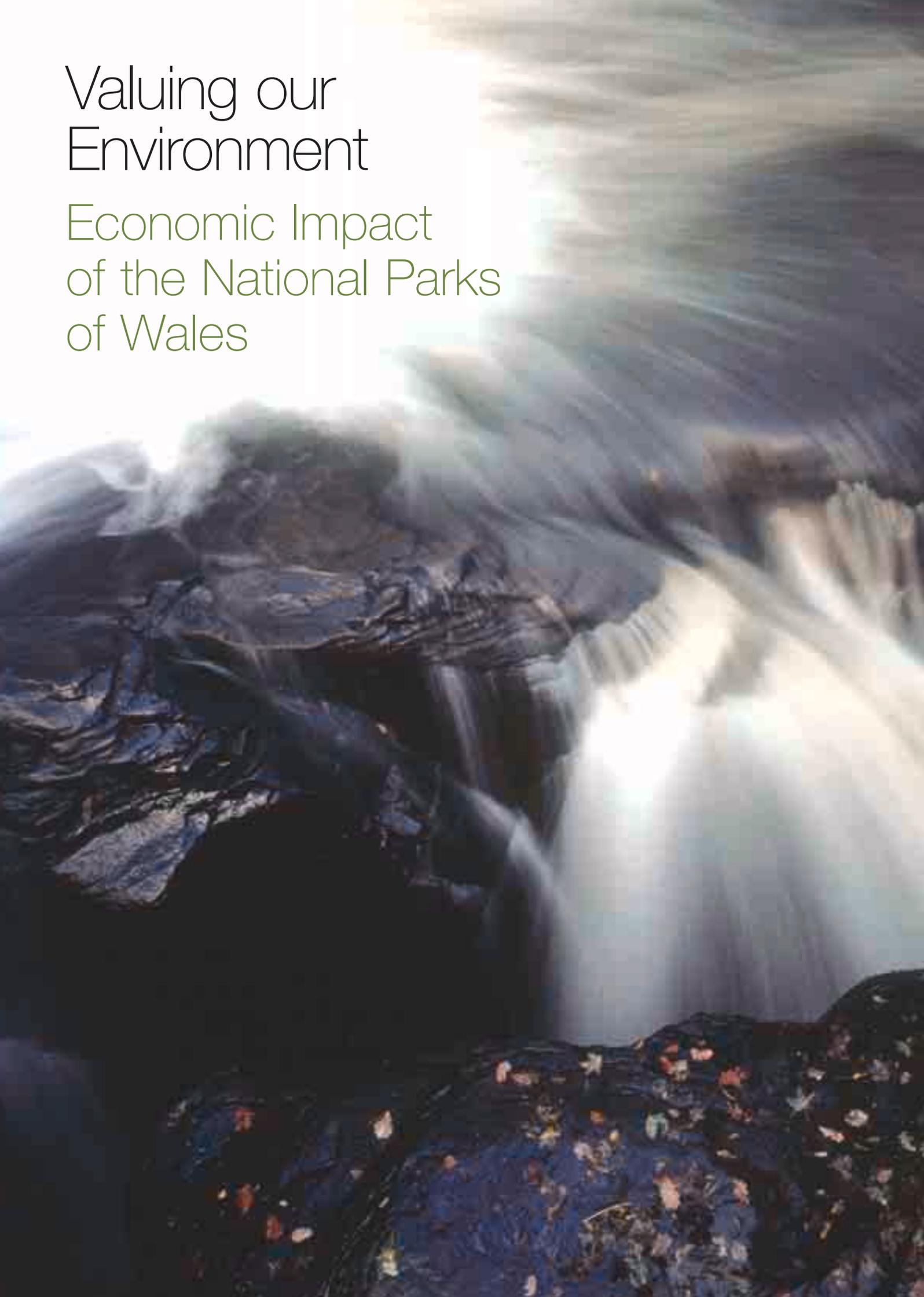
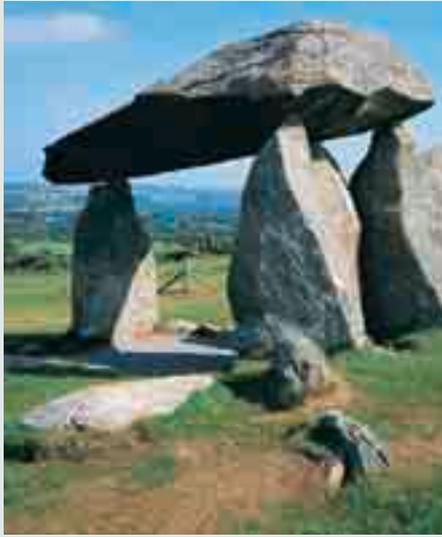


Valuing our Environment

Economic Impact of the National Parks of Wales



Introduction to 'Valuing our Environment'



© Crown Copyright 2006

The **Valuing our Environment Partnership** works together to reveal hard economic evidence that the environment is fundamental to prosperity in Wales. In 2001 the Partnership commissioned research which, for the first time, calculated the economic impact of the whole environment of Wales. It found:

The environment is fundamental to prosperity in Wales

- **£6 billion of GDP** in Wales is directly dependent on the environment.
- **1 in 6 Welsh jobs** is supported by the environment.
- The environment contributes **£1.8 billion in wages** to the economy of Wales each year.



© Crown Copyright 2006

The **economic activities** relating to the environment were categorised:

- Dependent on the quality of the environment (e.g. tourism and leisure)
- Intensive users of environmental resources (e.g. agriculture and water abstraction)
- Protecting and enhancing the environment (e.g. conservation and waste management)

The Valuing our Environment Partnership has also published research on the economic value of the historic environment in Wales as well as an analysis of the four economic regions of Wales.

The Valuing our Environment Partnership is led by the National Trust Wales and brings together major organisations working across Wales:-

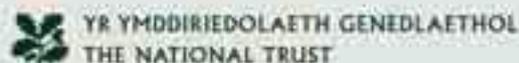
Countryside Council for Wales

Environment Agency Wales

Heritage Lottery Fund Wales

National Trust Wales

Welsh Assembly Government – DEIN



Valuing the National Parks of Wales



© NTP/Lian Shaw



Image Courtesy of BENPA

This new research sets out to inform the National Assembly for Wales, Local Authorities and other decision makers in Wales about the economic value of the three National Parks of Wales. It shows that the Brecon Beacons National Park, Pembrokeshire Coast National Park and Snowdonia National Park make a considerable contribution to the economy of Wales.

The environment of the three National Parks of Wales:

- **Supports nearly 12,000 jobs**
- **Produces total income of £177 million**
- **Generates £205 million GDP**

A breakdown of the headline figures shows that the Parks' environment directly supports 10,200 jobs, £146 million income to businesses and contributes £176 million to the economy of Wales. These direct jobs and outputs generate further indirect economic activity in Wales through their impacts on suppliers and wages spent in Wales. The relationship of this study to related economic assessments such as 'STEAM' is included in the full report on the website.

Environmentally linked economic activity in the three National Parks of Wales

Indicator	BBNP	PCNP	SNP	Total
Employment				
Direct employment	2,718	3,762	3,775	10,255
Indirect employment in NP	153	61	66	280
Indirect employment outside NP	426	831	135	1,392
Total	3,279	4,653	3,975	11,926
Income (£ millions)				
Direct income	40.17	51.41	55.17	146.75
Indirect income in NP	1.25	0.77	0.71	2.74
Indirect income outside NP	7.23	16.20	3.90	27.33
Total	48.65	68.39	59.78	176.82
GDP (£ millions)				
Direct	48.70	65.30	62.75	176.75
Indirect	9.88	15.24	2.87	27.99
Total	58.58	80.54	65.62	204.74

The environment of the National Parks of Wales is a major economic asset

Valuing the National Parks of Wales



© Crown Copyright 2006

Employment

- 10% of all Welsh employment linked to the environment is based on the National Parks.
- In the National Parks the percentage of jobs dependent on the environment is more than double the Wales average.

Using the three categories of environment related employment, the research showed that the employment profiles in the three National Parks of Wales are similar, but that they are distinctly different from Wales as a whole. Activities dependent on the quality of the environment such as tourism and recreation, and intensive users of the environment, such as agriculture and fishing are the most important sectors.

Tourism is the dominant employment in Snowdonia and Pembrokeshire Coast National Parks. In Brecon Beacons National Park agriculture is the biggest sector.

Benefits beyond the boundaries

- The National Parks are icons for tourism inside and outside the boundaries.
- The Parks provide a strong brand image for Welsh goods and services.
- Much of the economic benefit of the Parks occurs outside their boundaries.
- The Parks therefore support not only their local economies but also the economy of Wales as a whole.



Image Courtesy Pembrokeshire County Council



© APCE/SNPA

< The research looked at the economic impact of the Snowdonia National Park on Dolgellau, a town within its boundaries, and compared the benefit with that gained by Machynlleth, a town outside the Park. Results showed that both towns benefited equally from the National Park and its environment. This highlights the value of the Parks to the whole of Wales.

Valuing Brecon Beacons National Park



© BENIPA/Mari Roberts



© BENIPA/Nigel Turner



© BENIPA/Mari Roberts

The environment of the Brecon Beacons National Park

- Produces a total of £49 million in income
- Supports nearly 3,300 jobs
- Contributes £59 million to the GDP of Wales

Agriculture is the biggest employment sector in the Brecon Beacons National Park. Tourism activities, in particular recreation, are also important. A significant proportion of tourism visits to the Brecon Beacons National Park are day visits by local residents from the South Wales region. Brecon Beacons has the lowest direct employment of all the National Parks but has the largest indirect employment within its boundaries. There is a high level of self sufficiency in the economy of Brecon Beacon National Park. Specific examples include contracting work in agriculture, which is sourced locally, and the hospitality industry that uses local food to enhance marketability.

Key Findings

Employment

- Total direct employment linked to the environment of the Brecon Beacons National Park amounts to 2,718 jobs.
- Indirect employment is 579.
- About three quarters (74%) of indirect employment occurs outside the Park.

Income

- Direct income from the National Park is £40.17 million.
- Indirect income is a further £8.48 million.
- 85% (£7.23 million) of indirect income benefits the rest of the Welsh economy outside the Park boundary.

< The British Horse Society (BHS) has given a 'Best Access' award to the Brecon Beacons National Park for being the most active National Park in opening up equestrian routes. This has brought significant economic benefit to businesses within the Park.

Valuing Pembrokeshire Coast National Park



© NTPL/Ian Shaw



© Crown Copyright 2006



© Crown Copyright 2006

The environment of the Pembrokeshire Coast National Park

- **Generates a total of £68 million in income**
- **Supports 4,653 jobs**
- **Contributes £81 million to the GDP of Wales**

The Pembrokeshire Coast National Park has a huge economic impact outside its boundaries because it is mainly a coastal ribbon. Nearly all the indirect employment and indirect incomes generated by the Park environment benefits the rest of the Welsh economy. Employees, goods and services can easily travel in and out of the Park and the majority of suppliers and employees are located outside the Park. Employment is strongly tourism based.

Key Findings

Employment

- Total direct employment relating to the environment of the Pembrokeshire Coast National Park amounts to 3,762 jobs.
- Indirect employment is 892.
- 93% of indirect employment occurs outside the National Park.

Income

- Direct income from the Pembrokeshire Coast National Park is £51.41 million.
- Indirect income is a further £16.97 million.
- 95% (£16.2 million) of indirect income occurs outside the Park.

< In a recent survey into the benefits of National Trails in Wales commissioned by the Countryside Council for Wales, the Pembrokeshire Coast Path was identified as having a significant impact on accommodation providers, with almost half of those contacted saying that the Trail was 'very important to the profitability' of their business. Earlier research from the Coast Path User survey calculated that the coastal path generated some £14m into the local economy (1997).

Valuing Snowdonia National Park



© NTP/Lian Shaw



© NTP/L Joe Cornish



© National Trust

The Environment of the Snowdonia National Park

- **Generates a total of £60 million in incomes**
- **Supports nearly 4,000 jobs**
- **Contributes £66 million to the GDP of Wales**

Tourism is the most important employer in the Snowdonia National Park. Much of the economic benefit occurs outside its boundaries. Many day visitors come to the Park from tourist accommodation outside the Park. Therefore visitor numbers are high but the spend per head within the Park is low. Businesses in Snowdonia mainly employ people who live in the Park (82%) and source more than half their supplies from within the boundaries.

Key Findings

Employment

- Total direct employment relating to the environment of the Snowdonia National Park amounts to 3,775 jobs.
- Indirect employment is 201.
- Two thirds (67%) of indirect employment occurs outside the National Park.

Income

- Direct income from the Snowdonia National Park is £55.17 millions.
- Indirect income is a further £4.61 million.
- 85% (£3.9 million) of indirect income benefits the rest of the Welsh economy outside the Park.

< The Snowdonia Upland Footpath Scheme is a European funded £1.5 million partnership between the Countryside Council for Wales, the National Trust and Snowdonia National Park, which has created 16 jobs, improved the quality of the landscape and increased the local skills base.

Conclusions

National Parks are designated to conserve and enhance natural beauty, wildlife and cultural heritage, and to promote opportunities for the understanding and enjoyment of the area by the public, while seeking to foster the socio-economic well being of their communities.

The conservation duty is often perceived as a limit on development. However this research shows that the three National Parks make a significant contribution to their regional economies, and indeed to the economy of Wales.

The iconic qualities of the environment in the three National Parks are major attractions to visitors. Their economic value benefits the whole of Wales.

The National Parks continue to need strong protection in order to ensure that they remain a major asset for Wales. This research will provide the evidence to increase recognition of their value.

For more information:

Phone the National Trust on **029 2046 2281**. For the full report click on **www.nationaltrust.org.uk/walespolicy**

This publication is available in large-format print.

Printed using vegetable-based inks on chlorine free paper made from sustainable sources.

October 2006.

The research was jointly funded by the Countryside Council for Wales, Brecon Beacons National Park Authority, Pembrokeshire Coast National Park Authority, Snowdonia National Park Authority and the National Trust Wales.



YR YMDDIRIEDOLAETH GENEDLAETHOL
THE NATIONAL TRUST