

Cross Party Group Title:	Outdoor Activity Sector in Wales
Date of Meeting:	23rd June 2023
Location:	Plas Menai National Outdoor Centre for Wales, Caernarfon
Attendees:	Title:
Sam Rowlands (SR)	Chair – Member of the Senedd
Rhun ap Iorweth	Member of the Senedd (for Presentation 1)
Paul Donovan	Secretariat - Wales Adventure Tourism Organisation
Rebecca Brough	Secretariat – Ramblers Cymru
Harry Saville	Office of Sam Rowlands MS
Emma Edwards-Jones	Member - Snowdonia-Active Representative
Alison Roberts	Observer - Natural Resources Wales Representative
Phil Stone	Member – Canoe Wales representative
Gethin Thomas	Member – Bangor University
Tracey Evans	Member- The Outdoor Partnership Representative
Paul Frost	Member- The Outdoor Partnership Representative
Paul Airey	Member- The Outdoor Partnership Representative
Tom Carrick	Member – British Mountaineering Council Cymru
Dave MacCallum	Observer – Natural Resources Wales
Arwel Phillips	Member - Urdd
Graham French	Member - AHOEC North Wales Representative
Steve Morgan	Member – Plas Menai
Alistair Dickson	Member - Canoe Wales
Eluned Roberts	Member – Institute Outdoor Learning Cymru
Simon Patten	Member – Mountain training Cymru

Jethro Moore	Member – NCC & Adventure Beyond
Mark Jones	Member - The Outdoor Partnership Representative
Gwenda Owen	Member – Cycling UK
Sioned Williams	Member – Swim Wales
Deborah Mahon	Member – Sport Wales
Mike Smith	Member – SWOAPG & Dolygaer

1. Welcome, Introductions, Apologies, and opening remarks.

Steve Morgan, Head of Operations at Plas Menai, welcomed the group to the centre and invited members to participate in a water-based activity after the meeting.

The Chair welcomed members and set out his intention to share key points and presentations from the meeting with both Ministers and Senedd members to further awareness and ongoing discussions.

Rhun ap Iorwerth MS assured the group of his commitment to the outdoor activity sector and to helping achieve more connection through outdoor activity, especially amongst young people; he welcomed the strong engagement of the sector and recognised the importance of the ideas generated through the group's discussions which politicians can strive to deliver.

Apologies were noted and the minutes of the March 2023 meeting agreed as accurate.

Matters arising from previous meeting:

- CPG member's letter regarding access reform trials has been resent to Deputy Minister for Climate Change following reshuffle of portfolios. A follow-up meeting is being sought with the Deputy Minister and representatives of Cycling UK, Ramblers Cymru and Wales Adventure Tourism Organisation.
- Further briefings and questions related to public access and the Agriculture Bill were provided to Senedd members.

Presentation 1: "Talking about Outdoor Safety...everyone's an expert!" (Emma Edwards-Jones- Snowdonia Active, Paul Donovan- Wales Adventure Tourism Organisation)

- Founded in Wales to help reduce pressure on Coastguard, RNLI and Mountain Rescue teams by addressing need for safety information, the AdventureSmart approach was a response to Visit Wales' Year of Adventure campaign.
- It is a collaborative, evidence-based model, financially supported initially by the Welsh Government with continued support from partner organisations, working to understand what is driving rescue callouts.
- See similar problems across world and now part of an international group working to further safety in the outdoors.
- The challenge is converting expert, detailed knowledge to reach both new participants and those with some experience and confidence who are pushing their boundaries.
- AdventureSmart is an enabling campaign to support, not scare, people; behaviour change focus to understand motivations and help people take responsibility.
- Carefully crafted messages, developed collaboratively with experts and shared through partners including tourism businesses who have reach to target audiences.
- Highlighted how crafting messaging is important, including addressing ambiguity, complexity, and assumptions of comprehension levels (e.g., reading levels)
- Building trusted and consistent brand – a partnership, not an organisation, with a business toolkit to encourage providers, the hospitality and retail sectors to share and support messaging.
- Full communications and brand package which can be used in a 'pick and mix' style with other messaging, e.g. Countryside code. Friday socials every month to amplify messaging through partners and working with Mosaic Outdoors to reach BME groups.

- Strong uptake of approach in Lake District has enabled expansion to Adventure Smart UK (also in NI) projects.
- Ongoing challenges of finding and using appropriate, engaging imagery which shows good practice, and being aware that technology and practice change quickly in some activities.

Discussion points included:

Consider how to utilise the potential of TikTok shorts and influencers – maximising the effective use of video on these platforms, including value of ‘shock’ tactics.

Navigation messaging - suggestion made regarding working with the Orienteering Federation or looking at the Scout and Guide movement’s approach to teaching in this area. May also be opportunities with map providers (e.g., google) promoting messaging?

The importance of end-user engagement to get feedback – this is happening but there are capacity limitations.

The challenge is to make it financially viable, including for other community languages.

Tensions – safety knowledge is needed and levels of understanding, but key is to not make the outdoors a scary place but to encourage people to do it well.

Would like to get messaging promoted through large retailers, but in a way which is not about selling more kit, with focus remaining on knowledge and safety. Affordability of kit is a big issue which can exclude people, so need to be careful.

Presentation 2: Access to Water (Phil Stone – Canoe Wales)

- In Wales, 61.4k adults took part in water activities (in 2018); 62K children take part per yr via school – opportunities here to link to safety messaging at early age; 7.6m across uk (doubled in 2 years)
- Participation numbers have increased since the pandemic e.g. Stand Up Paddleboarding up 300%, Canoe Wales membership has doubled.
- Limited free access to water in Wales, with only 27km of free navigation out of 10,700km rivers. There are some restricted agreements in place, e.g. with limits on time of use
- In Spring 2019 the Minister with responsibility for access to water committed to seeing change in 18 months, or the government would legislate for improvements. However, there has been no progress.
- Through a National Access Forum sub-group, a 2-year process of collaborative discussion resulted in a report outlining a way forward, but this has not been taken forward by the Welsh government.
- Lots of visible signage acting as barriers; confrontations not uncommon; physical barriers (steep banks, barbed wire).
- Paddlers play a part in supporting cleaner rivers e.g. volunteer days have resulted in ten tons of waste removed from the Teifi over 4 Saturdays (predominately agricultural waste); Check-Clean-Dry is prevalent behaviour amongst paddler to ensure biosecurity.
- Fair, shared, and sustainable access for all is the ambition.

Discussion points

Reason for no legislation? Available time given as reason however it was noted that there is capacity in legislative committees and plenary for scrutiny of Bills.

Some further piloting of agreements is planned however ownership issues make it difficult. Higher rights routes could lead to public inquiry challenges and the need for compulsory purchase.

Loss of National Access forum Water subgroup is a concern – had built relationships, but its disbanding is leading to re-entrenchment and silos.

Are there learnings from the implementation of Open Access Land, or indications that a Scottish model is being considered? Open Access Land was delivered without the need to pay for rights, suggested that the same approach should work for water rights. It was felt that attitudes to water use are not as relaxed in Wales as in Scotland.

Concerns that limited sites are making environmental pressures more extreme – there is a need to share impacts across more sites, supporting case for better rights.

The current model is not working for Wales, but reluctance to do something difficult. Suggested that Liberal Democrat policy is moving to be more supportive at UK level.

Suggestion that the Swim Wales accreditation and assessment process for safety of swimming at staffed sites, approach could be adapted to unmanned sites. Canoe Wales has asked NRW/ Dwr Cymru to look at their sites for access improvements.

Presentation 3: Adventure Learning Framework (Gethin Mon Thomas - Bangor University, Tracey Evans – The Outdoor Partnership)

- Highlighted social value/return on investment for their outdoor activity work (£1 investment brings £7.12 return)
- Education is the place to start passion for activity as part of everyday life; curriculum for Wales gives an opportunity through the four purposes, chance to use meaningful adventure learning experiences as equally important part of education.
- Framework to help develop an individual's ability across areas like risk and lived experience, supporting learners to achieve the four purposes. Contributes to problem solving, collaboration, confidence, and self-esteem through physical and social experiences – skills and attitudes that employers will want.
- Framework helps schools see the opportunities and promotes engagement with activities, including, on or near site, and off-site adventure learning. Linked to Cynefin concept (emphasis on local area – ‘grow roots before growing wings’)
- Framework uses principles of progression as part of learning and assessment.
- Currently developing guidance, awards, staff training, and seeking impactful case studies in trial schools. Pilot schools are testing resources; will apply learning to refine and further develop ahead of national upscaling over 12-24 months.
- Looking for support and funding to scale up – UK alignment is a future objective.

Discussion points

Parental anxiety and liability concerns can fuel the restrictive nature of children's education; risk aversion of parents and school headteacher are often barriers. This highlights the importance of safety education and training of staff to build skills and confidence; also, guidance had been adopted by Welsh Government covering outdoor visits.

Importance of outdoor education advisors (OEA) having conversations with staff and parents on the benefits outweighing risks. Teachers need guidance and advice but without resorting to off-the-shelf plans which goes against the ethos of curriculum.

The role of outdoor education advisers (local authorities may have this role as part of a wider job description) is to support schools in outdoor educational opportunities. Wales has a network of Outdoor Education Advisers chaired by Clare Adams (T: 01600 750221, 07966 158868.

E: clareadams@monmouthshire.gov.uk.

National Guidance, adopted by Wales Government as the primary source of guidance in Wales for educational establishments, has a description of the role of OEAs and the consistent network of OEAs covering the country (<https://oeapng.info>)

This guidance also covers FE colleges and OEAs are starting to roll out Further Education Visits Coordinator training for FE college senior managers. There is a working group at present for this initiative, supported by the Senedd, chaired by Paul Airey, with Mike Rosser as the development officer. The Welsh Government lead is Marion Jebb, head of post 16 Quality in FE. (marian.Jebb@gov.wales).

Institute for Outdoor Learning are hoping to run conferences in 2024 to bring teachers and providers together to share knowledge and give support, e.g. child-led risk assessment to develop skills.

The importance of developing decision-making skills in curriculum can be supported by this outdoor learning approach; covid has adversely affected the way children are interacting and behaving.

Presentation 4 - Economic and Social Evaluation of the Outdoor Activity Sector in Wales (Paul Donovan - Wales Adventure Tourism Organisation)

- Pembrokeshire Coastal Forum, a core member of the Wales Adventure Tourism Organisation alongside Snowdonia-Active and South Wales Outdoor Activity Providers Group, secured funding from the Welsh Government Coastal Capacity Building Challenge Fund to conduct an economic and social evaluation of the outdoor activity sector in Wales.
- The research was conducted by Miller Research with the aim of assessing the economic impact, considering the social value of adventure activities, and setting a baseline to enable strategic plan for adventure tourism.
- 606 responses to the survey came from both activity participants and activity providers, evidencing significant growth and change in the outdoor sector as highlighted in similar research conducted by Miller Research in 2014.
- The mental health value of the outdoor activities sector to Wales is £26.4m, with 94% citing mental health and wellbeing as extremely or very important.
- There were high levels of visitor satisfaction with 94% saying that they would come back to Wales or recommend it to others.
- Net economic impact of outdoor activity providers amounts to £272.87 million annually with £205 million staying in Wales.
- Net impact of outdoor activity tourism on the Welsh economy amounts to £1.619 billion annually with 31.3K jobs supported, which equates to 21% of the tourism workforce in Wales.
- Those who take part in adventure activities with an activity provider are likely to stay longer, spend more and behave appropriately.
- The Outdoor Education (Wales) Bill could provide a significant boost for the outdoor sector.

- A 10% increase in participation would create a social value return of £187 million.

Discussion points

Has the evaluation looked specifically at Welsh language providers? This was not specifically highlighted in this report. Some work is underway via a PhD in Cardiff University

Importance of clarity around use of metrics like social value and being clear when it related to a specific project/ or more general survey. Danger of different metrics for sector being used which could undermine credibility.

General updates

Adventure Activity Accreditation (Paul Donovan - Adventure UK, Outdoor Alliance Wales)

- In 2017, HSE asked Adventure UK (formerly the Adventure Activities Industry Advisory Council) to propose a non-statutory alternative scheme to the Adventure Activities Licensing Authority (AALA) scheme, considering key criteria set by HSE.
- HSE consulted with the adventure activity sector in the UK, offering 3 possible options: Option 1 - status quo; Option 2 - amendments to the statute regarding extending the range of activities and removal of the set fee to enable alignment; Option 3 - the repeal The Activity Centres (Young Persons' Safety) Act 1995 in favour of the Adventure UK proposal. The result of the consultation was to proceed with Option 3 - further developing the AdventureUK proposal.
- Further development work, consultation with the adventure activity sector in the UK and liaising with HSE, resulting in a final proposal being presented to HSE in 2022.
- During this time, a new contractor (AdventureRMS) for the AALA scheme was appointed, with HSE fulfilling the administrative role. This was previously carried out by the previous contractor (TQS).
- HSE have now confirmed that they are to continue with the current arrangements regarding statutory licensing in the UK for adventure activities and not pursue the Adventure UK proposal. This is despite the HSE consultation in 2017 indicating very little support for Option 1, which was to do nothing, no change.

NB. To pursue Options 2 & 3 would require HSE Board and Ministerial approval together with parliamentary time to either amend or repeal The Activity Centres (Young Persons' Safety) Act 1995.

- The adventure activity sector in the UK has one statutory accreditation scheme (AALA) which is aimed at providers offering certain activities to under 18s, and a number of non-statutory accreditation schemes Adventuremark, Learning Outside the Classroom (LOtC) Quality Badge Adventurous Activities, Association of Heads of Outdoor Education Centres (AHOEC) Gold Standard & British Activity Providers Association (BAPA) which are aimed at providers offering any adventure activities regardless of who they provide it to and where it is provided. In addition, there are a number of National Governing Body (NGB) schemes for specific activities.
- Visit Wales has its own adventure activity assurance scheme to enable providers of adventure activities in Wales to be listed on [VisitWales.com](https://www.visitwales.com). The scheme recognises the UK accreditation schemes and provides a route for those who are not accredited by one of the UK schemes. This route involves a consultation with a Visit Wales nominated technical consultant and includes an audit of the business and an activity observation to ensure the provider meets the Visit Wales scheme ten standards.

Outdoor Education (Wales) Bill (Sam Rowlands MS)

- This was given leave to proceed given in October 2022, giving 13 months to lay version on Bill in Senedd (by November 2023). A broad consultation was conducted in early 2023, and a children and young person consultation is currently underway.
- The draft Bill has been kept as simple as possible and will be open for summer consultation. It is not possible to secure funding commitment through the legislation, so the Bill is being carefully drafted. The challenge ahead regarding achieving political support was raised, given the votes available, but if vote is tied. convention is that the Chair will vote for the Bill.

Meeting Actions

ACTION: Secretariat to provide copies of presentations and supporting key notes for June meet. to the Chair for onward circulation

Date of next meeting: to be confirmed.