

Executive summary

Tourism plays a huge part in the Welsh economy, generating £6.2 billion in visitor expenditure every year, although this is not without challenges, notably for litter and waste management. Tourism generally correlates with an increasing prevalence of general litter, equipment litter, fly-camping, fly-tipping from holiday lets and misuse of public bins. The phenomenon of tourism-related litter has been well-studied through various means including perception surveys, correlations between beach visitor numbers or seasonal tourism influxes with litter levels, and beach visitor association with certain litter types like on-the-go food and drinks packaging. These issues have been enhanced by the coronavirus pandemic as domestic tourism increased as international travel restrictions were imposed, creating unprecedented concentrations of visitors in more rural destinations and a related increase in on-the-go food and drink consumption.

The study of visitor behaviour is known as 'holiday psychology' due to distinguishable differences to studies of behaviour in the home or work situation. The most influential behaviour principles on tourists are perceived behavioural control (the ease of an action), social and personal norms, incentives, and the 'spillover' effect (the reproduction of behaviours from other settings such as work or home). Perceived behavioural control is lower whilst on holiday (actions seem more burdensome) as the focus is on more 'hedonistic' desires rather than responsibilities. Hence, the consumption of cheap poor-quality items like equipment or packaging that may not be bought at home is increased, escalating visitor destination waste problems. In this situation, the phenomenon of 'moral licencing' permits people to act in less environmentally conscious ways than usual as they justify less environmentally responsible decisions on holiday with good pro-environmental behaviour at home.

There are numerous opportunities to address these issues at Welsh Government, local government, national park and business or industry level. These include techniques tried and tested elsewhere such as the introduction of a visitor levy which could support revenues for local services. Evidence from other destinations with visitor levies suggest this is best done through highly transparent means where the funding is clearly ringfenced for environmental and regenerative purposes. A charge of just one pound per person per night could generate up to £41 million in revenue for the whole of Wales.

Marketing techniques that have been effective in European destinations involve advertising visible codes of conducts in national parks, and promoting messaging emphasising area nature designations and zoning policies. These can help communicate that anti-social behaviour is not acceptable and demonstrate responsible behaviours to new visitors who are not accustomed to visiting these areas of natural beauty. Alongside current efforts, the Welsh Government is encouraged to pursue incentives for packaging reduction for businesses and customers through grants, tax reductions or packaging levies. This can facilitate the transition to normalising sustainable packaging even where it is more expensive than its unsustainable counterparts. Increasing responsibly managed camping capacity through aires (where campervans can stop for use of the most basic facilities such as waste disposal (refuse and bodily) and running water) and pop-up campsites can help respond to the surge in fly-camping which has been seen as a result of the COVID-19 pandemic, with Gwynedd planning to trial aires in 2023. It is noted that this growth in fly-camping may decrease naturally as international flight capacity recovers post-lockdowns.

Holiday let uncertainty should also be investigated and more heavily regulated and monitored when it comes to waste as current guidelines do not state who the onus of proper waste disposal falls on (i.e., guests or hosts) and allow small businesses to be exempt from requiring trade waste agreements. Smaller-scale opportunities could be trialled and expanded if successful, like voluntary smoking or plastic item bans, Adopt-a-beach / Coast Care schemes and binfrastructure for recycling equipment waste or borrowing items. Some of these recommendations will require specialist knowledge in determining how they will work in the Welsh or local contexts and how is best to implement them, therefore it is essential to work closely with tourism partners and stakeholders.

The COVID-19 pandemic and subsequent travel restrictions brought increased challenges for destination and visitor management as unprecedented numbers and a 'new' audience of visitors took domestic holidays. Litter and waste management is rarely a key feature in national tourism policy, yet it is being increasingly prioritised, especially in local and regional plans. Litter and waste have a twofold impact, not only putting a strain on the managing authority to deal with (often by diverting resources from elsewhere) but it also has a significant impact on visitor perception of an area (and their likelihood of making a return visit). It is suggested that litter and waste management should be allocated greater attention and resources which take into account seasonal pressures as it is seen as one of the most integral parts of visitor management which many councils and other duty bodies are struggling with. Waste management is a feature in many local and regional plans but has yet to be truly recognised in any national strategies from the sector or government.

Meanwhile, whilst tourism businesses are leading the way in terms of plastic and waste reduction through voluntary initiatives such as the <u>Global Tourism Plastics Initiative</u> and <u>Green Key</u>, these schemes have yet to extend to the 'private hosting' sectors which make up a significant percentage of Wales' accommodation offer and represent a missed opportunity to engage visitors.ⁱ

Key points

- There is a correlation between visitor numbers and littering and waste management issues which puts a strain on local resources and service delivery.
- Visitors may be unfamiliar with waste practice in the area they visit, lack a 'connection' with the area or they may be driven by 'holiday psychology' factors which may result in less responsible waste behaviours.
- This research indicates that specific interventions, messaging and targeted awareness raising is required for visitors.
- Whilst litter and waste management are common in local tourism sustainability plans, it tends not to be recognised through more regional and national plans, despite the significant impact on resources and services.
- Whilst many tourism and hospitality businesses are increasingly adopting more responsible
 practices and standards, there is a significant gap in the requirements and initiatives within
 the private hosting sector.
- There are a number of policies and initiatives which could be considered to support visitor destinations in managing these issues more effectively and many examples of best practice.

- A Visitor Levy ringfenced for environmental resources and services would be one part of a solution to ensuring greater resource allocation in those areas that are both struggling to cope with demand but also rely on high environmental standards to attract return visits.
- Circular economy ambitions are essential parts of sustainable tourism. Reuse and repair
 initiatives, as well as overall waste reduction through businesses and local and national
 policies, will have an impact in lessening the problem and promoting positive behaviours.
- Communities are often already engaged in local tourism and waste management issues and their activities can be maximised with the support of local authorities and relevant NGOs.

Recommendations

Please note that some recommendations can be achieved individually or through partnerships across different levels but have been presented only once in the table for clarity.

Welsh Government

General tourism litter

- A tourism levy may help fund local authority waste management such as litter picking, and bin provision and collection as well as supporting regeneration and environmental improvement.
- Business incentives to reduce non-biodegradable or single-use packaging such as expanded polystyrene for example chip trays and coffee cups.
- Promote the use of reusable facemasks instead of single-use masks wherever possible.

Equipment litter and fly-camping

• Bans of cheap poor-quality equipment.

Fly-tipping and holiday residences

- Determine who the legal onus of proper waste disposal falls to for holiday lets - guests or hosts. All types of holiday accommodation should come under Business Waste regulations for the sake of clarity and accountability.
- Target holiday let booking sites such as AirBnb to establish a common guidance and waste management principles which lays out host and visitor responsibilities.

Local government and national park authorities

General tourism litter

- Voluntary smoking bans on problem-beaches could be applied in some areas but should be subject to impact assessment.
- Appropriate marketing for the area either through demarketing, nature conservation area signage or stressing codes of conduct in national parks and other popular areas.
- Encourage an Adopt-a-beach / Coast Care scheme for out-of-season amenity beaches, or beaches not cleansed regularly by the local authority.
- Highlight wherever possible the nature conservation value of an area and code of conduct through numerous information channels, especially in national parks and other exceptional land designations.
- Focus on retaining repeat visitors who may develop place attachment more easily than one-off visitors.

Equipment litter and fly-camping

- Trialling pop-up campsites and aires located in areas seeking more visitors, so to spread financial benefits and reduce overcrowding in popular areas.
- A broken equipment box to collect broken equipment for recycling.
- Trials of enforced or casual zoning of areas to prevent some activities from occurring in naturally sensitive areas, while allowing space for this in less sensitive areas.
- A 'beach toy library' where equipment can be placed for reuse by someone else, including buckets, spades, nets, parasols, bodyboards, hiking poles, waterproof ponchos etc.

Fly-tipping and holiday residences

- Send educational materials on waste management duties to the host or management company either when they move from domestic to business tax rates, or when holiday lets are granted a change of use class (pending consultation by Welsh Government).
- Local authority bin audits should map holiday accommodation and should allocate bin provision and messaging accordingly.
- Investigate the use of binfrastructure design as a deterrent of using public bins for domestic holiday let waste.
- Promote the ease of pro-environmental behaviour (PEB) by referring back to people's behaviours at home regarding recycling and waste management.

Business and industry

General tourism litter

- Public incentives to bring reusable containers / bottles through the application of financial levies or localised deposit return schemes.
- Encourage the uptake of Litter Free Zones programme by businesses, especially in high footfall areas and visitor destinations.
- Beach equipment hire schemes to minimise purchases of cheap poor-quality equipment.
- Further expanding refill stations to tourist hotspots to reduce plastic bottle consumption.



