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PR19 Public Access and Recreation

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1.1. Introduction

As a customer focussed company, we want as many of our customers as possible to enjoy the assets that we own on their behalf.

2015-2020 has seen a step change in our activities to encourage visitors to our sites. By the end of AMP7 we want to realise our ambition to create a network of well-used, high quality visitor destinations.

We have set ourselves the challenging target of almost doubling the footfall at our visitor centres by 2025. The 2024/25 visitor number target is 830,000 visitors, representing an almost 90% increase on the 425,000 visitor numbers in 2018/19.

Looking to the longer term, our company’s strategic vision outlined in our Welsh Water 2050 document includes becoming, ‘a business which uses its land holdings and other assets to maximise the well-being if its customers, encouraging healthy lifestyles and recreation, and supporting biodiversity and ecosystems’. By the end of AMP7, we will be well on course toward the achievement of this goal.

This section of our Business Plan covers:

- The background to our investment in recreational facilities;
- The significant progress we have made in AMP 6 to improve our facilities for visitors;
- An outline of the additional investment planned by 2020;
- Customer feedback;
- Affordability; and
- Supporting the Welsh Government agenda.

The background to our investment in recreational facilities

Welsh Water is a major land holder. We own and manage an estate that comprises some 2,000 sites or 35,000 hectares across Wales and the Marches.

Like all statutory water undertakers, Welsh Water is under a long-standing legal duty (under section 3 of the Water Industry Act 1991) to ensure that, within the exercise of our functions, the water and land we own is made available for recreational purposes, where reasonably practicable. The same duty in the 1991 Act places conservation duties upon us, reminding us of our important stewardship role. As a Welsh public authority, we are under a strengthened biodiversity duty by virtue of the Environment (Wales) Act 2016.

Our asset base includes about 90 reservoirs, varying in size from 2 acres to over 1000 acres. We actively encourage the public to visit and enjoy 17 of our larger reservoir sites. Some are an integral part of Wales’ most iconic landscapes, such as the Brecon Beacons National Park. The Elan Estate, under the management of the Elan Valley Trust, is our most extensive land holding, encompassing 72 square miles of unspoilt land and water. Many of our sites are
designated for their nature conservation interest, for example all those with visitor centres are Sites of Special Scientific Interest.

The extent and type of facilities for visitors varies between sites, with some much more developed than others. For example, our reservoir sites within the National Parks are comparatively undeveloped, offering visitors the opportunity for the peaceful enjoyment of the magnificent local landscapes. In contrast, we offer a much wider range of activities elsewhere, particularly at our growing network of visitor centres.

Significant progress in 2015-2020 to improve our facilities for visitors

AMP6 has seen a number of important milestones.

- May 2015 saw the official opening our popular £2.5 million watersports and visitor centres at Llandegfedd, adding to our existing network of visitor centres at Llys y Frân in the south west, Llyn Brenig in the north and Elan in mid Wales.
- Also during 2015, Welsh Water’s Elan Valley Estate achieved International Dark Sky Park status, becoming the first privately owned but publicly accessible park in the world to receive the accolade, and protecting the species-rich habitats on the estate from encroaching light pollution.
- In January 2016 we acquired the 999 year lease for Lisvane and Llanishen reservoirs and the surrounding land on the outskirts of Cardiff. As well as having a role in securing future water supplies, our ambition is that the site will be the venue for a new, flagship visitor centre serving Wales’ capital city.
- In 2017 working in collaboration with Visit Wales, we successfully applied for a £1.7m grant from the European Regional Development Fund toward the £4m redevelopment of our Llys y Frân site.
- In December 2017, working with the Elan Valley Trust, national and local partners, £1.8 million was secured from the Heritage Lottery Fund towards ‘Elan Links’, a five year programme of investment worth over £3.3million.

Additional investment planned by 2020

By 2020, our Llys y Frân visitor centre will undergo a major £4m redevelopment. We are currently seeking planning permission for our proposals, which include an enlarged visitor centre, a new watersports centre and enhanced facilities for cyclists. The project will deliver an iconic tourist attraction, uplifting the quality of our offering to customers, drawing significant extra visitors and stimulating the regional visitor economy.

Our plans for our proposed visitor centre for Cardiff at our Lisvane and Llanishen reservoir site are also evolving rapidly. We are working closely with the local community and their representatives as well as regulators and other stakeholders to ensure their buy-in of our proposals, so that we can provide an exciting new facility for the people of Cardiff while respecting the environmental sensitivities of the site. The site includes two Sites of Special Scientific Interest for overwintering birds and waxcap fungi and is of strategic importance to the expansion of green infrastructure in Cardiff, as part of a wildlife corridor into the city: the development of our proposals for managing public access to the site therefore requires
careful balancing of the needs of the community with those of an operational reservoir and our duty to protect, maintain and where possible enhance the special features of site.

We are also working closely with Llanelli Rural District Council to agree priorities for improving access and recreational opportunities at Swiss Valley reservoirs; and with Anglesey Council, RSPB and North Wales Wildlife Trust to develop plans to reopen Llyn Alaw reservoir to visitors, funded by our customer dividend.

In 2018 we applied for Tourism Amenity Infrastructure Scheme grants totalling £280k for live streaming of our first nesting pair of osprey at Llyn Brenig and, in partnership with Swansea Council, for improved facilities, such as access and paths, at our Lliw reservoirs. Assuming our applications are successful, we intend to complete these projects in 2019.

Our plans for AMP7

As a responsible owner of a network of sites that are open to the public we must ensure that they are maintained in good working order and safe for people to use. Our top priority must therefore be to continue to ensure that our recreational sites are properly maintained.

AMP 7 will see the completion of many of the developments that are currently underway or being planned. This will include our ‘Elan Links’ programme to restore many of Elan’s important habitats, as well as its built and cultural heritage, provide training and skills development opportunities for local people while increasing access and the range and numbers of visitors to the site.

In AMP 7 we will realise our ambition to open a flagship attraction in Cardiff. We expect it to be a very popular new amenity serving the people of Wales’ capital city. We want the offer to include something for everyone, whether for those looking for a quiet ramble in a beautiful part of the city, to those seeking a more exciting visitor experience.

By the end of AMP7 we want almost twice as many visitors, attracted by our expanded network of new or refurbished facilities offering a much wider range of activities in a sustainable, imaginative and sensitive way.

Customer feedback

Our customers value what we do in terms of education, recreation and nature conservation.

In response to our 2016 ‘Have Your Say’ customer consultation, 50% chose giving back to communities, including visitor centres, as a worthwhile use of our funds. We also know, for example from our consultation in 2017 on ‘Welsh Water 2050’, that customers expect us to enhance biodiversity and the environment in general, not least as this contributes to the well-being of the communities we serve.

The consultations undertaken as part of the planning processes for Llys y Frân and Lisvane/Llanishen have demonstrated the broad interest and support of national agencies, such as Visit Wales, local communities and their representatives including councils and schools, in widening access and developing facilities at our reservoirs.

In 2018 we commissioned BDRC to undertake visitor research at our attractions to enable us to create a visitor profile, understand their needs and expectations and measure the quality
of the visitor experience. It provides an important baseline against which future performance can be measured and benchmarked against UK visitor attractions.

In 2018/9 we will be developing a model for measuring social return on investment so that we can fully understand and evaluate;

- the socio cultural impacts in terms of health and well-being for local communities through increased opportunities to participate in physical activities, therapeutic benefits of access green and blue space, volunteering, events, social capital etc.;
- the economic impact of our visitor attractions on regional visitor economies, direct and indirect through the tourism multiplier, jobs created, skills development and training opportunities; and
- the environmental impacts of our attractions during development and operation through improvements to habitats, education and interpretation, recycling.

Affordability

Despite our unprecedented expansion plans for our visitor facilities, we are committed to minimising any associated burden on customers’ water bills and our cost to serve. As illustrated in this Supporting Document, AMP6 has seen greater collaboration with local, regional and national partners in destination development, enabling us to access a range of external funding opportunities. In this way, we have delivered many of these exciting projects at a much lower cost to the generality of our water charge payers.

Our ambition by the end of AMP7 is for our sites to reach breakeven or, ideally, become profitable as a result of the significant increase in visitor numbers that we are predicting.

We are therefore ‘raising our game’ in terms of marketing to encourage greater awareness and use of our sites. A business review and destination management plans have been commissioned for each of our sites with the objective of improving the visitor experience, broadening our sites’ appeal, enhancing the commercial activities in a sustainable, innovative and sensitive manner, targeting our investment to enhance income and control operating costs, while building awareness of Dŵr Cymru and engaging the communities we serve.

Our new approach to marketing includes revitalised websites and the development of a digital strategy. We are also cultivating strategic partnerships with regional tourism forums as well as angling associations, other sports bodies, the Arts Council Wales and the Welsh Government’s tourism arm, Visit Wales.

We already work in partnership with ‘The Fishing Passport’ and ‘The Canoe Passport’ schemes to market fishing and canoeing opportunities at our reservoirs so that our customers and visitors to Wales can enjoy the facilities we have to offer.

Supporting the Welsh Government agenda

We want our recreational sites to become a flagship for supporting the Welsh Government’s overarching policy agenda.
The Well-being of Future Generations (Wales) Act 2015 put sustainable development at the heart of government in Wales and its agencies. Although Welsh Water is not directly within the Act’s ambit, we want to support the delivery of its statutory goals.

- A prosperous Wales – our visitor attractions are of strategic importance to the regional and local visitor economies across Wales. Llys Y Fran has been prioritised as one of 10 regional Tourism Attractor Destinations (strategic tourism infrastructure projects) due to its importance to the rural economy in Pembrokeshire. The Prosperity for All: Economic Action Plan (2018) has identified Tourism as one of the 4 foundation sectors, which form the backbone of many local economies in Wales. A resilient Wales – through sensitive management and development, our sites will can help maintain and enhance a biodiverse natural environment with healthy functioning ecosystems. At Llyn Brenig our environmental enhancements have attracted a pair of breeding Osprey for the first time ever in 2018. The proportion of our sites that have national and international designations in recognition of their conservation importance (i.e. Sites of Special Scientific Interest, Special Areas of Conservation or Special Protection Areas) is evidence of their high importance to the natural environment.

- A healthier Wales – by reengaging the public with their natural environment and providing a range of opportunities for relaxation and healthy exercise, our sites support society’s mental and physical well-being. We continue to look for further opportunities to enhance the well-being of our visitors, hence our plans to provide new opportunities for people to walk and cycle at Llys y Frân, Elan Valley & Lisvane/Llanishen.

- A more equal Wales – access to all our sites is free. By expanding our network of sites we are making them more accessible for people across Wales. We continue to look for ways to improve disabled access (we have recently purchased a second boat for disabled anglers) and we are also working with the Alzheimer’s Society to become a dementia friendly organisation. At Elan we are working with Tir Coed to provide training and skills development opportunities in rural crafts and environmental management for hard to reach groups.

- Wales of cohesive communities – in addition to providing local visitor amenities, we see our visitor centres as a way of connecting with our customers and local communities, as well as informing them about what we do. We are developing a volunteering framework to encourage local people and communities to collaborate with us at our sites and take a greater level of ownership over their local beauty spots. For example, we are working with the Silver Slashers group (part of the Ramblers Association) as well as Anglesey Council who have adopted the paths around our Alaw Reservoir.

- A Wales of vibrant culture and thriving Welsh language – as a company we are very proud of our Welsh identity and the heritage of our sites. For example at our Elan site, where several of the structures are listed because of their architectural interest, we host various events focussing on the site’s history and the local culture. We also strive to be an exemplar organisation in presenting a bi-lingual public face.
A globally responsible Wales – we make extensive use of renewable energy sources at our visitor centres, including through hydroelectricity. We also use sustainable building materials, for example in the construction of our Llandegfedd visitor centre.

We know that the Welsh Government wants to encourage access to inland waters to enhance recreational opportunities on water for locals and visitors\(^i\). Our reservoirs are, first and foremost, operational sites that pose inherent, often hidden dangers, so there will always be limitations on the types of access and water contact sports that we can safely permit. However, our growing network of well-managed, visitor friendly sites offer great opportunities for visitors to enjoy the green and blue space. Several of our sites provide top quality water sports centres, e.g. our Llandegfedd watersports centre which specialises in tuition and watersports equipment hire, offering one of the best sailing experiences in South Wales. Llyn Brenig is now recognised as one of the best top-of-the-water fisheries in the UK and has hosted World, Commonwealth and International matches. We also allow third party organisations to use our sites in a responsible way, such as the Merthyr Tydfil Sailing Club at our Pontsticill Reservoir site.

The Welsh Government is committed to reversing the decline in Wales’ biodiversity\(^ii\) and sees a biodiverse natural environment as a key part of achieving a resilient Wales\(^iv\). The Environment (Wales) Act 2016\(^v\) placed a strengthened, legal biodiversity duty on public authorities in Wales, including Welsh Water, requiring us to maintain and enhance biodiversity in the exercise of our functions. The 2016 Act requires us to publish a plan setting out how we will meet this duty. Our biodiversity plan, “Making time for nature”\(^vi\) commits us to “look for new opportunities at our visitor centres to support nature and to engage the public with the natural environment”. This has informed our proposals to develop our sites so, for example, our plans to develop the Llys y Frân visitor centre have been designed to be sympathetic to the needs of the bats, otters and other wildlife with whom we share the site.

We are certainly open to new, innovative ideas. We are using the Vision XS ‘5 Models’ to estimate and understand the market, develop memorable visitor experiences and create viable operational plans to future-proof the business. In terms of innovative activities for visitors, we have recently introduced a climbing wall and water walking balls – or “Zorbs” - at our Llandegfedd visitor centre, providing new, exciting experiences for visitors, while adding a new income stream for us. As part of the Elan Links project at Elan Valley, working in partnership with the Arts Council Wales and CARAD (a community arts organisation), we are hosting two artist residencies per year and one of only three artist Fellowships in Wales.
References

i Section 4 of the Well-being of Future Generations (Wales) Act 2015
ii ‘Taking Forward Wales’ Sustainable Management of Natural Resources’ – Welsh Government June 2017
iii See, for example, ‘Nature Recovery Plan for Wales: Setting the course for 2020 and beyond’ – Welsh Government 2015
iv Section 4 of the Well-being of Future Generations (Wales) Act 2015
v Section 6 of the Environment (Wales) Act 2016
vi ‘Making time for nature: Dŵr Cymru Welsh Water’s plan for maintaining and enhancing biodiversity’ – Welsh Water 2017