

Combating Undertourism in North Wales



Tourism is worth £3.69 billion to the North Wales Economy

26.4m day visitors to North Wales

10.51m staying visitors to North Wales

46,000 jobs in tourism, which is 1 in every 7 of all jobs

Our research shows that in 2019 the value of tourism was worth £3.69 billion to the county and supported 46,000 jobs.

With North Wales increasingly recognised as a world class visitor destination with international and UK wide appeal we have the opportunity to significantly grow the value of tourism to the local economy and county as a whole. **A 1% growth in tourism spend would add an extra £20m to the economy.**

North Wales Tourism is one of the UK's leading tourism organisations, supporting businesses across North Wales. Our aim is to grow and maintain a prosperous and sustainable tourism industry in North Wales.

We have over 30 years of experience supporting North Wales businesses to develop and maintain a sustainable tourism industry and marketing the region to visitors. We promote North Wales as a year-round destination, focussing resources on markets, territories and channels that represent the greatest potential for growth. Our campaigns are integrated across digital, social, print, e-communications, PR and events.

We have over 1400+ members within and connected to the tourism industry, including accommodation providers, attractions, activities, food and drink, retail and event operators. Also suppliers who offer a range of products and services for the tourism industry.

Together we are a dynamic and successful community of businesses united by a common purpose - a successful and sustainable tourism industry in North Wales.

Combating Undertourism in North Wales

During the pandemic in 2020 we were requested to put a recovery plan together for North Wales by the Deputy Minister for Culture, Sport and Tourism Dafydd Ellis- Thomas MS.

Background – Widely recognised to have accelerated trends and impact of ICT on business and personal lives COVID-19 has also laid bare a number of structural deficiencies in destination management throughout all parts of the world with particular impact on communities here in North Wales.

It is an understandable, natural human reaction after periods of restricted consumption to turn to “the familiar” once restrictions are removed. We witnessed this during summer of 2020 when the first place many people wanted to explore and relax in was here in North Wales. This is a phenomenon that our region could in “normal” times be rightly proud. However, the success of historic marketing messages concentrating on “Honeypot” locations has resulted in more visitors than can be accommodated whilst less than a couple of miles away spare capacity remains untapped. This imbalance creates tension and dissatisfaction in both environments.

Phrases such as Climate Emergency may have become politicised however most of us as the “general public” understand the requirement for us all to make contributions towards environmental management, reducing and or eliminating waste and building sustainable practices – this sensitivity extends to personal expenditure decisions and growing awareness of the potential harm, some irreversible that visitors may cause within destinations placing increasing responsibility on Destination Management Organisations to create and promote sustainable practices.

Thriving despite current conditions NWT has been the leading sector representative body in Wales for approaching 3 decades and is recognised as one of the most effective within the UK. The company has established international links, UK links and strong ties throughout Wales in the interest of members.

Since being claimed by [SKIFT](#) in 2016 the word, Overtourism has become a ubiquitous term associated with destinations that experience periods of visitor numbers beyond the capacity of the destination that is coterminous with host communities and visitors to coexist without harm to either party. It also references the harm caused to natural and built landscapes with “locals” being left to manage the impact of detritus deposited by visitors, harming wildlife and the natural habitat plus placing strains on public services and facilities. It has also been associated with the erosion of cultural values and the “gentrification” of destinations resulting in local residents being priced out of their regions and contributing to overall growing dissatisfaction with visitors as a cause of more harm than benefits for the destination.

The activities of a number of visitors to Wales during August and September 2020 have understandably caused great concern and revulsion by those living and working in Wales. With the expectation that Local Authorities, National Parks, Welsh Government, National Bodies and the tourism sector will react with policies, regulation and enforcement to protect host communities from the worst excesses of visitor actions. And that these parties will in collaboration with each other devise sustainable practices that do not undermine the experience of locals and visitors.

However abhorrent we find the undisputed disruption caused by Overtourism we should not divert energy and innovation away from addressing the entrenched historical issue that we need to overcome, namely; UNDERTOURISM. Undertourism has plagued our sector and region for generations. It is important to not lose sight that for the 10 week period or so that Overtourism impacts on the region we have 40 weeks during which the impacts of Undertourism permeate through all levels of our communities! Please use the links throughout this paper to read further.

Resetting for 2022 and beyond provides an unrivalled opportunity to fully research and understand the root causes of Undertourism and under the watchful brief and guidance of a new dedicated body learn from destinations throughout the world how to build back better in North Wales. This may include agreement to only use Welsh names in promotions. A real opportunity to celebrate Welsh culture, making it one of the main reasons for travelling. Bringing place names and legends to life in order visitors understand and appreciate that

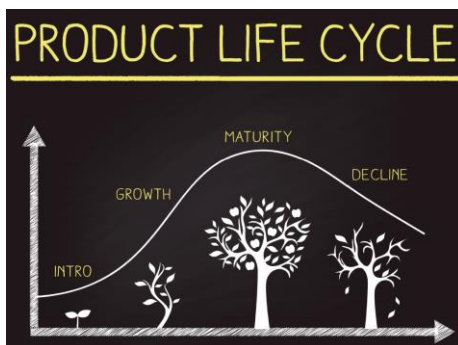
these are not just stunning vistas but sacred places that are enshrined in thousands of years of storytelling and traditional values.

North Wales Tourism as the leading pan regional body representing the sector is happy to demonstrate leadership, galvanising interested parties and stakeholders in the search for workable solutions that can deal with the immediate concerns of residents followed by medium and longer term sustainable solutions. If, as many suspect the root cause of Overtourism is poor and or inadequate destination management, both Undertourism and Overtourism can be addressed through partnership with host communities and all interested stakeholders.

The Index of Resident Irritation is referred to as [Doxey's IRIDEX](#). Represented by 4 stages;

1. **Euphoria** - Visitors are welcome and there is little planning.
2. **Apathy** – Visitors taken for granted and contact becomes more formal.
3. **Annoyance** – Saturation is achieved, and the local people start to have misgivings. Overtourism Planners attempt to control the situation via increasing the infrastructure rather than limiting growth.
4. **Antagonism** – Open expression of irritation and planning is remedial, yet promotion increases to offset the deteriorating reputation of the destination.

Doxey's IRREDEX when overlayed with the traditional product life cycle bell curve foretells the penalties to destinations of poor planning, taking visitors for granted and for failing to be fully engaged with qualitative metrics in favour of ever-increasing number of visitors.



These serve as warning as to the longer-term consequences of failing to address the underlying structural weaknesses of the product, visitor management and consumer mix. They also help to illustrate how important it is that destinations “refresh” their overall offer and introduce more

sensitive measurement criteria such as value per tourist / visitor rather than purely number of visitors and include thorough evaluation of the impact of visitor interaction on culture and wider societal changes as part of its Destination Management approach.

Some areas have undertaken [De-Marketing strategies](#) adopting a revised version of the “4P’s”

- **Product:** restricting the number of entrance tickets sold per day or per hour
- **Price:** increasing prices to restrict those who can afford to visit
- **Place:** restricting group visits or packages at peak periods of the day / season
- **Promotion:** reduce the amount of promotional material and channels

Models such as [IQM](#) with additional influences of [Doughnut Economics](#) could be used to ascertain the capacities of destinations throughout North Wales to absorb visitors and maintain cultural integrity whilst developing a sustainable economic environment, investing in people’s futures.

Collaborating with [North Wales Economic Ambition Board](#) and senior partners such as North Wales Mersey Dee Business Council, the six Local Authorities and Snowdonia National Park Authority, North Wales Tourism ([NWT](#)) is best placed to coordinate support from Welsh Government to develop and hone destination management practices that align with the [17 United Nations Sustainable Development Goals](#)

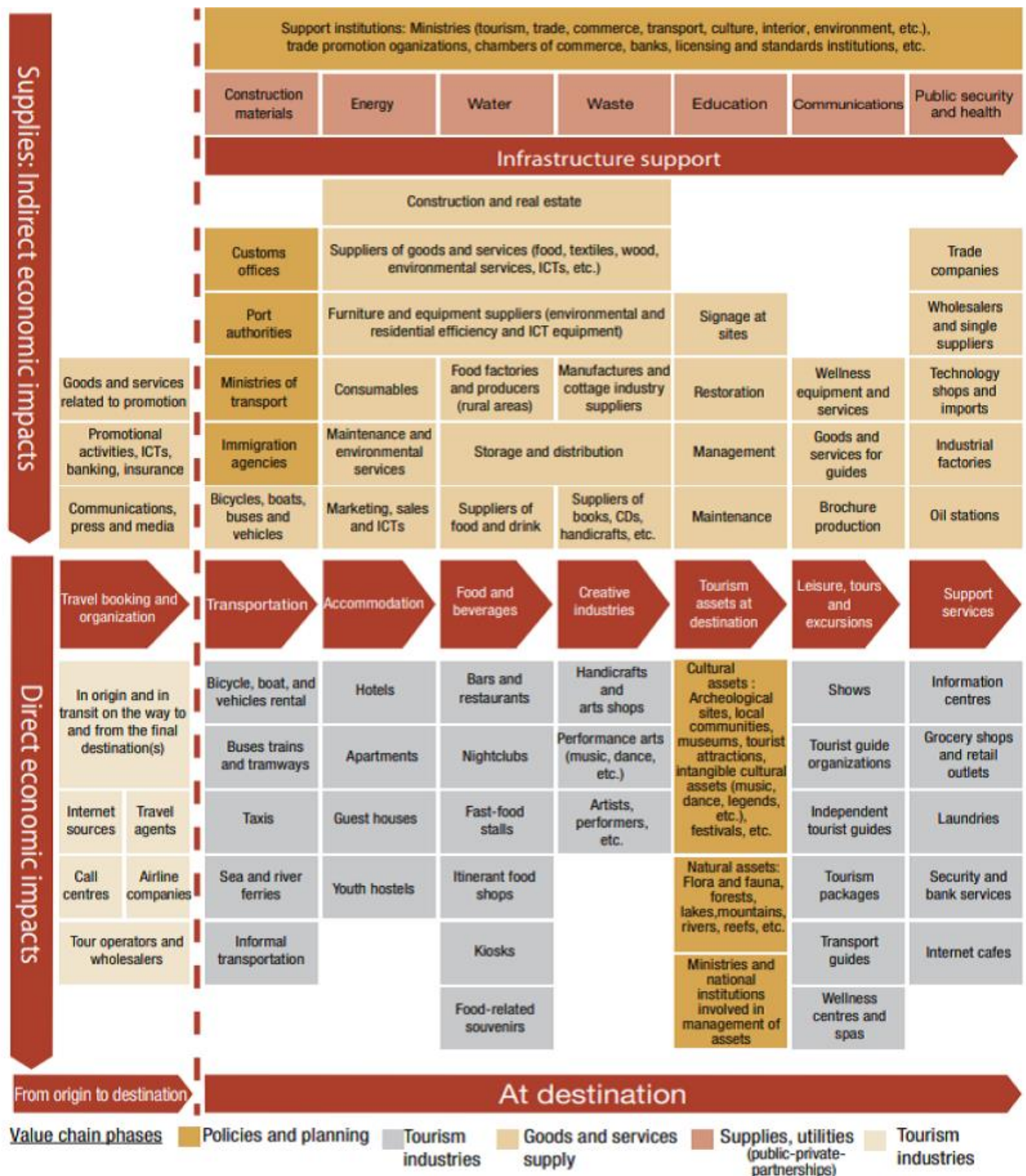


North Wales has established a leadership position having earned its reputation as the [Adventure Capital of Europe](#). Adopting UN SDG’s can provide the platform for the region to become recognised on the world stage as a truly sustainable destination.

Under the leadership of NWT experienced administrators from Visit Wales Regional Team plus a lead officer from each Local Authority and SNPA could be seconded to the Regional Destination Management Organisation (RDMO) replacing the existing regional tourism forum. This body could perhaps be part of a regional economic development agency and could play a key role of oversight of funds directed to the region via Enhanced Population calculations, ensuring these funds are used strategically to underpin the region's economic development plan in alignment with UN SDG's. Authority could be given to the RDMO through revised Remit Letters from Welsh Government Ministers, highlighting key strategic goals that should be supported and delivered within the region. Remits may also include restriction of public sector organisations contributing to destination marketing without endorsement of RDMO.

Both Overtourism and Undertourism are fundamentally symptoms of failed, under resourced economic and political leadership. Both need to be addressed as we reset for 2022. It will be challenging for Welsh Government to not only devolve more resources and accountability to partnerships that they have influence over but not have direct control. However, if the region is to embark on a journey that establishes North Wales as a beacon for the world with respect to sustainable destination management the private sector and its ability to draw investment, to innovate, create sustainable jobs and a vibrant "value net" needs to be empowered and supported to take the lead role.

The image below provides a good example of how crucial tourism is to destinations and just how many core functions of Government have both direct and indirect impact on the customer journey from; prearrival, during their stay and on their way home. These high-level interactions need managing to ensure they are as smooth and seamless as possible from the visitor perspective. It is of course crucial that these interactions are always managed and resourced with host communities at the forefront of policy makers, delivery organisations and regulative bodies minds. As much of Destination Management is delivered at Local Authority level primarily for the benefit of local residents with elected members and officers directly accountable to their electorate it is vital that their crucial role should be recognised, resourced and coordinated throughout the region.



Sustainable Development Goals highlight how a global approach to resetting North Wales Visitor Economy can be achieved for the benefit of those of us who live and work here and for future generations of visitors and residents. SDG's are in alignment with [Welsh Government core policies](#) and provide an overarching framework that provides space for a broad church of stakeholders that ensures everyone in our society has a stake and influence for a sustainable future.

Wales has 2 regions in the top-15 European regions at risk of Overtourism that directly impact on North Wales: West Wales and The Valleys and East Wales. Further information and case studies can be found at;

<https://research4committees.blog/2019/01/17/overtourism-impact-and-possible-policy-responses/>

Addressing structural deficiencies at regional and local levels will empower individuals, communities and enterprises to engage in a “bottom-up” approach. creating sustainable models of visitor management at a local level. Our sector needs Welsh Government and UK Government to collaborate to deliver a macro environment that is designed to discourage leakage from our economy. The introduction of Digital Transaction Tax at 2% is a welcomed first small step, stronger initiatives are desperately required to ensure more of the consumer spend is retained within our destinations. With [online travel agencies](#), [food delivery](#), transport platforms and online product markets extracting up to 30% in commission fees, most of which leaves the UK, Governments are overseeing enterprises being extorted for market share. The physical marketplace is full of regulations and laws designed to provide the consumer with reassurance of safety, provenance and legality plus providing a transparent environment for enterprises to trade. Governments need to address the inequalities and lack of transparency within the Online Marketplaces as a matter of urgency. Quick wins could include forcing all online sales to disclose at point of purchase how much commission is being paid and to what jurisdiction the commission will be sent – Afterall when we present a bill, we have to declare VAT and service charge! Parity between physical and online markets will empower consumers to make educated and informed choices. Another “quick win” could include relaxation of Government Intervention / State Aid rules that prohibit Governments from competing in the digital marketplace. This would encourage Visit Wales, NWT and MWT to develop Online Travel Agencies that charge up to 5% commission with all surplus / profits going back into destination marketing. Sustainable “sense of place” could be further enhanced through a national and regional code of conduct and grading award with minimum standards that effectively become a licence to be endorsed by the national and regional body. If the awarding body was sufficiently sophisticated to assess training and people development, we might encourage a rapid upskilling and broader recognition of career opportunities, a workplace environment that

competes with other sectors fostering meaningful links with HE and FE to evolve blended learning options that directly impact on visitor experiences.

Moving towards Destination Management and away from Destination Marketing will encourage greater emphasis and resources to support research and performance criteria. Intelligent analysis of [STEAM](#) to evaluate key metrics such as day, overnight, local and out of area visitor expenditure and habits will be crucial to revising targets and the allocation of resources required for sustainable visitor management.

The function and purpose of Visit Wales needs urgent review. It is appropriate for Welsh Government to fund and create national marketing collateral however, these materials should be used within agreed protocols by licensed enterprises who meet verifiable standards. The strategic purpose of Visit Wales should be informed by a “board that has a non-public sector majority.

5 Key “asks”

1. Alignment of Welsh Government Policies with UN SDG’s including the establishment of RDMO’s with addressing Undertourism & Overtourism within their region as their overriding “1st Principle”. They will provide oversight of funding to Local Authority and National Parks via Enhanced Population calculations, coordinating, local, regional, national policies
2. Visit Wales to be “repurposed” to reflect the aspirations of destinations and enterprises, especially micro, SME’s, 3rd sector – aligning Government strengths and capacity with destination management, developing grading and quality linked to sustainable destination management. Oversight of Visit Wales to be via a broad stakeholder group led by RDMO’s
3. Welsh Government to collaborate with UK Government to address inequalities of digital marketplace especially commission fee platforms to include mandatory display at point purchase the of amount of commission and country where funds will be received

4. Coordination of people development, market research and STEAM industry statistics to be led by RDMO's and supported with Remit letters from Welsh Government Ministers
5. Moratorium on all public sector spending on marketing

[Adrian Barsby](#) April 2021