencies better communicate:

“We do not have a clear dialogue with other agencies, and there is no mechanism for that to happen either. ... There is a need for clear leadership, by Visit Wales or someone else, and, as with anything, an audit needs to be done of what is going on to be able to find where those opportunities are.”²²

¹⁹ RoP [para 104] 18 November 2010, Rural Development Sub-Committee

²⁰ RoP [para 98] 2 December 2010, Rural Development Sub-Committee

²¹ RoP [para 104] 18 November 2010, Rural Development Sub-Committee

²² RoP [para 59] 18 November 2010, Rural Development Sub-Committee

41. The National Farmers Union suggested in their written evidence that:

“...the tourism industry in Wales has missed the influence, experience and recognition of a tourism figurehead, such as the Chairman of the Wales Tourist Board, before its demise. This role has not been replaced and the visibility of the tourism service sector in Wales has unfortunately diminished.”²³

42. Rob Hanna from Wales Environment Link, told the Committee about the frustration he had with Visit Wales:

“I think that it (*Visit Wales*) plays an important role in what it does. My contact with it has been fairly positive, in terms of key departments within the organisation. One of the things that I personally find frustrating is that these organisations need to be made more visible in terms of who does what, who your contacts are and where the opportunities are, so that we, as an external body, can recognise the opportunities and links. It has been very difficult just to get simple things like an organogram of who is who and who does what within the organisation.”²⁴

43. The evidence received by the Committee suggests that the location of Visit Wales either within or outside of the Government, is not as significant as its ability to support the tourist industry. We would like to see a Visit Wales which is flexible and responsive to the needs of the tourist providers. Furthermore, Visit Wales must be accessible and show clear leadership to the industry.

44. We do not think that increased visibility for Visit Wales would need a large investment of resources, and that simple steps would make a big difference. For example, we believe that an increase in transparency about the organisational structure and the issuing of key contacts would help put a public face on the organisation.

The Committee recommends that Visit Wales publishes information about the key contacts points within the organisation to increase transparency.

²³ [Rural Development Sub-Committee: RDC\(3\)-RuralTour 7: Evidence from NFU Cymru](#)

²⁴ RoP [para 61] 21 October 2010, Rural Development Sub-Committee

3. Funding and Support

45. In addition to the policies and strategies, the Committee heard a range of evidence on the need for improvements to the funding and support for rural tourism.

Finance

46. Investment support for tourism was restructured in July 2010 following the launch of the Economic Renewal Programme, and the abolition of SIF (*Single Investment Fund*). The Economic Renewal Programme lists six sectors which form the focus of Welsh Government intervention; however tourism is not one of these sectors. The Tourism Investment Support Scheme (TISS) was established as a replacement for the previous funding provided by SIF and is managed by Visit Wales.

47. Adrian Greason-Walker from the Wales Tourism Alliance told the Committee

“We have seen section 4 come and go, and it was valuable to the tourism industry. We then moved into SIF, the single investment fund, and that has now changed into TIS, the tourism investment strategy. It is great news that Visit Wales is back in charge of that funding pot”²⁵

48. On the exclusion of Tourism from the list of six strategic priorities, Chris Osborne, Chair of the Wales Tourism Alliance said:

“We have been debating this among ourselves. To an extent, the jury’s out because of the tourism investment support scheme, which will be Visit Wales’s equivalent of the special six funding opportunities. ...

“We would like to think that there may be an opportunity there as it will be determined and delivered by people who may have a better understanding.”²⁶

49. In developing and rolling out TISS, we agree with the Farmers Union Wales that:

²⁵ RoP [para 20] 30 September 2010, Rural Development Sub-Committee

²⁶ RoP [para 94] 30 September 2010, Rural Development Sub-Committee

“Whilst recognising that job creation is an important factor in viewing tourism’s wider economic contribution to GDP, the FUW believes that Government should, when weighing up potential grant bids, consider job security and the economic viability of SMEs as equally important factors.”²⁷

50. Peter Cole expressed concern about the ending of FS4B, due to the wider support it offered:

“Although people highlighted the grants or financial support that were available through the FS4B system, it provided a lot more, such as looking at workforce development and putting together business plans or health checks for businesses and advising them in that way. The development grant/loan aspect is being brought back into Visit Wales, but I feel uncertain about where the more general pastoral care will come from.”²⁸

51. The Committee also heard concern from the Wales Tourism Alliance about the tourism training programme Croeso Cynnes Cymreig, which they did not feel was necessarily tailored enough for Wales. In developing any future pastoral care for tourist industries, we feel it is essential that the unique nature of rural Wales is accounted for.

52. The Committee heard from a number of witnesses about how the different investment grants help the private sector maintain standards and competitiveness.

53. Andrew Blake from Association for Areas of Outstanding Natural Beauty argued:

“Tourism in urban and rural areas is a very fine mix between the private sector and the public sector, and the voluntary sector as well to a certain extent. So, for the private sector, targeted grants and instruments are effective in raising standards or in facilitating investment.”²⁹

And that therefore:

²⁷ [Rural Development Sub-Committee: RDC\(3\)-RuralTour 14: Evidence from Farmers Union Wales](#)

²⁸ RoP [para 24] 21 October 2010, Rural Development Sub-Committee

²⁹ RoP [para 22] 18 November 2010, Rural Development Sub-Committee

“Any investment will help, and the more focused and targeted it is, the more effective it will be. The sustainable development fund has enabled us to support small initiatives that may have not been able to take advantage of the bigger rural development plan funding.”³⁰

54. Rob Hanna emphasised the importance of the Sustainable Development Fund and the support this can give to tourist providers:

“...industry providers need a lot more support and a voice to be able to bring forward innovative ideas. ... As an organisation, we took advantage of that (*sustainable development fund*) and developed a product, working closely with some of the partners that I just mentioned. We are now delivering a world-class product that is available only here in Wales; it is not being offered anywhere else in the world. That was all stimulated by the small little grant and the investment and network that came through the sustainable development fund.”³¹

55. In addition to the Sustainable Development fund, written evidence from the Farmers Union Wales suggested that money from the Rural Development Plan could be utilised more effectively:

“Farming Connect could play an important role in co-ordinating the delivery of support as it is a recognised brand within the farming community. The FUW also believes that its remit could be expanded to include the dissemination of information on alternative support avenues, including local initiatives run under the Axis 3 programme.”³²

56. Sam Littlechilds from the Youth Hostel Association, pointed to the problems that they experience with accessing funding:

“However, because we are part of an organisation, it is impossible for us to lock in to some of the SME funding that is available. In places where we are trying to start new initiatives and new activities and to get more young people to visit, it is

³⁰ RoP [para 22] 18 November 2010, Rural Development Sub-Committee

³¹ RoP [para 35] 18 November 2010, Rural Development Sub-Committee

³² [Rural Development Sub-Committee: RDC\(3\)-RuralTour 14: Evidence from Farmers Union Wales](#)

more difficult for us to say that those places are viable when they cannot have statutory support.”³³

57. We acknowledge that the decision to restructure the funding for tourism has been tentatively welcomed by the industry and that it is obviously too early to make an assessment on whether this move will be positive or negative. However, the Committee would like an assurance that tourism financing will remain a priority for the Government, despite it not being identified as a strategic priority.

58. Furthermore, in line with our earlier recommendations, the Committee would like to ensure all information about possible financial grants and support is publically available in a central area.

The Committee recommends that the Tourism Investment Support Scheme is evaluated in July 2012 to ensure that it is delivering the necessary support for the tourist industry.

The Committee recommends the Minister for Heritage works with the Minister for Economy and Transport to ensure that the additional pastoral support previously provided by FS4B is available, and delivered in a method appropriate for rural tourism businesses.

The Committee recommends that assessments on applications to Sustainable Development Fund should give due regard to potential tourism benefits.

Investment in Rural Wales’ infrastructure

59. Investment must be made in key areas of infrastructure so that tourism can remain a viable industry in rural Wales. Furthermore, investment in the infrastructure of rural Wales will help to maintain communities, which in turn are a key attraction and selling point. The Committee in particular was concerned with broadband, rights of way and transport.

Broadband

60. All of the witnesses told the Committee about the importance of broadband for businesses to operate in this competitive market, and

³³ RoP [para 85] 18 November 2010, Rural Development Sub-Committee

many also mentioned the expectation of visitors around broadband availability. Andrew Blake, from the Association for Areas of Natural Beauty said:

“Broadband is now essential for most businesses. Rural tourism is made up of a huge number of small businesses. I find that, if I am arranging a trip away, I will try to do as much of it as possible over the internet, and that is the case for a huge number of people these days. Therefore, having broadband access in rural areas is essential for those businesses to have a presence on the internet and so on, and to have booking systems and communications systems that are compatible with the twenty-first century.”³⁴

61. Rob Hanna from Wales Environment Link, argued that:

“...the way in which the consumer is purchasing tourism is different today from how it was five years ago: people are using mobile technology and are making decisions later. So, it is a very fast-changing environment, and we have to be flexible and responsive if we are to cash in on that. We do not have a year or two years for development; we have to respond immediately, using initiatives such as social marketing, Twitter and Facebook. We have to enable our communities to do that, and so infrastructural things such as the internet and 3G services are crucial in rural areas, because consumers are going to those areas expecting those facilities.”³⁵

62. In addition to considering the much needed improvements to the broadband network, it is also essential to make comparable improvements in the 3G network, as this is increasingly important to tourists. John Tyler from Brecon Beacons National Park said:

“... the infrastructure is vital—broadband in particular. Indeed, the 3G phone network will probably become increasingly important in tourism, because people do not tend to take their laptops on holiday, but they do take their mobile phones. So, capital investment in infrastructure is very important indeed.”³⁶

³⁴ RoP [para 9] 18 November 2010, Rural Development Sub-Committee

³⁵ RoP [para 41] 18 November 2010, Rural Development Sub-Committee

³⁶ RoP [para 77]. 2 December 2010, Rural Development Sub-committee

63. When he presented evidence to the Committee, the Minister for Heritage stated that:

“The economic renewal programme expects all businesses in Wales to have access to next-generation broadband by the middle of 2016. That is a tall order, but it is something that we should aim for, and we certainly accept the importance of it.”³⁷

64. The Committee strongly believe that the Welsh Government must ensure that comprehensive broadband coverage is achieved across Wales, and in particular rural Wales, as a matter of priority. This is vital to ensure that Wales remains a competitive and viable tourist destination in comparison to the rest of the UK. The ‘independent explorer’ identified by the Minister as the main target group for Welsh tourism, will expect, if not demand access to broadband and 3G networks.

65. The Committee are concerned that regions like Cornwall, which could be seen to be in direct competition for tourism with areas of rural Wales, has invested heavily in its broadband infrastructure. This will place Wales at a distinct disadvantage. In September 2010 Cornwall Council announced a £132 million “Superfast Broadband” project, involving investment from BT and the European Regional Development Fund. Cornwall Council stated that:

“The area will benefit from faster broadband thanks to the creation of a high speed network that will be open to all communications providers on a wholesale basis. The aim is to give between 80 and 90 per cent of local businesses and homes access to super-fast fibre broadband by 2014. Fibre to the premise (FTTP) technology will feature heavily with the expectation being that half of local businesses and homes will have access to it. FTTP delivers the UK’s fastest broadband speeds of up to 100Mbps. These are among the best speeds on offer anywhere in the world and will transform the competitiveness of local businesses.”³⁸

66. We welcome the recognition by the Minister of the importance of developing broadband infrastructure for rural Wales, we are very

³⁷ RoP [para 56]. 2 December 2010, Rural Development Sub-committee

³⁸ Cornwall Council: [Cornwall and Isles of Scilly first rural areas to get super-fast broadband in deal worth up to £132m](#), 30 September 2010 [Accessed 28 January 2011]

concerned that the timeframe will put Wales at least two years behind one of the major competitors

The Committee recommends that given the current poor broadband service many parts of rural Wales have and the importance of this to tourism, rural Wales is prioritised in the broadband roll out with the aim of catching up with competitors such as Cornwall

Rights of Way Access

67. One of the key attractions of rural Wales is the access to footpaths and in particular the coastal path. James Parkin from Pembrokeshire Coast National Park stressed to the Committee that:

“We cannot underplay the value of the rights-of-way network. We recently hosted a party from a national park in Finland, whose members were incredibly envious of our rights-of-way network, and how accessible parts of Wales are compared with other countries.”³⁹

68. Given the importance of this access, we agree with the comments made by Rob Hanna from Wales Environment Link that:

“it seems crazy that only half our rights-of-way network is open today, although it is a huge economic driver for tourism in Wales. We spent £300 million this year on roadworks and £1.8 million on footpaths. That is a distorted investment.”⁴⁰

69. To address this, he suggested:

“We recognise that the investment that the Welsh Assembly Government is making in a diverse range of programmes could be related. Glastir is one example. If implemented properly, Glastir would protect habitats and landscapes and improve their quality, and would also contribute in a very real way by opening up a further 16 per cent of the rights-of-way network in Wales”⁴¹

³⁹ RoP [para 86]. 2 December 2010, Rural Development Sub-committee

⁴⁰ RoP [para 36] 18 November 2010, Rural Development Sub-Committee

⁴¹ RoP [para 33] 18 November 2010, Rural Development Sub-Committee

70. In addition to footpaths, the Committee also received evidence from the British Horse Society Bridleways group that Wales was not making enough of the equestrian access it has through the rights of way network, and that support should be given to ensure bridleways are kept open.

Transport

71. The Committee heard evidence from a number of witnesses about the need for improvements to the transport infrastructure in Wales, as well as receiving a number of written submissions from groups seeking improvements to the rail network. Chris Osborne from the Wales Tourism Alliance told the Committee:

“There is no doubt that Wales is transport-challenged, and in a world where environmental sustainability is becoming increasingly important, the options available to the visitor to Wales are disappointing”⁴²

72. Peter Cole from the Regional Tourism Partnerships suggested that:

“...we need to understand that the vast majority of our visitors are arriving by car and will continue to do so, because it is too easy. Our main market is England, so arrivals are likely to be by car from across the border. The trick is to get people out of those cars and to give them a choice, so that they do not have to worry about their cars on at least some days of their holiday. We need to tell them that there are other options, such as walking, riding or cycling. It is largely about sharing information because there are bus services and rural rail services in Wales.”⁴³

73. Rowland Pittard from the Youth Hostel Association argued that improvements to the major travel infrastructure will help develop Wales as tourist destination:

“...infrastructure is important to get tourists into the country—rail infrastructure, express coaches and airlines. How many people come directly to Cardiff airport to start their holidays? Perhaps we need more facilities to entice tourists to come just

⁴² RoP [para 74] 30 September 2010, Rural Development Sub-Committee

⁴³ RoP [para 53] 21 October 2010, Rural Development Sub-Committee

to Wales, so that Wales is not an add-on to a visit to England, Scotland or Ireland. It is important to try to make Wales a destination in its own right and to market it as such”⁴⁴

74. Improvements to transport connections to access, and travel about in, rural Wales are needed to ensure that tourists have a variety of travel options, in particular for those who do not have access to a car – evidence from the National Trust suggested this could be about 25% of people.⁴⁵ Furthermore, good, reliable transport is important for those living in the rural communities in order to ensure that they can easily access any jobs which may be created and maintain a vital sense of community. This point is obviously wider than just tourism, but is key to supporting this key driver of the Welsh economy.

75. The Committee heard interesting evidence from the Youth Hostel Association about the need to ensure their urban facilities, such as in Cardiff and Conwy, are attractive enough to move people into the rural areas of Wales. This principle also applies to transport. An improved transport infrastructure also helps to link urban and rural tourism. A comprehensive guide of public transport options and a greater amount of accessibility to rural Wales from the major urban hubs, would help visitors experience everything that Wales has to offer, in a sustainable fashion.

The Committee recommends the Welsh Government should continue to lobby the UK Government around the electrification of the London to Swansea rail line to help ensure Wales is viable tourist destination.

The Committee recommends that Visit Wales should produce a comprehensive guide to the public transport which is available to and within Rural Wales including initiatives such as Beacons Bus and Snowdon Sherpa

⁴⁴ RoP [para 97] 18 November 2010, Rural Development Sub-Committee

⁴⁵ [Rural Development Sub-Committee: RDC\(3\)-15-10 Paper 4: Evidence from National Trust Wales](#)

4. The Visitor Experience

76. The Committee heard a great deal of evidence about the need to establish Wales as a visitor destination in its own right, and to make sure visitor experiences are memorable. This chapter explores a number of ways this could be achieved.

77. As a Committee, we are keen that all facets of Wales are utilised to their full advantage as we believe this will help to ensure Wales is competitive in the future. According to Rob Hanna from Wales Environment Link, Wales needs to:

“...find our unique identity and separate ourselves and what we are selling from the rest of the market. The one thing that Wales has, without question, is the quality of its landscapes and seascapes. That relies heavily on the people who live in those areas delivering that for us. Again, it is about the sustainability, the biodiversity, the hedges and the walls and the features of those landscapes—the very things that people appreciate. It is a very difficult quality to define sometimes, because it is not a product; it is a collection of experiences”⁴⁶

78. In giving evidence to the Committee, the Minster outlined the type of visitor which Wales was aiming to attract:

“...the target segment that we are going for is the ‘independent explorer’. That is broad enough to encompass people who want to go mountain biking, golfing or fishing, or families who simply want to explore.”⁴⁷

79. The Committee identified the culture, sustainability and activity tourism as three key parts of Wales as a tourism attraction.

Culture

80. The Committee heard from a number of witnesses about the positive links which had been made between tourism and culture, and the impact this was having on making Wales a unique and interesting destination.

⁴⁶ RoP [para 45] 18 November 2010, Rural Development Sub-Committee

⁴⁷ RoP [para 26]. 2 December 2010, Rural Development Sub-committee

81. Peter Cole from the Regional Tourism Partnerships explained how the positioning of tourism in the heritage portfolio had been helped the industry:

“Tourism has realised that what makes Wales different and how we can define ourselves differently to competing destinations is our cultural output, what people find to do, see and experience, and the sense of place. Those are the things that differentiate Wales. We love our scenery, our coast and our mountains, but many other destinations can claim those things and provide them. It is our culture that defines us as different. ...it fits fairly easily into the heritage portfolio and gives it an edge by adding wealth creation to things that need to be supported and funded.”⁴⁸

82. John Ablitt, from Snowdonia National Park also supported the links between culture and tourism:

“We have talked about the importance of the sense of place, and ensuring that people who come to Wales feel that they are coming somewhere different and unique, and that it is like going to Russia or a destination such as that; you are going somewhere that is special. Our cultural tourism is important, as is the way in which the culture and way of life of people in local areas is mirrored by the landscape in which they live. They have formed the landscape, but the landscape has very much formed the way that people live. That closeness is so important, and when you bring in the Welsh language too, we have a unique product that we can develop.”⁴⁹

83. The Committee believes that the work undertaken to make links between tourism and culture is a good model for the future. It makes the most of the uniqueness of Wales and helps ensure a clear sense of place is developed.

84. The Committee would recommend consideration is given to the position of tourism in future Governments, to make sure it is positioned within a portfolio where the wider impact of tourism is recognised.

⁴⁸ RoP [para 25] 21 October 2010, Rural Development Sub-Committee

⁴⁹ RoP [para 80]. 2 December 2010, Rural Development Sub-committee

Sustainability

85. Tourism provides rural Wales with an opportunity to showcase its commitment to sustainability, not least as one of the key attractions of Wales is the natural landscape and the unspoilt coastline. The Campaign for National Parks informed the Committee that:

“Some 73 per cent of visitors have cited the natural environment as their reason for coming to Wales.”⁵⁰

86. Ruth Williams from the National Trust told the Committee that:

”To have sustainable tourism, we need more investment. There is a lot of investment in marketing at all sorts of levels, but what we absolutely need is to invest in the asset, and looking after those assets, such as countryside footpaths—and the all-Wales footpath is a fantastic example—because, unless we do that, then we are marketing nothing”⁵¹

87. The Committee was unable to establish through the evidence gathered what the balance and main aim should be for tourism in rural Wales between increasing the visitor numbers or increasing the visitor spend. This is particularly relevant to ensure measures can be put in place to guarantee the sustainable use of the land. We heard from many witnesses about the potential for conflict within these categories. For example, Andrew Blake from the Association of Areas of Outstanding Natural Beauty told the Committee:

“In the Wye Valley—I am sure that it is the same for other AONBs—our objective is not to increase visitor numbers per se; our objective is to increase the visitor experience, to extend the visitor stay and, therefore, to increase the visitor spend in the area. Therefore, we want people to stay longer and spend more rather than increase the visitor numbers. That has knock-on effects in terms of transport and infrastructure, so impacts on the natural environment.”⁵²

88. Tourism can be utilised as a method of delivering information to the public about sustainability, and could therefore help contribute to

⁵⁰ RoP [para 118]. 2 December 2010, Rural Development Sub-committee

⁵¹ RoP [para 113]. 2 December 2010, Rural Development Sub-committee

⁵² RoP [para 24] 18 November 2010, Rural Development Sub-Committee

the Government's target to reduce Carbon emissions by 3%. Patrick O'Reilly from Countryside Council Wales argued that:

"Rural tourism, uniquely, provides people not just with memories but with understanding. So, one thing that we can do is ensure that we provide a quality experience, not just with regard to what happens when people are here, but with regard to all the information that they get, so that they understand, and do not place excessive pressure on, our natural resources, and so that their behaviour is compatible with the behaviour that ensures sustainable use of the natural environment in Wales"⁵³

89. Tied in with the concept of what the focus of tourism should be, is the idea of trying to get people to visit Wales all year round. Andrew Blake from the Association of Areas of Natural Beauty said:

"The aim is to get the visitors who are already coming here to come back more often and to spread the season a bit more. Natural landscapes are worth visiting in every season to see the seasonal differences. That is something that we promote. So, people do not come back just once, but at least four times a year, if not eight."⁵⁴

90. Peter Cole from Regional Tourism Partnership suggested that work could be undertaken in the Department for Heritage to address seasonality by developing:

"... a full-ish events programme through the year. We should punctuate the year and ensure that the lights do not go out in October and come back on to welcome people back at Easter. People should be able to find out that Llandeilo has a shopping festival in February and decide that it is worth going for that."⁵⁵

91. National Trust Wales stated that it will be pushing to combat seasonality by providing tourists with a "year-round offer", and that the "last impression we should give is that Wales is closed to visitors for four or more months of the year."⁵⁶

⁵³ RoP [para 71]. 2 December 2010, Rural Development Sub-committee

⁵⁴ RoP [para 25] 18 November 2010, Rural Development Sub-Committee

⁵⁵ RoP [para 80] 21 October 2010, Rural Development Sub-Committee

⁵⁶ RoP [para 158]. 2 December 2010, Rural Development Sub-committee

92. In addition to creating a year round programme, the Committee heard also about the need for greater co-ordination for the activities which are organised. Rob Hanna from the Ramblers Association said:

“There are 106 agencies and organisations in Wales that deliver led-walk programmes, such as the Royal Society for the Protection of Birds and the National Trust, but you try to find them. They all advertise and market themselves in their own communication channels. There is no one place that you can pick up and collect these data online or even on your phone.”⁵⁷

The Committee recommends that Visit Wales works with colleagues in the Department for Heritage to produce a year round schedule of events in Wales, with the aim of combatting issues around seasonality and to provide greater co-ordination

Activity Tourism

93. In line with the concept of the independent explorer identified as the target tourist for Wales by the Minister, activity tourism will be of increasing importance to make Wales an attractive destination.

94. Peter Cole called for greater support to make sure Wales makes the most from the increasing amount of activity tourism:

“ Activity tourism is obviously very important for rural areas. Walking is the most popular activity in Wales. The trick with activity tourism is finding ways of making money from it. In the end, we are talking about the rural economy here, and how we ensure that there is money coming in. It is important that we up our range of services, that we up our range of quality, and that we up the opportunities for people to spend money in Wales.”⁵⁸

95. Andrew Blake from the Association of Areas of Natural Beauty suggested:

“For rural tourism in Wales, there is an increasing market and potential in activity tourism, particularly based around walking, sightseeing and the more active aspects of outward bound

⁵⁷ RoP [para 66] 18 November 2010, Rural Development Sub-Committee

⁵⁸ RoP [para 39] 21 October 2010, Rural Development Sub-Committee

activities and so on. ... All the surveys and statistics for England and Wales show that a huge amount of the tourism sector involves going to see nice views, seeking out peace and tranquillity, and activity. There is a huge opportunity there for Wales, which it is already capitalising on, but there are opportunities for further growth.”⁵⁹

96. The Committee received evidence from Sports Wales about the possibilities of developing sporting events in rural Wales at facilities such as the national shooting centre near Caersws or the Royal Welsh Showground:

“...It is a matter of whether there are things such as that which can be built on. That is what people in rural areas want, not just one-off activities. Having something this year is nice, but you really need something that happens on a frequent basis, this year, next year, and the year afterwards, so that they know that they can invest, whether in a bus or minibus service, in accommodation or whatever. Looking for those sorts of examples is very much the challenge.”⁶⁰

97. Any developments in activity tourism will need to be carefully managed to maintain the sustainability of these areas, a point which was highlighted by Huw Jones from Sports Wales:

“...the coincidence of sport and nature conversation, which is a continuous, ongoing issue, and not just in the three national parks in Wales. Something like half of all of the natural facilities identified in Wales have some form of nature conservation designation. How those facilities are used is a very important question.”⁶¹

Tourist Trails

98. Tied in with the concepts of both sustainable tourism and activity tourism, the Committee received interesting evidence about the development of tourist trails and interpretative information. We are keen to ensure adequate support and opportunities are provided for organisations to collaborate in such product development. This section

⁵⁹ RoP [para 7] 18 November 2010, Rural Development Sub-Committee

⁶⁰ RoP [para 152] 18 November 2010, Rural Development Sub-Committee

⁶¹ RoP [para 130] 18 November 2010, Rural Development Sub-Committee

has links with the earlier sections looking at the infrastructure for rural Wales and financing through the Sustainable Development Fund.

99. In the Areas of Outstanding Natural Beauty, Andrew Blake told us:

“You can download information on your iPhone or smartphone, which will give you on-the-spot interpretation about the site and so on. Obviously, that is fantastic if you have the connection and can do that. It is also a very efficient way of providing information without littering the countryside with interpretation boards and so on. More and more, the visitor is expecting and able to use that sort of thing, and if it is not available in rural areas, it can be a let-down for them.”⁶²

100. Rob Hanna, provided the Committee with an example of a product developed between Ramblers Association and Pembrokeshire Coast National Park called eTrails, which they are now trying to bring forward in the Valleys regional park:

“Effectively, we have given them what we call a ‘mobile guidebook’. So, with eTrails or other mechanisms, we are looking at how we can provide people with a richer information content in a more sustainable way, using podcasting or video-casting for example, and link to the tourism office, so that you can tell them where the nearest pub serving local Welsh beer is, where they can find local Welsh food or where they can go to a local singsong event or a ceilidh or whatever, so that they can get a broader, richer experience. It is all about information.”⁶³

101. John Albitt from Snowdonia National Park explained the importance of partnership working in delivering these products:

“ We are moving into the realm of apps. In terms of partnership working, we are working with Gwynedd Council and Conwy County Borough Council; we are providing the technology and expertise, and we are working with the councils to develop a joint app that takes in the national park and areas within those authorities that lie outside the national park.”⁶⁴

⁶² RoP [para 12] 18 November 2010, Rural Development Sub-Committee

⁶³ RoP [para 51] 18 November 2010, Rural Development Sub-Committee

⁶⁴ RoP [para 92]. 2 December 2010, Rural Development Sub-committee

102. In addition to developing technology to navigate trails and pass on information, the Committee also received a great deal of written evidence on the different types of trails that have been developed to promote different areas of rural Wales. These include waterways trails, food and drink trails and Heart of Wales rail ale trail and the Cambrian ALEways trail – which have been developed along to promote places selling real ale along these rail routes.

103. We would like to see the Welsh Government support the development of these trails through the facilitation of knowledge transfer and partnership working between relevant organisations.

The Committee recommends that the Minister for Heritage works with the Welsh Local Government Association, National Park Authorities and CCW to produce e-trails for all parts of Rural Wales.

Witnesses

The following witnesses provided oral evidence to the Committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed in full at

<http://www.assemblywales.org/bus-home/bus-committees/bus-committees-scrutiny-committees/bus-committees-third-rd-home/bus-committees-third-rd-agendas.htm>

30 September 2010

Adrian Walker and Chris Osborne Welsh Tourism Alliance

18 November 2010

Andrew Blake The National Association for Areas of Outstanding Natural Beauty

Rob Hanna Ramblers Association and Wales Environment Link

Rowland Pittard and Sam Littlechilids The Youth Hostel Association

Huw Jones Sports Wales

2 December 2010

Alun Ffred Jones Minister for Heritage

Jonathan Jones and Nigel Adams Welsh Assembly Government

Richard Tyler, James Parkin and John Ablitt Wales Association of National Parks

Jont Bulbeck and Patrick O'Reilly Countryside Council for Wales

Dr Ruth Williams National Trust Wales

Dr Norma Barry Campaign for National Parks

List of Written Evidence

The following people and organisations provided written evidence to the Committee. All written evidence can be viewed in full at

<http://www.assemblywales.org/bus-home/bus-committees/bus-committees-scrutiny-committees/bus-committees-third-rd-home/inquiries-3/rdc3-inqrurtour/cmt-text-25.htm>

<i>Organisation</i>	<i>Reference</i>
Wales Tourism Alliance	RDC(3)-11-10 : Paper 1 and RDC(3)-12-10 : Paper 4
Regional Tourism Partnerships	RDC(3)-12-10 : Paper 1
National Association for Areas of Outstanding Natural Beauty	RDC(3)-13-10 : Paper 1
Ramblers Association and Wales Environment Link	RDC(3)-13-10 : Paper 2
Youth Hostel Association	RDC(3)-13-10 : Paper 3
Sports Wales	RDC(3)-13-10 : Paper 4
Welsh Assembly Government	RDC(3)-15-10 : Paper 1
Association of National Parks	RDC(3)-15-10 : Paper 2 and Annex A
Countryside Council for Wales	RDC(3)-15-10 : Paper 3
National Trust Wales	RDC(3)-15-10 : Paper 4
Campaign for National Parks	RDC(3)-15-10 : Paper 5
Brecon Beacon Tourism	RDC(3)-RURALTOUR01
Railfuture Rural Tourism	RDC(3)-RURALTOUR02
Severn Tunnel Action Group	RDC(3)-RURALTOUR03
Welsh National Park Authorities	RDC(3)-RURALTOUR04 and Annex A
Youth Hostel Association	RDC(3)-RURALTOUR05
Snowdonia Active	RDC(3)-RURALTOUR06
NFU Cymru	RDC(3)-RURALTOUR07
Wales Tourism Alliance	RDC(3)-RURALTOUR08

Community Rail Partnerships	RDC(3)-RURALTOUR09
North Pembrokeshire Transport Forum	RDC(3)-RURALTOUR10
Passenger Focus	RDC(3)-RURALTOUR11
Stonewall Cymru	RDC(3)-RURALTOUR12
Four Regional Tourism Partnerships	RDC(3)-RURALTOUR13
Farmers Union Wales	RDC(3)-RURALTOUR14
Wales Environment Link	RDC(3)-RURALTOUR15
British Horse Society Bridleways	RDC(3)-RURALTOUR16
British Horse Society Cymru	RDC(3)-RURALTOUR17
British Waterways	RDC(3)-RURALTOUR18, 18A, 18B, 18C and 18D
Powys Local Action Forum	RDC(3)-RURALTOUR19
Alex Badley	RDC(3)-RURALTOUR20
Upland Forum	RDC(3)-RURALTOUR21
Tourists Against The Cull / Yvette Brown	RDC(3)-RURALTOUR22