north wales economic ambition board
bwrdd uchelgais economaidd gogledd cymru

Literature review of recent research within the outdoor tourism sector

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North Wales Economic Ambition Board

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Introduction

The Outdoor Partnership provided the North Wales Economic Ambition Board with a brief to carry out a literature review of recent research within the tourism sector and bring conclusions in line with 4 Key Questions they posed:

1. The size and range of the outdoor activity sector across North Wales
2. Future analysis of the sector's development
3. Skills shortfall appraisal
4. Assessment of added value from increasing the capacity of the sector

Rationale and Background

(Provided by The Outdoor Partnership)

North Wales is a national and international holiday destination. The close proximity of cultural, landscape, accommodation and travel networks provides a rich mix of holiday opportunities. An integral part of the holiday scene is the natural environment including coastline, rivers, countryside, moorlands and mountains. Each provide a variety of healthy and stimulating activity holiday opportunities and on which an "adventure holiday" industry has been created.

New natural and built opportunities are increasingly being developed in North Wales (e.g. Surf Snowdonia, Zip World and Bounce Below) and in turn are likely to stimulate demand for more attractions and more visitors.

Research undertaken in 2003 (Bangor University for Snowdonia Active – 2003) showed that home grown businesses were significantly under-represented in the sector at 4% based on the number of operators and instructors who received their secondary education in North Wales. Similar research in 2013 (Bangor University for The Outdoor Partnership) showed this gap had reduced to 25%.

In 2004 a number of business operators with the local authorities (Anglesey, Gwynedd, Conwy), and national agencies at a local level, with the help of Welsh Government, set up The North West Wales Outdoor Partnership which was incorporated as a Charitable Company in 2013 as *The Outdoor Partnership (TOP)*. TOP works to promote participation, volunteering, educational and employment opportunities to residents of North Wales. It has established a continuum from schools to community clubs and employment pathways to support the local outdoor tourism industry.

The outdoor industry has an established training programme based on national governing bodies of sport (NGBS) qualifications. Many of the NGBS qualifications are recognised internationally and are accepted as a baseline by the Adventure Activities Licensing Authority (AALA). However it is felt this established training route largely benefits a more mature candidate, often from outside the North Wales area and is biased toward technical skills development.

In 2014 – 2015, to cater for the emerging young workforce of Wales, the Sector Skills Council (SkillsActive) developed a Level 3 apprenticeship framework for outdoor instructors in conjunction with TOP, WATO and included Grŵp Llandrillo/ Menai. This qualification is a good starting point suitable for a "closed environment" where risk is easily managed but is not suitable for the "open environment" in which many operators work in the remote mountains, rivers, shoreline and cliffs of North Wales. It is felt a higher level (Level 4) apprenticeship is required based upon the NGBS qualifications but incorporating business, organisational, management and teamwork skills. Training of this type would provide a pathway for local residents to access the outdoor activity tourism industry with the necessary technical skills, proven experience and business skills to support the future growth of the industry.

It is on this basis and rationale that The Outdoor Partnership is gathering credible evidence to support this need for the sector to grow.

Summary of Evidence

The data and evidence gathered for this research report has been carried out in 3 stages:

Stage 1:

Narrative desk research of recent reports. The following reports have been reviewed:

Name of publication	Author / Source	Date
1 Tourism Strategy North Wales	Tourism Partnership North Wales	2010-2015
2 The Economic Impact of Outdoor Activity Tourism in Wales	Miller Research Consulting	2014
3 Recreation Strategy	Snowdonia National Park	2012-2017
4 The Welsh Government Strategy for Tourism	Welsh Government	2013-2020
5 Sustainable Tourism	Welsh Government	2007
6 The Food Tourism Action Plan for Wales	Welsh Government	2015-2020
7 The Impact of Climate Change on the Welsh Visitor Economy	Visit Wales, Welsh Government, Countryside Council for Wales	2010
8 Hospitality, tourism and sport sector: Sector Skills Assessment, UK	UKCES	2012
9 Future proofing your business	Visit Wales	2013
10 UK Commission's Employer Skills Survey 2013: Wales	UKCES	2013
11 Regional Skills and Employment Plan	NWEAB	2015
12 Outdoor Tourism project: assessment of the potential of outdoor tourism & marketing recommendations	Blue Sail Consulting Ltd	2012

The research has highlighted each report's key findings, conclusions and recommendations.

Stage 2:

A range of data and statistical evidence has been reviewed to capture the industry's current demography as well as indicators of success and customer base.

Data	Source	Date
1 Local Authority Tourism Profiles	Stats Wales Welsh Government	2010-2012
2 The GB Tourist Statistics 2014	Visit England	2015
3 Further Education post 16 Lifelong Learning Wales (LLWR) Database	Stats Wales Welsh Government	2012-2014
4 Work Place Learning Lifelong Learning Wales (LLWR) Database	Stats Wales Welsh Government	2012-2014
5 Apprenticeship Matching Service	Careers Wales	2015
6 Jobs Growth Wales	Careers Wales	2015
7 National Survey of career aspirations of young people	Careers Wales	2015

Stage 3:

A concluding review of the evidence and how they relate to the 4 Key Questions posed in the research brief:

1. The size and range of the outdoor activity sector across North Wales
2. Future analysis of the sector's development
3. Skills shortfall appraisal
4. Assessment of added value from increasing the capacity of the sector

North Wales Outdoor Tourism sector

Evidence to respond to The Outdoor Partnership Key Questions

Stage 1: Literature Review

Narrative desk research reports – collation of findings and recommendations

Name of Report	Date	Web link	Summary	Conclusion / recommendations
1 Tourism Strategy North Wales Tourism Partnership North Wales (TPNW)	2010-2015	http://nwef.infobasecymru.net/IAS/themes/databyregionalpriorities/tourism	Tourism generates £1.8bn for the North Wales economy each year, supports an estimated 37,500 jobs and is a lifeline for numerous small businesses. There is potential for further growth. Like an export industry tourism brings money into the region from outside and North Wales would be poorer without this. North Wales accounts for a third of Wales' tourism, attracting 8m staying visitors and an estimated 17m day trips in 2007. The majority of the visitors are from the UK and holiday tourism predominates. Tourism is not evenly distributed across the region, the North West (Anglesey, Conwy, Gwynedd) accounts for 75% of staying visits and 60% of day visits, with the balance of 25% of staying visits and 40% of day visits in the North East (Denbighshire, Flintshire, Wrexham). It is quite seasonal with 70% of trips taking place in the summer 6 months. There is evidence to suggest that awareness and appeal of the region is slipping and that we are failing to attract new visitors and new markets.	Projecting distinctive strengths Investing in product excellence Providing an outstanding experience Working together in partnership
2 The Economic	March 2014	http://gov.wales/topics/tourism/dev	Attitudes towards outdoor activities in Wales are generally very positive, with many regarding it as a top destination	1. As one of the first economic impact studies of its kind to be

Impact of Outdoor Activity Tourism in Wales Miller Research Evaluation Consulting		elopmentl1/activitytourism/outdoor-activity-report/?lang=en	for outdoor adventure experiences. Relatively strong recent business performance within the sector was attributed by providers to an increase in domestic tourism, a growing outdoor activity market and the rising profile of Wales as an outdoor destination, as well as individual business expansion. Growing competition between increasing numbers of providers and access restrictions were thought to constrain further growth within the sector. Increasing operational costs, a deficiency in qualified staff and poor marketing were also identified as barriers to development of outdoor activities in Wales. Total estimated annual contribution of outdoor activity tourism to the economy of Wales is approximately £481m or 6% of the total economic contribution of all tourism in Wales. Additional spend generated by outdoor activity tourists in Wales annually is estimated as being able to support in the region of 8,243 full time equivalent jobs in the Welsh labour market. The value added contribution of outdoor activity tourism in Wales accounts for 10% the Welsh tourism economy. Total expenditure on outdoor activity tourism in Wales accounts for 10% or 12% of expenditure in the tourist economy as a whole, according to Visit Britain and Welsh Government sources respectively. Activity tourism is a high value tourist activity considering that the contribution of added value output is greater than the (average) proportion of all tourists who are activity	undertaken in Wales, it is important to consider how the research should inform future impact assessments. 2. It is evident that both individuals who have participated in outdoor activities in Wales and those providing outdoor activities consider Wales to be a good destination for a variety of outdoor activities and abilities. In addition to the environment, outdoor activity facilities and wider tourist services are key strengths of the sector in Wales. 3. Individual business expansion is thought to be constrained by increasing numbers of competing providers as well as some providers suggesting that the capacity of the environment to support further activities is limiting future growth. Providers are dissatisfied with current national marketing of the sector and a lack of qualified and suitable staff is blamed on a lack of entry point into the sector. 4. Certain groups are discouraged from undertaking activities such as kayaking in Wales due to confusion and dispute over access to land and water. Access is therefore a key issue to be tackled in order to encourage further success of the sector in Wales.

			tourists.	
3 Recreation Strategy Snowdonia National Park	2012-2017	http://www.eryri-npa.gov.uk/authority/publications/recreation-strategy	The Recreation Strategy shall "...ensure equitable, widespread and sustainable access which recognises the need to protect tranquillity and discourage damaging activities...The Strategy will also seek to boost the positive economic and community impacts of recreation..." The Strategy's Aims and Actions are also framed by the planning policies of the Eryri Local Development Plan.	1. Protect Snowdonia's special qualities from the adverse effects of recreation and inappropriate types of activity 2. Promote safe and responsible enjoyment of the National Park's special qualities 3. Deliver sustainable, widespread economic growth based on the special qualities of Snowdonia 4. Improve access to high quality recreation activities across the National Park which promote health and wellbeing and understanding 5. Deliver an infrastructure appropriate to the needs of customers, especially at popular sites and locations by advocating appropriate trails, transport infrastructure and public facilities 6. Advocate better understanding between user groups and landowners, through mechanisms such as the Local Access Fora 7. Promote community and business involvement in recreation management
4 The Welsh Government Strategy for Tourism	2013-2020	http://gov.wales/topics/tourism/developmentl1/partnershipforgrowth/?lang=en	This strategy sets the vision for the us and the industry to work in partnership to increase visitor spend to Wales. The strategy focuses on **5 key areas**:	3 Year Action Plan focusing on: ▪ more luxury and branded hotels ▪ more well-being facilities, such as spas ▪ more heritage hotels that utilise historic and distinctive buildings

Welsh Government			▪ **promoting** the Brand ▪ **product** Development ▪ **people** Development ▪ profitable **Performance** ▪ **place** Building. The strategy identifies a product-led approach to developing and marketing tourism in Wales. This means working with iconic, high quality, reputation-changing products and events.	▪ more all year round attractions, activities and cultural experiences ▪ more innovative, unusual and distinctive products. The Great Britain domestic market is the main market for Wales and will continue to be the main focus. Marketing activity will be increased in London and South East Midlands and Yorkshire, as well as within Wales itself for the first time. Overseas, the 3 key markets identified by the panel are Ireland, Germany and USA
5 Sustainable Tourism Welsh Government	2007	http://gov.wales/depc/publications/tourism/aboutvisitwales/stratpol/sustainabletourism/sustainable-tourism-eng?lang=en	The purpose of this sustainable tourism framework is to outline what sustainable development means for the tourism sector in Wales. Its purpose is to guide those involved in promoting and developing tourism in the public, private and voluntary sectors, nationally, regionally and locally to ensure that the tourism industry contributes to sustainable development in Wales. Tourism destinations that will be able to demonstrate a clear commitment to sustainability could gain an edge over competitor destinations. Trend data from Leisure Intelligence suggests there is an increasing desire for a more authentic holiday experience and a greater interaction with local people and communities. Local cuisine, the desire to experience different cultures and to get off the beaten track, are becoming increasingly important factors in holiday choice.	There are four key objectives supporting the vision:- • Promoting local prosperity • Supporting community well-being and involvement • Minimising tourism's environmental impact • Protecting and giving value to natural heritage and culture
6 The Food	2015-2020	http://gov.wales/docs/drah/publicati	'Towards Sustainable Growth: An Action Plan for the Welsh Food and Drink Industry 2014-2020' recognises the	1. To make its mark on the Food Tourism map Wales needs to embrace

Tourism Action Plan for Wales Welsh Government		ons/Tourism/150310food-tourism-action-plan-en.pdf	importance of the local food supply chain to the food industry in Wales, encompassing local retail, hospitality/ food service and direct retail (farm shops, markets and festivals). In 2009 the Welsh Government's Food Division (FD) and Visit Wales (VW) jointly launched the 'Food Tourism Action Plan for Wales', recognising the potential for growth within this sector 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 good quality local food experience, in order to deliver an authentic Welsh experience to visitors. 2. Developing links between the Food and Tourism sectors provides the potential to maximise the amount of income retained in the area and the resulting multiplier effect on the Welsh Economy. 3. Collaborative working and the development of local food supply chains has the potential of raising the profile of Wales as a food destination.
7 The Impact of Climate Change on the Welsh Visitor Economy Visit Wales, Welsh Government, Countryside Council for Wales	2010	http://gov.wales/docs/drah/publications/Tourism/130906impactclimatechange.pdf	Wales has traditionally been viewed as a family/beach holiday destination, but increasing emphasis on the 'independent active' visitor. Five active activities were identified: ▫ Golf ▫ Beach activities (3S and active) ▫ Walking ▫ Mountain biking ▫ Urban activities, e.g. visiting indoor/outdoor museums Results suggest that there will be more optimum days for most visitor activities important to Wales in the future: • Wetter autumns and winters may have an adverse	1. The collection of data on recreational activity rates and weather conditions in Wales should be improved. 2. Metrics and climate thresholds for key Welsh recreational activities should be developed. 3. Further research needs to be undertaken into the relationship between weather conditions and particular activities, especially golf and walking. 4. More research is required to assess climate drivers alongside non-climate

			impact on visits outside the main summer season • These are only the direct impacts of climate change on the visitor economy • Only a limited range of weather variables are included, e.g. wind, lag effect of past rainfall on ground conditions • Other factors, such as marketing and transport infrastructure are important if Wales wants to capture this growth in demand	drivers of tourist behaviour and attitudes. 5. An examination of the supply-side effects of climate change on the Welsh visitor economy should be undertaken as a priority. 6. There should be a more coordinated approach to climate adaptation and mitigation strategies in the Welsh tourism industry. 7. There needs to be greater provision of information and advice to the Welsh tourism industry concerning the impacts of climate change and the potential for mitigation and adaptation measures.
8 Hospitality, tourism and sport sector: Sector Skills Assessment UKCES	2012	https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/306403/briefing-paper-ssa12-hospitality-sport-tourism.pdf	The workforce is also relatively low skilled. Only a fifth of the workforce are qualified to level 4 and above (compared to 37 per cent across the whole economy), though this varies by subsector. With a quarter of all vacancies proving hard-to-fill and 20 per cent of establishments reporting skills gaps (compared to 13 per cent across the whole economy), the sector requires a better skilled workforce and steps must be put in place to provide more effective training mechanisms. Employers need to be reassured that those entering the workforce are capable of performing to a high standard and that effective training solutions are in place to develop staff once they are in the workforce. Apprenticeships are an important tool to address both these needs.	Future skills needs: A number of broad skills and labour market priority areas have been identified for the hospitality, tourism and sport sector: • Increasing the supply of the workforce. This includes: supporting sector job growth, accelerating social mobility in the workplace, professionalising the workforce and increasing the effectiveness of training. • Improvement of customer service skills. • Increasing business investment in skills and reducing wasted public expenditure.

				• Aligning employers and stakeholders to deliver sustained growth through skills. • Matching training supply to employer needs
9 Future Proofing your business: A practical guide to weathering climate change for the Welsh Tourism Industry Visit Wales	2013	https://business.wales.gov.uk/dmwales/sites/dmwales/files/documents/Climate_Change_Document_Final_English_19-06-13.pdf	The tourism industry is already vulnerable to current extreme weather events (such as the heatwave in 2003, periods of dry weather and the floods in 2012) and are likely to be impacted more frequently as the climate continues to change. 64 per cent of UK businesses have suffered a supply chain disruption due to extreme weather conditions, according to a survey conducted by Zurich and others. Climate change is likely to affect all organisations and industry sectors; the scale of the effects will depend on factors such as an organisation's activities and location. Scientists project that the following changes in the climate in Wales will become apparent in the future; • Summers will be hotter, the annual average temperatures in Wales will rise by 1.3°C by the 2020s, 2.0°C by the 2040s and 3.3°C by the 2080s, against the 1961 to 1990 baseline, • Summer rainfall will decrease significantly over time, • Winter rainfall will increase significantly over time. It is expected that these increases will be as a result of increased storminess leading to intense, but short- lived, rainfall events, • Sea levels will rise and coastal areas will be more at risk from storm surges.	Change brings opportunities and threats bring change: Potential for new business, increased sales due to change in weather and extended season of activities and tourists.
10 UK	2013	http://gov.wales/docs/caecd/research	There has also been an increase in skills gaps among Caring, Leisure and Other services staff compared to 2011.	

Commission's Employer Skills Survey 2013: Wales Results UKCES		/2014/140604-employer-skills-survey-2013-wales-report-en.pdf	There has also been an increase in the proportion of skill shortages in the Caring, Leisure and Other services vacancies (28 per cent, from 12 per cent in 2011). Looking to future skills needs, almost three-quarters (72 per cent) of establishments anticipate that they will have a need to increase or refresh the skills of their staff in the coming year. This was particularly the case for employers with staff in Professional occupations (43 per cent of those employing professionals identified a need to increase the skills of this group) and Caring, Leisure and Other services occupations (39 per cent). This again highlights skill needs in Wales among Caring, Leisure and Other services occupations.	
11 Regional Skills Plan NWEAB	2015	http://issuu.com/nweab/docs/skills_plan_final_web_file http://nwef.infobasecymru.net/IAS/	**Tourism** is expected to create an extra 3,000 jobs during the next 5-10 years. The tourism industry already generates £1.8bn for the North Wales economy each year and supports an estimated 37,500 jobs, and for a county such as Conwy particularly, is a key driver to its overall economy	
12 Outdoor Tourism Project: assessment of the potential of outdoor tourism & marketing recommendations	2012	http://www.outdoortourism.org/OT_Project_Marketing_Final.pdf http://www.outdoortourism.org/	Blue Sail were appointed to : • Undertake a baseline study of outdoor providers in 3 areas in Ireland (Dún Laoghaire Rathdown, Kildare and Kilkenny) and 2 areas in Wales (Conwy and Gwynedd) • Assess the potential in each area for outdoor tourism • Make recommendations for joint marketing opportunities	1. There is limited consumer data and market intelligence for outdoor tourism. Including consumer perceptions and satisfaction with the outdoor experiences on offer which could inform growth and drive expansion. 2. Providers need to be clear which specific market segment they are targeting for marketing of products as this will potentially drive the specific

Blue Sail Consulting Ltd				qualifications required by the sector and their staff. 3. Product development around the attraction and experiences such as increase and develop local accommodation, food and transport. 4. Cross area collaboration for the purposes of targeting markets, share experiences, and joint promotion. A strong clear branding and positioning is required to run across all partners in order to explore new product development such as events and franchising

Conclusions of Literature Review

1. Strong emphasis of working in partnership to continue at national, regional, county and local/community level.
2. Working together and forming 'smart' partnership to focus on shared outcomes and benefits. Bringing the natural resources, experience and service providers and economic regeneration together to identify the strengths and opportunities, resolve confusion, disputes or conflicts of interests.
3. 'Joined up thinking' to act on recommendations which links the economy, employers, young people, education, infrastructure.
4. 'Outdoor tourism' specifically, as a relatively new growth sub-sector within the generic tourism industry, is lagging behind more established and recognised sectors or industries in clearly defining, promoting and funding a career pathway that highlights the career opportunities and many possible entry points and progression routes in order to sustain the supply of highly skilled and qualified labour that the industry needs.
5. A demand and supply assessment should be carried out to meet industry specific needs. A mapping exercise of current qualifications, accreditation and governing body standards will bring about a coordinated understanding of the outcomes being achieved. Then, comparing these outcomes

against industry specific qualifications and accreditations to identify the gaps in requirements and a strategy to build these into future education and work based learning for the sector.

6. The mapping exercise will inform and educate the sector which will help in defining clear career progression, high quality training , skills development and qualifications as outcomes. Development of the career path will promote more local industry lead apprenticeships with industry specific and National Governing Body (NGB) qualifications built into the experience to add value to the apprenticeship.
7. There is clear national and local evidence identifying the need for a more skilled workforce in the outdoor sector. Being 'skilled' in the outdoor sector requires a number of NGB qualifications as a minimum if meaningful employment is to be achieved.
8. Continuing to act on recommendations and build further evidence. Improve the robustness, monitoring and impact of evaluation and research. Some evidence is out of date, such as the Impact of Climate Change, and needs to be updated to provide further robust evidence for the sector.
9. Coordinated marketing and promotion. Focus on year round expansion of activities and experiences. The Welsh Government's Tourism Strategy focuses on 5 key areas, which all providers should align with and replicate in its business planning and growth aspirations : Promotion, Product, People, Performance and Place. This clearly indicates a commitment by Welsh Government to support the adventure tourism and recreation sector in achieving these goals. Research suggests that providers need to be clear which market segment they are targeting with their product in order to drive the qualifications required by them and their staff.

Stage 2: Data analysis

Local Authority Tourism Profiles http://gov.wales/statistics-and-research/local-authority-tourism-profiles/?lang=en
2010-2012
Stats Wales
Welsh Government

The 6 Local Authorities in Wales came highest in the following indicators:

- Total Trips – Gwynedd and Conwy 3rd and 4th
- Total Nights – Conwy and Denbighshire 4th and 5th
- Total Spend – Gwynedd and Conwy 2nd and 3rd

Proportion of day trips in Wales highest in Gwynedd, with Anglesey 3rd

Highest proportion of overseas visitors overnight stays 3rd highest in Wales is Wrexham. Conwy, Anglesey, Denbighshire and Gwynedd are ranked the lowest, numbers 18-21.

A three year annual average shows that Gwynedd ranks highest in Wales for GB based overnight trips, with Wrexham and Flintshire lowest in the North Wales region and ranked 13 and 14th in Wales.

A three year annual average shows that Cardiff ranks highest in Wales for overseas visitor trips with Gwynedd coming second.

8 of the top 20 Welsh overnight destinations are based in North Wales – Llandudno, Bangor, Barmouth, Porthmadog, Pwllheli, Caernarfon, Bala, Llangollen.

The % of employment within tourism is high in North Wales with Conwy, Anglesey and Gwynedd coming 1st, 3rd and 4th out of the 22 Local Authorities in Wales.

The GVA of tourism activities as a % of the whole economy are highest in Conwy and Denbighshire in Wales, at almost 9%, with Gwynedd and Anglesey in second place at almost 8%. In contrast, Flintshire and Wrexham are the lowest in the region and in Wales.

The GB Tourist Statistics 2014 https://www.visitengland.com/sites/default/files/gb_tourist_report_2014_-_31st_august_2015_0.pdf

In Wales, during 2014, some 10 million domestic tourism trips were taken, staying for 35 million bednights and spending £1.7 billion. These figures are all at the peak or close to the peak seen for Wales in the past nine years. This was driven by growth in the number of both holiday and VFR (visiting friends and relatives) trips during 2014. Compared to 2013, the number of trips made and the bednights increased year on year (+1% and +4% respectively), and the expenditure remained unchanged.

This is a very positive picture for Wales compared to England and the GB national average where during 2014 the overall volume of trips taken in GB fell by -7% to 114.2 million. The number of bednights spent during GB trips in 2014 decreased by -6% to 349.5 million. Along with the decline in trips since 2013, the amount of expenditure on GB trips in 2014 has also fallen by -3% to £22.7 billion. The volume of trips taken for holidays reflects the decline seen at an overall level, having dropped by -7% to 52.9 million. Visits to friends and relatives dropped by -4% to 42.5 million and there was also a decrease in the volume of business trips taken within GB to 15.9 million trips (-11% compared to 2013).

However, Wales falls behind the figures for Scotland where 12.5 million domestic tourism trips were taken during 2014, with 41.6 million bednights and expenditure of £2.9 billion in spend. These figures are similar to those seen in 2013 for Scotland – trips increased by +3%, bednights decreased by -3% and expenditure was unchanged at £2.0 billion.

In 2014, Wales had 8% of the total share of tourism trips in Great Britain, by country; with England having 81% and Scotland having 11%. This figure remains unchanged since 2013 and increased by 1% since 2012. One of the small but significant figures which differentiate Wales to Scotland, and England in particular, are the number of GB trips for business purposes. Wales has a 7% share of GB trips for business purposes, (lower than 2013, approx. 9%), with England and Scotland having an equal 17% share.

Spending on Welsh domestic tourism trips continues to grow. The value of Welsh tourism trips was just over £1.7 billion in 2014 which was up +2.3% on 2013. Accommodation still represents the largest portion of expenditure at 36%, which was an increase of +9.2% on 2013. Eating and drinking out makes up 22% of spend - an increase of +11.9% since 2013 and travel costs now account for 18%, down -7.1% in 12 months.

Accommodation accounted for a greater proportion of expenditure on holiday trips in Wales, at 40% (up 17.8%), whereas a similar proportion is spent on eating and drinking out (21%) and a smaller proportion is accounted for by travel costs (15%).

As with the other countries, Families and Empty Nesters made up the majority of holiday trips in Wales during 2014, with 2.4 and 2.2 million trips respectively. These were both increases since 2013, +12.0% for Families and +10.6% for Empty Nesters. The number of holiday trips taken by Older Independents remained at a similar level to 2013 (1.0 million trips), whereas holiday trips taken by Pre-nesters fell by -25.3%. Over the past five years the only group to have seen significant growth is the Empty Nesters.

All GB tourism spend in Snowdonia National Park was at £185 million in 2014, ranked 4th highest National Park in GB, with the Lake District being the highest at £239 million. In Wales, on average Gwynedd is the highest ranking county in Wales where tourist have spent most money during the last 3 years, as well as seeing most visitor trips and overnight stays.
This is a comparison of the 3 top GB destinations :

	Trips	**Nights**	**Spending millions**
Gwynedd	1.66	7.09	£300
City of Edinburgh	2.28	5.73	£595
London	11.38	24.36	£2,889

GB Tourist 'lifestage' definitions:

Pre-nesters	Under 35 years and no children
Families	All ages and with children
Older Independents	35-54 years and no children
Empty nesters	55+ years and no children

Lifelong Learning Wales Record (LLWR) DATABASE

https://statswales.wales.gov.uk/Catalogue/Education-and-Skills/Post-16-Education-and-Training/Further-Education-and-Work-Based-Learning/Lifelong-Learning-Wales-Record

The Lifelong Learning Wales Record (LLWR) is a record of post 16 learning activities provided by and completed by learners in FE colleges (not schools).

There are two years of comparable datasets in the Lifelong Learning Wales database of post 16 **work based learning** provision across all apprenticeship programmes. The following number of post 16 individuals started training in the leisure, sport and travel programme areas in North Wales:

Programme area : leisure, sport, travel

Date	Foundation Apprenticeship (Level 2)	Apprenticeship (Level 3)	Higher Apprenticeship (Level 4+)	Total for the region
2012-13	40	35		75
2013-14	40	60		100

This dimension gives the sector category of the apprenticeships who started on the 'leisure, sport, travel' programme.
Further analysis in the dimension which gives the subject learning activity is captured in a different dataset on the LLWR database.
This dimension gives a subject classification for the learning activity. The subjects have been derived from the first letter of the Learn Direct Classification System (LDCS), which has a code assigned to each learning activity. Analysis of this classification shows a slightly different number of post 16 work based learning provision, as follows:

Subject area : Sports, games and recreation:

Date	NQF Level 1 or equivalent	NQF Level 2 or equivalent	NQF Level 3 or equivalent	NQF Level 4 or equivalent	Total for the region
2012-13	95	30	55	0	185
2013-14	50	15	40	0	

Stats Wales (source: LLWR)

https://statswales.wales.gov.uk/Catalogue/Education-and-Skills/Post-16-Education-and-Training/Further-Education-and-Work-Based-Learning/Lifelong-Learning-Wales-Record

Data is available for two years for comparison purposes from Stats Wales, derived from the LLWR database.

This analysis shows during the two years 2012-13 and 2013-14 the total number of **work place learning** places in the region within the Leisure, Sport and Travel sector.

This sector includes the following sub categories:

- Active Leisure and Learning
- Advanced Fitness
- Instructing Exercise and fitness
- Leisure Management
- Leisure Operations
- Playwork
- Sporting Excellence
- Travel Services
- Other

Date	Active Leisure and Learning	Advanced Fitness	Instructing Exercise and fitness	Leisure Management	Leisure Operations	Playwork	Sporting Excellence	Travel Services	Other
2012-13	15	25	50	15	5		15		5
2013-14		50	55	25	10	25	15		

This table demonstrates the total number of apprenticeship programmes in North Wales at Foundation Apprenticeship Level (2) and Apprenticeship Level (3) during the two year period available on Stats Wales 2012-2014

This data can be broken down further per county in the region for the two years as follows:

	2012-13	**2013-14**
Anglesey	0	0
Gwynedd	0	10
Conwy	35	35
Denbighshire	30	35
Flintshire	45	45
Wrexham	25	50

Consultation and feedback from industry specialists, such as Paul Donovan, Chair of Wales Adventure Tourism Organisation suggests that a greater understanding of what apprenticeships really are and what they offer, is required. Equally, the content of the apprenticeship must reflect the needs of the sector and be allowed a degree of flexibility to accommodate the many variables that exist, particularly in the outdoor sector. E.g. regardless of how good a apprentice is when they complete their apprenticeship, if they have not achieved two or three NGB qualifications, as a minimum, they are unlikely to gain meaningful employment. NGB's are therefore vital to an apprentice's future.

- A clear pathway is also required to ensure that fully understand the many route choices & the various possible entry points. The Specifications and Apprenticeship Framework(SASW), along with the key indicators ought to allow a degree of flexibility to enable the various elements of the apprenticeship to be achieved through a number of means. Whilst the apprenticeship outcome will be the same i.e. Level 3, Level 4 etc., the outcome for the apprentice should be unique to their needs & requirements, subject to their chosen pathway.
- The Apprentice Matching Service (AMS) would suggest its ability to match an apprentice to a chosen career pathway. Without the current existence of a clear pathway, this service would not appear to be user friendly for those searching for a pathway in the outdoor tourism sector.

According to the NWEAB Skills and Employment Plan 2015, there is still a mild stigma associated with apprenticeships within North Wales, as elsewhere, and educating both schools and parents on the benefits an apprenticeship can offer to a young person needs to be better communicated regionally, particularly with the new economic opportunities that are forthcoming across North Wales.

Employers say the big challenge is awareness. According to employers, schools especially, don't always recognise the value of apprenticeships, hence students aren't encouraged to pursue them. However, in schools particularly around the North East of Wales, due to its close proximity to established manufacturing employers, some schools alongside the FE sector – particularly those who've formed relationships with employers – are providing good quality careers guidance, but many students still assume university is the only route. The challenge therefore is to work in greater collaboration as a region via the likes of Careers Wales, to offer further detail to parents and schools on the benefits an apprenticeship pathway can offer in terms of a long term career, as a viable and valued alternative to further education or university.

The **Apprentice Matching Service (AMS)** is a database managed by Careers Wales where employers can advertise apprenticeship vacancies for young people aged 16-19 to apply.

Data from the Careers Wales Apprentice Matching Service for the two year period 2012-14 shows that there were 1,164 apprenticeship vacancies posted on AMS in the region during that period, with 1.8% (22) of those apprenticeship opportunities based in the leisure, sports and tourism sector. The number of applications received for these opportunities in the leisure, sports and tourism sector in North Wales was 107.

A snapshot exercise searching for all apprenticeships in the 'sport, leisure and tourism' sector on the AMS database during one day in September 2015 found 5 apprenticeship opportunities available on the AMS site in Wales, none based in North Wales.

https://ams.careerswales.com/Public/Default.aspx?mode=vacancy

Jobs Growth Wales (JGW) is six months opportunity in a job paid at least the National Minimum Wage managed by Careers Wales and part funded by ESF and Welsh Government. Jobs Growth Wales addresses youth unemployment and aims to create 16,000 jobs for unemployed job-ready young people aged 16 to 24 by March 2016. Information from the Jobs Growth Wales database, provided by Careers Wales for the two year period 2012-2014 shows that there were 3,579 jobs posted on the web site available in North Wales and 3.8% (137) of these were specific to the leisure, sport and tourism sector. The number of applications received for these opportunities in leisure, sport and tourism was 829.

A snapshot exercise searching for all apprenticeships in the 'sport, leisure and tourism' sector on the JGW database during one day in September 2015 found no opportunities available on the JGW site for North Wales

One of the main challenges for employers who are considering taking on an apprentice, is what they do next, and how to develop the individual, whilst also potentially increasing their own organisations outputs and developments. A key piece of advice from existing employers within North Wales who have taken on apprentices and seen the benefit, is *"Hire for Attitude. Train for Skills". (http://www.supertemps.co.uk/blog/2014/Attitude-is-key-to-success-for-young-job-seekers.aspx)*

FURTHER EDUCATION AND POST 16 LEARNING in leisure, travel and tourism subject areas.

The LLWR database also records the number of post 16 aged students who study leisure and tourism related vocational courses at different levels. The table below demonstrates that the number of courses has decreased slightly in this sector. This data demonstrates the lack of HE and NVQ 4 level courses specific to this sector during the two years that this data is available from Stats Wales:

		Pre entry level	Entry level	NQF level 1 or equivalent	NQF level 2 or equivalent	NQF level 3 or equivalent	HE level / NQF level 4 or above	Mixed levels	Not known / not applicable	All levels
2013-14	**Catering / food / leisure services / tourism**	20	200	1,445	4,335	655	10	.	115	6,775
2012-13	**Catering / food / leisure services / tourism**	*	265	1,330	4,845	630	15	.	240	7,325

LLWR data 2012-2014

For the past 2 years, the LLWR data also captures the medium of delivery for the regions with North Wales's highest ranking Welsh medium delivery of post 16 courses being in the health and caring courses. The table below shows the 6 highest ranking subjects out of 24 post 16 subject areas in North Wales with a demand for Welsh language or bilingual teaching.

	All mediums of delivery			All mediums of delivery
	Welsh	Bilingual	English	
All subjects – top 6 extracted below from a list of 23	5975	18570	135265	159810
Care / personal development (including basic skills)	1835	5095	30820	37750
Health care / medicine / health & safety	485	1985	12745	15215
Sciences & mathematics	450	970	10205	11620
Sports, games and recreation	**450**	**360**	**1335**	**2145**
Catering / food / leisure services / tourism	**360**	**1325**	**5095**	**6775**
Business / management / office studies	295	750	6470	7520

https://statswales.wales.gov.uk/Catalogue/Education-and-Skills/Post-16-Education-and-Training/Further-Education-and-Work-Based-Learning/Learners/Further-Education/learningactivitiesfurthereducationinstitutions-by-subject-mediumofdelivery
LLWR database 2013-14

ASPIRATIONS OF YOUNG PEOPLE – Careers Wales Survey 2015

Careers Wales carries out a national survey of career aspirations of young people aged 14-15, or Year 10 in secondary schools. In 2015 5,398 young people in North Wales secondary schools responded to the survey, approx. 66% of the total year 10 cohort in North Wales and 26% of total year 10 learners across Wales.

The results for North Wales below shows the number of year 10 learners who have indicated an interest in each occupational area as either 1st, 2nd, 3rd or 4th choice are as follows:

Rank	Occupational area (SIC) Top 4 extracted below from a total list of 29	Total Number of year 10 learners
1	Leisure, sports and tourism	1,153
2	Teaching and education	1,134
3	Engineering	1,111
4	TV, film and media	1,108

Welsh Government Demand/Supply Assessment Exercise, September 2015

The Welsh Government commissioned the 3 skills partnerships in Wales to develop Demand/Supply Regional assessments by 30th September 2015, following the completion of Regional Employment and Skills Plans earlier in the year. The Demand/Supply Assessment is a pilot this year and will potentially contribute to advise WG on future regional prioritisation for skills funding in line with employment and skill needs, linking with FE and WBL provision.
This extract on Tourism is taken from the NWEAB Demand/Supply Report to the Welsh Government, September 2015.

TOURISM (regional and national priority alignment)
The North Wales Economic Ambition Board's Regional Skills and Employment Plan, 2015, reports that Tourism is expected to create an extra 3,000 jobs during the next 5-10 years within the region. The tourism industry already generates £1.8bn for the North Wales economy each year and supports an estimated 37,500 jobs, and for a county such as Conwy particularly, is a key driver to its overall economy.
Latest figures from the ONS Business Count of local units shows that the number of leisure, sports and tourism related registered businesses in North Wales is at 6,125. Just over 75% of these units are micro businesses, employing between 0-9 people.
According to the Tourism Strategy North Wales 2010-2015, published by the Tourism Partnership North Wales in 2015, tourism generates £1.8bn for the North Wales economy each year, supports an estimated 37,500 jobs and is a lifeline for numerous small businesses. The report echoes the Regional Skills & Employment Plan in suggesting that there will be further growth as the sector looks to develop its sustainable year round provision and offer.

The move from seasonal to a more sustainable year round economy within this sector, will require additional skills needs to be addressed, as the current percentage of employment within tourism is high in North Wales; with Conwy, Anglesey and Gwynedd coming 1st, 3rd and 4th out of the 22 Local Authorities in Wales.
The GVA of tourism activities as a % of the whole economy are highest in Conwy and Denbighshire in Wales, at almost 9%, with Gwynedd and Anglesey in second place at almost 8%. According to the GB Tourist Statistics, 2014, all GB tourism spend in Snowdonia National Park was at £185 million in 2014, ranked as 4th highest National Park in GB, with the Lake District being the highest at £239 million.
Looking to future skills needs, almost three-quarters (72 %) of establishments anticipate that they will have a need to increase or refresh the skills of their staff in the coming year. This was particularly the case for employers with staff in Professional occupations (43% of those employing professionals identified a need to increase the skills of this group – including the outdoor sector) and Leisure and Other services occupations (39%).
The number of apprenticeships within leisure (incl. sport and travel) saw an increase from 140 in 2012/13 to 175 in 2013/14; and within hospitality an increase from 480 in 2012/13 to 650 in 2013/14.
Demand for employment in this sector is further demonstrated by 492 Jobs Growth Wales opportunities posted for this sector between 2012 and 2014, of which there were 2,664 applicants; and for the 45 apprenticeships posted there were 260 applicants.
The growth of year round facilities within the region such as Zip World, Bounce Below, and Surf Snowdonia amongst others necessitates a higher suite of skills to deliver a sustainable career pathway, and opportunity for progression within the industry within North Wales. The outdoor tourism sector has played a key part in the sectors general expansion, and as a specific sub-sector, is seeing a considerable increase in its value overall to the region, with current estimates at £213million per annum.

The outdoor tourism sector differs slightly from the more seasonal factors elsewhere within the industry, in that much of it is a year-round suite of activities that requires sustainable employment opportunities with many technical and specifically skilled individuals to undertake key frontline roles; a trait further supported by the Miller Research report published in 2015, '*The Economic Impact of Outdoor Activity Tourism in Wales*'.
Strong recent business performance within the sector has been attributed by providers to an increase in domestic tourism, a growing outdoor activity market, and the rising profile of North Wales as an outdoor destination, as well as individual business expansion.
Whilst growing competition between increasing numbers of providers and access restrictions were thought to constrain further growth within the sector, this is yet to become evident.

However, increasing operational costs, a deficiency in qualified skilled staff and poor marketing have been identified as barriers to development of outdoor activities in Wales. The total estimated annual contribution of outdoor activity tourism to the economy of Wales is approximately £481m or 6% of the total economic contribution of all tourism in Wales, and higher as a percentage of the economy in North Wales.

Careers Wales carries out a national survey of career aspirations of young people aged 14-15, or Year 10 in secondary schools. In 2015, 5,398 young people in North Wales secondary schools completed the survey, approx. 66% of the total year 10 cohort in North Wales and 26% of total year 10 learners across Wales.

The results in 2015 showed that in North Wales, from a sample of 5,398 young people, 21.4% (1,153) young people indicated that leisure, sports and tourism work was one of their top 4 career choices, and 8.9% (479) of the total surveyed indicated that leisure, sports and tourism work was their first career choice. This was the highest ranking first choice amongst a list of 29 sectors. Amongst those who indicated that leisure, sports and tourism was their first career choice, 33 young people indicated that they would seek an apprenticeship, 160 would prefer to move into an FE college as their next step and 225 individuals would prefer to stay on in school as their preferred next step for this career pathway.

STAGE 3: Key Questions

Using the evidence to respond to the 'Key Questions' posed by The Outdoor Partnership:

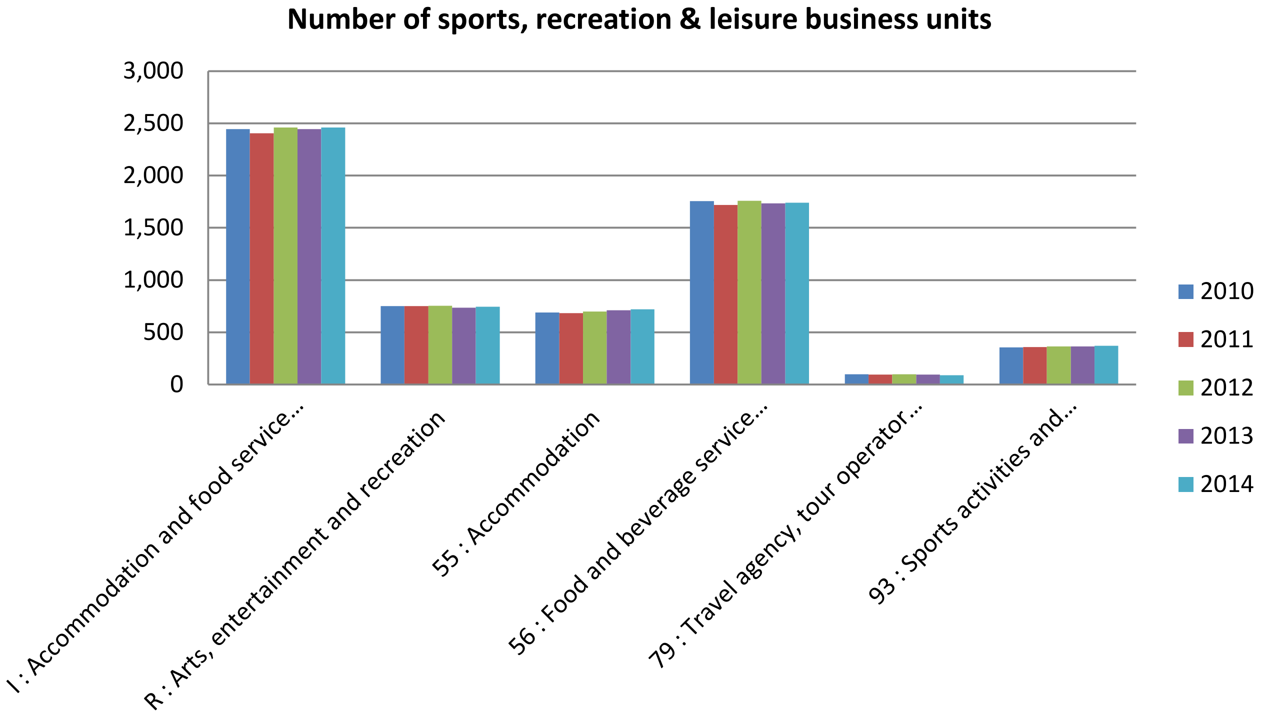
1. **The size and range of the outdoor activity sector across North Wales.**
Latest figures from the ONS Business Count of local units below shows that the number of leisure, sports and tourism related registered businesses in North Wales is at 6,125.

Just over 75% of these units are micro businesses, employing between 0-9 people.
The number of business units across the sector is highest in Gwynedd for all categories.

Local ıority county	I : Accommodatio and food service activities	R : Arts, entertainment and recreation	55 : ccommodation	56 : Food and beverage ·vice activities	79 : Travel agency, tour operator and er reservation service and related activities	93 : Sports activities and amusement and recreation activities
Anglesey	240	60	80	160	5	30
Conwy	540	145	215	330	15	60
Denbighshir	335	100	60	280	15	50
Flintshire	345	120	50	295	20	75
Gwynedd	**710**	**200**	**290**	**420**	**20**	**90**
Wrexham	290	120	30	255	10	65
Column ıl	**2,460**	**745**	**720**	**1,740**	**90**	**370**
Number employing 0-9 people	**1,810**	**590**	**495**	**1,315**	**75**	**260**
%	**74%**	**79%**	**69%**	**76%**	**83%**	**70%**

ONS UK Business Counts - Local units 2015

The trends over the last 4 years in terms of the number of business units in the sector in North Wales are shown in the table below, which demonstrates that there has been minimal growth and fluctuation in the sector during the past 4 years. However, accommodation, food and sports activities have seen a slow but steady increase during the last 4 years. Sports and accommodation industries particularly saw the highest growth of 4% during the same 4 year period, despite the slow economic growth overall.



ONS UK Business Counts - Local units 2015

2. Future analysis of the sector's development

There is no shortage of evidence to suggest that the sector needs direction and partnership work for growth. The sustained growth indicators in this sector are positive, despite wider economic challenges. According to the Miller Research recommendations, there are two areas which need particular attention if there is to be further growth and sustained growth in this sector:

- *Individual business expansion is thought to be constrained by increasing numbers of competing providers as well as some providers suggesting that the capacity of the environment to support further activities is limiting future growth. Providers are dissatisfied with current national marketing of the sector and a lack of qualified and suitable staff is blamed on a lack of entry point into the sector.*
- *Certain groups are discouraged from undertaking activities such as kayaking in Wales due to confusion and dispute over access to land and water. Access is therefore a key issue to be tackled in order to encourage further success of the sector in Wales.*

There were similar conclusions and recommendations made in other reports also including the Tourism Strategy North Wales and Recreation Strategy from Snowdonia National Park.

Tourism, recreation and leisure are recognised in the EU Economic Prioritisation Framework 2014. The EPF will help to guide the use of EU funding over the 2014–2020 funding period by setting it within a broader investment context. It provides an overview of areas of key economic opportunity in Wales, highlighting

important investments which are underway or being planned.
http://gov.wales/docs/wefo/publications/150615theeconomicprioritisationframeworkv3.pdf

Reference to North Wales' 'Demand Drivers' in this document are:

I. **Centres of Excellence, Visit Wales**. A Tourism 'Centre of Excellence' is a tourism destination with:

- one or more thematic strengths
- where the quality of the tourism experience (people, places, information and products) attracts visitors over time to sustain a community (within a defined geographic locality) through focused economic activity
- maintains and enhances that development.

The centres will focus on tourism growth markets linked to activities such as:

- walking
- cycling
- fishing
- riding
- watersports
- adventure tourism
- other attractions e.g. historic gardens that use the natural and built environment.

Centres of excellence are a key component of both the Coastal and Sustainable Tourism projects and are recognized by Visit Wales in the following locations:
http://business.wales.gov.uk/dmwales/sites/dmwales/files/documents/E4G%20CoE%20projects%20map%20-%20English.pdf

II. **Tourism attractions and centres**, including outdoor pursuits driving tourism and visitor demand:
   - UNESCO World Heritage Sites :
     - The Castles and Town Walls of Caernarfon and Conwy
     - Harlech and Beaumaris Castles
     - Pontcysyllte Aqueduct and Canal, near Wrexham

III. **Unique built and natural environments** and recent investments in the Outdoor Sector and the development of internationally renowned developments such as Zipworld in Bethesda, Dolgarrog, Marsh Tracks BMX International standard facilities

IV. **Food and Farming**: Knowledge Transfer Partnerships exists with several food production companies and manufacturing businesses, supporting product development and international business development

3. Skills Shortfall appraisal

The evidence suggests that there are enough young people with career aspirations for the leisure, sports and tourism sector according to the recent Careers Wales survey as well as trends in students post 16 choices. Also, there were 6,775 post 16 vocational courses in Further Education available in this sector, reinforcing a supply of interested young people as the future workforce for the sector. However, there are a limited number of vocational courses which provide sector specific certification and accreditation for the outdoor tourism industry at level 3 and in particular at Level 4 that needs to be investigated further. This investigation could take the form of a regional (and national) mapping exercise to identify the national QCF qualifications with the sector specific certifications and accreditations needed. Whilst the Level 3 pathways exists, the outcome for the apprentice is one that does not allow for meaningful employment, due to the fact that NGB qualifications are not supported within the framework of the apprenticeship. Given the nature of the responsibilities that go 'hand in hand' with the role as an outdoor instructor, the apprentice would not be considered for meaningful employment until post 18 years.

Key to the future development of the sector is *"a clear career pathway across all levels, influenced by strong industry leadership, to raise the industry profile and attract a wider range of candidate abilities, skills and qualifications."*

The sector has demonstrated its growth success and further growth potential; it is one of the Welsh Government's priority sectors for growth nationally, it is recognised by the North Wales Economic Ambition Board as one of the three priority sectors in the region; however, there is a shortage of apprenticeships at level 3 and above with industry specific qualifications in comparison to other priority sectors and industries in the region which responds specifically to the outdoor tourism industry's needs. Attention should be paid to an equitable investment for growth in education and training opportunities post 16 in the active tourism sector, on a par with energy, construction and advanced manufacturing and engineering for example. A clear career pathway across all levels, influenced by strong industry knowledge and leadership on needs, could raise the industry's profile further and attract a wider range of candidate abilities, skills and qualifications.

The recent national UKCES survey reported that there has been an increase in skills gaps among Caring, Leisure and Other services staff compared to 2011 and an increase in the proportion of skill shortages in the Caring, Leisure and Other services vacancies (28 per cent, from 12 per cent in 2011). The survey does not identify the outdoor tourism industry needs specifically and incorporates this sector in the wide definition of caring, leisure and other services. However, it further reinforces other local and industry specific findings.

Furthermore, the UKCES survey is looking to future skills needs, almost three-quarters (72 per cent) of establishments anticipate that they will have a need to increase or refresh the skills of their staff in the coming year. This was particularly the case for employers with staff in Professional occupations (43 per cent of those employing professionals identified a need to increase the skills of this group) and Caring, Leisure and Other services occupations (39 per cent). Again this reinforces the needs of the outdoor tourism industry for sector specific skills, qualifications and accreditation.

4. Assessment of added value from increasing the capacity of the sector

The EU Economic Prioritisation Framework 2014 identifies tourism as one of the national economic opportunity. The EPF will help to guide the use of EU funding over the 2014–2020 funding period by setting it within a broader investment context. It provides an overview of areas of key economic opportunity in Wales, highlighting important investments which are underway or being planned. http://gov.wales/docs/wefo/publications/150615theeconomicprioritisationframeworkv3.pdf

The ambition of the new tourism strategy for Wales 'A partnership for Growth: 2013-2020' is to grow tourism earnings by 10% or more by 2020.

The development and growth of tourism, recreation and leisure across Wales creates opportunities for a wide range of sectors and makes those areas more attractive for inward investment and for skilled labour, for example associated infrastructure and facility development
has the potential to generate significant employment for the construction industry and its supply chains.

A three year annual average shows that Gwynedd ranks highest in Wales for GB based overnight trips, with Wrexham and Flintshire lowest in the North Wales region and ranked 13 and 14th in Wales. A three year annual average shows that Cardiff ranks highest in Wales for overseas visitor trips with Gwynedd coming second. 8 of the top 20 Welsh overnight destinations are based in North Wales – Llandudno, Bangor, Barmouth, Porthmadog, Pwllheli, Caernarfon, Bala, Llangollen.

Tourism is expected to create an extra 3,000 jobs during the next 5-10 years. Tourism generates £1.8bn for the North Wales economy each year, supports an estimated 37,500 jobs and is a lifeline for numerous small businesses. The GVA of tourism activities as a % of the whole economy are highest in Conwy and Denbighshire in Wales, at almost 9%, with Gwynedd and Anglesey in second place at almost 8%. However, there is potential for further growth. The outdoor tourism industry specifically has recognised this potential for all year round activities and sustainable tourism despite adverse weather conditions. Like an export industry tourism brings money into the region from outside and North Wales would be poorer without this.

According to the annual survey 'The GB Tourist', in 2014, Wales had 8% of the total share of tourism trips in Great Britain, by country; with England having 81% and Scotland having 11%. This figure remains unchanged since 2013 and increased by 1% since 2012.

Spending on Welsh domestic tourism trips continues to grow. The value of Welsh tourism trips was just over £1.7 billion in 2014 which was up +2.3% on 2013. Accommodation still represents the largest portion of expenditure at 36%, which was an increase of +9.2% on 2013. Eating and drinking out makes up 22% of spend - an increase of +11.9% since 2013. There are strong indicators of steady growth in a relatively stagnant economy.

All GB tourism spend in Snowdonia National Park was at £185 million in 2014, ranked 4th highest National Park in GB, with the Lake District being the highest at £239 million. In Wales, on average Gwynedd is the highest ranking county in Wales where tourist have spent most money during the last 3 years, as well as seeing most visitor trips and overnight stays.

According to industry specialist, Paul Donovan, Chair of WATO, there are benefits from the outdoor tourism industry which clearly align to other Welsh Government policies and strategies, such as Education, the Environment, Culture and Health, can all benefit from increasing the capacity of the sector. Looking to the ‘Well Being of Future Generations (Wales) Act 2015 and the 7 Well-being Goals, were the capacity of the sector to grow, it would be well positioned to support the creating of:

- A globally responsible Wales;
- A prosperous Wales;
- A resilient Wales;
- A healthier Wales;
- A more equal Wales;
- A Wales of cohesive communities;
- A Wales of vibrant culture and thriving Welsh language.

“The development and growth of tourism, recreation and leisure across Wales creates opportunities for a wide range of sectors and makes those areas more attractive for inward investment and for skilled labour, for example associated infrastructure and facility development has the potential to generate significant employment for the construction industry and its supply chains.”

The Economic Prioritisation Framework for Welsh European Funds:
A Guidance Document providing an Investment Context for the Implementation of EU Programmes in Wales
Version 1: 20 November 2013

Overall Conclusions & Recommendations

Partnership

1. Strong emphasis of working in partnership to continue at national, regional, county and local/community level. Working together and forming 'smart' partnership to focus on shared outcomes and benefits. Bringing the natural resources, experience and service providers and economic regeneration together to identify the strengths and opportunities, resolve confusion, disputes or conflicts of interests. 'Joined up thinking' to act on recommendations which links the economy, employers, young people, education, infrastructure at a regional and national level.

Career Pathway and Progression

2. 'Outdoor tourism' specifically, as a relatively new growth sub sector within the generic tourism industry, is lagging behind more established and recognised sectors or industries in clearly defining, promoting and funding a career pathway that highlights the career opportunities and many possible entry points and progression routes in order to sustain the supply of highly skilled and qualified labour that the industry needs in North Wales.

3. A demand and supply assessment should be carried out to meet industry specific needs. A regional mapping exercise of current qualifications, accreditation and governing body standards will bring about a coordinated understanding of the outcomes being achieved. Then, comparing these outcomes against industry specific qualifications and accreditations to identify the gaps in requirements and a strategy to build these into future education and work based learning for the sector.

4. The growth of year round facilities within the region such as Zip World, Bounce Below, and Surf Snowdonia amongst others, necessitates a higher suite of skills to deliver a sustainable career pathway, and opportunity for progression within the industry within North Wales.

Qualifications, accreditation and skills

5. Due to the complexity of the industry's range of qualifications and accreditation, there is no bespoke data on professional qualifications within areas of expertise and delivery for the sector, e.g. mountaineering, canoeing. A mapping exercise will inform and educate the sector to help define a clear career progression, signposting to high quality training, skills development, accreditation and qualifications as outcomes. Development of this sector specific career path will promote more local industry lead apprenticeships with industry specific and National Governing Body (NGB) qualifications built into the experience to respond to the sector needs and add value to the apprenticeship.

6. There is clear national and local evidence identifying the need for a more skilled workforce in the outdoor sector in North Wales. Being 'skilled' in the outdoor sector requires a number of NGB qualifications as a minimum if meaningful employment is to be achieved across the region. Previous research carried out by Blue Sail Ltd in 2012 suggests that providers need to be clear which market segment they are targeting with their product in order to drive the qualifications required by them and their staff, also noted in recommendation 8 below.

Working smarter based on evidence

7. We need to continue to act on recommendations and build further evidence, such as improving the robustness, monitoring and impact of evaluation and research. There is limited data available on consumer experience, expectations and satisfaction for outdoor tourism in order to inform expansion and growth. Some evidence is out of date, such as the Impact of Climate Change and needs to be updated to provide further robust evidence for the sector across North Wales and beyond.

8. We need better coordinated marketing and promotion with a focus on year round expansion of activities and experiences. The Welsh Government's Tourism Strategy focuses on 5 key areas, which all providers should align with and replicate in its business planning and growth aspirations: Promotion, Product, People, Performance and Place. This clearly indicates a commitment by Welsh Government to support the adventure tourism and recreation sector in achieving these goals across North Wales and beyond. Furthermore, previous research suggests that providers need to be clear which market segment they are targeting with their product and this will drive the qualifications required by them and their staff.

9. We, as a region, need to strengthen our alignment to other sectors to help recognise and harness the potential added value that the outdoor tourism sector can bring to other policy areas, such as education, health and the environment in North Wales.

References

Name of publication	Author / Source	Date
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4 The Welsh Government Strategy for Tourism	Wels Government	2013-2020
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10 UK Commission's Employer Skills Survey 2013: Wales	UKCES	2013
11 Regional Skills and Employment Plan	North Wales Economic Ambition Board	2015
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