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CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

Mr Dylan Williams
Prif Weithredwr– Chief Executive
CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL
Swyddfeydd y Cyngor - Council Offices
LLANGEFNI
Ynys Môn - Anglesey
LL77 7TW

Ffôn / tel (01248) 752500
Ffacs / fax (01248) 750839

RHYBUDD O GYFARFOD	NOTICE OF MEETING
PANEL CANIATÂD ARBENNIG O'R PWYLLGOR SAFONAU	**STANDARDS COMMITTEE DISPENSATION PANEL**
DYDD LLUN, 14 MEDI 2026 am 10:00 o'r gloch	**MONDAY, 14 SEPTEMBER 2026 at 10:00 am**
YSTAFELL BWYLLGOR, SWYDDFEYDD Y CYNGOR AC YN RHITHIOL DRWY ZOOM	**COMMITTEE ROOM, COUNCIL OFFICES AND VIRTUALLY VIA ZOOM**

Swyddog Pwyllgor	**Mrs Shirley Cooke 01248 752518**	**Committee Officer**

Aelodau Annibynnol / Independent Members

Mr T Rhys Davies
Mr Brace Griffiths
Mr Trefor Owen

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A G E N D A

1 DECLARATION OF INTEREST

To receive any declaration of interest from any Member or Officer regarding any item of business.

2 ELECTION OF CHAIR

To elect a Chair for the meeting.

3 MINUTES (Pages 1 - 4)

To confirm the draft minutes of the Dispensation Panel held on 24 July 2026.

4 APPLICATION FOR DISPENSATION (Pages 5 - 158)

To consider an application for dispensation by a County Councillor.

DISPENSATION PANEL OF THE STANDARDS COMMITTEE

Minutes of the hybrid meeting held on 24 July 2026

PRESENT: **Independent Members**

Mr Rhys Davies (Chair)
Mr David Davies
Mrs Gill Murgatroyd

IN ATTENDANCE: Director of Function (Council Business)/Monitoring Officer
Committee Officer (SC)
Webcasting Officer (FT)

ALSO PRESENT: Councillor Alun Roberts (Applicant)
Mr Andy Godber (Visitor Economy and Coastal Areas Manager, Economic Development)

APOLOGIES: None

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1. ELECTION OF CHAIR

Mr Rhys Davies was appointed Chair for the meeting.

2. DECLARATION OF INTEREST

Councillor Alun Roberts declared a personal interest in the meeting as he is the Applicant seeking the dispensation.

Mr David Davies declared a personal interest in the meeting, as he owns a campervan and occasionally visits campsites on Anglesey.

3. MINUTES

The draft minutes of the Dispensation Panel meeting held on 15 June 2026 were presented and confirmed as correct.

4. APPLICATION FOR DISPENSATION

The Director of Function (Council Business)/Monitoring Officer reported that Councillor Alun Robets has applied for the dispensation (Enclosure 1 to the report). She stated that the application includes information about the nature of the interest, type of dispensation sought and grounds for seeking a dispensation. She gave an overview of the relevant statutory grounds.

It was noted that the County Council has consulted on a proposal about whether or not to adopt a visitor levy pursuant to the Visitor Accommodation (Register and Levy) Act 2025.

Councillor Alun Roberts has applied for the dispensation to participate fully in meetings or discussions on the levy, and to write to officers and members about the matter. He wishes to remain in the room during any debate or voting on the issue and wishes to vote at such meetings.

The Chair invited Councillor Roberts to speak in support of his application.

Councillor Roberts reported that his partner is employed as a part-time receptionist two mornings a week in a local hotel. Councillor Roberts explained that he is the Portfolio Holder for Leisure, Tourism, Maritime and Property and wishes to be transparent about any decisions he participates in on the visitor levy by declaring an interest in meetings.

Members of the Panel were afforded an opportunity to question Councillor Roberts on his role as an elected member and Portfolio Holder, as well as various aspects of his partner's work, and the potential impact of the levy.

Councillor Roberts confirmed that his partner is an employee and not involved in any decision making at the hotel. If adopted, the levy would be unlikely to have any impact on his partner. The Visitor Economy and Coastal Areas Manager confirmed that any adoption of the levy would be applicable at the higher rate to residents at hotels.

In response to a question on understanding Councillor Roberts' role as a Portfolio Holder, Councillor Roberts responded that he will be presenting the report to Council, but the decision to accept or reject the levy will not be his personal decision and will be decided by full Council.

The Visitor Economy and Coastal Areas Manager reported that over 2,000 responses have been received to the visitor levy consultation, which has now ended. A report on the findings from the consultation will be presented to the Executive and Council in September to make a decision.

After hearing the background to the application for dispensation by the Applicant, the Panel retired to private session to determine whether or not to grant a dispensation, and if granting a dispensation, to consider (i) on what ground or grounds the dispensation is granted and (ii) whether there are any limitations/constraints to be imposed.

Retiring to public session, the Chair reported that the Panel considered and agreed that the Applicant has a prejudicial interest due to his role as a Portfolio Holder in this specific area.

RESOLVED to grant a dispensation to Councillor Roberts in respect of the interest referred to in the application and on the statutory grounds identified in Paragraphs (d) and (f) in the application.

The dispensation permits the Councillor to: -

- **write to officers and members about the issue;**
- **speak to officers about the issue, provided a note is taken of any such discussions;**
- **speak at meetings about the issue;**
- **remain in the room during any debate on the issue and any voting;**
- **vote at such meetings;**
- **participate fully in any public meetings and meetings of any outside bodies etc.**

Limitation:

The dispensation shall expire at the end of the current term for elected members of the County Council (on the fourth day after the next local government election).

Actions:

- **Councillor Roberts must declare a prejudicial interest when attending Council and all other relevant meetings.**
- **The Monitoring Officer and Chair to agree on the wording of a Decision Notice.**
- **The Chair to write to Councillor Roberts confirming that the Dispensation Panel has granted the dispensation.**
- **To share a copy of the Decision Notice with Councillor Roberts and Democratic Services.**

The meeting concluded at 11:20 am

MR RHYS DAVIES
CHAIR

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ISLE OF ANGLESEY COUNTY COUNCIL	
MEETING:	**STANDARDS COMMITTEE (DISPENSATION PANEL)**
DATE:	**14.09.26**
TITLE OF REPORT:	**TO CONSIDER AN APPLICATION FOR DISPENSATION**
PURPOSE OF THE REPORT:	**TO DETERMINE AN APPLICATION FOR DISPENSATION BY A MEMBER OF THE ISLE OF ANGLESEY COUNTY COUNCIL AND THE TERMS OF ANY DISPENSATION GRANTED**
REPORT BY:	**LYNN BALL DIRECTOR OF FUNCTION (COUNCIL BUSINESS) / MONITORING OFFICER**

DOCUMENTS ATTACHED

1. Application by Councillor Derek Owen
2. Code of Conduct for Members of Isle of Anglesey County Council
3. Standards Committee (Grant of Dispensations) (Wales) Regulations 2001
4. Part 4 of the Local Government Regulations (Standards Committees, Investigations, Dispensations and Referral) (Wales) (Amendment) 2016
5. Briefing Note provided by the Standards Committee to County Councillors on Dispensations attaching a draft Application and Decision Form
6. Methodology Note for the consideration of applications for dispensation
7. Report to Council on 12/05/2026 entitled “Visitor Levy Consultation”

1. BACKGROUND

As set out in the Code of Conduct for Isle of Anglesey County Council **(Enclosure 2)**, any member who has a personal and prejudicial interest in an item of business is precluded from participation in relation to that business.

Personal interests are listed in paragraph 10 of the Code. The definition of a prejudicial interest is provided in paragraph 12 of the Code.

In some limited, and specified, circumstances a member may be able to overreach the impediment created by the personal and prejudicial interest, if they are able to obtain a dispensation from the Standards Committee.

Dispensations may only be granted in the circumstances listed in Section 2 of **Enclosure 3**.

2. THE APPLICATION

The application to be considered is included in **Enclosure 1.** The application is made on the basis that Councillor Derek Owen operates a caravan business and seeks a dispensation to allow Councillor Derek Owen to participate in future meetings or discussions, or written representations, relating to the adoption of a Visitor Levy in accordance with the Visitor Accommodation (Register and Levy) Act 2025.

3. PANEL'S CONSIDERATIONS

The Panel should consider the Methodology Note provided at **Enclosure 6**.

Should the Panel decide to grant the dispensation, consideration should also be given to imposing any constraints on the dispensation. It should be noted that the application does not extend to voting on the adoption of a Visitor Levy. The Panel is referred to the 'Decision Form' at **Enclosure 5** which notes the consideration which may apply.

4. RECOMMENDATIONS

To consider the merits of the application and:

(A) determine whether or not to grant a dispensation; and,

(B) if granting a dispensation, to decide:-

(i) on what ground or grounds the dispensation is granted; and

(ii) whether there are any limitations/constraints to be imposed

THE ISLE OF ANGLESEY COUNTY COUNCIL

DISPENSATION APPLICATION TO THE STANDARDS COMMITTEE BY A MEMBER OF THE COUNTY COUNCIL

Name of Member:	**County Councillor Derek Owen**
Member's contact details:	**DerekOwen@anglesey.gov.wales**
Ward:	**Twrcelyn**
Nature of prejudicial interest* in respect of which the Dispensation is sought:	**I own land that is partly used as a caravan site, comprising five caravan pitches and one static caravan. The business is operated by my partner.**
Business in which the Member wishes to participate:	**Whether or not to adopt a visitor levy pursuant to the Visitor Accommodation (Register and Levy) Act 2025**
Type of Dispensation sought (tick as necessary and insert any required information):	o write to officers and members about the issue; o speak to officers about the issue, provided a note is taken of any such discussions; o speak at all meetings about the issue; o remain in the room during any debate on the issue and while voting takes place, but not to participate in voting;
Statutory Ground/s under which Dispensation is requested:	2(d) if the nature of the member's interest is such that the member's participation in the business in which the interest relates would not damage public confidence in the conduct of the relevant authority's business; 2(f) the participation of the Member in the business to which the interest relates is justified by the Member's particular role or expertise.
Is the interest registered as per Section 81(1) & (2) of the LGA 2000:	
Date by which a decision is required:	**24 September 2026 (indicative date)**

Signed: Approved	**Date:**

* Prejudicial Interests – these are personal interests which an objective observer would consider so significant that they are likely to compromise a member's ability to act in the public interest

ENCLOSURE 2

5.1 Members' Code of Conduct

This is the Code of Conduct adopted by the County Council on 12.05.2016

Part 1 - Interpretation

1. (1) In this code

"co-opted member" ("aelod cyfetholedig"), in relation to a relevant authority, means a person who is not a member of the authority but who -

(a) is a member of any committee or subcommittee of the authority, or

(b) is a member of, and represents the authority on, any joint committee or joint subcommittee of the authority, and who is entitled to vote on any question which falls to be decided at any meeting of that committee or subcommittee;

"meeting" ("cyfarfod") means any meeting -

(a) of the relevant authority,

(b) of any executive or board of the relevant authority,

(c) of any committee, subcommittee, joint committee or joint subcommittee of the relevant authority or of any such committee, subcommittee, joint committee or joint subcommittee of any executive or board of the authority, or

(d) where members or officers of the relevant authority are present other than a meeting of a political group constituted in accordance with regulation 8 of the Local Government (Committees and Political Groups) Regulations 1990 (1)
and includes circumstances in which a member of an executive or board or an officer acting alone exercises a function of an authority;

"member" ("aelod") includes, unless the context requires otherwise, a co-opted member;

"registered society" means a society, other than a society registered as a credit union, which is —

(a) a registered society within the meaning given by section 1(1) of the Co-operative and Community Benefit Societies Act 2014; or

(b) a society registered or deemed to be registered under the Industrial and Provident Societies Act (Northern Ireland) 1969;

"register of members' interests" ("cofrestr o fuddiannau'r aelodau") means the register established and maintained under section 81 of the Local Government Act 2000;

"relevant authority" ("awdurdod perthnasol") means -

(a) a county council,

(b) a county borough council,

(c) a community council,

(d) a fire and rescue authority constituted by a scheme under section 2 of the Fire and Rescue Services Act 2004 or a scheme to which section 4 of that Act applies,

(e) a National Park authority established under section 63 of the Environment Act 1995;

“you” (“chi”) means you as a member or co-opted member of a relevant authority; and

“your authority” (“eich awdurdod”) means the relevant authority of which you are a member or co-opted member.

(2) In relation to a community council—

(a) “proper officer” (“swyddog priodol”) means an officer of that council within the meaning of section 270(3) of the Local Government Act 1972; and

(b) “standards committee” (“pwyllgor safonau”*)* means the standards committee of the county or county borough council which has functions in relation to the community council for which it is responsible under section 56(1) and (2) of the Local Government Act 2000.

Part 2 - General Provisions

2. (1) Save where paragraph 3(a) applies, you must observe this code of conduct -

(a) whenever you conduct the business, or are present at a meeting, of your authority;

(b) whenever you act, claim to act or give the impression you are acting in the role of member to which you were elected or appointed;

(c) whenever you act, claim to act or give the impression you are acting as a representative of your authority; or

(d) at all times and in any capacity, in respect of conduct identified in paragraphs 6(1)(a) and 7.

(2) You should read this code together with the general principles prescribed under section 49(2) of the Local Government Act 2000 in relation to Wales.

3. Where you are elected, appointed or nominated by your authority to serve -

(a) on another relevant authority, or any other body, which includes a police authority or Local Health Board you must, when acting for that other authority or body, comply with the code of conduct of that other authority or body; or

(b) on any other body which does not have a code relating to the conduct of its members, you must, when acting for that other body, comply with this code of conduct, except and insofar as it conflicts with any other lawful obligations to which that other body may be subject.

4. You must -

(a) carry out your duties and responsibilities with due regard to the principle that there should be equality of opportunity for all people, regardless of their protected characteristics or socio-economic circumstances;

(b) show respect and consideration for others;

(c) not use bullying behaviour or harass any person; and

(d) not do anything which compromises, or which is likely to compromise, the impartiality of those who work for, or on behalf of, your authority.

(e) attend at least one training session on this code of conduct during each full term of office, such attendance to take place during the six months following election in the case of those members elected to the County Council for the first time and those having been re-elected but without continuity of office.

5. You must not -

(a) disclose confidential information or information which should reasonably be regarded as being of a confidential nature, without the express consent of a person authorised to give such consent, or unless required by law to do so;

(b) prevent any person from gaining access to information to which that person is entitled by law.

6. (1) You must -

(a) not conduct yourself in a manner which could reasonably be regarded as bringing your office or authority into disrepute;

(b) report, whether through your authority's confidential reporting procedure or direct to the proper authority, any conduct by another member or anyone who works for, or on behalf of, your authority which you reasonably believe involves or is likely to involve criminal behaviour (which for the purposes of this paragraph does not include offences or behaviour capable of punishment by way of a fixed penalty);

(c) report to your authority's monitoring officer any conduct by another member which you reasonably believe breaches this code of conduct;

(d) not make vexatious, malicious or frivolous complaints against other members or anyone who works for, or on behalf of, your authority.

(2) You must comply with any request of your authority's monitoring officer, or the Public Services Ombudsman for Wales, in connection with an investigation conducted in accordance with their respective statutory powers.

7. You must not -

(a) in your official capacity or otherwise, use or attempt to use your position improperly to confer on or secure for yourself, or any other person, an advantage or create or avoid for yourself, or any other person, a disadvantage;

(b) use, or authorise others to use, the resources of your authority -

(i) imprudently;

(ii) in breach of your authority's requirements;

(iii) unlawfully;

(iv) other than in a manner which is calculated to facilitate, or to be conducive to, the discharge of the functions of the authority or of the office to which you have been elected or appointed;

(v) improperly for political purposes; or

(vi) improperly for private purposes.

8. You must -

(a) when participating in meetings or reaching decisions regarding the business of your authority, do so on the basis of the merits of the circumstances involved and in the public interest having regard to any relevant advice provided by your authority's officers, in particular by -

(i) the authority's chief executive;

(ii) the authority's chief finance officer;

(iii) the authority's monitoring officer;

(iv) the authority's chief legal officer (who should be consulted when there is any doubt as to the authority's power to act, as to whether the action proposed lies within the policy framework agreed by the authority or where the legal consequences of action or failure to act by the authority might have important repercussions);

(b) give reasons for all decisions in accordance with any statutory requirements and any reasonable additional requirements imposed by your authority.

9. You must -

(a) observe the law and your authority's rules governing the claiming of expenses and allowances in connection with your duties as a member;

(b) avoid accepting from anyone gifts, hospitality (other than official hospitality, such as a civic reception or a working lunch duly authorised by your authority), material benefits or services for yourself or any person which might place you, or reasonably appear to place you, under an improper obligation.

Part 3 - Interests

Personal Interests

10. (1) You must in all matters consider whether you have a personal interest, and whether this code of conduct requires you to disclose that interest.

(2) You must regard yourself as having a personal interest in any business of your authority if -

(a) it relates to, or is likely to affect -

(i) any employment or business carried on by you;

(ii) any person who employs or has appointed you, any firm in which you are a partner or any company for which you are a remunerated director;

(iii) any person, other than your authority, who has made a payment to you in respect of your election or any expenses incurred by you in carrying out your duties as a member;

(iv) any corporate body which has a place of business or land in your authority's area, and in which you have a beneficial interest in a class of securities of that body that exceeds the nominal value of £25,000 or one hundredth of the total issued share capital of that body;

(v) any contract for goods, services or works made between your authority and you or a firm in which you are a partner, a company of which you are a remunerated director, or a body of the description specified in sub-paragraph (iv) above;

(vi) any land in which you have a beneficial interest and which is in the area of your authority;

(vii) any land where the landlord is your authority and the tenant is a firm in which you are a partner, a company of which you are a remunerated director, or a body of the description specified in sub-paragraph (iv) above;

(viii) any body to which you have been elected, appointed or nominated by your authority;

(ix) any -

(aa) public authority or body exercising functions of a public nature;

(bb) company, registered society, charity, or body directed to charitable purposes;

(cc) body whose principal purposes include the influence of public opinion or policy;

(dd) trade union or professional association; or

(ee) private club, society or association operating within your authority's area,

and in relation to (aa) to (ee), in which you have membership or hold a position of general control or management;

(x) any land in your authority's area in which you have a licence (alone or jointly with others) to occupy for 28 days or longer;

[Note: subparagraph (b) is omitted]

(c) a decision upon it might reasonably be regarded as affecting -

(i) your well-being or financial position, or that of a person with whom you live, or any person with whom you have a close personal association;

(ii) any employment or business carried on by persons as described in 10(2)(c)(i);

(iii) any person who employs or has appointed such persons described in 10(2)(c)(i), any firm in which they are a partner, or any company of which they are directors;

(iv) any corporate body in which persons as described in 10(2)(c)(i) have a beneficial interest in a class of securities exceeding the nominal value of £5,000; or

(v) any body listed in paragraphs 10(2)(a)(ix)(aa) to (ee) in which persons described in 10(2)(c)(i) hold a position of general control or management,

and in relation to (i) to (v), to a greater extent than the majority of –

(aa) in the case of an authority with electoral divisions or wards, other council tax payers, rate payers or inhabitants of the electoral division or ward, as the case may be, affected by the decision;

or

(bb) in all other cases, other council tax payers, ratepayers or inhabitants of the authority's area.

Disclosure of Personal Interests

11. (1) Where you have a personal interest in any business of your authority and you attend a meeting at which that business is considered, you must disclose orally to that meeting the existence and nature of that interest before or at the commencement of that consideration, or when the interest becomes apparent.

(2) Where you have a personal interest in any business of your authority and you make -

(a) written representations (whether by letter, facsimile or some other form of electronic communication) to a member or officer of your authority regarding that business, you should include details of that interest in the written communication; or

(b) oral representations (whether in person or some form of electronic communication) to a member or officer of your authority you should disclose the interest at the commencement of such representations, or when it becomes apparent to you that you have such an interest, and confirm the representation and interest in writing within 14 days of the representation.

(3) Subject to paragraph 14(1)(b) below, where you have a personal interest in any business of your authority and you have made a decision in exercising a function of an executive or board, you must in relation to that business ensure that any written statement of that decision records the existence and nature of your interest.

(4) You must, in respect of a personal interest not previously disclosed, before or immediately after the close of a meeting where the disclosure is made pursuant to sub-paragraph 11(1), give written notification to your authority in accordance with any requirements identified by your authority's monitoring officer from time to time but, as a minimum containing -

(a) details of the personal interest;

(b) details of the business to which the personal interest relates; and

(c) your signature

(5) Where you have agreement from your monitoring officer that the information relating to your personal interest is sensitive information, pursuant to paragraph 16(1), your obligations under this paragraph 11 to disclose such information, whether orally or in writing, are to be replaced with an obligation to disclose the existence of a personal interest and to confirm that your monitoring officer has agreed that the nature of such personal interest is sensitive information.

(6) For the purposes of sub-paragraph (4), a personal interest will only be deemed to have been previously disclosed if written notification has been provided in accordance with this code since the last date on which you were elected, appointed or nominated as a member of your authority.

(7) For the purposes of sub-paragraph (3), where no written notice is provided in accordance with that paragraph you will be deemed as not to have declared a personal interest in accordance with this code.

Prejudicial Interests

12. (1) Subject to sub-paragraph (2) below, where you have a personal interest in any business of your authority you also have a prejudicial interest in that business if the interest is one which a member of the public with knowledge of the relevant facts would reasonably regard as so significant that it is likely to prejudice your judgement of the public interest.

(2) Subject to sub-paragraph (3), you will not be regarded as having a prejudicial interest in any business where that business -

(a) relates to -

(i) another relevant authority of which you are also a member;

(ii) another public authority or body exercising functions of a public nature in which you hold a position of general control or management;

(iii) a body to which you have been elected, appointed or nominated by your authority;

(iv) your role as a school governor (where not appointed or nominated by your authority) unless it relates particularly to the school of which you are a governor;

(v) your role as a member of a Local Health Board where you have not been appointed or nominated by your authority;

(b) relates to -

(i) the housing functions of your authority where you hold a tenancy or lease with your authority, provided that you do not have arrears of rent with your authority of more than two months, and provided that those functions do not relate particularly to your tenancy or lease;

(ii) the functions of your authority in respect of school meals, transport and travelling expenses, where you are a guardian, parent, grandparent or have parental responsibility (as defined in section 3 of the Children Act 1989) of a child in full time education, unless it relates particularly to the school which that child attends;

(iii) the functions of your authority in respect of statutory sick pay under Part XI of the Social Security Contributions and Benefits Act 1992, where you are in receipt of, or are entitled to the receipt of such pay from your authority;

(iv) the functions of your authority in respect of an allowance or payment made in accordance with the provisions of Part 8 of the Local Government (Wales) Measure 2011, or an allowance or pension provided under section 18 of the Local Government and Housing Act 1989;

(c) your role as a community councillor in relation to a grant, loan or other form of financial assistance made by your community council to community or voluntary organisations up to a maximum of £500.

(3) The exemptions in subparagraph (2)(a) do not apply where the business relates to the determination of any approval, consent, licence, permission or registration.

Overview and Scrutiny Committees

13. You also have a prejudicial interest in any business before an overview and scrutiny committee of your authority (or of a Subcommittee of such a committee) where -

(a) that business relates to a decision made (whether implemented or not) or action taken by your authority's executive, board or another of your authority's committees, Subcommittees, joint committees or joint Subcommittees; and

(b) at the time the decision was made or action was taken, you were a member of the executive, board, committee, Subcommittee, joint-committee or joint Subcommittee mentioned in sub-paragraph (a) and you were present when that decision was made or action was taken.

Participation in Relation to Disclosed Interests

14. (1) Subject to sub-paragraphs (2), (2A), (3) and (4), where you have a prejudicial interest in any business of your authority you must, unless you have obtained a dispensation from your authority's standards committee –

(a) withdraw from the room, chamber or place where a meeting considering the business is being held -
(i) where sub-paragraph (2) applies, immediately after the period for making representations, answering questions or giving evidence relating to the business has ended and in any event before further consideration of the business begins, whether or not the public are allowed to remain in attendance for such consideration; or

(ii) in any other case, whenever it becomes apparent that that business is being considered at that meeting;

(b) not exercise executive or board functions in relation to that business;

(c) not seek to influence a decision about that business;

(d) not make any written representations (whether by letter, facsimile or some other form of electronic communication) in relation to that business; and

(e) not make any oral representations (whether in person or some form of electronic communication) in respect of that business or immediately cease to make such oral representations when the prejudicial interest becomes apparent.

(2) Where you have a prejudicial interest in any business of your authority you may attend a meeting but only for the purpose of making representations, answering questions or giving evidence relating to the business, provided that the public are also allowed to attend the meeting for the same purpose, whether under a statutory right or otherwise.

(2A) where you have a prejudicial interest in any business of your authority you may submit written representations to a meeting relating to that business, provided that the public are allowed to attend the meeting for the purpose of making representations, answering questions or giving evidence relating to the business, whether under statutory right or otherwise.

(2B) when submitting written representations under sub-paragraph (2A) you must comply with any procedure that your authority may adopt for the submission of such representations.

(3) Sub-paragraph (1) does not prevent you attending and participating in a meeting if -

(a) you are required to attend a meeting of an overview or scrutiny committee, by such committee exercising its statutory powers; or

(b) you have the benefit of a dispensation provided that you -

(i) state at the meeting that you are relying on the dispensation; and

(ii) before or immediately after the close of the meeting give written notification to your authority containing -

(aa) details of the prejudicial interest;

(bb) details of the business to which the prejudicial interest relates;

(cc) details of, and the date on which, the dispensation was granted; and

(dd) your signature.

(4) Where you have a prejudicial interest and are making written or oral representations to your authority in reliance upon a dispensation, you must provide details of the dispensation within any such written or oral representation and, in the latter case, provide written notification to your authority within 14 days of making the representation.

Part 4 - The Register of Members' Interests

Registration of Personal Interests

15. (1) Subject to sub-paragraph (4), you must, within 28 days of -

(a) your authority's code of conduct being adopted or the mandatory provisions of this model code being applied to your authority; or

(b) your election or appointment to office (if that is later),

register your personal interests, where they fall within a category mentioned in paragraph 10(2)(a) in your authority's register of members' interests by providing written notification to your authority's monitoring officer.

(2) Subject to sub-paragraph (4), you must, within 28 days of becoming aware of any new personal interest falling within a category mentioned in paragraph 10(2)(a), register that new personal interest in your authority's register of members' interests by providing written notification to your authority's monitoring officer.

(3) Subject to sub-paragraph (4), you must, within 28 days of becoming aware of any change to a registered personal interest falling within a category mentioned in paragraph 10(2)(a), register that change in your authority's register of members' interests by providing written notification to your authority's monitoring officer..

(4) Sub-paragraphs (1) and (2) and (3) do not apply to sensitive information determined in accordance with paragraph 16(1).

(5) Sub-paragraph (1) and (2) will not apply if you are a member of a relevant authority which is a community council when you act in your capacity as a member of such an authority.

(6) You must, when disclosing a personal interest in accordance with paragraph 11 for the first time, register that personal interest in your authority's register of members' interests by providing written notification to your authority's monitoring officer.

Sensitive information

16. (1) Where you consider that the information relating to any of your personal interests is sensitive information, and your authority's monitoring officer agrees, you need not include that information when registering that interest, or, as the case may be, a change to the interest under paragraph 15.

(2) You must, within 28 days of becoming aware of any change of circumstances which means that information excluded under sub-paragraph (1) is no longer sensitive information, notify your authority's monitoring officer asking that the information be included in your authority's register of members' interests.

(3) In this code, "sensitive information" ("gwybodaeth sensitif") means information whose availability for inspection by the public creates, or is likely to create, a serious risk that you or a person who lives with you may be subjected to violence or intimidation.

Registration of Gifts and Hospitality

17. You must, within 28 days of receiving any gift, hospitality, material benefit or advantage above a value specified in a resolution of your authority, provide written notification to your authority's monitoring officer of the existence and nature of that gift, hospitality, material benefit or advantage. Such written notification should be provided here

ATODIAD/ENCLOSURE 3

CYNULLIAD CENEDLAETHOL CYMRU

OFFERYNNAU STATUDOL

2001 Rhif 2279 (Cy. 169)

LLYWODRAETH LEOL, CYMRU

Rheoliadau Pwyllgorau Safonau (Caniatáu Gollyngiadau) (Cymru) 2001

NODYN ESBONIADOL

(Nid yw'r nodyn hwn yn rhan o'r Rheoliadau)

O dan adran 51 o Ddeddf Llywodraeth Leol 2000 ("y Ddeddf") mae'n ofynnol i gynghorau sir a chynghorau bwrdeistref sirol, awdurdodau tân ac awdurdodau Parciau Cenedlaethol yng Nghymru ("awdurdodau perthnasol") fabwysiadu cod ymddygiad ar gyfer aelodau ac aelodau cyfetholedig sy'n gorfod ymgorffori unrhyw ddarpariaethau gorfodol o unrhyw god ymddygiad enghreifftiol a gyhoeddir gan Gynulliad Cenedlaethol Cymru o dan adran 50(2) o'r Ddeddf.

Mae adran 81(1) a (2) o'r Ddeddf yn darparu bod yn rhaid i'r swyddog monitro ym mhob awdurdod perthnasol sefydlu a chadw cofrestr o fuddiannau aelodau ac aelodau cyfetholedig yr awdurdod a bod darpariaethau gorfodol y cod enghreifftiol sy'n gymwysadwy i bob awdurdod perthnasol yn gorfod ei gwneud yn ofynnol i aelodau ac aelodau cyfetholediog pob awdurdod gofrestru unrhyw fuddiannau ariannol ac eraill a bennir yn y darpariaethau gorfodol yng nghofrestr yr awdurdod hwnnw.

O dan adran 81(3) a (4) o'r Ddeddf rhaid i'r darpariaethau gorfodol hynny ei gwneud yn ofynnol hefyd i aelod neu aelod cyfetholedig o awdurdod perthnasol sydd â buddiant o'r fath ei ddatgelu cyn cymryd rhan mewn unrhyw fusnes gan yr awdurdod sy'n berthnasol i'r buddiant a gwneud darpariaeth i atal yr aelod neu'r aelod cyfetholedig hwnnw rhag cymryd rhan mewn unrhyw fusnes gan yr awdurdod y mae'r buddiant a ddatgelwyd yn berthnasol iddo neu i gyfyngu ar y rhan y mae'n ei chymryd ynddo.

NATIONAL ASSEMBLY FOR WALES

STATUTORY INSTRUMENTS

2001 No. 2279 (W. 169)

LOCAL GOVERNMENT , WALES

The Standards Committees (Grant of Dispensations) (Wales) Regulations 2001

EXPLANATORY NOTE

(This note does not form part of the Regulations)

County and county borough councils, community councils, fire authorities and National Park authorities in Wales ("relevant authorities") are required by section 51 of the Local Government Act 2000 ("the Act") to adopt a code of conduct for members and co-opted members which must incorporate any mandatory provisions of any model code of conduct issued by the National Assembly for Wales under section 50(2) of the Act.

Section 81(1) and (2) of the Act provides that the monitoring officer of each relevant authority must establish and maintain a register of interests of the members and co-opted members of the authority and that the mandatory provisions of the model code applicable to each relevant authority must require the members and co-opted members of each authority to register in that authority's register such financial and other interests as are specified in the mandatory provisions.

Under section 81(3) and (4) of the Act those mandatory provisions must also require a member or co-opted member of a relevant authority who has such an interest to disclose it before taking part in any business of the authority which relates to it and make provision for preventing or restricting the participation of that member or co-opted member in any business of the authority to which the disclosed interest relates.

Mae adran 81(4) o'r Ddeddf yn darparu nad yw unrhyw gyfranogiad gan aelod neu aelod cyfetholedig o awdurdod perthnasol mewn unrhyw fusnes a waherddir gan y darpariaethau gorfodol yn fethiant i gydymffurfio â chod ymddygiad yr awdurdod os yw'r aelod neu'r aelod cyfetholedig wedi gweithredu yn unol â gollyngiad rhag y gwaharddiad a gafodd ei ganiatáu gan bwyllgor safonau'r awdurdod yn unol â rheoliadau a wneir o dan is-adran (5).

Mae'r rheoliadau hyn yn rhagnodi'r amgylchiadau y caiff pwyllgorau safonau'r awdurdodau perthasol ganiatáu gollyngiadau o'r fath odanynt.

Section 81(4) of the Act provides that any participation by a member or co-opted member of a relevant authority in any business which is prohibited by the mandatory provisions is not a failure to comply with the authority's code of conduct if the member or co-opted member has acted in accordance with a dispensation from the prohibition granted by the authority's standards committee in accordance with regulations made under subsection (5).

These regulations prescribe the circumstances in which standards committees of relevant authorities may grant such dispensations.

OFFERYNNAU STATUDOL

2001 Rhif 2279 (Cy. 169)

LLYWODRAETH LEOL, CYMRU

Rheoliadau Pwyllgorau Safonau (Caniatáu Gollyngiadau) (Cymru) 2001

Wedi'u gwneud	*21 Mehefin 2001*
Yn dod i rym	*28 Gorffennaf 2001*

Mae Cynulliad Cenedlaethol Cymru yn gwneud y Rheoliadau canlynol drwy arfer y pwerau a roddwyd iddo gan adran 81(5) ac (8) o Ddeddf Llywodraeth Leol 2000(**a**).

Enw, cychwyn, cymhwyso a dehongli

1.- (1) Enw'r Rheoliadau hyn yw Rheoliadau Pwyllgorau Safonau (Caniatáu Gollyngiadau) (Cymru) 2001 a deuant i rym ar 28 Gorffennaf 2001.

(2) Mae'r Rheoliadau hyn yn gymwys i Gymru yn unig.

(3) Yn y Rheoliadau hyn -

mae "aelod" (*"member"*) yn cynnwys aelod cyfetholedig;

ystyr "awdurdod perthnasol" (*"relevant authority"*) yw cyngor sir neu gyngor bwrdeistref sirol, cyngor cymuned, awdurdod tân neu awdurdod Parc Cenedlaethol;

ystyr "buddiant" (*"interest"*) yw buddiant y mae'n ofynnol ei gofrestru yng nghofrestr buddiannau'r awdurdod perthnasol;

ystyr "corff gwirfoddol" (*"voluntary organisation"*) yw corff (heblaw awdurdod lleol neu gorff cyhoeddus arall) sy'n cynnal ei weithgareddau heblaw ar gyfer gwneud elw;

acystyr "y Ddeddf" (*"the Act"*) yw Deddf Llywodraeth Leol 2000.

(a) 2000 p. 22.

STATUTORY INSTRUMENTS

2001 No. 2279 (W. 169)

LOCAL GOVERNMENT, WALES

The Standards Committees (Grant of Dispensations) (Wales) Regulations 2001

Made	*21st June 2001*
Coming into force	*28th July 2001*

The National Assembly for Wales makes the following Regulations in exercise of the power given to it by section 81(5) and (8) of the Local Government Act 2000(**a**).

Name, commencement, application and interpretation

1.- (1) The name of these Regulations is the Standards Committees (Grant of Dispensations) (Wales) Regulations 2001 and they shall come into force on 28th July 2001.

(2) These Regulations apply to Wales only.

(3) In these Regulations -

"interest" (*"buddiant"*) means an interest which is required to be registered in the relevant authority's register of interests;

"member" (*"aelod"*) includes a co-opted member;

"relevant authority" (*"awdurdod perthnasol"*) means a county or county borough council, a community council, a fire authority or a National Park authority;

"the Act" (*"y Ddeddf"*) means the Local Government Act 2000; and

"voluntary organisation" (*"corff gwirfoddol"*) means a body (other than a local authority or other public body) whose activities are carried on otherwise than for profit.

(a) 2000 c. 22.

Yr amgylchiadau lle gellir caniatáu gollyngiadau

2. Caiff pwyllgor safonau awdurdod perthnasol ganiatáu gollyngiadau o dan adran 81(4) o'r Ddeddf -

(a) os oes gan ddim llai na hanner aelodau'r awdurdod perthnasol neu hanner aelodau un o bwyllgorau'r awdurdod (yn ôl fel y digwydd) y mae'r busnes i gael ei ystyried ganddo fuddiant sy'n berthnasol i'r busnes hwnnw;

(b) os oes gan ddim llai na hanner aelodau gweithrediaeth arweinydd a chabinet y mae'r busnes i gael ei ystyried ganddo fuddiant sy'n berthnasol i'r busnes hwnnw a bod naill ai paragraff (ch) neu baragraff (d) hefyd yn gymwys;

(c) yn achos cyngor sir neu gyngor bwrdeistref sirol, os byddai anallu aelod i gymryd rhan yn tarfu ar gydbwysedd gwleidyddol yr awdurdod perthnasol neu'r pwyllgor o'r awdurdod y mae'r busnes i'w ystyried ganddo i'r fath raddau nes y byddai'r canlyniad yn debygol o gael ei effeithio;

(ch) os yw natur buddiant yr aelod yn gyfryw fel na fyddai cyfranogiad yr aelod yn y busnes y mae'r buddiant yn berthnasol iddo yn niweidio hyder y cyhoedd yn y modd y mae busnes yr awdurdod perthnasol yn cael ei gynnal;

(d) os yw'r buddiant yn gyffredin i'r aelod ac i gyfran arwyddocaol o'r cyhoedd;

(dd) os oes cyfiawnhad i'r aelod gymryd rhan yn y busnes y mae'r buddiant yn berthnasol iddo oherwydd rôl neu arbenigedd penodol yr aelod;

(e) os yw'r busnes y mae'r buddiant yn berthnasol iddo i'w ystyried gan bwyllgor trosolygu a chraffu i'r awdurdod perthnasol ac nad yw buddiant yr aelod yn fuddiant ariannol;

(f) os yw'r busnes sydd i'w ystyried yn berthnasol i arian neu eiddo corff gwirfoddol y mae'r aelod yn aelod o'i bwyllgor neu ei fwrdd rheoli heblaw fel cynrychiolydd yr awdurdod perthnasol ac nad oes gan yr aelod unrhyw fuddiant arall yn y busnes hwnnw ar yr amod na fydd unrhyw ollyngiad yn ymestyn i gymryd rhan mewn unrhyw bleidlais mewn perthynas â'r busnes hwnnw; neu

(ff) os yw'n ymddangos i'r pwyllgor ei bod o les i drigolion ardal yr awdurdod perthnasol i'r anallu gael ei godi, ar yr amod bod hysbysiad ysgrifenedig bod y gollyngiad yn cael ei ganiatáu yn cael ei roi i Gynulliad Cenedlaethol Cymru o fewn saith diwrnod a hynny mewn unrhyw fodd y gall ei bennu.

Circumstances in which dispensations may be granted

2. The standards committee of a relevant authority may grant dispensations under section 81(4) of the Act where -

(a) no fewer than half of the members of the relevant authority or of a committee of the authority (as the case may be) by which the business is to be considered has an interest which relates to that business;

(b) no fewer than half of the members of a leader and cabinet executive of the relevant authority by which the business is to be considered has an interest which relates to that business and either paragraph (d) or (e) also applies;

(c) in the case of a county or county borough council, the inability of the member to participate would upset the political balance of the relevant authority or of the committee of the authority by which the business is to be considered to such an extent that the outcome would be likely to be affected;

(d) the nature of the member's interest is such that the member's participation in the business to which the interest relates would not damage public confidence in the conduct of the relevant authority's business;

(e) the interest is common to the member and a significant proportion of the general public;

(f) the participation of the member in the business to which the interest relates is justified by the member's particular role or expertise;

(g) the business to which the interest relates is to be considered by an overview and scrutiny committee of the relevant authority and the member's interest is not a pecuniary interest;

(h) the business which is to be considered relates to the finances or property of a voluntary organisation of whose management committee or board the member is a member otherwise than as a representative of the relevant authority and the member has no other interest in that business provided that any dispensation shall not extend to participation in any vote with respect to that business; or

(i) it appears to the committee to be in the interests of the inhabitants of the area of the relevant authority that the disability should be removed provided that written notification of the grant of the dispensation is given to the National Assembly for Wales within seven days in such manner as it may specify.

Llofnodwyd ar ran Cynulliad Cenedlaethol Cymru o dan adran 66(1) o Ddeddf Llywodraeth Cymru 1998(**a**).

Signed on behalf of the National Assembly for Wales under section 66(1) of the Government of Wales Act 1998(**a**).

21 Mehefin 2001

21st June 2001

D. Elis-Thomas

Llywydd y Cynulliad Cenedlaethol

The Presiding Officer of the National Assembly

(a) 1998 p. 38.

(a) 1998 c. 38.

CYNULLIAD CENEDLAETHOL CYMRU

OFFERYNNAU STATUDOL

2001 Rhif 2279 (Cy. 169)

LLYWODRAETH LEOL, CYMRU

Rheoliadau Pwyllgorau Safonau (Caniatáu Gollyngiadau) (Cymru) 2001

NATIONAL ASSEMBLY FOR WALES

STATUTORY INSTRUMENTS

2001 No. 2279 (W. 169)

LOCAL GOVERNMENT, WALES

The Standards Committees (Grant of Dispensations) (Wales) Regulations 2001

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ISBN 0-11-090284-X

9 780110 902845

£2.00

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ENCLOSURE 4

WELSH STATUTORY INSTRUMENTS

2016 No. 85

The Local Government (Standards Committees, Investigations, Dispensations and Referral) (Wales) (Amendment) Regulations 2016

Amendments to the Standards Committees (Grant of Dispensations) (Wales) Regulations 2001

4.—(1) The Standards Committees (Grant of Dispensations) (Wales) Regulations 2001(**1**) are amended as follows.

(2) In regulation 1, in paragraph (3) in the appropriate place insert—

""community sub-committee" ("*is-bwyllgor cymunedol*") means a sub-committee appointed by a standards committee of a local authority under section 56 of the Act;";

""joint committee" ("*cyd-bwyllgor*") means a committee established by two or more relevant authorities under section 53(1) of the Act;";

""section 54A sub-committee" ("*is-bwyllgor adran 54A*") means a sub-committee appointed by a standards committee under section 54A(1) of the Act";

""standards committee" ("*pwyllgor safonau*") means—

(a) a standards committee of a relevant authority;

(b) a joint committee;

(c) a section 54A sub-committee; or

(d) a community sub-committee;".

(3) In regulation 2—

(a) at the end of paragraph (h) omit "or";

(b) in paragraph (i), for the words that follow "removed" substitute "; or";

(c) after paragraph (i) insert—

"(j) "it appears to the committee to be otherwise appropriate to grant a dispensation."

(4) After regulation 2 insert—

"**Dispensations granted in accordance with regulation 2(j)**

3.—(1) A dispensation granted by the standards committee of a relevant authority under section 81(4) of the Act on the grounds set out in regulation 2(j) and which remains in effect, must be reviewed by the standards committee once in every 12 month period from the date on which the dispensation is first granted.

(2) When conducting a review under paragraph (1) the standards committee must determine whether the dispensation should continue to have effect.

(**1**) S.I. 2001/2279 (W. 169).

Procedure and powers of standards committees

4.—(1) A standards committee of a relevant authority may refer an application for a dispensation made by a member of the authority to the standards committee of another relevant authority for consideration and determination.

(2) The monitoring officer of a relevant authority to which an application for a dispensation is made may, with the prior written consent of the chairperson of the standards committee of that authority, make arrangements for the application to be considered and determined by the standards committee of another relevant authority.

(3) Where reasonable efforts to contact the chairperson of the standards committee of the relevant authority have been unsuccessful, the vice-chairperson of the standards committee may give consent under paragraph (2).

(4) Where a monitoring officer or standards committee makes arrangements for a dispensation application to be considered and determined by the standards committee of another relevant authority, the monitoring officer or standards committee that makes those arrangements must provide notice to the person making the application accordingly.

(5) The notice to which paragraph (4) refers must include the following—

(a) a statement that the matter has been referred to another relevant authority's standards committee for consideration and determination;

(b) the name of the other relevant authority; and

(c) the reason why the application has been referred to the standards committee of the other relevant authority.

(6) When the standards committee has determined the application it must give written notice of its decision to the—

(a) member applying for the dispensation; and

(b) standards committee of the referring relevant authority."

ENCLOSURE 5

Briefing Note to Members

Dispensations

This is a briefing note for Members of the Isle of Anglesey County Council on the topic of 'Dispensations'. Should Members have any queries, please contact the Monitoring Officer.

The Isle of Anglesey County Council's Code of Conduct for Members

No Member is allowed to participate in a matter where he/she has an interest which is prejudicial* unless a dispensation has already been granted by the Council's Standards Committee. This information is contained in paragraph 14 of the Code

Grounds on which a dispensation may be granted

The grounds on which a dispensation may be granted are:-

1. At least half of the relevant Members (Council/Committee) would be unable to take part in a meeting because of a prejudicial interest;

2. The lack of participation by Members would affect political balance;

3. The nature of the interest is such that participation would not damage public confidence in the decision;

4. The Applicant Member's interest is common to a significant proportion of the general public;

5. The Applicant Member's particular role or expertise would justify participation;

6. The interest is registrable but not financial and the decision will be considered by a scrutiny committee

7. The business relates to the finances or property of a voluntary organisation and the Applicant Member sits on its board or committee in his/her own right, and he/she does not have any other interest [although in this instance, any dispensation will not allow the Applicant Member to vote on the matter];

8. The Standards Committee believes that the Applicant Member's participation would be in the interest of the people in the Council's area and the Committee notifies Welsh Ministers within 7 days of the dispensation being granted; or

9. The Standards Committee believes it appropriate to grant the dispensation, as a practical solution to the disability (infirmity) of the Applicant Member which otherwise would make it difficult for them to leave a room/chamber when a matter in which they have a prejudicial* interest is being discussed.

What is the application process for a dispensation?

The Applicant Member must apply in writing to the Standards Committee and will usually be expected to attend the meeting of the Standards Committee Panel which will take the decision.

An Applicant Member may apply individually or, in common circumstances, a joint or collective application may be made by more than one Member.

The Standards Committee will consider all applications on their own facts; balancing the public interest in preventing those with prejudicial* interests from taking part in decisions while maximising the public interest in democratic participation.

The decision as to whether a dispensation shall be granted is at the Standards Committee's discretion. The terms and duration of any dispensation shall be decided by the Standards Committee.

If the Standards Committee approves an application it must grant the dispensation in writing. No Member may rely on a dispensation until such time as the written decision has been published. Where necessary, and possible, this will be expedited.

Requirements on Members when relying on a dispensation

Once the Standards Committee has approved an application and has granted the dispensation, in writing, the Member will then be able to participate (subject to any limitations imposed) despite his/her prejudicial* interest.

(a) Meetings:

Where a Member has a dispensation and wants to participate in a meeting to discuss the relevant matter, the Member must:

(i) state at the meeting, when the item is to be discussed, that he/she is relying on a dispensation; and

(ii) before, or immediately after the close of the meeting, he/she must give written notification** to the Council.
The notification must include:

1. details of the prejudicial* interest for which the dispensation was granted;
2. details of the business to which the prejudicial* interest relates;
3. details of the dispensation, including the date on which it was granted, and
4. the Member's signature.

(b) Written representations:

Where a Member has been provided with a dispensation, and is making written representations to the Council, the Member must provide details of the dispensation in any correspondence on the subject to which the dispensation relates.

(c) Oral representations:

Where a Member has been provided with a dispensation, and is making oral representations to the Council, that Member must:

(i) include details of the dispensation in any oral representations and

(ii) provide written notification** to the Council within 14 days of making the oral representations

Footnote/definitions

* prejudicial interests – these are personal interests (listed in the Members' Code of Conduct) which an objective observer would consider so significant that they are likely to compromise the Member's ability to put the public interest first.

** written notification – in formal meetings, Members may rely upon the standard form of declaration. In informal meetings Members must provide written confirmation to the lead officer and ask that the dispensation be included in any informal minute/file note of the meeting.

THE ISLE OF ANGLESEY COUNTY COUNCIL

DISPENSATION APPLICATION TO THE STANDARDS COMMITTEE
BY A MEMBER OF THE COUNTY COUNCIL

Name of Member:	
Member's contact details:	
Ward:	
Nature of prejudicial interest* in respect of which the Dispensation is sought:	
Business in which the Member wishes to participate:	
Type of Dispensation sought (tick as necessary and insert any required information):	o write to officers [and/or the Executive / Committee / Council] about the issue; o speak to officers of the Council about the issue [in the presence of two other persons] [who are not Trustees or Board Members of [INSERT]], provided a note is taken of any such discussions; o speak at Executive/Committee/Council meetings and answer any questions about the issue; o remain in the room during any debate/voting on the issue; o vote at such meetings; o other
Statutory Ground/s under which Dispensation is requested (See overleaf for available grounds):	
Is the interest registered as per Section 81(1) & (2) of the LGA 2000:	**Yes / No**
Date by which a decision is required:	
Signed:	**Date:**

* Prejudicial Interests – these are personal interests which an objective observer would consider so significant that they are likely to compromise a member's ability to act in the public interest

Circumstances When A Standards Committee May Grant Dispensation

The Standards Committee (Grant of Dispensations) (Wales) Regulations 2001 as amended by The Local Government (Standards Committees, Investigations, Dispensations and Referral) (Wales) (Amendment) Regulations 2016 specifies that the Council's Standards Committee may grant dispensations under Section 81(4) of the Local Government Act 2000 where:

(a) no fewer than half of the Members of the Council or of a Committee of the Council (as the case may be) by which the business is to be considered has an interest which relates to that business;

(b) no fewer than half of the Members of the Executive of the Council (i.e. Leader and Cabinet) by which the business is to be considered has an interest which relates to that business and either paragraph (d) or (e) also applies;

(c) Members' inability to participate would upset the political balance of the Council, or any of its committees by which the business is to be considered, to such an extent that the outcome would be likely to be affected;

(d) the nature of the Member's interest is such that the Member's participation in the business to which the interest relates would not damage public confidence in the conduct of the Council's business;

(e) the interest is common to the Member and a significant proportion of the general public;

(f) the participation of the Member in the business to which the interest relates is justified by the Member's particular role or expertise;

(g) the registerable interest relates to business which is to be considered by Scrutiny Committee of the Council, and the Member's interest is not a pecuniary/financial interest;

(h) the business relates to the finances or property of a voluntary organisation of whose management committee or board the Member is a member otherwise than as a representative of the Council and the Member has no other interest in that business, provided that any dispensation shall not extend to participation in any vote with respect to that business;

(i) it appears to the Standard Committee to be in the interest of the inhabitants of the area of the Council that the disability should be removed, provided that written notification of the grant of the dispensation is given to the National Assembly for Wales within 7 days. Such a notification should specify the Member to whom the dispensation would apply and the Standards Committee's reasons why the disability should be removed; or

(j) it appears to the committee to be appropriate to grant the dispensation, as a practical solution to the disability (infirmity) of the Member which otherwise would make it difficult for them to leave a room/chamber when a matter in which they have a prejudicial interest is being discussed.

THE ISLE OF ANGLESEY COUNTY COUNCIL

DECISION OF THE STANDARDS COMMITTEE IN RELATION TO AN APPLICATION FOR DISPENSATION BY A MEMBER OF THE COUNTY COUNCIL

Decision of the Standards Committee:	
Date decision made by the Standards Committee:	
Name of persons to be notified of the Standards Committee's decision:	
Date any dispensation expires:	

Pursuant to paragraph [ ] of The Standards Committee (Grant of Dispensations) (Wales) Regulations 2001 as amended by The Local Government (Standards Committees, Investigations, Dispensations and Referral) (Wales) (Amendment) Regulations 2016, the Standards Committee has resolved to **grant a dispensation** to Councillor [ ] in respect of that / those interest(s) referred to in the Application at page 1, which permits the Councillor to:

- write to officers [and/or the Executive/Committee/Council] about the issue;
- speak to officers of the Council about the issue [in the presence of two other persons] [who are not Trustees or Board Members of [INSERT]], provided a note is taken of any such discussions;
- speak at Executive/Committee/Council meetings and answer any questions about the issue;
- remain in the room during any debate/voting on the issue;
- vote at such meetings;
- other

The Councillor can therefore speak [and vote] at Executive/Committee/Council meetings in relation to the issue and answer any questions from members of the Executive/ Committee/Council [but must leave the meeting before matters that the Councillor speaks upon are debated or voted up on] OR
[and may remain in the room during the debate and vote on the issue but must not vote on the issue].

Before the Councillor speaks with, or writes to, officers of the Council, or speaks at Executive/Committee/Council meetings on the issue, the Councillor must still:-

- declare an interest in the matter; and
- confirm that a dispensation has been granted to allow the Councillor to speak [and vote] about it; and
- complete the notification to the Clerk setting out the interest and the dispensation.

By authority of the Isle of Anglesey County Council's Standards Committee

Dated:_____

ENCLOSURE 6

DISPENSATION CONSIDERATIONS -
Guidance for the Standards Committee Panel when considering Councillors' applications for dispensation:

1. Reading:
   - Consider the Report prepared by / on behalf of the Monitoring Officer.
   - Consider the enclosures to the Report, particularly the Application Form completed by the Councillor, in order to gather all facts.

2. Multiple Applications:
   - Deal with each application individually and on its own facts.
   - Consider following a procedure at the Hearing:
     - Gather background / general information (if needed);
     - Listen to Councillor A's application / ask questions if in attendance / ask the Clerk;
     - Retire to consider Councillor A's application;
     - Resume – may announce the decision in relation to Councillor A's application, or may defer announcing the decision until all applications have been considered;
     - Repeat, depending on the number of applications to be considered.

3. Personal / Prejudicial Interest:
   - For each application, determine –
     - Is there a PERSONAL INTEREST?
       - Consider the Code of Conduct (included as an enclosure to the Report) – what is the personal interest?
     - Is the personal interest PREJUDICIAL?
       - Again, consider the Code of Conduct (included as an enclosure to the Report) – is the personal interest also prejudicial?
   - If there is no personal interest, or the personal interest is not prejudicial, there is no need to consider an application for dispensation as the Councillor is able to fully participate in the business.

4. Ground for Dispensation:
   - Where there is a personal interest which is prejudicial, consider the GROUND on which the dispensation may be granted. The grounds are listed on the back of the Application Form.
     - Has the Applicant correctly identified these on the Application Form?
     - Has the Applicant included all required Dispensations on the Form i.e. for voting / speaking / writing etc.?

5. Restrictions / Limitations on the Dispensation:
   - When deciding whether or not to grant the Dispensation, consider (if the Dispensation is to be granted) if any restrictions or limitations are required. Matters such as if the Councillor can speak but not vote or whether the dispensation is for one meeting only or the duration of the Council term.

6. Decision Form
   - In granting the dispensation, the Panel will need to complete the Decision Form which details (a) the decision of the Standards Committee; (b) the date when the decision is made; (c) who should be informed of the decision; (d) the date when the dispensation expires; (e) under which ground(s) the dispensation is being granted; and (f) what the dispensation allows the Councillor to do (i.e. speak, vote etc.).

ENCLOSURE 7

Isle of Anglesey County Council	
Report to:	Full Council
Date:	12th May 2026
Subject:	Public Consultation on the proposed Visitor Levy
Portfolio Holder(s):	Cllr. Alun Roberts (Leisure, Tourism, Maritime and Property
Head of Service / Director:	Christian Branch Head of Regulation & Economic Development
Report Author: **Tel:** **E-mail:**	Andy Godber Visitor Economy and Coastal Areas Manager andygodber@ynysmon.llyw.cymru
Local Members:	Applicable to all Elected Members

A –Recommendation/s and reason/s

The Full Council is asked to support:

The undertaking of a public consultation process regarding the potential introduction of a visitor levy on Anglesey (in line with Council and Welsh Government guidelines).

The visitor levy is a potential additional charge to be paid when staying in visitor accommodation in Wales.

The money raised from the levy will be used to improve local tourism. It will help to:

- maintain local facilities and infrastructure.
- protect Anglesey's natural environment
- ensure communities can continue welcoming visitors whilst preserving what makes each area special.

Local Councils can choose if they want to introduce the visitor levy in their area, but this must be determined after consulting with residents and businesses.

This means the levy will only be charged in areas where communities have decided it is right for them.

The earliest the Isle of Anglesey County Council could bring in a Visitor Levy is October 2027.

The Welsh Government advocate the use of the Gunning Principles for consultation – these are:

- Consultation must be at a formative stage.

A –Recommendation/s and reason/s
• Sufficient information must be provided to allow intelligent consideration of response and may include an economic impact assessment. Other considerations are to include information on the improvements to destination management which would result from the additional funding derived from the Levy. • Adequate time must be given for consideration and response. • Feedback from the consultation must be considered by decision makers. It is proposed that the consultation process should commence on the 18th May for a period of 8 weeks. Further details and the approach to consultation can be seen in **ANNEX A.**

B – What other options did you consider and why did you reject them and/or opt for this option?
The other option would be to reject the introduction of the Visitor Levy without consulting the sector and wider public.

C – Why is this a decision for the Full Council?
Legal advice has concluded that the decision to consult on the potential introduction is one that needs to be made by Full Council.

Ch – Is this decision consistent with policy approved by the Full Council?
Although not specifically referenced in the Destination Management Plan nor Council Plan, the rationale of the Levy to deliver sustainable destination management is consistent with both policies.

D – Is this decision within the budget approved by the Council?
The consultation and accompanying economic and equality impact assessments will be delivered utilising existing Regulation and Economic Development Service funding.

Dd – Assessing the potential impact (if relevant):		
1	How does this decision impact on our long term needs as an Island?	The recommendation is to support the delivery of a full consultation process. Theis will form the basis for a decision on the adoption of the Visitor Levy.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Not applicable – currently support required for consultation phase only
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	The intention is to work collaboratively with the neighbouring Councils of Gwynedd and Conwy to follow a set timescale and process for consultation. However, the consultation itself will be undertaken independently.
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	The public will have an opportunity to provide feedback through the consultation process.
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	A full equality impact assessment has been carried out and will be reviewed post consultation (see **ANNEX B)**
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	A full economic impact assessment has been carried out and will be reviewed post consultation (see **ANNEX C)**
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	The consultation process will be fully bilingual. An evaluation of potential impacts on the Welsh Language forms part of **ANNEX B**

E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	Recommended that consultation should be conducted. Recommended that collaboration on the consultation approach should be done with Gwynedd and Conwy Councils but
2	Finance / Section 151 (mandatory)	

E – Who did you consult?		What did they say?
3	Legal / Monitoring Officer (mandatory)	that the consultation itself should be independent.
4	Human Resources (HR)	NA
5	Property	NA
6	Information Communication Technology (ICT)	Preparing the digital consultation materials
7	Procurement	NA
8	Scrutiny	NA
9	Local Members	NA

F - Appendices:
ANNEX A - Consultation expectations and requirements for Local Authorities ANNEX B - Equality Impact Assessment including Welsh Language ANNEX C - Economic Impact Assessment ANNEX D - Evaluation on the Potential Impacts on the Environment

Ff - Background papers (please contact the author of the Report for any further information):
ANNEX E - Destination Management Plan 2023-2028

ANNEX A

Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025

Consultation expectations and requirements for Local Authorities

1. Introduction

The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 received Royal Assent on 18th October. The Act gives local authorities the power to introduce a visitor levy (the levy) charged on overnight stays in visitor accommodation in their area. The levy is discretionary in nature; it will be for local authorities to decide whether to introduce it following consultation with their communities and local businesses.

Implementation of the levy itself is discretionary for each local authority and cannot occur before 2027 as it must be preceded by a consultation with mandatory consultees.

More information on the levy can be found here;

Visitor Levy and Register of Visitor Accommodation Providers

2. Welsh Government Draft Consultation Guidance

The route map for the decision-making process by the local authority has been published in draft form by Welsh Government and forms the basis of this update on next steps.

Neighbouring authorities of Gwynedd and Conwy have illustrated an intention to undertake a consultation process on the potential introduction of the Levy in May-July 2026, and it is considered prudent by officers to follow a similar timeline.

This consultation process will inform the decision making of the Council.

Each local authority has discretion on whether to adopt and implement the visitor levy. If an authority wishes to implement a levy there is a mandatory consultation with residents, businesses and other local organisations prior to implementation.

3. Consultation requirements

- Consultation must be at a formative stage
- Sufficient information must be provided to allow intelligent consideration of response and may include an economic impact assessment. Other considerations are to include information on the improvements to destination management which would result from the additional funding derived from the Levy.
- Adequate time must be given for consideration and response.
- An 8 week consultation period is proposed.
- Feedback from the consultation must be considered by decision makers.

3.1 Local authorities must consult with the following groups:

- Local residents, workers, and students.
- Community Councils within the principal Council's area.
- Public Services Boards.
- Neighbouring principal Councils.
- A Corporate Joint Committee that includes at least senior executive member of the Council.
- Organisations that represent businesses that work in tourism

3.2 The consultation should include:

- A published proposal outlining the case for the levy.
- Potential benefits and suggestions for how the levy might be invested.
- A local impact assessment (social, economic, environmental effects).
- Clear, accessible materials and realistic timelines.
- Collaboration with the Welsh Revenue Authority (WRA) for operational advice and support.

3.3 Local authorities must also:

- Conduct Equality Impact Assessments under the Equality Act 2010.
- Align with the Well-being of Future Generations (Wales) Act 2015.
- Follow the Code of Recommended Practice for consultation and engagement.

3.4 Engagement Methods

The consultation costs are to be covered by the local authority and as such the suggestion is to make use of most cost-effective means of engagement.

These would be -

- Online Survey
- Digital and social media feeds
- Local radio advert highlighting consultation
- Printed versions of consultation and supplementary information in public buildings including leisure centres and libraries.

Additionally face to face engagement is to be delivered through--

- Public meetings, workshops, pop-ups. These will be geographically spread across Anglesey
- Business Sector specific meeting with the Welsh Revenue Authority.

4. After consultation:

- Officers will report back findings from the consultation and provide the Council with a recommendation.
- The Full Council must vote on the decision.
- If approved, a formal notice must be published including -
  - ◊ Results of the decision making process
  - ◊ Rates of the Levy to be introduced
  - ◊ Effective date for introduction
  - ◊ Other information the authority considers appropriate

5. Local authority options and obligations

Local authorities can decide how to use any revenues raised from the visitor levy to support tourism. They must set out their proposed use of the levy in a report to be published before any consultation takes place and they will be required to provide an annual report on how the revenues raised have benefited their area.

The additional resource is to be directed at improving destination management, and its use is to be reported to Welsh Government on an annual basis thus ensuring that this ring fenced resource is used in accordance with the Act.

The establishment of a visitor Levy Partnership Forum which is a requirement on all adopting Councils will support this determination of spend allocation.

Although the use of the additional resources is to be determined through the Levy Partnership Forum, it is expected that the objectives of the Destination Management Plan will be at the core of this determination of future investment. Namely the enhancement of Anglesey as a destination which is sustainably managed with communities, culture, heritage and the natural environment as its key assets.

It should also be noted that the levy cannot be amended or abandoned until it has been in place for at least 12 months and any amendments would require a further consultation process.

6. Other information

Collection of the levy will be managed by the Welsh Revenue Authority (WRA) on behalf of any local authority that chooses to implement a visitor levy.

CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

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Equality Impact Assessment of the Visitor Levy

ynysmon.llyw.cymru anglesey.gov.wales

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1 Introduction

1.1 This Equality Impact Assessment (EQIA) considers the potential equality impacts related to Isle of Anglesey County Council imposing a visitor levy.

1.2 This document provides information to the Isle of Anglesey County Council to support their consideration of imposing a visitor levy with regard to its Public Sector Equality Duty (PSED).

1.3 In addition it also consider the potential effect on the Welsh Language and considers the socio-economic status in the context of the Socio-Economic Duty

Overview of the Visitor Levy

1.4 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the '2025 Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.

1.5 The levy is chargeable at two separate rates:

- Campsite pitches and shared rooms (hostels and dormitories): 75p plus VAT per person, per night
- All other types of visitor accommodation: £1.30 plus VAT per person, per night

Note that those who camp in campervans, caravans or glamping will be required to pay the higher rate.

1.6 There are exemptions[1]; Visitors will not pay the visitor levy if they are:

- under 18 years of age and staying on a campsite pitch or in shared rooms (such as a hostel or a dormitories)
- staying for more than 31 nights in a single booking
- in emergency or temporary housing arranged by the local council

1.7 The funds from the levy will be reinvested for the purposes of destination management and improvement in the area. Section 44 of the 2025 Act stipulates that councils must use the proceeds of the levy for:

- mitigating the impact of visitors;
- maintaining and promoting use of the Welsh language;
- promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
- providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

[1] The visitor levy: a small contribution for a lasting legacy. Available here

Purpose of this Equality Impact Assessment

1.8 In considering whether to impose a visitor levy, Isle of Anglesey County Council is required to consider potential equality effects that may relate to the protected characteristics under the 2010 Equality Act (the '2010 Act').[2] The purpose of this EQIA is to provide information to assist the council in its role as the local authority when discharging its PSED.

1.9 **Section 2** of this report provides context by setting out the legislative and policy context and **Section 3** explains the methodology applied in this EQIA, considering both disproportionate and differential effects.

1.10 The Welsh Government has already conducted an EQIA of imposing a visitor levy across Wales.[3] **Section 4** summarises the findings of this EQIA. **Section 5** looks at the effect of imposing a visitor levy in Anglesey and the potential ways in which these effects may interact with protected characteristics.

1.11 **Section 6** considers the potential effect on the Welsh Language and **Section 7** considers the socio-economic status in the context of the Socio-Economic Duty.

1.12 A separate Economic Impact Assessment has been conducted – this is cross-referenced where relevant in this EQIA.

[2] The Equality Act 2010.
[3] Welsh Government, 2025. Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025: Equality Impact Assessment here

2 Legislative and policy context

The Equality Act

2.1 The 2010 Act forms the basis of anti-discrimination law in Great Britain. Section 4 of the 2010 Act defines various protected characteristics which are covered by the Act:

- Age;
- Disability;
- Gender reassignment;
- Marriage and civil partnership;
- Pregnancy and maternity;
- Race;
- Religion and belief;
- Sex
- Sexual orientation

2.2 The 2010 Act requires authorities to have due regard to equality considerations when exercising their functions. This Public Sector Equality Duty (PSED) requires public authorities to have due regard to the need to:

- Eliminate discrimination, harassment, victimisation and any other that is prohibited by or under this Act:
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- Foster good relations between persons who share a relevant protected characteristic and those that do not share it.

2.3 The need to advance equality of opportunity includes the need to (as set out in Section 149 (3) of the 2010 Act):

- Remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
- Take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
- Encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low

The Well-being of Future Generations Act 2015 and the Socio-Economic Duty

2.4 The Welsh Government's **Well-being of Future Generations Act 2015**[4] (WFGA) sets out seven goals for improving Wales' social, economic, environmental and cultural well-being. These provide a legally binding common purpose for national and local governments as well as for local health boards and other public bodies. The goal of 'A More Equal Wales' aims to create a society that enables people to fulfil their potential, regardless of background or circumstance.

2.5 Sections 1 to 3 of the Equality Act set out **The Socio-Economic Duty**, and these sections took effect in Wales in 2021. The duty means that an authority "must, when making decisions of a strategic nature about how to exercise its functions, have due regard to the desirability of exercising them in a way that is designed to reduce the inequalities of outcome which result from socio-economic disadvantage". In doing so, the authority must take account of guidance issued by Welsh ministers.

2.6 This guidance[5] defines socio-economic disadvantage as "living in less favourable social and economic circumstances than others in the same society", and that this can include both "communities of interest" and "communities of place".

Other relevant policy

2.7 The **Future Wales: National Plan 2040** (2021)[6] is to shape a future that is sustainable, healthy, equitable and fair. Each region is encouraged to build on their existing strengths and pursue opportunities to achieve greater prosperity and well-being.

2.8 Two of the twelve future Wales outcomes mention tourism, including the importance in of 'attracting the interest and expenditure of tourists and providing a distinctive and trusted brand for Welsh businesses' and providing sustainable transport options.

2.9 Tourism and leisure is recognised as a major and growing employer and contributor to the Welsh rural economy. The plan stats that sustainable forms of tourism, including opportunities for active, green and cultural tourism, should be explored. Tourism is also a 'focus' of the North Wales Coastal Settlements regional Growth Area (Policy 21).

2.10 The Plan also highlights increasing the prevalence of the Welsh language is also a priority.

2.11 **The Economic mission: priorities for a stronger economy (2023),** sets out the Welsh Government's priorities for building a more prosperous, equal, and greener economy. This includes:

- A just transition and green prosperity
- A platform for young people, fair work, skills and success

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[4] Welsh Government. Well-being of Future Generations Act 2015. https://www.legislation.gov.uk/anaw/2015/2/contents/enacted
[5] Welsh Government. 2021. A More Equal Wales: The Socio-Economic Duty.
[6] Welsh Government. 2021. Future Wales: The National Plan 2040.

- Stronger partnerships for stronger regions and our everyday economy
- Investing for growth.

2.12 The economic mission outcomes underpin the four priorities: a more prosperous economy, a greener economy and a more equal economy. It defines as more prosperous economy is one that operates within safe environmental limits and advances the well-being of current and future generations. An active government that drives economic development to grow the economy and reduce inequalities.

2.13 The **Strategic Equality and Human Rights Plan 2025-2029** (2025)[7] fulfils the Welsh Government's duties in relation to specific protected characteristics under the Equality Act and commitments to Human Rights. It sets out the long term aim for Wales as 'Wales is a nation based on equity, anti-discrimination, and inclusion, through strengthening and advancing equality and human rights.'

2.14 The **Economic Contract**[8] is an agreement between the Welsh Government and the businesses it supports to identify how partnership working will improve economic resilience and make Wales a more attractive place to work. The Contract commits businesses to providing public investment contributions that prioritise social and environmental needs, including access to Fair Work and the promotion of wellbeing. In response to these contributions, the Contract commits the Welsh Government to setting out the non-financial support it will provide to businesses in return.

Anglesey Policy

2.15 The vision of the **Anglesey and Gwynedd Joint Local Development Plan 2011-2026** (2017)[9] (JLDP) is to put plans and projects in place that will promote prosperous, healthy and safe communities. Strategic objectives include:

- To safeguard and strengthen the Welsh language and culture, and to promote its use as an essential part of community life.
- To increase employment and economic activity rates and reduce unemployment rates, so that all are closer to the national averages.

2.16 The plan acknowledges tourism as a key economic sector and priority, and that there is a need to ' improve and manage the 'all year' tourist provision in the area in a sustainable way whilst at the same time promoting the heritage, the Welsh language and Welsh culture of the area'.

2.17 The IACC's vision set out in the **Council Plan 2023-2028**[10] is to ''Create an Anglesey that is healthy and prosperous where people can thrive'. The plan is underpinned by six objectives: (the Welsh Language, Social Care and Wellbeing, Education, Housing, Economy and Climate Change).

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[7] Welsh Government. 2025. Strategic Equality and Human Rights Plan 2025-2029
[8] https://businesswales.gov.wales/economic-contract
[9] Isle of Anglesey County Council and Cyngor Gwynedd Council. 2017. Anglesey and Gwynedd Joint Local Development Plan 2011-2026.
[10] Isle of Anglesey County Council. Council Plan 2023-2028.

2.18 Anglesey's Strategic Equality Plan 2024-2028 establishes eight equality objectives for Anglesey:

- Education: Take action to address gaps in educational attainment and support the wellbeing of school pupils
- The workplace: Take action to ensure we are an equal opportunities employer and reduce pay gaps
- Living standards: Take action to improve the living standards of protected groups
- Health well-being and social care: Take action to improve health, wellbeing and social care outcomes
- Personal security: Take action to safeguard protected groups
- Participation: Increase access to participation and encourage diversity in decision making
- Socio-economic disadvantage: Take action to address disadvantage
- Working practices: Improve our internal practices to ensure fairness for all

2.19 The intention is to ensure that equality is an integral part of work across the organisation and does not sit apart as a separate project. Annual action plans ensure governance and monitoring.

3 Methodology – EQIA

Approach

3.1 All interventions will have a range of impacts, with potentially both positive and negative impacts.

3.2 Everyone affected by an intervention will have some protected characteristics as defined by the 2010 Act, and there will be varying degrees of intersectionality (such as age, race and sex), and people will not all be equally affected. That does not however, necessarily constitute an equality effect.

3.3 To identify which effects are relevant to equality considerations, equality assessments distinguish equality effects as those that have either a disproportionate or differential effect upon persons who share a relevant protected characteristic compared to persons who do not share it, as explained below:

- **Disproportionate**: there may be a disproportionate equality effect where people with a particular protected characteristic make up a greater proportion of those affected than in the wider population.
- **Differential**: there may be a differential equality effect where people with a protected characteristic are affected differentially to the general population as a result of vulnerabilities or restrictions they face because of that protected characteristic.

3.4 The scale and significance of such impacts cannot always be quantified. Therefore, the consideration of equality effects includes a descriptive analysis of the potential impacts and identifying whether such impacts are adverse or beneficial.

3.5 Equality effects are complex and impacts are difficult to accurately and comprehensively predict. People's protected characteristics are personal and not always known, and not all of the people who will live near, work in or visit the area in future are already there today. For this reason, the EQIA can only consider effects that can reasonably be foreseen.

3.6 Any decision taken by a public body may involve a need to consider and balance a range of both positive and negative effects of different types. There may be reasonable mitigation measures that can eliminate or reduce some disproportionate or differential equality effects, but some impacts may not always be avoidable.

Scope of Assessment

3.7 The main objective of an EQIA is to provide IACC with information, with regard to the likely impact on the protected characteristics identified in the 2010 Equality Act, to inform their decision making.

3.8 There are three broad groups of people who may be affected by the visitor levy:

- Those who are (or may be in the future) employed in tourism jobs (or related sectors) whose employment may be affected by the introduction of the levy – this equally applies to business owners who may be affected.

- Resident who live in the area who may be affected by the introduction of the levy – through change in visitor numbers and / or who benefit from the investment of the levy spending

- Visitors (or others who are staying overnight) who are required to pay the levy

3.9 Within these groups there will be people with different protected characteristics and there will be varying degrees of intersectionality.

3.10 The starting point for the assessment is the Welsh Government all-Wales level EQIA[11] (WG EQIA), including the assessment, consultation / engagement and mitigation. We then consider whether there are any Anglesey specific characteristics that may alter the findings of the WGIA and lead to disproportionate or differential effects. This is set out in Section 4 while the local EQIA is set out in Section 5.

3.11 Later sections consider the potential effect on the Welsh Language and considers the socio-economic status in the context of the Socio-Economic Duty.

[11] Welsh Government, 2025. Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025: Equality Impact Assessment here

4 Summary of the Welsh Government national level EQIA

4.1 The WG EQIA draws on a range of statistical data and figures on all protected characteristics and engagement with stakeholders including charities, disability groups and faith organisations to identify and (where possible) mitigate potential negative equality impacts.

4.2 The WG EQIA states that:

> ***'The overall aim of the levy is to generate additional revenue for local authorities that choose to use a levy and it is not expected there are "direct" impacts on those with protected characteristics.'***

4.3 The assessment identified that a visitor levy will affect local authorities, visitors, local residents and businesses where a levy is implemented, either directly or indirectly. A 'direct impact' of the visitor levy was defined as any potential impact of having to pay or charging the levy. An 'indirect impact' was defined as potential impacts due to the existence of a levy.

4.4 The WG EQIA acknowledges that existing research on the impacts of introducing a visitor levy on protected characteristics is limited so uses qualitative information and some data to make inferences as to potential "indirect" impacts. The same caveats apply to the local assessment.

Overall position on refunds and exemptions

4.5 Welsh Government conducted formal engagement on the Act, including with regard to exemptions. Generally, those in favour of applying exemptions to certain groups typically did so on the basis that:

4.5.1 exemptions should be applied to promote fairness and equality of outcome by supporting groups with protected characteristics, and

4.5.2 that certain groups should not be classified as visitors and therefore, should not be imposed upon a levy.

4.6 Those who disagreed with applying exemptions, did so on the basis that exemptions could introduce complexities, increase administrative burden for tax authorities and visitor accommodation providers, and could be unfair since all visitors benefit from the visitor services and infrastructure.

4.7 Ultimately, Welsh Government is clear that there needs to be a clear policy basis for a reduced rate or exemption based on protected characteristics. The approach is therefore to minimise the use of exemption but use a lower levy rate.

4.8 To ensure a level of progressivity is met and those on lower incomes are not dissuaded or unable to meet the extra costs associated with the levy, there are two rates set out in the Bill a lower rate for hostels and campsites and a higher rate for all other visitor accommodation. Although it

is noted that those who camp in campervans, caravans or glamping will be required to pay the higher rate.

4.9 The Welsh Ministers can assess and revise the visitor levy rates that are set in legislation should adverse impacts materialise.

4.10 The legislation sets out two categories of stays in relation to the levy, that will be either, exempted or refunded:

- **Exemptions** include stays arranged by local authorities, those who are homeless, accommodation for asylum seekers, private hospitals, approved premises, care homes and gypsy and traveller sites.
- **Refunds** may be provided where it is not possible to provide an exemption. This includes stays where there is a risk to the health, safety or welfare if an individual stayed at their sole or main residence, where an individual was homeless (and the stay was not exempt), and stays by those in receipt of a disability benefit where the person was accompanied by a person providing care, support or assistance.

4.11 Exemptions are made for the following groups and situations:

- Overnight stays at a gypsy and traveller site
- Home office arranged stays as part of their statutory obligations.
- Local authority arranged emergency stays in visitor accommodation as part of their duties under the Housing Act (Wales) 2014.
- Ministry of Justice arranged stays as part of their statutory obligations.
- Those under the age of 18 are not included in the calculable charge for lower-rated stays.

4.12 Similarly, refunds are available in cases where it is not possible to provide an exemption, such as:

- Stays related to temporary emergency housing arranged by charitable organisations in visitor accommodation on behalf of homeless people including those fleeing domestic abuse and asylum seekers.
- Disabled persons in receipt of a qualifying disability benefit who has paid visitor levy whilst staying in visitor accommodation and who are accompanied by a carer.
- Stays where there is a risk to the health, safety or welfare if an individual stayed at their sole or main residence (for example stays arranged by charities for vulnerable persons or where fire, flood or other disaster has rendered a property uninhabitable or where emergency services have advised not to stay at the property for such reasons).

4.13 As part of the consultation process, Welsh government officials engaged with policy teams in Welsh Government and the third sector to gain a better understanding of the lived experiences of vulnerable groups requiring visitor accommodation.

4.14 As a result of this engagement, the following actions were undertaken with respect to exemptions and refunds:

- Exemptions:

- Making clear in the 2025 Act, the types of stays in visitor accommodation not subject to a visitor levy to ensure policy aims are realised
- Ability to introduce new, modify or remove exemptions should there be emerging evidence of any disproportionate impact.

- Refunds – ability to add to the list of scenarios in which a refund may apply, should emerging evidence suggest so.

Protected characteristics

4.15 Table 4.1 summarises the impact on each protected characteristic and measures to mitigate the impacts in the WG EQIA.

Table 4.1: Impact on protected characteristics – WG EQIA

Protected characteristic	Potential Impact	Mitigation
Age	No direct negative or positive impacts. Some secondary impacts identified for children and young people. The ability to pay a levy may affect those with lower incomes, e.g. younger or lower people differently.	Under 18s are excluded from the levy for lower-rated stays.
Disability	It could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit. This is because disabled persons requiring a carer would potentially face additional costs due to the levy applying to the carer, should those additional costs be incurred by the disabled person.	Refund mechanism for persons in receipt of a disability benefit who are accompanied by a person providing care, support or assistance.
Gender reassignment	No direct negative impact.	Stays in private hospitals are exempt from a levy.
Marriage and civil partnership	No direct negative impact	
Pregnancy and maternity	No direct negative impact.	
Race	No direct negative impact	Gypsy, Roma and Travellers sites provided by a local authority or registered social landlord are exempt from a levy.

Protected characteristic	Potential Impact	Mitigation
		Exemptions / refunds are available for vulnerable groups, e.g. asylum seekers and those fleeing domestic abuse
Religion and belief	No direct negative impact. The levy may affect affordability for religious tourism but free accommodation is exempt.	The Welsh Revenue Authority (WRA) will offer non-digital processes to accommodate those whose faith may restrict digital engagement. Free accommodation exempt from a levy and stays in lower rated accommodation have a lower levy charge. Revenue generated from the levy could be used for the preservation and maintenance of religious sites.
Sex	No direct negative impact.	
Sexual orientation	No direct negative impact.	

4.16 As a result of the stakeholder engagement, additional mitigation measures that will be implemented include:

- Local authorities publishing a report on the amount of revenue generated and how the revenue has been / will be used for the purposes of destination and improvement in the local area where it is spent (reflected in Section 45 of the 2025 Act)
- Welsh Ministers carrying out a review of the operation and effect of the 2025 Act and publishing a review on a 5-year cycle (reflected in Section 63 of the 2025 Act)
- Monitoring the use of data such as Visit Wales surveys, the Tourism Barometer and engagement with local authorities and businesses.
- WRA monitoring and reviewing the effectiveness of levy administration through engagement with local authorities and businesses and reporting on the amount of revenues collected.

4.17 The findings of this national level assessment and the mitigation measures are considered below where appropriate.

5 Local equality impact assessment

5.1 The following section provides baseline data on the demographics of the local population and visitors with respect to the protected characteristics as defined by the 2010 Act where available data exists. It also provides a comparison against baseline demographic data for Wales with respect to the protected characteristics. Appendix A includes a summary of the relevant data for the resident population and is cross-referred to here as necessary.

5.2 Consultation with stakeholders is forecast to commence in 2026. Comments through the consultation process will inform the next stage of the EQIA (as appropriate).

5.3 Mitigation measures and recommendations set out within the EQIA draw upon those presented in the WG EQIA already conducted by the Welsh Government of imposing a levy across Wales and those mentioned in the 2025 Act.

Protected Characteristics

Age

5.4 The potential impact with respect to age is considered for:

- Visitors
- Local population in terms of employment

Visitors

5.5 The WG EQIA noted that 'It may be that those at ages typically associated with lower incomes (for instance, younger people), are less able to afford the extra cost of visitor accommodation'.

5.6 Those under the age of 18 staying in lower rated stays are not required to pay the levy for lower rated stays. This will help mitigate any potential negative effects on young people as they may be more likely to stay in lower rated visitor accommodation (although the WG EQIA notes that there is no data to confirm this assertion).

5.7 The WG EQIA also notes that extra costs might not discourage those earning less to go on holiday, but it might alter behaviour in other ways, such as staying for a shorter period or spending less.

5.8 The WG EQIA does not specifically consider the potential impact on older people.

5.9

5.10 While interpreting the table, it should be noted that:

- The Anglesey visitor age profile is from 2019, whereas the all-Wales visitor age profile is from 2024.

- The Anglesey visitor age profile is across both day and overnight visitors whereas the all-Wales visitor age profile is for domestic overnight visitors

5.11 shows the age distribution of visitors to Anglesey and Wales. There appears to be a smaller proportion of younger visitors to Anglesey than to Wales as a whole and a larger population of older people (although the data is not like for like).

5.12 While interpreting the table, it should be noted that:

- The Anglesey visitor age profile is from 2019, whereas the all-Wales visitor age profile is from 2024.
- The Anglesey visitor age profile is across both day and overnight visitors whereas the all-Wales visitor age profile is for domestic overnight visitors

Table 5.1: Age profile of visitors

	16 – 24	25 – 34	35 – 44	45 – 54	55 – 64	65+
Anglesey (% of visitors)[12]	16	14	15	20	18	17
Wales (% of trips)[13]	20	27	19	13	13*	7*

Note: where a figure is followed with a single asterisk, the base size is below 100 and the figure should be treated as indicative.

5.13 The extent to which there is likely to be a differential impact on young people is (in part) mitigated by the exemption for under-18s from the lower band of the Levy. There does not appear to be a disproportionate impact (as the data suggests there are fewer young Welsh visitors to Anglesey than Wales as a whole).

5.14 A higher proportion of older visitors to Anglesey could lead to disproportionate impact as a result adverse impact of the increase in the cost of the trip. On the other hand, the WG EQIA also notes the following benefits, which is relevant to visitors and residents (emphasis added):

5.14.1 'The additional revenue could also indirectly benefit older and younger residents by improving the overall quality of life in the community, should the funds be used to enhance infrastructure, making the destination more accessible for more people'.

5.14.2 'The funds could also support cultural preservation efforts, which could help to protect and promote local heritage and traditions, benefiting older people who may have a deeper connection to these cultural elements12, and conversely younger people by maintaining or creating new facilities for younger generations to use'.

Employment

5.15 The age profile of Anglesey residents is older than the Welsh and North Wales average with fewer working age people overall – refer to Appendix A for more detail.

[12] Wales Visitor Survey 2019 for Isle of Anglesey County Council
[13] Domestic GB tourism statistics (overnight trips): annual report 2024. Available here

5.16 The WG EQIA notes that those employed in tourism often have jobs that are more insecure, i.e. part-time working or spending less time working for the same employer. Additionally, those employed in the tourism sector are generally younger.

5.17 The WG EQIA also draws on the national level economic impact assessment and notes the impact of a visitor levy on employment as being between +100 FTE jobs to around -400 FTE jobs. The range arises due to the uncertainty in the extent to which a downturn in demand for tourism services will be offset by expenditure of visitor levy revenues.

5.18 The equivalent number for Anglesey is between -25 and +7 FTE jobs (refer to the Economic Impact Assessment for more data). Any loss of jobs could be felt disproportionately by young people.

5.19 The WG EQIA noted that 38% of tourism workers were aged between 16-29 in 2022 across Wales. More recent data shows that over the period Oct 2024 – Sept 2025, 25% of Welsh residents worked in the Distribution, hotels and restaurants sector were aged between 16-24.[14] This compares to 27% in Anglesey. There are particularly high proportion of people ages 16-19 (15%) working in the sector in Anglesey, compared to the Welsh average (10%).

Table 5.2 Employment by age (Distribution, hotels and restaurants) – resident (Oct 2024 – Sept 2025) [15]

Age group	Anglesey		Wales	
16 – 19	900	15%	23,700	10%
20 – 24	700	12%	35,300	15%
25 – 49	2,200	37%	104,800	45%
50+	2,100	36%	67,000	29%
Total	**5,900**	**100%**	**230,800**	**100%**

5.20 While there could be a disproportionate effect (due to higher likelihood of young people being employed in the tourism sector), the magnitude of any negative effect is likely to be very small – there are is a maximum reduction of 25 jobs, equivalent to loss of -0.1% of employment in Anglesey, and that is a worst case scenario. There could also be a positive effect (estimated of up to 7 jobs).

5.21 The WG EQIA also notes that 'should the additional revenue raised stimulate improvements to the local infrastructure and services, this could see an increase in visitors to the area, spurring more employment opportunities in the tourism sector'.

Age overall

[14] Office for National Statistics. Annual Population Survey
[15] *Ibid*

5.22 WG concludes there are 'nil' potential direct impacts with regard to Age once mitigation (including the under-18 exemption for lower bound accommodation) is taken into account.

5.23 There are possible impacts related to a higher proportion of older visitors to Anglesey, and a young workforce, but any impacts of the levy are likely to be small – and will to some extent be offset by the spending of the levy. Therefore, it is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA

5.24 A further assessment of the likely impact on younger or older people could be carried out once further information is available on how the fund will be spent.

Sex

5.25 The potential impact with respect to sex is considered for:

- Visitors
- Local population in terms of employment

Visitors

5.26 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, and do not make any distinction based on sex.

5.27 The WG EQIA notes that studies have reported men being more amenable to paying a visitor levy - this may be due to the interaction of gender and income, where women have lower incomes on average than men

5.28 Table 5.3 5.3 below shows that there are similar proportions of female and male visitors visiting Anglesey and Wales as a whole (although the data is not like for like) and in both cases there is a larger proportion of female visitors.

5.29 While interpreting the table below, it should be noted that:

- The Anglesey visitor profile is from 2019, whereas the all-Wales visitor sex profile is from 2024.
- The Anglesey visitor profile is across both day and overnight visitors whereas the all-Wales visitor sex profile is for domestic overnight visitors.

Table 5.3 Visitor distribution by sex

	Anglesey[16]	**Wales**[17]
Female	60%	59%
Male	40%	40%
All persons	**100%**	**100%**

NB that percentages may not sum to 100% due to rounding

[16] Wales Visitor Survey 2019 for Isle of Anglesey County Council
[17] Domestic GB tourism statistics (overnight trips): annual report 2024. Available here

5.30 The WG EQIA also notes that surveys suggest that:

- A majority (58%) of respondents agreed that tourists should contribute towards the costs of maintaining and investing in the destinations they stay in. Very few (13%) disagreed
- There was agreement that tourists should contribute to maintaining and investing in destinations and this correlates strongly with social grade and 'financial means'

5.31 WG concludes there are 'nil' potential direct impacts with regard to Sex. There are no Anglesey specific characteristics that would change the findings of the WG EQIA.

Employment

5.32 In terms of employment, the WG EQIA also notes that across Europe, the share of women in the tourism workforce is also often higher. However, Table 5.4 below shows that the employment in Distribution, Hotels and Restaurants is roughly evenly split between men and women in both Anglesey and Wales.

Table 5.4: Employment by sex (Distribution, Hotels and Restaurants)[18]

	Anglesey	Wales
Female	3,085 (50%)	132,116 (49%)
Male	3,062 (50%)	137,360 (51%)
All persons	**6,147 (100%)**	**269,476 (100%)**

5.33 It is not anticipated that there would be a disproportionate or differential impact in Anglesey as a result of the levy on females or males working in the tourist sector.

Marriage and Civil Partnership

5.34 Provisions in the 2025 Act are not expected to have any impact on marriage and civil partnership characteristic. Overnight visitor accommodation for weddings / civil partnership ceremonies will be subject to a levy.

5.35 There are slightly lower proportions of single people in Anglesey than the North Wales or Wales average and a slightly higher proportions of people who are married or in a civil partnership, or are divorced, separated or widowed – refer to Appendix A for more detail.

5.36 WG concludes there are 'nil' potential direct impacts with regard to Marriage and Civil Partnership. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.

Gender Reassignment

[18] Office for National Statistics. Census 2021

5.37 Provisions of the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on gender reassignment.

5.38 However, consideration in the 2025 Act is given to those requiring medical treatment for gender reassignment process and hospital stays do not get charged a levy.

5.39 WG concludes there are 'nil' potential direct impacts with regard to Gender reassignment. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.

Sexual Orientation

5.40 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on sexual orientation.

Visitors

5.41 Evidence suggests that 10% of trips taken to Wales were undertaken by LGBTQ+ visitors from January to December 2024.[19] The WG EQIA notes that there is no evidence to suggest that visitors with this sexual orientation characteristics would be disadvantaged through the provisions of the 2025 Act. The equivalent data for Anglesey is unavailable.

Employment

5.42 In the general population there are similar proportions of people who are gay, lesbian or bisexual in Anglesey as there are across North Wales and Wales. In terms of employment, the table below shows that:

- There are slightly lower proportions of bisexual and gay or lesbian workers employed in the distribution, hotels and restaurants sector in Anglesey (3%) compared to Wales (4%)
- There are slightly higher proportions of bisexual and gay or lesbian workers employed in the distribution, hotels and restaurants sector (3%) than the average across all sectors in Anglesey (2%) – that is the same pattern as in Wales (4% compared to 3%).

Table 5.5: Employment of residents by Sexual Orientation[20]

		Straight or Heterosexual	Gay or Lesbian	Bisexual	All other sexual orientations	Not answered	TOTAL
Distribution, hotels and restaurants	Anglesey	90%	2%	1%	0%	7%	100%
	Wales	90%	2%	2%	0%	6%	100%
All sectors	Anglesey	92%	1%	1%	0%	6%	100%
	Wales	91%	2%	1%	0%	5%	100%

[19] Domestic GB tourism statistics (overnight trips): annual report 2024. Available here
[20] Office for National Statistics. Census 2021

Sexual Orientation – overall

5.43 WG concludes there are 'nil' potential direct impacts with regard to Sexual Orientation. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA

Race

5.44 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on race.

5.45 As the WG EQIA notes, the impact of visitor levies on race can vary depending on specific contexts and implementation approaches, and where the revenue raised is spent. Proactive measures can be taken to ensure that the benefits of tourism are distributed more equitably among all segments of the population, with community engagement and inclusive decision-making processes being crucial to address potential negative impacts on minority ethnic groups.

5.46 As set out in Section 5, there is a refund mechanism that allows for refunds where groups are be housed in visitor accommodation temporarily and this is paid for by a supporting charity, in emergency situations

Visitors

5.47 Table 5.6 shows the ethnicity profile of domestic Wales overnight tourism in 2024 and the ethnicity profile of visitors to Anglesey.

Table 5.6 Ethnicity profile of visitor trips and visitors

Ethnicity of respondent	Wales (% of trips)[21]	Anglesey (% of visitors)[22]
White	80%	99%
Mixed / Multiple ethnic groups	3%**	
Asian / Asian British	6%*	
Black / African / Caribbean / Black British	7%*	
Chinese	0%**	2%
Arab	0%**	
Other ethnic group	0%**	
Prefer not to say / Don't know / Unspecified	3%**	
Total	**100%**	**100%**

Note: where a figure is followed with a single asterisk, the base size is below 100 and the figure should be treated as indicative. Where a figure is followed with a double asterisk, the base size is below 30 and users are advised to not use this estimate.

Note: percentages may not sum to 100% due to rounding

5.48 While interpreting the table above, it should be noted that:

[21] Domestic GB tourism statistics (overnight trips): annual report 2024. Available here
[22] Wales Visitor Survey 2019 for Isle of Anglesey County Council

- The Anglesey visitor profile is from 2019, whereas the all-Wales visitor ethnicity profile is from 2024.
- The Anglesey visitor profile is across both day and overnight visitors whereas the all-Wales visitor sex profile is for domestic overnight visitors
- Because the Anglesey and Welsh visitor profiles are derived from different data sources, the categories are different.

5.49 None the less this suggests that the is a lower proportion of visitors to Anglesey who are from an ethnic minority group, compared to the Wales average.

Employment

5.50 In terms of employment, the table below show that:

- There are lower proportions of people who are from an ethnic minority group employed in the distribution, hotels and restaurants sector in Anglesey (5%) compared to Wales (12%)
- There are slightly higher proportions of people who are from an ethnic minority group employed in the distribution, hotels and restaurants sector (5%) than the average across all sectors in Anglesey (4%) – this means a change in employment levels could affect his group (albeit any change is likely to be small).

Table 5.7: Employment of residents by ethnicity[23]

		Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White: English, Welsh, Scottish, Northern Irish or British	White: Irish	White: Gypsy or Irish Traveller, Roma or Other White	Other ethnic group	Total
Distribution, hotels and restaurants	Anglesey	2%	0%	1%	95%	0%	2%	0%	100%
	Wales	4%	1%	1%	88%	0%	5%	1%	100%
Total	Anglesey	1%	0%	1%	96%	1%	2%	0%	100%
	Wales	3%	1%	1%	91%	0%	4%	1%	100%

Gypsy Roma and Traveller sites

5.51 The WG EQIA notes that Gypsy, Roma and Travellers lifestyle is inherently transient and involves movement across local authority boundaries.

[23] Office for National Statistics. Census 2021

5.52 The WG EQIA mentions that a discussion between Welsh Government officials and Tros Gynnal Plant Cymru highlighted that if the designated permanent and transient sites were exempt from paying a levy then there would unlikely be a significant impact on Gypsy Roma Travellers.

5.53 Gypsy, Roma and Traveller sites that are provided by a local authority or registered social landlord are exempted from a levy. There are no registered sites in Anglesey.

5.54 The WG EQIA notes that Gypsy Roma Travellers use a number of public and private sites across Wales, including seasonal sites, land suitable for negotiated stopping, mainstream holiday sites for seasonal travel. Members of the Gypsy Roma Traveller community who use visitor accommodation other than for their main of usual place of residence would be subject to the levy.

5.55 The Act provides Welsh Ministers with powers to create new national exemptions should there be evidence of negative impact on any particular group.

Asylum seekers and refugees

5.56 The WG EQIA notes that given asylum seekers will have limited or no recourse to funds, application of a levy could have a negative impact. However, the 2025 Act allows accommodation for asylum seekers arranged by local authorities to be exempt from paying a levy. There is also a refund mechanism to allow charities to recoup the costs from the levy for any eligible stays.

5.57 In September 2025, there were 3,331 asylum seekers in Wales in receipt of Home Office support that were housed in Contingency Accommodation (hotel), Initial Accommodation, Dispersal Accommodation (longer term accommodation) or receiving subsistence only.[24]

5.58 Similarly, in September 2025, 20 asylum seekers in Anglesey in receipt of Home Office support that were housed in Dispersal accommodation.[25]

5.59 The WG EQIA notes that there are difficulties in identifying how many refugees there are in Wales and its entirety as there is lack of data on where refugees settle. Nevertheless, latest evidence suggests that that there were 11 cases of resettlement in Wales in Q2 of 2025 (in Denbighshire, Flintshire, Wrexham, Carmarthenshire and Powys).[26]

5.60 Again, the 2025 Act provides Welsh Ministers with powers to create new national exemptions should there be evidence of negative impact of any particular group.

Race – overall conclusion

5.61 WG concludes there are 'nil' potential direct impacts with regard to Race. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.

[24] Home Office. Immigration system statistics data tables. Available here
[25] Home Office. Immigration system statistics data tables. Available here
[26] Home Office. Immigration system statistics data tables. Available here

5.62 Visitors to Anglesey and employees in the distribution, hotels and restaurants sector are more likely to be white, than the average across Wales.

5.63 As noted by the WG EQIA, proactive measures can be taken to ensure the benefits of tourism, including the spending of the fund, are distributed more equitably among all segments of the population.

Violence against Women, Domestic Abuse and Sexual Violence (VAWDASV)

5.64 The WG EQIA sets out the engagement that Welsh Government has undertaken with service providers and survivors to understand the lived experience more fully and understand the levels of these types of scenarios.

5.65 Exemptions and mechanisms for refund have been included in the Act and guidance will be prepared with regard to the application process (with regard to the disclosure of personal details). Further information is set out in Section 4.

Religion and Belief

5.66 The WG EQIA estimated that there were 174,456 domestic tourists that "visited a cathedral, church, abbey or other religious building" in 2023.

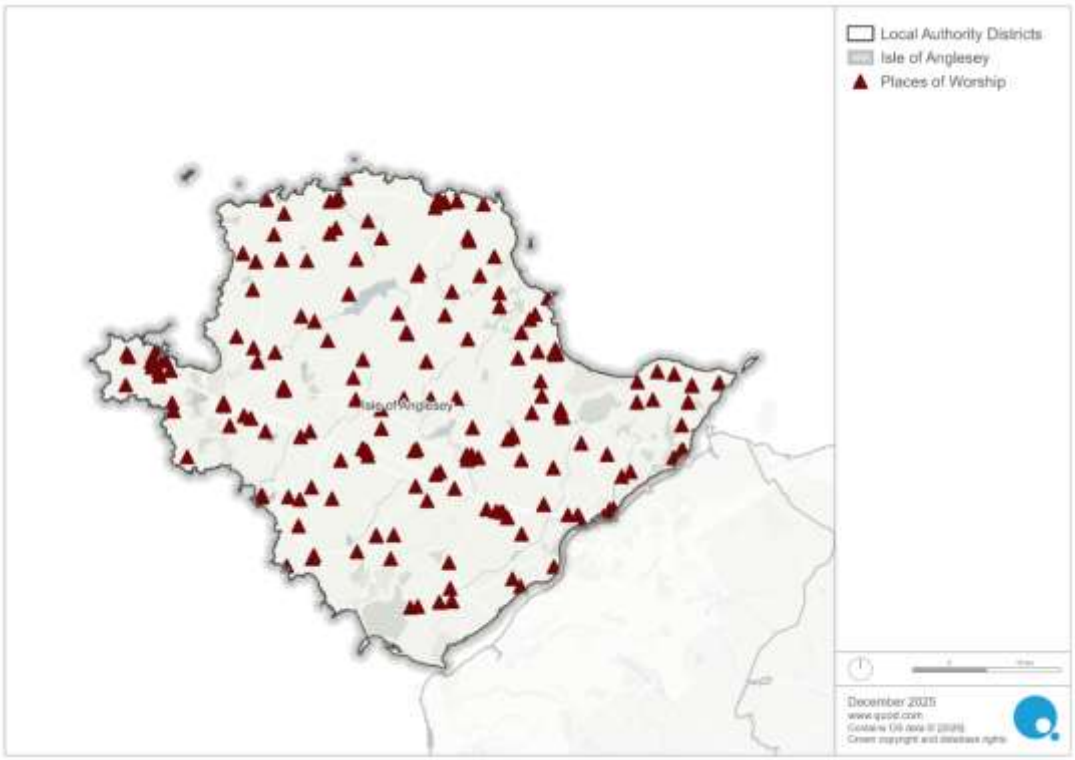
5.67 The WG EQIA notes that there is no direct correlation between visitor levies and religion, belief or non-belief. It also notes that tourism-related policies or taxes might interact with an individuals' freedom to practice religion, depending on the nature of the visit. Introducing a visitor levy might affect the affordability of visiting such places, potentially influencing the number of pilgrims or tourists visiting religious sites due to the levy increasing the cost of stay for visitors staying overnight in visitor accommodation.

5.68 In undertaking the national level assessment, Welsh Government officials met with the Inter-faith Council for Wales in 2023 and also received a response to a further request for feedback in June 2024 via their representation in the Third Sector Partnership Group.

5.69 The levy would not apply to accommodation that was free of charge. However, the levy will apply to stays in lower rated overnight visitor accommodation (an issue raised through engagement as faith groups often arrange camping trips), although the lower rate may mitigate potential negative impacts.

5.70 The equivalent data for number of tourists visiting a religious building in Anglesey is unavailable. However, Figure 5-1 shows there are 212 places of worship in Anglesey. Note that mapping of the places of worship is indicative and may not always be complete and there is no clear legal definition of places of worship.

Figure 5-1: Places of worship in Anglesey



5.71 There may be an adverse impact on those who do not engage with digital processes as part of their faith. To mitigate any potential impact there will be a non-digital service when required.

5.72 WG concludes there are 'nil' potential direct impacts with regard to Religion and Belief. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.

Disability

5.73 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence and do not make any distinction based on disability.

Population

5.74 There were about 14,245 people who were disabled under the Equality Act in Anglesey accounting for 20.7% of the total population – this is lower than the Welsh average of 21.6%.[27]

Visitors

5.75 The WG EQIA identified that according to historic evidence, there may be some scenarios where disabled people may face higher costs for staying in visitor accommodation and identified some barriers and challenges for disabled people including:

[27] Census 2021

- Environmental barriers: The UK Disability Survey research report 2021 showed that 57% of disabled people reported being unable to go on holiday due to accessibility issues, i.e. access into public buildings.
- There is a lack of information and awareness about the availability and quantity of accessible tourism facilities and services, and the rights and entitlements of disabled people as tourists. Information on accessible destinations is a key factor in increasing tourism opportunities among disabled individuals.
- Booking a holiday may lead to extra costs due to a lack of availability of accessible and affordable accommodation and transport options, especially in rural and remote areas, and during peak seasons. In a recent survey by Leonard Chesire Disability, published in Enable Magazine, 8 in 10 disabled people said they faced barriers and difficulties staying at UK hotels and resorts. Over 70% flagged issues finding accessible rooms. Costs of accessible accommodation are also a common barrier to taking a break for around 6 in 10 survey respondents, with accessible rooms often seen as more expensive.

5.76 The WG EQIA noted a number of other challenges including

- Limited choices and opportunities for disabled people and those with impairments - that can affect their quality and satisfaction with their tourism experiences.
- Lack of accessibility for some disabled people in campsites and hostels leading to further strain on travel budgets – this is mitigated to some extent by the lower rate in the legislation
- Additional cost and or limited options for people who need a carer, specialist equipment or guide dog

5.77 Recognising that there is an overall lack of data and evidence, Welsh Government officials met with representatives from Disability Wales, Autistic UK and the Fair Treatment for the Women of Wales in formulating the WG EQIA.

5.78 The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit.

5.79 WG EQIA considers a number of options for refunds for both disabled people and carers. Ultimately, the option including in the Act was to issue refunds for disabled people in receipt of a qualifying disability benefit who has paid a visitor levy while staying in a visitor accommodation and accompanied by a person providing care. The WG EQIA acknowledges (in part because it does not include carers) that this option does 'not fully eliminating the risks of indirect discrimination, it was perceived to be a proportionate response which balances the need to address the indirect discrimination but also ensure the integrity and efficiency of the tax system'.

5.80 In terms of tourism activity, 31% of all trips to Wales include somebody who is disabled or has an impairment. Additionally, 20% of all overnight trips taken to Wales from January to December 2024 were by those taking care of people with medical conditions.[28] Some of these trips relate to says with friends and family in their own homes rather than visitor accommodation and it does

[28] Domestic GB tourism statistics (overnight trips): annual report 2024. Available here

not mean that these visitors were accompanying the person they care for rather that they simply have this type of caring responsibility. The equivalent data for Anglesey is presently unavailable.

Employers and employment

5.81 The WG EQIA also notes the WRA will collect and manage levy. For accommodation providers, it is anticipated that the day-to-day operation of the levy will have minimal impact on business owners who have visual and / or hearing impairments due to the multiple ways a person can interact with the WRA – digital system for filing and remitting returns to the WRA alongside the provision of a telephone and paper service, where necessary.

5.82 Additionally, the WG EQIA notes that disabled workers are more likely to end up in insecure work than non-disabled workers. Of the workers working in tourism in Wales, 18% are disabled – a similar proportion to the average across all industries.[29] The equivalent data for Anglesey is presently unavailable.

Disability overall

5.83 The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit but that the option (not including an exemption) was a proportionate response.

5.84 Once mitigation (including refund for person in receipt of a disability benefit) is included, no other impacts were identified and it is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.

5.85 Proactive measures can be taken to ensure the benefits of tourism, including the spending of the fund, are distributed more equitably among all segments of the population – this could include measures to improving accessibility for disabled people to tourist sites.

Pregnancy and maternity

5.86 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on pregnancy and maternity.

5.87 The ONS does not provide statistics on the number of people who are pregnant. Therefore, this baseline analysis considered live birth data[30] as a proxy. The latest available data from 2024 indicate the general fertility rate[31] is higher (48.6) in Anglesey than the average for Wales (45.7).

5.88 WG concludes there are 'nil' potential direct impacts with regard to Pregnancy and maternity. While there is a higher fertility rate in Anglesey, It is not anticipated that this would change the finding of 'nil' impact.

[29] Welsh Government. Welsh tourism sector business and labour market statistics. Available here
[30] Office for National Statistics, 2024. Live Births.
[31] Office for National Statistics, 2021. Census.

Summary of impact on groups who share a protected characteristic

5.89 Table 5.8 below summarises the findings of the equality impact assessment against protected characteristics.

Table 5.8 Summary of impacts

Age	WG concludes there are 'nil' potential direct impacts with regard to Age once mitigation (including the under-18 exemption for lower bound accommodation) is taken into account. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA. There are possible impacts related to a higher proportion of older visitors to Anglesey, and a young workforce, but any impacts of the levy are likely to be small – and will to some extent be offset by the spending of the levy.	Under 18s are excluded from the levy for lower-rated stays Future use of the levy
Disability	The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit but that the option (not including an exemption) was a proportionate response. Once mitigation (including refund for person in receipt of a disability benefit) is included, no other impacts were identified and it is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.	Refund mechanism for persons in receipt of a disability benefit who are accompanied by a person providing care, support or assistance. Future use of the levy
Gender reassignment	WG concludes there are 'nil' potential direct impacts with regard to Gender reassignment. It is not anticipated that there would be any Anglesey	Stays in private hospitals are exempt from a levy.

	specific characteristics that would change the findings of the WG EQIA.	
Marriage and civil partnership	WG concludes there are 'nil' potential direct impacts with regard to Marriage and Civil Partnership. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.	No potential impacts identified
Pregnancy and maternity	WG concludes there are 'nil' potential direct impacts with regard to Pregnancy and maternity. While there is a higher fertility rate in Anglesey, It is not anticipated that this would change the finding of 'nil' impact.	No potential impacts identified
Race	Visitors to Anglesey and employees in the distribution, hotels and restaurants sector are more likely to be white, than the average across Wales. WG concludes there are 'nil' potential direct impacts with regard to Race. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.	Gypsy, Roma and Travellers sites provided by a local authority or registered social landlord are exempt from a levy. Exemptions / refunds are available for vulnerable groups, e.g. asylum seekers and those fleeing domestic abuse Future use of the levy
Religion and belief	WG concludes there are 'nil' potential direct impacts with regard to Religion and Belief. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA.	The WRA will offer non-digital processes to accommodate those whose faith may restrict digital engagement. Free accommodation exempt from a levy and stays in lower rated accommodation have a lower levy charge. Future use of the levy
Sex		No potential impacts identified

	WG concludes there are 'nil' potential direct impacts with regard to Sex. There are no Anglesey specific characteristics that would change the findings of the WG EQIA. It is not anticipated that there would be a disproportionate or differential impact in Anglesey as a result of the levy on females (or males) working in the tourist sector.	
Sexual orientation	WG concludes there are 'nil' potential direct impacts with regard to Sexual Orientation. It is not anticipated that there would be any Anglesey specific characteristics that would change the findings of the WG EQIA	No potential impacts identified

6 Welsh Language

6.1 The Wellbeing of Future Generations Act states that Welsh public bodies must carry out sustainable development to improve the country's economic, social, environmental and cultural wellbeing. One Wellbeing Goal for achieving this is to create a society that promotes and protects the Welsh language. In accordance with this, this EqIA considers the potential impact of the Visitor Levy on the prevalence of the Welsh language in Anglesey.

6.2 The Welsh Government has undertaken a national Welsh Language Impact Assessment of the Act[32].

6.3 The Welsh Government also undertook a consultation exercise as part of this assessment. This found that whilst most respondents did not have specific views concerning the impact of the visitor levy on the Welsh language, a small number of respondents expressed concern about the impact on the perception of Wales, and that any decline in tourism resulting from a levy could reduce opportunities to use the Welsh language, as well as having a potentially negative impact on Welsh speaking communities. On the other hand, some respondent s highlighted that revenues raised through a levy could be used to promote and facilitate the use of the Welsh language.

The Welsh Language in Anglesey – and in the tourist and food sector

6.4 Historically a heartland of the Welsh language, Anglesey remains one of the strongest Welsh speaking areas in Wales.

6.5 The 2021 Census identifies the prevalence of skills in the Welsh language across Wales. The proportion of residents who have some skill in Welsh (reading, writing, speaking or understanding spoken Welsh) is significantly higher in Anglesey (69%) than across North Wales (39%) and Wales (25%).

6.6 Additionally, the proportion of Anglesey residents who can speak, read and write Welsh (45%) is almost double the average for North Wales (24%) and over three times the Wales average (14%).

Table 6.1: Welsh Language (Census 2021)

Measure		Isle of Anglesey	Travel to Work Area	North Wales	Wales
Welsh Language Skills	Any skills in Welsh (reading, writing, speaking or understanding spoken Welsh)	69%	72%	39%	25%
	Can understand spoken Welsh only	11%	10%	7%	5%
	Can speak, read and write Welsh	45%	50%	24%	14%

[32] Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025: Welsh Language Impact Assessment

No skills in Welsh	31%	28%	61%	75%

6.7 The distribution, hotels and restaurants sector has slightly fewer Welsh speakers than the average across all sectors but it is still very high (51% of residents aged 16 years and over in employment in the sector).

Table 6.2: Welsh Language - residents aged 16 years and over in employment in the sector (Census 2021)

	Anglesey	North Wales	Wales
All sectors	59%	29%	17%
Distribution, hotels and restaurants	51%	25%	14%

6.8 The WLIA notes that the visitor levy could potentially impact the Welsh language if it were introduced in areas where relatively high proportions of Welsh-speakers work in the accommodation and food services industry. These could be positive and negative.

Potential for positive impacts

6.9 The WLIA notes that there could be positive impacts resulting from:

- A boost to the local economy through the spending of the levy leading to an increase in employment in the tourism sector – the Economic Impact Assessment suggested there could be between -25 and +7 jobs so this is likely to be relatively small impact .
- Positive impact in terms of exposure to Welsh language
- Use the revenue from the levy to promote and support the Welsh language or to fund initiatives that improve the infrastructure and services in areas which currently have (or until recent decades have had) a relatively high percentage of Welsh-speakers. This could promote the visibility, vitality, and viability of the Welsh language, as well as increase the awareness and appreciation of visitors and residents alike.

6.10 We have identified four broad areas where spending of the Levy could benefit the Welsh language – note this is indicative and will need to be confirmed through governance processes and in line with the Act were the Levy to be adopted:

1. **Strengthening Welsh Language Infrastructure and Promotion,** including:
   - Community initiatives promoting Welsh language use
   - Local cultural events, festivals, and Welsh-medium visitor experiences
   - Grants to organisations delivering Welsh-medium services

2. **Supporting Sustainable Tourism That Respects Welsh Identity,** including:
   - Welsh cultural programmes
   - Interpretation and signage in Welsh
   - Preservation of local heritage

These could strengthen Welsh identity in the visitor experience.

3. **Mitigating Pressures on Welsh-speaking Communities,** including**:**
   - Managing tourism pressures in communities with high proportions of Welsh speakers
   - Infrastructure provision, maintenance or improvement (paths, car parks etc)

4. **Economic Opportunities for Welsh Speakers,** including**:**
   - Welsh-medium customer service training
   - Encouraging tourism businesses to use Welsh in branding
   - Alignment with existing schemes (e.g. ARFOR) that link language and economic development.

6.11 If the visitor levy boosts economic resilience in areas with relatively high rates of overnight stays where Welsh-speakers are prevalent, it could help support the delivery of one of 'Cymraeg 2050' objectives: creating favourable conditions for the Welsh language to thrive.

6.12 It is acknowledged that were (some of) the levy spending not to be targeted on Welsh language initiatives, then the opportunity would be lost.

Potential for negative impacts

6.13 The WLIA also notes some potential negative impact:

- The potential negative economic impact of the levy – although as above, there are anticipated to be a maximum of a loss of -25 jobs in a worst case scenario) and so this impact is likely to be relatively minimal.

- The potential impact on overnight trips that aim to support the Welsh language and Welsh-medium education. This could have education and cultural impacts However, under 18s will not have to pay the levy when staying in hostel style accommodation or on campsite pitches. Reliefs are applied to overnight stays that are supplied by education providers as part of the supply of a course of study offered to pupils or students.

Summary

6.14 Overall, there is strong prevalence of Welsh speakers in Anglesey, including in the tourism sector.

6.15 A visitor levy in Anglesey could have both positive and negative impacts on the Welsh language. There could be small negative impacts associated with a reduction in visitor spending, or there could be a small increase as a result of the employment supported through spending of the levy.

6.16 Similarly there could be positive impacts associated with the outcome of the spending of the levy – that will depend on the how the fund is spent (which will be developed including feedback through consultation).

7 Socio-Economic Status

7.1 Although socio-economic status is not a protected characteristic, it is relevant to the socio-economic duty in the Equality Act and therefore is included in this EqIA. There are multiple aspects to socio-economic status, which are considered below.

7.2 We consider the socio-economic status of residents of Anglesey as well as the travel to work area and North Wales to account for those who may commute to Anglesey for work. Those local / regional stats are compared to national (Welsh level) statistics.

7.3 The impact of the Visitor Levy is estimated to be between -25 and +7 FTE jobs (refer to the Economic Impact Assessment for more data) – this is a very small impact in the context of the Anglesey economy (a loss of 25 jobs is equivalent to loss of -0.1% of all employment).

7.4 We do not consider directly the socio-economic status of visitors, since those visitors who are able to travel are by definition able to fund leisure activities and are able to change how (or where) they spend their leisure spending.

Health and lifestyle

7.5 Health and lifestyle factors can be taken as indicators of socio-economic status. Higher rates of obesity, smoking and alcohol consumption are often associated with areas of high deprivation and low socio-economic status.

7.6 According to ONS data[33], in 2022-2024, life expectancy at birth was higher in Anglesey for both men and women than North Wales (across the BCUHB - Betsi Cadwaladr University Health Board) and Wales averages. Life expectancy is taken as an indicator of socio-economic status in the WGFA and the Welsh National Plan.

Table 7.1: Health and Lifestyle indicators

		Isle of Anglesey	North Wales (BCUHB)	Wales
Life expectancy at birth (years) (2018-20)	Male	78.7	78.4	78.3
	Female	82.7	82.4	82.2

7.7 Table 7.2 demonstrates that self-assessed health in Anglesey is broadly in line with averages for North Wales and Wales and slightly higher in the TTWA. There are very similar numbers of people who are disabled as defined by the Equality Act.

33 https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/lifeexpectancyforlocalareasoftheuk

Table 7.2: Health and Disability (2021 Census)

		Isle of Anglesey	TTWA	North Wales (BCUHB)	Wales
Self-Assessed Health	Very good & Good	79%	81%	80%	79%
	Fair	15%	14%	14%	14%
	Bad & Very Bad	6%	5%	6%	7%
Disability under the Equality Act	Day-to-day activities limited a lot	9%	9%	9%	10%
	Day-to-day activities limited a little	11%	11%	11%	11%

7.8 Despite the above showing that Anglesey has relatively good records of health and lifestyle factors when compared to regional and national averages, the JLDP still aims to improve this by promoting prosperous, healthy and safe communities.

7.9 The visitor levy could have negative impacts on health if it leads to an increase in unemployment or economic activity, but the impact of jobs Is expected to be very low. Conversely, the levy could have a positive impact on health if it were to increase employment (though the spending of the levy) and through the spending of the levy if it (for example) encouraged community cohesion or improved local assets that have a positive impact on health and wellbeing.

Qualifications

7.10 The WFGA identifies the qualification level of a population as a wellbeing indicator.

7.11 Overall, Anglesey's population's highest level of qualification aligns with the other spatial levels[34]. The proportion of young adults with further or higher education-level qualifications (17%) is slightly lower than the Welsh average (18%), but the older populations (65 years and above) are generally more qualified in Anglesey than across Wales as a whole – 28% with further or higher education-level qualifications, compared to 25% and 24% across North Wales and Wales, respectively.

7.12 Anglesey has a lower proportion of people with no qualifications – 18% of adults over 16, compared to 19% and 20% across North Wales and Wales, respectively.

Table 7.3: Qualifications (Census 2021) - % of residents over 16

Measure		Isle of Anglesey	North Wales	Wales
No qualifications	**Total**	**18%**	**19%**	**20%**
	Aged 16-24	11%	12%	11%
	Aged 25-64	12%	12%	14%
	Aged 65+	32%	35%	38%

[34] Office for National Statistics, 2021. Census.

GCSEs or A-Level equivalent	**Total**	**41%**	**41%**	**40%**
	Aged 16-24	66%	66%	66%
	Aged 25-64	44%	44%	42%
	Aged 65+	26%	26%	24%
Further or Higher Educations	**Total**	**32%**	**31%**	**32%**
	Aged 16-24	17%	17%	18%
	Aged 25-64	37%	37%	38%
	Aged 65+	28%	25%	24%
Other qualifications	**Total**	**9%**	**9%**	**8%**
	Aged 16-24	5%	5%	5%
	Aged 25-64	7%	7%	7%
	Aged 65+	15%	15%	14%

Economic activity

7.13 The rate of economic activity in Anglesey (80%) is higher than the other spatial levels (77% for the Travel to Work Area, 78% in North Wales and 76% across Wales). The WFGA identifies the proportion of people not in employment or education as a key wellbeing indicator. There is high levels of economic inactivity in those aged 16 to 19 at all spatial levels, but less pronounced at an Anglesey level.

7.14 The rate of unemployment in Anglesey (4%) is lower than across the Travel to Work Area (7%) and Wales (5%). Again there is higher unemployment amongst young people (particularly 16 – 19) but this is less pronounced in Anglesey than at other spatial scales.

7.15 Promoting economic activity in young people, as well as retaining those who are economically active, are priorities of the Welsh National Plan and Anglesey and Gwynedd's JLDP.

7.16 Older populations (50+) in Anglesey do not exhibit notably different levels of unemployment compared to the other spatial areas (3% in Anglesey, the Travel to Work Area TTWA[35] and Wales).

7.17 Claimant count data shows similar patterns with 4% of residents claiming benefits principle for the reason of being unemployed.

7.18 The visitor levy could result in a small increase or small decrease in employment – as set out above this magnitude of the impact means that the overall effect on economic activity and unemployment is likely to be small.

[35] As defined by the ONS

Table 7.4: Economic Activity and Unemployment

Measure		Isle of Anglesey	TTWA	North Wales	Wales
Economic activity rate (APS Oct 2024-Sep 2025)	Total (16 - 64)	80%	77%	78%	76%
	Aged 16-19	59%	53%	45%	43%
	Aged 20-24	70%	56%	69%	70%
	Aged 25-34	86%	90%	89%	86%
	Aged 35-49	91%	88%	86%	86%
	Aged 50+	41%	42%	41%	39%
Unemployment rate (APS Oct 2024-Sep 2025)	Total (16 - 64)	4%	7%	4%	5%
	Aged 16-19	15%	39%	*	29%
	Aged 20-24	*	16%	*	11%
	Aged 25-34	*	7%	*	3%
	Aged 35-49	2%	2%	*	3%
	Aged 50+	3%	3%	*	3%
Claimant Count (Dec 2025) - as a % of residents		4%	3%	*	3%

* Figure not available at this spatial level.

Income

7.19 The National Plan identifies wages as a key indicator of socio-economic status.

7.20 The Annual Survey of Hours and Earnings provides data on residents' and workers' pay and hours worked based. In 2025, the average gross weekly pay for a resident in Anglesey was £613, slightly higher than Wales (£602). Workers in Anglesey also earned more than the Welsh average (£617 compared to £590).

7.21 The 10th percentile for weekly wage in Anglesey is broadly in line with the Welsh average for residents (£216 compared to £223) while workers in Anglesey earn slightly more (£234 compared to £217).

7.22 Data by sector is not available at a lower than country (Wales) level. The accommodation and food sector in Wales is typically paid less well than the average across all jobs, in part (but not entirely) due to the high occurrence of part time work. Again to the extent that the levy resulted in a change in income, there could be a (small) change in income.

Table 7.5: Gross Weekly Pay 2025

		Resident - all sector		Worker - all sector		Worker - Accommodation and Food
	Measure	Isle of Anglesey	Wales	Isle of Anglesey	Wales	Wales
Median	Full time	£ 693	£ 719	£ 704	£ 704	519
	Part time	£ 276	£ 292	£ 297	£ 290	201
	All	£ 613	£ 602	£ 617	£ 590	293
	Full time	£ 503	£ 487	£ 492	£ 483	415

10th percentile	Part time		*		£	90		*		£	92		*
	All	£	216		£	223	£	234		£	217		82

* Figure not available at this spatial level.

Deprivation

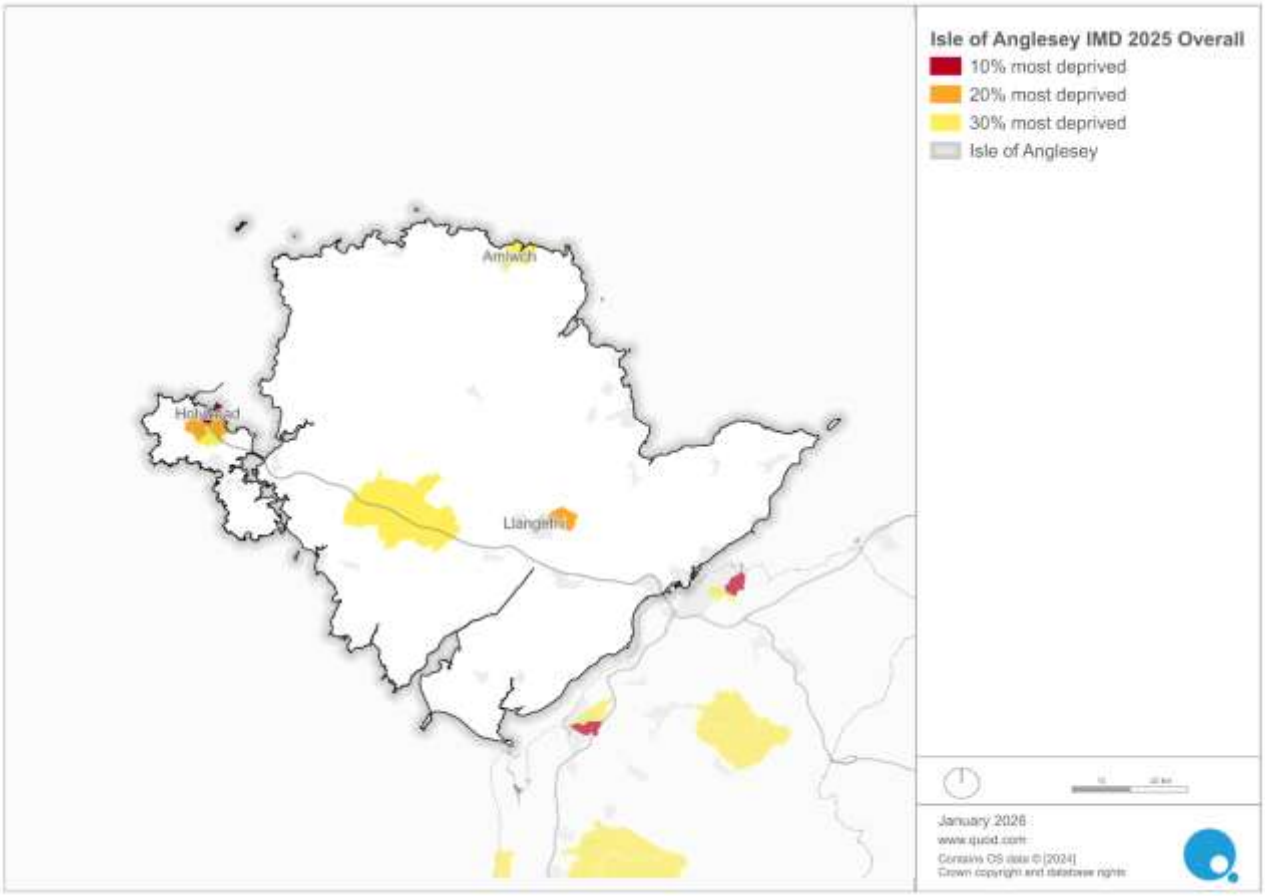
7.23 The Welsh Government's Index of Multiple Deprivation (2025) combines indicators including a range of social, economic, and housing factors, to yield a deprivation score for all areas across Wales (Lower Layer Super Output Areas [LSOAs]). There are eight domains of deprivation that are investigated:

- Income
- Employment
- Health
- Education
- Access to services
- Housing
- Community safety
- Physical environment

7.24 All areas are ranked relative to one another according to their level of deprivation. Tthe figure below shows the relative levels of deprivation in Anglesey – areas shown in red are within the 10% most deprived, areas in orange are within the 10% - 20% most deprived areas and areas in yellow are within the 20% - 30% most deprived.

7.25 As shown in **Error! Reference source not found.**, there are some areas in Anglesey that are within the 10% - 20% and 20% - 30% most deprived areas in Wales and a small area that falls amongst the top 10% most deprived areas.

Figure 7.1: IMD map for Anglesey



7.26 The use of funds from the levy will be reinvested for the purposes of destination management and improvement in the area, including providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people), and mitigating the impact of visitors. Depending on the use of the fund, it could reduce deprivation (or indicators of deprivation) and / or res as a result of investment.

Housing and living situation

7.27 According to the 2021 Census, 2% of households in Anglesey live in overcrowded homes (occupancy rating of bedrooms of -1 or less). This is consistent with the other spatial areas. A higher proportion of household have a car (85%) compared to North Wales (83%) or Wales (81%) average.

7.28 The 2021 Census also provides data on housing tenure. In Anglesey, the proportion of owner-occupied households (68%) is in in line with the North Wales average and higher than Wales average (66%). When looking at tenure by age of household representative, Anglesey has slightly higher proportions of owner-occupied households across all age groups than national averages. The proportion of socially and privately rented households is relatively consistent across the different spatial levels – Anglesey has slightly high incidence of older people in private rented and lower in social rented).

7.29 To the extent that the visitor demand did fall as a result of this levy (which is likely to be relatively small), this could relieve some pressure on the private rented sector.

Table 7.6: Housing and living situation

Measure		Isle of Anglesey	North Wales	Wales
Overcrowding (occupancy rating of -1 and -2 or less, bedrooms)		**2%**	**2%**	2%
Owner-occupied households	**Total****	**68%**	**68%**	**66%**
	Aged 16-64**	61%	62%	60%
	Aged 65+**	80%	79%	79%
Privately rented households	**Total****	**16%**	**17%**	**17%**
	Aged 16-64**	21%	22%	22%
	Aged 65+**	8%	8%	7%
Socially rented households	**Total****	**16%**	**16%**	**16%**
	Aged 16-64**	18%	17%	18%
	Aged 65+**	12%	13%	14%
One or more car or van in household		85%	83%	81%

** By household reference person.

Overall impact on socio-economic status

7.30 Health and lifestyle indicators suggest that Anglesey generally performs as well as or better than regional and national averages. Economic activity is generally strong, with higher participation and lower unemployment than regional and national levels, although youth unemployment remains a challenge and there a pockets of high deprivation.

7.31 Any employment effects from the levy are likely to be relatively small (and could be marginally positive or marginally negative).

7.32 The use of funds from the levy will be reinvested for the purposes of destination management and improvement in the area, including providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people), and mitigating the impact of visitors. Depending on the use of the fund, it could reduce deprivation (or indicators of deprivation) and / or res as a result of investment.

8 Appendix A – Resident data

Table 8.1: Resident summary

Measure		Isle of Anglesey	Travel to Work Area	North Wales	Wales
Population (2021 Census)					
Population		68,900	131,700	686,900	3,100,000
Age (2021 Census)					
Age Structure	Aged 0-15	17%	17%	17%	18%
	Aged 16-64	57%	60%	59%	61%
	Aged 65+	26%	23%	23%	21%
Sex (2021 Census)					
Male / Female		49% / 51%	49% / 51%	49% / 51%	49% / 51%
Gender Identity (2021 Census)					
Gender identity different from sex registered at birth total		0.4%	*	0.3%	0.5%
Sexual Orientation (2021 Census)					
Gay, Lesbian or Bisexual		2%	*	2%	3%
Not Answered		8%	*	8%	8%
Marriage and Civil Partnership Status (2021 Census)					
Single		33%	*	35%	37%
Married / Civil Partnership		47%	*	45%	44%
Divorced / Separated / Widowed		21%	*	20%	19%
General Fertility Rates (2024)					
General Fertility Rates (number of live births a year per 1,000 women aged 15 to 44 years)		48.6	*	*	45.7
Race (2021 Census)					
Ethnicity	Asian/Asian British	1%	2%	1%	3%
	Black/Black British	0%	0%	0%	1%
	Mixed/Multiple	1%	1%	1%	2%
	White	98%	96%	97%	94%
	Other	0%	0%	0%	1%
Place of Birth	UK	97%	95%	94%	93%
	Europe (excluding UK)	2%	2%	4%	3%
	Africa	0%	1%	1%	1%
	Middle East and Asia	1%	2%	1%	2%

	Americas and Caribbean	0%	0%	0%	0%
	Antarctica and Oceania	0%	0%	0%	0%
Main Languages	English or Welsh	99%	*	97%	97%
	European	0%	*	2%	2%
	Outside of UK and Europe	0%	*	1%	2%
Religion and Belief (2021 Census)					
Christian		52%	48%	50%	44%
Buddhist		0%	0%	0%	0%
Hindu		0%	0%	0%	0%
Jewish		0%	0%	0%	0%
Muslim		1%	1%	1%	2%
Sikh		0%	0%	0%	0%
Other religion		0%	1%	0%	1%
No religion		41%	44%	42%	47%
Not Answered		7%	7%	7%	6%
Health and Disability (2021 Census)					
Self-Assessed Health	Very good & Good	79%	81%	80%	79%
	Fair	15%	14%	14%	14%
	Bad & Very Bad	6%	5%	6%	7%
Disability under the Equality Act	Day-to-day activities limited a lot	9%	9%	9%	10%
	Day-to-day activities limited a little	11%	11%	11%	11%

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Economic Impact Assessment of the Visitor Levy

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1 Executive Summary

1.1 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the 'Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.

1.2 The Isle of Anglesey County Council is considering introducing a visitor levy – this Economic Assessment seeks to determine the potential economic impact of doing so.

1.3 There have been a number of studies to support the Welsh Government's decision to implement the Act. This report reviews these reports to determine the applicability of applying the same approach at a more local level.

1.4 The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of applicable evidence of the impact of visitor levies from elsewhere, and there are gaps and uncertainties in data. This means that the national assessment is heavily caveated and relies on wide ranges – there are further complications with a local assessment as a result of gaps in data and an even more immature evidence base on the local impact of visitor levies (as opposed to national).

1.5 The key caveats relevant to the local level assessment are:

- There are significant uncertainties in the elasticities of demand – this is the case at a Welsh level and is even more acute when applied at an Anglesey level.
- There are different data sources for the current size of the Anglesey visitor economy. The main analysis uses the International Passenger Survey (IPS) and the Great British Tourism Survey (GBTS) – this is in line with the Welsh Government Appraisal and guidance provided to local authorities. STEAM data reports a much larger current visitor economy – the implications of this is set out in the report.
- At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Anglesey may be in Conwy or Gwynedd (and vice versa).
- The available data does not differentiate between those who camp in campsites and those who camp in caravans / campervan or glamping.
- Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Anglesey.
- The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – at an Anglesey level, there will be different impacts if one local authority implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge.

1.6 Therefore, the Anglesey level assessment is appropriately caveated, and should be read in the context of gaps in the data and the relatively limited evidence base, particularly at the local level.

1.7 Nonetheless, we are confident that the impact on the Anglesey will be relatively small in terms of both the impact on employment and GVA. We have applied a broadly similar approach to the Welsh Government analysis to establish bookends for the likely range of these impacts.

1.8 Within this main analysis, the assumptions are generally conservative in terms of the approach to assessing the impact on the economy (i.e. they verge on overestimating the negative impact). For example, we assumes the Anglesey suffers all the loss of visitor spending, when in reality some of the spending will be lost from outside of Anglesey (as people staying in Anglesey spend money in other local authorities on day trips). It also assumes that there is leakage of economic activity from the spending of the levy outside of Anglesey while also assuming that Anglesey businesses do not benefit from contracts that result from the spending of visitor levies from other local authorities.

1.9 Similarly, the analysis assumes there is no change in the visitor economy other than allowing for a reduction in visitors in response to the introduction of the levy. In practice, if the visitor economy grows then the funding raised by the levy will increase (and vice versa[1]), and indeed the levy spending could drive higher tourism through an improved visitor experience. This would help to maintain and improve Anglesey's competitiveness as a tourist destination. There is evidence of year on year growth in visitors in other locations where visitor levies have been introduced.

1.10 Any growth in the visitor economy would also offset any losses to the economy (jobs and GVA) as a result of the visitors who do not come as a result of the levy and result increase the levy revenue.

1.11 Nonetheless, based on this approach, the impacts of the levy are estimated to be relatively small. It is estimated that the levy could result in:

- A change in employment could be between -25 and +7 – this is between a loss of -0.1% or an increase of 0.04% of employment in Anglesey.
- A change in annual GVA could be between -£1.2m and +£0.2m per annum – this is equivalent to between a loss of -0.1% and an increase of 0.01% of Anglesey's economy.
- A revenue of between £1.1m to £1.2m per annum

1.12 This range from a relatively small negative impact to a relatively small positive impact reflect the findings of the Welsh Government Appraisal which also concluded a small negative to small positive impact at a national scale.

1.13 The STEAM data estimates the current Anglesey tourist economy to be much larger than the IPS and GBTC – the impacts of the levy would be approximately 3 to 4 times larger if the STEAM data were used instead. This highlights the uncertainty in the data and therefore the inherent uncertainty in forecasting the impact of the levy.

[1] Conversely if tourism reduced for reasons other than the levy, the revenue funding would decrease.

2 Introduction

An overview of the Visitor Levy

2.1 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the 'Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.

2.2 The levy is chargeable at two separate rates:

- Campsite pitches and shared rooms (hostels and dormitories): 75p per person, per night
- All other types of visitor accommodation: £1.30 per person, per night

Note that those who camp in campervans, caravans or glamping will be required to pay the higher rate.

2.3 There are exemptions[2]; Visitors will not pay the visitor levy if they are:

- under 18 years of age and staying on a campsite pitch or in shared rooms (such as a hostel or a dormitories)
- staying for more than 31 nights in a single booking
- in emergency or temporary housing arranged by the local council

2.4 The funds from the levy will be reinvested for the purposes of destination management and improvement in the area. Section 44 of the Act stipulates that councils must use the proceeds of the levy for:

- mitigating the impact of visitors;
- maintaining and promoting use of the Welsh language;
- promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
- providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

The purpose of this report

2.5 The Isle of Anglesey is seeking to determine the potential economic impact of introducing a visitor levy.

2.6 This report is phase two of a two phase process. Part one was joint commission between the local authorities of Gwynedd, Anglesey and Conwy which reviewed the data availability and evidence

[2] http://gov.wales/visitor-levy-small-contribution-lasting-legacy

base that could be used in the individual Economic Impact Assessments. This means (as far as possible and appropriate) there is a uniform approach to the data review and analysis to feed into the consultation process. This Economic Impact Assement for Angelsey is stand alone and inlcudes the relevent information from the phase one study.

2.7 Section 3 of this report reviews the work undertaken by Welsh Government to understand the economic impacts of the Act at a national level, and the extent to which the approach could be applicable at a more local level.

2.8 The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of applicable evidence of the impact of visitor levies from elsewhere, and there are gaps and uncertainties in data. Therefore even the national assessment is heavily caveated and relies on wide ranges. These limitations are even more pronounced at local level.

2.9 The key caveats relevant to the local level assessment are:

- There is uncertainty over how much of the levy is passed to consumers (modelled as 'bookends' at 0% or 100%)
- There are significant uncertainties in the elasticities of demand – this is the case at a Welsh level and is even more acute when applied at an Anglesey level.
- There are different data sources for the current level of visitors, bed nights and spend. The main analysis uses the International Passenger Survey and the Great British Tourism Survey (GBTS) – this is in line with the Welsh Government Appraisal and guidance provided to local authorities. Using STEAM data reports a much larger current visitor economy and therefore a larger impact – this means that there is a large range of potential impact and highlights the inherent uncertainty in the forecasting.
- At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Anglesey may be in Gwynedd or Conwy (and vice versa).
- Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Anglesey.
- The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – at an Anglesey level, there will be different impacts if Anglesey implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge.
- The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities. On the one hand, the approach will underestimate the impact on visitors and the loss of employment as a result of lower visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. If will also be offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.

2.10 The local (Anglesey) level assessment is therefore appropriately caveated and should be read in the context of uncertainty in data and relatively limited evidence base, particularly at the local level.

2.11 An updated report will be produced if further data become available or further data / feedback received through the consultation process would meaningfully change the conclusions of the economic impact assessment.

2.12 The remainder of the report covers:

- A review of the work undertaken by the Welsh Government to understand the economic impact of the Act (Section 3)
- A wider literature review to understand the extent to which evidence exists that would allow for the Wales wide approach to be undertaken at a smaller geographical scale (Section 4)
- Caveated Anglesey level economic impact assessment (Section 5)
- Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Anglesey (Section 6)
- Conclusion (Section 7)

3 Studies to support the Welsh Government Act – Economic Impact

3.1 There have been a number of studies to support the Welsh Government's decision to introduce the Act. These include:

- Evidence review of elasticities relevant to a visitor levy in Wales, Alma Economics, 2022
- The Potential Economic & Greenhouse Gas Impacts of a Visitor Levy in Wales, Cardiff Business School & Welsh Government, 2024 - referred to in this report as the Welsh Government 2024 analysis
- Revised analysis of the potential economic and greenhouse gas impacts of a visitor levy, Welsh Government, 2025 - referred to in this report as the Welsh Government 2025 analysis
- Review of impacts of visitor levies in global destination, Bangor University 2024

3.2 These reports are undertaken at an all Wales level and are heavily caveated.

Evidence review of elasticities relevant to a visitor levy in Wales, Alma Economics, 2022

3.3 Alma Economics undertook a Rapid Evidence Assessment (REA) which reviewed the literature on elasticities relevant to a visitor levy in Wales.

3.4 It sought to estimate the price elasticity of demand of tourism and accommodation in particular. Price Elasticity of Demand (PED) is the measure of responsiveness of the demand for a good or service when its price changes. A negative PED denotes a decrease in quantity demanded when price increases. A high elasticity of demand indicates that the quantity demanded of a good or service is highly responsive to changes in its price, meaning a small price change can lead to a significant change in demand. Inelastic (or low elastic) demand is when demand is not responsible to price.

3.5 The report identified a high level of uncertainty and significant evidence gaps. Even where relevant evidence was found, there was a large variation in the magnitude of estimates of elasticities and there were no studies that provided Wales specific estimates and only a small minority of studies considered the UK market.

3.6 There were significant variations in the findings for tourism – while the majority of studies (70%) found that tourism was inelastic, there were some studies that reported elastic demand. The average mid-range PED across all studies was -0.7 and the median was -0.9. Thes means that for a 1% increase in the price of a good or service leads to a 0.7% reduction in demand.

3.7 There were only two studies that specifically considered accommodation – those showed it to be price inelastic (at -0.7). The report includes a caveat that these should be interpreted with caution given the limited number of studies. At least one of these reports was specifically based on international tourism – and so will be less relevant to a domestic market.

3.8 The review (by the report's own admission) provided very little evidence addressing the more nuanced research questions, including (i) insight into the drivers of visitor behaviour, (ii) the impact of visitor levies or similar on tourism demand, and (iii) how the explored elasticities may vary depending on the characteristics of tourists (e.g., based on protected characteristics).

3.9 The report itself is also clear that these studies provided very little evidence differences that might occur at a sub-regional level, with most studies focusing on national impacts and / or international tourism.

The Potential Economic & Greenhouse Gas Impacts of a Visitor Levy in Wales, Cardiff Business School & Welsh Government, 2024

3.10 This report estimates the economic and greenhouse gas emissions impact of the levy at an all-Wales level. We have reviewed it to understand the extent to which a similar method could be used to estimate the impact of a levy in individual Local Authorities.

3.11 The report includes two scenarios:

i. 100% levy is passed on from business to consumers.

ii. 100% levy is absorbed by the business

3.12 The analysis does not account for supply-side changes, such as providers exiting the market due to the levy.

100% Levy is passed on from business to consumers

3.13 The study calculates the likely impact on the study in three scenarios (optimistic, neutral and pessimistic) based on a range of elasticities taken from the Alma study. It applies these to different visitor segments (two domestic with different spending patterns and overseas visitors). This results in a change in consumer demand for each segment.

3.14 The report uses elasticities from the Alma Economics study which (as above) has significant uncertainty, data gaps, and is largely based on international tourism and national effects. The issue of applying national elasticities will be more problematic at a Local Authority level than it would be at an all-Wales level.

3.15 The study assumes that the price elasticity of demand feeds through directly into the economy – i.e. the increase in the levy results in a reduction in demand (within the study area) which means a reduction in total trip spending (also in the study area). This could be due to either people not visiting the study area or visiting the study area for a shorter period of time as a result of the levy.

3.16 The model then uses Input-Output tables to determine the likely impact of the Welsh Economy.

100% Levy is absorbed by the business

3.17 This scenario assumes that there is no change to visitors or revenues and that businesses absorb all of the costs. The report assumes that there are no supply side changes – i.e. no business exits the market, or are put off entering the market in future, instead the levy is taken from the output of the businesses.

3.18 It assumes that there are no losses in employment and only decreases in salary (and other elements of output). This is likely to underestimate the employment loss since – in reality, a loss of revenue would result in a reduction in staff as well as a reduction in salaries.

Issues and Caveats

3.19 The report itself highlights significant caveats:

- **Price Elasticity Uncertainty**: as above, there are significant uncertainties in the elasticities – this is the case at a Welsh level and will become even more acute if used at a smaller study area.
- **Accommodation Supply**: as above, the model does not account for supply-side changes, such as providers exiting the market due to the levy.
- **Pass-Through Assumptions**: as above, the report assesses the 'book ends' of the likely impact by assessing the impact if the levy is passed on to visitors or absorbed by businesses – it does not seek to assess the extent to which one is more or less likely.
- **In-Wales Costs**: The analysis only includes in Wales costs and so it likely underestimates the total costs of the trip, particularly for international trips. This will therefore overestimate the reduction in international trips post levy (and so presents a worst-case scenario)
- **Base-Year Constraints**: The levy is modelled on 2019 tourism data due to data limitations, with rates adjusted for inflation.
- **Future inflatio**n: Future inflation and sector changes are not included – it is effectively a snapshot in time in a given year.
- **Administrative costs**: The analysis does not include any frictional or administrative costs that any new Levy might engender.

Revised analysis of the potential economic and greenhouse gas impacts of a visitor levy, Welsh Government, 2025

3.20 This report updated the previous work for two sets of rates. One of those sets of rates (£1.30 standard / £0.75 lower) was subsequently used in the Act. The analysis also excluded children and young people staying in Lower Band accommodation, since they are excluded from the Levy.

3.21 The report used similar methodology as the original but noted that: 'Constraints on time and access to data architectures mean a full, and fully comparable, reworking of the 2024 impact assessment is not possible'.

3.22 The results of the analysis at a Welsh level are set out in Table 3.1.

Table 3.1: Summary of likely impacts in Welsh Government report

			Likely range
Employment	Passing Levy onto visitors	FTEs	-400 to 100
	Businesses absorb levy	FTEs	360
Annual GVA (£m)	Passing Levy onto visitors		-£7.5m to +£11.1m
	Businesses absorb levy		-£32.3m

Review of impacts of visitor levies in global destination, Bangor University 2024

3.23 Bangor University undertook a review of international evidence on the environmental, social, and cultural impacts of visitor levies in various global destinations. The report then provided recommendations of the Welsh Government on the implementation of the levy.

3.24 The report identified five case studies / areas which had implemented visitor levies that had similarities to Wales in terms of the reliance on the tourism sector and / or their social, cultural and/or environmental context. This meant that the case studies included places that, like Wales, were reliant on their tourism industry.

3.25 The report focused on the implementation of the levy – including what the levy can be spent on, the decision making process and authority, local accountability, the scope of project and activities funded, the impact of the funded projects (noting a lack of evidence) and the need for transparency, accountability, monitoring and evaluation.

3.26 It did not focus on the impact of the levy on the tourism sector specifically, although there were some takeaways that do inform our report:

- There is limited evidence on the effects of tourism taxes: 'A **comprehensive assessment of the impacts of tourism taxes remains limited**, despite their clear motivations for implementation'.
- In general, there has been continued **year-on year growth in tourism in locations that have introduced a visitor levy** (although we cannot know what the counterfactual would have been without a levy).
- **Some locations choose to vary the tax during different seasons** – for example, the Balearic Islands have implemented two separate visitor levies: €0.25 – €1 per person per night in low season (November – April) and €1 – €4 per person per night in high season (May – October).[3] **While others do not:** in Mareo and San Martin, where seasonality is high (visitor numbers in the four busiest months are over ten times those in the quietest four months), a flat visitor levy has been imposed throughout the year (€1.50 – €3.50 per person per night).
- Some locations (Catalonia / Barcelona and the Balearic Islands) **vary by accommodation type / quality** (including different rates for different hotel 'star' quality. While **others do**

[3] Welsh Government, 2024. Review of visitor levies in global destinations here

not have as much differentiation: Iceland initially introduced a flat rate and subsequently split the rate into three broad categories camping, hotels, and cruise ships.

Conclusions and implications for our study

3.27 The work undertaken to support the Welsh Government has highlighted that there are gaps in the evidence base for understanding the economic impact of the Visitor Levy. This means that the Welsh level economic impact study is necessarily caveated and includes wide ranges / book ends for the likely impact.

3.28 Applying the Welsh Government approach at a more local area level would have the same caveats and issues – and some of the issues would be more acute at a smaller study area.

3.29 The detail is set out above, but the key issues include:

- **There is limited applicable evidence on the Price Elasticity of Demand** – both Welsh Government economic appraisals use the PEDs from the Alma Study which are largely national studies for international tourism. There are no Welsh specific studies and only two that specifically look at accommodation (rather than tourism as a whole). The issue of using these elasticities become even more acute at a smaller study area since it is not clear that national elasticities hold at a sub-regional level.
- The analysis does **not take a view on the extent to which the levy is passed on** - it has book end for the impact of 0% or 100% of the levy being passed onto consumers.
- It also does **not allow for supply side changes** – i.e. it does not allow for the potential some businesses are deterred from entering or leave the market. In the scenario where all of the levy is passed on to businesses, it is assumed that there is no loss in employment (only a loss in wages).
- **There is very little evidence addressing the more nuanced questions**, including (i) insight into the drivers of visitor behaviour, (ii) the impact of visitor levies or similar on tourism demand, and (iii) how the explored elasticities may vary depending on the characteristics of tourists (e.g., based on protected characteristics). **This means the analysis makes mostly linear assumptions based on averages.** This also makes it difficult to apply local characteristic to the study (and so to adapt the methodology in the national assessment to a more local level).
- It **does not include out of country costs** which likely underestimates the total cost of the trip, particularly for international trips. This will therefore overestimate the reduction in international trips post levy (and so presents a worst-case scenario).
- The analysis does not consider what visitor spending that is 'lost' as a result of the levy is spent on instead – this could be day trips (instead of overnight trips) or Welsh residents spending money on other things (instead of holidaying within Wales). This approach is again likely to be worst case scenario in terms of the impact of the levy on the Welsh economy. This is likely to be less relevant at Anglesey level than the Welsh level as those visiting Anglesey (who are put off by the levy) are unlikely to also live in Anglesey (whereas a Welsh resident may also holiday in Wales – for example, a Cardiff resident may spend money in Cardiff rather than holiday in Anglesey).

4 Further literature review

4.1 We conducted a further literature review to understand the extent to which evidence exists that would

- Allow for the Wales wide approach to be adapted for a local level assessment.
- Fill the evidence gaps identified above

4.2 There was limited additional evidence above what was used in the work to support the Welsh Government when implementing the Act.

4.3 There were various other examples where there has been continued year-on year growth in tourism in locations that have introduced a visitor levy (although as above we cannot know what the counterfactual would have been without a levy).

4.4 The other questions the literature review sought to answer were:

- To what extent does a visitor levy get passed on to visitors?
- How does the impact of a visitor levy change with seasonality or popularity of a destination?
- How does the does the cost of accommodation / trip change the impact of the levy? There was no additional evidence found to answer this question.
- Do visitors adjust their wider trip spending if they bear the cost of the levy?

To what extent does a visitor levy get passed on to visitors?

4.5 The extent to which a visitor levy gets passed on to consumers will determine whether it is consumers or accommodation providers who will bear the cost of the levy. As set out above the Welsh government economic appraisal does not take a view on this but tests book ends for 0% to 100% pass on.

4.6 The literature provides mixed evidence on the rate of pass-through (the extent to which businesses pass on changes in tax as changes in price to consumers) of a visitor levy or other tax mechanisms.

4.7 We looked at various tax mechanisms to determine pass-through rates:

- A review of lodging taxes in US cities showed that a lodging tax is unlikely to be fully passed on to the visitors – about 86% of tax paid is by visitors and the remaining 14% is absorbed by accommodation providers in the form of lower accommodation rates or reduced occupancy.[4]

[4] Hudson, S., Meng, F., So, K. K. F., Smith, S., Li, J., & Qi, R. (2021). The effect of lodging tax increases on US destinations. *Tourism Economics*, *27*(1), 205-219. Available here

- The European Commission study found that there was a high degree of pass-through in the long run but also had example of where taxes were not passed through. For example a case study of Disneyland Paris indicated they were unlikely to pass on VAT rate increases in 2014 to visitors due to the high price sensitivity of visitors. This meant Disneyland absorbed the cost of the VAT increase to mitigate the impact on visitor numbers and expenditure.[5]
- A study looking at the pass through of air passenger taxes on airfares across Europe estimated air passenger tax pass-through rates from 20% to 56%.[6] The same study mentions that the consumer share of the tax burden from a French VAT-reform was between 57% and 77%.

4.8 The literature review therefore does not provide clear evidence for the different level of pass-through rates that could be used – and so we maintain the approach in the Welsh Government Assessment of using bookends.

How does the impact of a visitor levy change with seasonality or popularity of a destination?

4.9 There are limited studies that have quantified PEDs for different seasons but several studies state that demand for tourism is less elastic in the high seasons compared to the low seasons.[7]

- The report on the balancing of revenue and demand in the hotel industry in Dubai[8] found that demand elasticity is much higher in the low seasons (and lower in high season). That is likely to be driven significantly by international travel – the report found that local hotels do not face strong seasonality as much international hotels do.
- The report on the price elasticities for accommodation services in Prague showed that visitors are less elastic during the high seasons than they are throughout the year with PEDs of -0.22 to 0.78 in the high seasons vs PEDs of -0.10 to -0.54 throughout the year. The positive PEDs in the high season suggest that the expected price-demand relationship may not always hold.[9]

4.10 The European Commission study found thar there were higher elasticity of demand in destinations with close substitutes. It showed that European countries in proximity still exhibit differences in PEDs due to the type of seasonal tourism offering.

4.11 Separately, the study of lodging tax increases on US destinations showed that approximately 49% of travellers altered their plans due to high travel taxes by reducing spending, staying somewhere cheaper and visiting during low season.[10]

4.12 While the literature review highlighted some further evidence on seasonality, not sufficiently to be able to determine how Anglesey would differ from the Welsh Average.

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[5] European Commission, 2017. The Impact of Taxes on the Competitiveness of European Tourism here
[6] Wozny, F. (2024). *Tax incidence in heterogeneous markets: The pass-through of air passenger taxes on airfares* (No. 16783). IZA Discussion Papers. Available here
[7] Baždar Gašljević, T., Maradin, D., & Cerović, L. (2023). Price Elasticity of Demand For Hotel Services On The Business Example Of Two Hotels In The Republic Of Croatia. *Journal of accounting and management*, *13*(1), 1-14. Available here
[8] Alrawabdeh, W. (2021). Seasonal balancing of revenue and demand in hotel industry: the case of Dubai City. *Journal of Revenue and Pricing Management*, *21*(1), 36. Available here
[9] Petříček, M., & Chalupa, Š. (2020). PRICE ELASTICITY OF DEMAND FOR ACCOMODATION SERVICES–EMPIRICAL APPLICATION IN PRAGUE. *Ad Alta: Journal of Interdisciplinary Research*, *10*(1). Available here
[10] Hudson, S., Meng, F., So, K. K. F., Smith, S., Li, J., & Qi, R. (2021). The effect of lodging tax increases on US destinations. *Tourism Economics*, *27*(1), 205-219. Available here

Do visitors adjust their wider trip spending if they bear the cost of the levy?

4.13 While the study of lodging tax increases on US destinations[11] mentioned above showed that visitors responded to a levy by decreasing their spending, the study did not quantify to what extent visitors reduce their spending. And overall, the literature is not clear about how visitors would adjust their wider trip spending if they bear the cost of the levy.

[11] Ibid

5 Caveated Anglesey level economic impact assessment

5.1 As set out in the previous sections, there is insufficient evidence to be able to robustly and accurately model the precise impact of the levy, or what how different scenarios would impact the magnitude of the effect (for example, whether other local authorities also implement a levy).

5.2 Therefore, we have taken a twin track approach to provide book ends (broadly following the Welsh Government approach) and sense checks for the likely range of the effect:

- Caveated reproduction of the Welsh Government approach. This is set out in Section 5.
- Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Anglesey. This is set out in this Section 6.

Caveated reproduction of the Welsh Government approach

5.3 We have taken a similar approach to the Welsh Government 2025 analysis to estimate the impacts at the Anglesey level – as in the Welsh Government approach this includes 'bookends' with two scenarios, one where 100% of the Levy being absorbed by businesses and another where 100% being absorbed by businesses

5.4 The approach is caveated because – as set out in Section 3, there are caveats within the Welsh Government report that also apply here and are in some cases more exaggerated in a local level assessment.

5.5 The key caveats that are relevant to the local level assessment are:

- At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Anglesey may be in Gwynedd or Conwy (and vice versa). For the purposes of this assessment, we assume that all spending is 'lost' from Anglesey and so this a worst-case scenario in terms of the impact on the visitor economy.
- Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Anglesey.
- There are different data sources for the current size of the Anglesey visitor economy – this is set out in more detail below.
- The Welsh Government analysis assume that a change in the price of tourism (i.e. the levy) results in a decrease in demand for tourism. It does not consider changes in visitor spending patterns within the trip (for example reducing other trip costs by the cost of the levy). This is likely to be worst case scenario in respect to the impact of the levy on the Welsh economy (assuming that the PED picks up all of the change in visitor behaviour). The same approach is taken in the local assessment – again this is likely to be worst case.

- There are significant uncertainties in the elasticities – this is the case at a Welsh level and is even more acute if used at a smaller study area. There is no alternative evidence for a more robust assessment and so we have used the range of elasticities of demand used in the Welsh Government assessment.
- The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – there will be different impacts if one local authority implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge. It is not possible to accurately assess what the impact of different combination of local authorities introducing the levy is, but the effect on the magnitude of the impact is considered.
- The scenario where the levy is passed onto businesses does not account for supply-side changes, such as providers exiting the market due to the levy.
- It also does not account for reductions in employment and assumes that the savings are found within the 'value add' of the businesses operations. In reality, it would likely result in a reduction of jobs too.
- The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities. One the one hand, the approach will underestimate the impact on visitors and the loss of employment as a result of lower visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. If will also be offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.

5.6 As with the Welsh Government analysis, the analysis does not include inflation (it considers the annual impact if the levy was in place in 2024 – the latest year for which data is available), it does not include administration costs on businesses, and it does not include costs that are outside of Wales (this means the analysis likely slightly overestimates the impact of the levy, particularly for international visitors – for whom out of Wales costs will be higher).

5.7 Given the lack of evidence, there are assumptions (such as elasticities of demand) where we have not sought to make the assumptions Anglesey specific – but instead have indicated whether the estimates are likely to under or overestimate the impacts, and provided sensitivity tests as appropriate.

5.8 VAT will be charged on the Visitor Levy[12].

Estimating the current number of visitor economy

[12] Visitor Levy for visitor accommodation providers: overview | GOV.WALES

5.9 In order to estimate the impact of the visitor levy, we first need to estimate the size of the visitor economy (the number of visitors, and nights stayed, and the spending that they support).

5.10 The Welsh Government analysis uses the Great British Tourism Survey (GBTS) and International Passenger Survey (IPS) for 2022 to 2024 – this is also the guidance that has been provided to local authorities.

5.11 This results in an average of 0.34m visits staying 1.4m bed nights and supporting £112m of spend. Note this is all trips including those that are staying in accommodation that is not included in the levy (for example staying with friends and family).

5.12 It should be noted that this data set has seen a reduction in bed nights and spend compared to pre Covid averages (2017-2019) and the data used in the Welsh Government Consultation Document[13]. This decrease may be partly due to a change in methodology in the data collection but may also be as a result of an actual decrease in tourism in Anglesey.

5.13 However using the 2022-24 average does not account for the more recent (or indeed future) growth in bed nights and spend. Therefore a sensitivity test is included with the 2024 bed nights and spend.

5.14 A sensitivity test is also included to include the STEAM data which has a much higher visitor numbers and spend data – this is likely to overestimate the impact of the levy but is included for completeness, and because it is noted that the rural nature of Anglesey may mean that the GTBS and the IPS may underestimate visitor numbers.

Visitor levy passed entirely on to tourists

5.15 This section assumes that 100% of the visitor levy is passed on to consumers. It first considers the impact of the loss of visitor spending and then considers the extent to which the spending of the levy itself would offset the loss.

The impact of the potential loss of visitor spending

5.16 In the main analysis we use the average annual data from the GTBS and IPS for 2022 to 2024

5.17 According to the Great British Tourism Survey, there were 0.28m domestic overnight visitors to Anglesey per year – who spend an average of 4 nights and spend £305 per person per trip.

Table 5.1: Domestic overnight visits to Anglesey

	Total (GBTS) (avg over 2022-2024)
Total visits to Anglesey by domestic overnight visitors	0.28m
Total Anglesey domestic bed nights	1.142m

[13] *Welsh Government Consultation Document: Consultation on proposals for a discretionary Visitor Levy for local authorities Compendium of visitor and visitor accommodation provider data sources 2022*

Average trip length (nights)	4.0
Total Anglesey domestic overnight expenditure (inc VAT)	£86.3m
Cost per trip (including VAT)	£305
Cost per night (including VAT)	£76

5.18 The data is not available by accommodation type for Anglesey – i.e. whether those visitors are in the lower band or standard band accommodation for the purposes of the visitor levy, or stay in other accommodation that is exempt.

5.19 However, we can make assumptions on the split based on two datasets:

- Data on the number of bed spaces by accommodation type by local authority – this can be compared to the total bed nights for the GBTS.
- Data on the split of visitors between lower band, standard band or other accommodation in Conwy and Gwynedd

5.20 Comparing these dataset suggests that that Anglesey has higher occupancy rates than neighbouring local authorities (Gwynedd or Conwy).

5.21 This results in a two scenarios

- A core scenario which assumes that the split between accommodation type is more similar to Conwy and assumes the ratio of bed spaces to occupants remains the same for lower band accommodation and the higher occupancy rate in Anglesey is as a result of higher occupancy in standard accommodation. This means the total bed nights is 889,000 (once those staying in accommodation exempt from the levy are excluded) and the split is 697,000 in standard accommodation and 192,000 in lower ban accommodation.
- A lower bound scenario which assumes that the split between accommodation type is more similar to Gwynedd and assume that the same ratio between bed spaces and bed nights in Gwynedd and then scales to meet the Anglesey occupancy – this results in a lower number of standard band visits.

5.22 The lower bound scenario is included as a sensitivity test later in this section.

5.23 Note the table below removes overnight stays that are exempt from the levy, for example those who stay with family or friends[14] - this is why the total numbers are lower than in Table 5.1.

Table 5.2: Domestic overnight visits to Anglesey – split between accommodation types are estimated (GBTS 2022 to 2024)

UK-resident visitors	Lower bound (est.)			Core(est.)		
	Standard Band	Lower Band	TOTAL excl 'other'	Standard Band	Lower Band	TOTAL excl 'other'

[14] For Great British Tourism Survey we exclude those staying in 'other accommodation' and for the International Passenger Survey we exclude those who are staying in their own home or staying for free with friends and family

Total visits overnight visitors ('000)	111	108	219	159	50	209
Total bed nights ('000)	417	426	843	697	192	889
Average trip length (nights)	3.8	3.9	3.8	4.4	3.8	4.2
Total overnight expenditure (including VAT)	£45m	£26m	£71m	£63m	£12m	£74m
Cost per trip (including VAT)	£405	£244	£326	£393	£236	£356
Cost per night (including VAT)	£108	£62	£85	£90	£62	£84

5.24 The Welsh Government 2025 analysis estimated that 22% of those in the Lower Band accommodation are children and so are exempt from the levy. It is assumed that this assumption holds at an Anglesey level – were the proportion of children to be lower the impact of the levy would be higher, and conversely were the proportion of children to be higher the magnitude of the impact of the levy would be smaller.

5.25 The table below include only eligible visitors (i.e. it excludes children visiting lower band accommodation) and also includes the international visitor data (taken from the International Passenger Survey for 2022 to 2024). It does not include those who are staying in accommodation that would be exempt from the levy[15].

5.26 Note that since the table below does not include either people who are staying in accommodation that is exempt, or children staying in lower bound accommodation – the 0.34m visits set out above reduces 0.24m visits (and bed nights and spend also reduce)

5.27 Note that all international visitors are assumed to stay in standard accommodation and so pay the levy – this is consistent with the Welsh Government analysis. Were there to be children in lower bound accommodation within this group, the magnitude impact of the levy would be smaller.

5.28 As set out above, the available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities.

5.29 On the one hand, the approach will underestimate the impact on visitors (including underestimating the number of people who pay the higher rate and overestimating the number of children who are exempt from paying) and the loss of employment as a result of lower visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. If will also be

[15] Ibid

offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.

Table 5.3: All eligible overnight visits to Anglesey – split between accommodation types and visitor type – core scenario (2022 to 2024)

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	International	Total
Eligible overnight visits ('000)	159	39	47	245
Eligible bed nights ('000)	697	150	169	1,015
Average trip length (nights)	4.4	3.8	3.6	4.1
Eligible overnight expenditure (inc VAT)	£63m	£9m	£22m	£94m
Cost per trip	£393	£236	£467	£382
Cost per night	£90	£62	£129	£92

5.30 The levy is £1.30 per person, per night for standard accommodation and 75p for lower band accommodation. VAT is charged and so those costs increase to £1.56 and 90p. Based on the average trip length and the total cost per trip, it is estimated that the visitor levy would be between 1.2% and 1.7% of the trip cost depending on trip / visitor type.

5.31 The elasticity is assumed to be -0.74. This is in line with the Welsh Government (2025) appraisal (for the neutral scenario). We have also tested the more pessimistic elasticity (-1.12) and more optimistic elasticity (-0.38) from the Welsh Government appraisal – this range is presented at the end this section.

5.32 As is set out above, there is very little evidence on local level elasticities as a result of visitor levies – the relatively limited analysis that exists is based on national evidence. In the absence of more locally specific evidence the range of multipliers has been applied.

5.33 It should also be noted that elasticity of demand in Anglesey will be affected (to some extent) by whether neighbouring local authorities also introduce the visitor levy – if Anglesey is the only local authority to introduce the levy, the impact on visitor behaviour will likely to be higher (as visitors may choose to go to other local authorities) whereas if more local authorities introduce a charge, the impact is likely to be lower.

5.34 Using the neutral multiplier (-0.74) results in a reduction in demand of between 0.9% and 1.3% depending on trip / visitor type.

Table 5.4: Change in demand as a result of the levy – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	International

Levy per person per night (ex VAT)	£1.30	£0.75	£1.30
Levy per person per night (inc VAT)	£1.56	£0.90	£1.56
Average trip length (nights)	4.4	3.8	3.6
Avg per-trip expenditure (inc VAT)	£393	£236	£467
Per trip Visitor Levy:	£6.84	£3.44	£5.66
a) As a % of trip cost	1.7%	1.5%	1.2%
b) Elasticity	-0.74	-0.74	-0.74
Percentage change in consumer demand (a x b)	-1.3%	-1.1%	-0.9%

5.35 This reduction in demand results in a £1.1m reduction in spending by visitors per year (including VAT) and £0.9m (excluding VAT).

5.36 Not all of that spend would have been spent in Anglesey - some would have been spent in other local authorities (either day trips or on the journey) but to be conservative it is assumed that all of the loss is felt in Anglesey. This will overestimate the (negative) impact on the Anglesey economy.

Table 5.5: Loss in trip expenditure – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total
Eligible overnight expenditure (inc VAT)	£63	£9	£22	£94
Percentage change in demand	-1.3%	-1.1%	-0.9%	
Post Visitor Levy expenditure (£m) (inc VAT)	£62	£9	£22	£92
Gross Trip Expenditure reduction (direct) (£m) (inc VAT)	-£0.8	-£0.1	-£0.2	-£1.1
Gross Trip Expenditure Losses (direct) (£m) (excl VAT)	**-£0.7**	**-£0.1**	**-£0.2**	**-£0.9**

5.37 Based on Welsh Government multipliers for 'accommodation and food' – indirect and induced effects are also included. Again, these would not all have been felt in Anglesey and so this is likely to overestimate (the negative) impact of the loss of expenditure as a result of the levy.

5.38 We apply both a type 1 (which captures direct and indirect effects) and type 2 multipliers (which capture direct, indirect and induced effects) for accommodation and food[16] – this is used as a proxy for all spending and it likely to capture the majority of the spending patterns.

5.39 This results in a loss of £0.7m of annual GVA per year – which results in the loss of between 18 and 21 FTE jobs.

Table 5.6: Loss in annual GVA and employment as a result of loss of visitor spending – core scenario

	Type 1	Type 1 and Type 2
Change in direct annual output (exl VAT)	-£0.9	-£0.9
Multiplier (accommodation and food)	1.23	1.39
Change in total annual output	-£1.1	-£1.3
Ratio of Output to GVA (accommodation and food)	0.58	0.58
Change in annual GVA	**-£0.7m**	**-£0.7m**
GVA per FTE (accommodation and food) in Anglesey	£35,500	£35,500
Change in FTE Employment	**-18**	**-21**

[16] This is based on Welsh Government Indicative economic multipliers (input-output tables): 2019

The impact of the Visitor Levy spending

5.40 The visitor levy will result in an increase in economic activity. The visitor levy can be spent on:

- mitigating the impact of visitors;
- maintaining and promoting use of the Welsh language;
- promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
- providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people

5.41 For the purpose of this assessment, it is assumed that the impact is felt equally across different sectors of the economy (and so Anglesey averages have been used).This could be updated when further information on the type of investment that the visitor levy is spent on is available.

5.42 The Levy would result in £1.2m of additional revenue excluding VAT (see Table 5.7) – this accounts for the reduction in demand as a result of the levy and excludes children from the lower band accommodation.

5.43 Not all of this will be spent with Anglesey employers, since:

- Up to 10% will go to Welsh Government to cover operating costs – in the main analysis it is assumed that the full 10% is taken by Welsh Government, but a sensitivity test is included to reduce this to 0% (to give the full range of 0% to 10%).
- A further 25% leakage is applied to allow for the spending of the Anglesey levy to be spent on companies outside of Anglesey. This is a conservative estimate since leakage is anticipated to be very low – the spending of the fund would be carried out by Anglesey Council. Spending is likely to include spending on destinations and communities in Anglesey and the spend would be with local contractors and businesses as far as possible. The nature of the spending (relatively small contracts) means that it is more likely to be delivered by local businesses and less likely to attract businesses from further afield. Nonetheless a higher leakage of 45% is included as a sensitivity test.

5.44 Again, we apply type 1 and type 2 multipliers and a ratio of GVA to output[17] – this result in an increase of approximately £0.5m to £0.6m in annual GVA in Anglesey supporting 6-7 FTE jobs (see Table 5.8).

Table 5.7: Loss in trip expenditure and levy revenue – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total
Post-levy eligible bed-nights (accounting for reduced demand ('000)	688	148	168	1,003

[17] Multiplier and ratio based on Welsh Government Indicative economic multipliers (input-output tables): 2019

Levy per person per night (ex VAT)	£1.30	£0.75	£1.30	
Visitor Levy Revenue (ex VAT)	**£0.9m**	**£0.1m**	**£0.2m**	**£1.2m**
Visitor Levy Revenue (inc VAT)	£1.1m	£0.1m	£0.3m	£1.5m

Table 5.8: increase in annual GVA and employment as a result of spending of the Visitor Levy – core scenario

	Low Scenario - Type 1	**High Scenario - Type 2**
Visitors Levy revenue (ex VAT) – direct output	£1.2m	£1.2m
Excluding 10% that goes to WG operating cost	£1.1m	£1.1m
Leakage	25%	25%
Visitors Levy revenue (ex VAT) in Anglesey – direct output	£0.8m	£0.8m
Multiplier (all sectors)	1.21	1.33
Change in total output (including direct etc) in Anglesey	£1.0m	£1.1
Ratio of Output to GVA (all sectors)	0.5	0.5
Change in GVA in Anglesey	**£0.5m**	**£0.6m**
GVA per FTE across all sectors (Anglesey)	£80,500	£80,500
Change in FTE Employment in Anglesey	**6**	**7**

Total impact of the Levy

5.45 The combined impact of the levy is the loss of visitor spending plus the increase economic activity as a result of the levy spending in Anglesey.

5.46 In the core scenario that is anticipated to be a £0.1 to £0.2m loss of annual GVA (which is a 0.01% decrease in Anglesey's annual GVA) and the loss of 12 to 14 jobs (which is less than 0.1% of the Anglesey employment).

Table 5.9: Change in annual GVA and employment combined effect – core scenario

		Core (based on elasticities)
GVA	Decrease due to loss of spending	-£0.7m
	Increase due to spending of the levy	+£0.5 to +£0.6m
	Change in annual GVA	**-£0.1m to -£0.2m**
	Anglesey GVA (2023)	£1,455m
	Approx percent of Anglesey Economy GVA	-0.01%
Employment	Decrease due to loss of spending	-18 to -21
	Increase due to spending of the levy	+6 to +7
	Change in FTE Employment	**-12 to -14**
	Anglesey FTE Total	18,065

Approximate percent of Anglesey employment	-0.07% to 0.08%

5.47 The core scenario is based on an elasticity of -0.74. Applying Welsh Government's optimistic elasticity (0.38) reduces the impact to the loss of 3 to 4 jobs and results in an increase in annual GVA of £0.24m.

5.48 Applying a more pessimistic elasticity (-1.12) results in a larger loss of up to 25 jobs and up to £0.6m annual loss in annual GVA.

Table 5.10: Change in annual GVA and employment combined effect

	Lower Bound (based on elasticities)	**Core (based on elasticities)**	**Higher bound (based on elasticities)**
Decrease due to loss of spending	-£1.0m to -£1.1m	-£0.7m	-£0.3m to -£0.4m
Increase due to spending of the levy	+£0.5m to +£0.6m	+£0.5m to +£0.6m	+£0.5m to +£0.6m
Change in annual GVA	**-£0.5m to -£0.6m**	**-£0.1m to -£0.2m**	**+£0.2m**
Anglesey GVA (2023)	£1,455m	£1,455m	£1,455m
Approx percent of Anglesey Economy GVA	-0.03% to -0.04%	-0.01%	0.01%
Decrease due to loss of spending	-23 to -32	-18 to -21	-9 to -11
Increase due to spending of the levy	+6 to +7	+6 to +7	+6 to +7
Change in FTE Employment	**-22 to -25 jobs**	**-12 to -14 jobs**	**-3 to -4 jobs**
Anglesey FTE Total	18,065	18,065	18,065
Approximate percent of Anglesey employment	-0.1%	-0.07% to -0.08%	-0.02%

5.49 Table 5.11 sets out the total levy revenue collected in each scenario – note the economic activity supported by these activities is included in the GVA impacts set above but is included here for clarity.

5.50 Based on the current number of visitors (bed nights) the levy would raise £1.2m, of which up to £1.1m would be retained by IACC to spend in the local area (in line with the Act) assuming that up to 10% of the revenue covers Welsh Government operating costs.

5.51 The approach set out in the previous analysis allows for a reduction in demand in response to the visitor levy – this reduction results in the revenue falling slightly but it remains between £1.22m and £1.24m in total, and between £1.09m and £1.11m once the contribution to Welsh Government operating costs have been excluded.

5.52 In reality, the revenue collected could be higher than this for a number of reasons:

- This assumes that the number of visitors is static as of 2022-2024 data – and the only change is a reduction in visitors (or bed nights) as a result of the levy. In reality the visitor economy may grow (with or without the levy). The Anglesey tourism market has been growing post Covid and this may continue. There is also evidence year-on year growth in tourism in locations that have introduced a visitor levy (refer to the Bangor University report as summarised in Section 3). On the other hand, if visitor numbers reduced, there would be a reduction in revenue.
- The levy will allow IACC to invest in activities in line with the Act, including promoting and supporting the sustainable economic growth of tourism, and providing, maintaining and improving infrastructure, facilities and services for use by visitors. This investment is itself likely to drive an increase in visitor numbers. Conversely there could be a fall in visitors without the investment in the levy.
- STEAM data suggests a much more significant current visitor economy in Anglesey – this would result in a larger revenue – this is set out in more detail in the sensitivity test in the next section.
- The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate, in reality some will pay the higher rate which will increase the revenue. There will also be fewer children who are exempt.

Table 5.11: Revenue estimates

		UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total	Reduced by 10% to WG for operating costs
Levy per night (excl VAT)		£1.30	£0.75	£1.30		
No reduction in demand	In scope bed nights	0.70m	0.15m	0.17m	1.02m	
	Revenue (excl VAT)	£0.91m	£0.11m	£0.22m	£1.24m	£1.11m
Core	In scope bed nights	0.69m	0.15m	0.17m	1.00m	
	Revenue (excl VAT)	£0.89m	£0.11m	£0.22m	£1.22m	£1.10m
Optimistic	In scope bed nights	0.69m	0.15m	0.17m	1.01m	
	Revenue (excl VAT)	£0.90m	£0.11m	£0.22m	£1.23m	£1.11m
Pessimistic	In scope bed nights	0.68m	0.15m	0.17m	1.00m	
	Revenue (excl VAT)	£0.89m	£0.11m	£0.22m	£1.22m	£1.09m

Sensitivity test and impacts of assumptions

5.53 There are a number of assumptions made above which effect the scale of the impact. The key assumption are set out in the table below, alongside the implications for the magnitude of the impact.

5.54 Additional sensitivity tests are also carried out below – those are set out in Table 5.12 and Table 13.

5.55 As set out above, there are a number of different sources for estimating the current size of Anglesey's tourist economy. The main analysis presented above uses the GBTS and IPS for average annual data for 2022 to 2024 – this is in line with the approach used by Welsh Government and also the guidance that has been provided to local authorities.

5.56 The annual figure for 2024 is higher than the average annual figures for 2022-24 (reflecting a recovering post-covid market) and so we have added the 2024 figures as a sensitivity test.

5.57 STEAM data estimates a much bigger tourism market in Anglesey – this is set out in more detail, including a sensitivity test, below.

Table 5.12: Implications of assumptions on likely magnitude of impact

	Sensitivity test	Implication
Contribution to WG operating costs reduced to 0%	Yes – Table 5.13	Tested in sensitivity test = **negligible change in impact**
Higher level (45%) of leakage is applied	Yes – Table 5.13	Tested in sensitivity test = Slightly higher magnitude of impact
Using 2024 GTBS and IPS data (instead of 2022 to 2024 average)	Yes – Table 5.13	Tested in sensitivity test = **negligible change in impact**
Using STEAM data	Yes – Table 5.14	Tested in sensitivity test = **Higher magnitude of impact**
Split of visitors is as per lower bound in Table 5.2	Yes – Table 5.13	Tested in sensitivity test = Slightly lower magnitude of impact
Proportion of children in standard accommodation is higher than 22%	No	Lower impact in terms of loss of visitor expenditure (as more children, who are exempt) + Lower impact in terms of spending of levy = **Lower magnitude of impact**
Proportion of children in standard accommodation is lower than 22%	No	Higher impact in terms of loss of visitor expenditure (as fewer children, who are exempt) + Higher impact in terms of spending of levy = **Higher magnitude of impact**

More pessimistic elasticity of demand	Included in Table 5.10 (lower bound)	Included in lower bound above = **Higher magnitude of impact**
More optimistic elasticity of demand	Included in Table 5.10 (higher bound)	Included in higher bound above = **Lower magnitude of impact**
Anglesey only local authority to introduce levy	Not explicitly	Not explicitly but likely to be closer to 'more pessimistic elasticity of demand' = **Higher magnitude of impact**
Anglesey and neighbouring local authorities to introduce levy	Not explicitly	Not explicitly but likely to be closer to 'more optimistic elasticity of demand' = **Lower magnitude of impact**
Less than 100% of spending is 'lost' from Anglesey	No	Lower impact in terms of loss of visitor expenditure = **Lower magnitude of impact**

Table 5.13: Sensitivity tests

	Core	**Lower % in standard accommodation**	**Contribution to WG operating costs reduced to 0%**	**Higher level (45%) of leakage**	**Using 2024 GTBS and IPS data**
Change in annual GVA	**-£0.1m to -£0.2m**	**-£0.1m**	**-£0.1m**	**-£0.3m**	**-£0.2m**
Anglesey GVA (2023)	£1,455m	£1,455m	£1,455m	£1,455m	£1,455m
% of Anglesey GVA	-0.01%	-0.01%	-0.01%	-0.02%	-0.01%
Change in FTE Employment	**-12 to -14 jobs**	**-10 to -11 jobs**	**-11 to -13 jobs**	**-14 to -16 jobs**	**-13 to -15 jobs**
Anglesey FTE Total	18,065	18,065	18,065	18,065	18,065
% of Anglesey employment	-0.07% to -0.08%	-0.06%	-0.06% to -0.07%	-0.08% to -0.09%	-0.07% to -0.08%

5.58 STEAM data reports a much higher tourism sector in Anglesey. In 2024 there were estimated to be 1.1m overnight visitors, staying 5.7m days and spending over £0.3bn. That is approximately 3 to 4 times bigger than the tourism market in Anglesey based on the IPS and the GTBS.

5.59 The sensitivity test below estimates the likely impact of the levy based on the STEAM numbers (they estimate a much higher visitor economy level than the GTBS and the IPS), this is likely to overestimate the impact of the levy but is included for completeness and in recognition that the rural nature of Anglesey may mean that the GTBS and the IPS may underestimate visitor numbers.

5.60 The STEAM data counts visitor days – for the purpose of the analysis we have assumed a staying visitor day = a night. This will overestimate the impact of the levy since someone may be present in an area for more days than they are nights.

5.61 The STEAM data does not split non-serviced accommodation into lower band and standard accommodation and so a range (i.e. from 100% in lower bound to 100% standard band) is used. The reality will be somewhere in between.

5.62 This STEAM analysis provides a bookend in terms of:

5.62.1 Worst case in terms of impact on employment and GVA – this results in a reduction of between 34 and 80 jobs (approximately 0.2% to 0.4% of Gwynedd's economy) and up to £1.1m GVA (up to 0.07%).

5.62.2 Best case in terms of available revenue spending – this increases to £3.1m to £6.2m (after accounting for contribution to Welsh Government operating costs). This is likely to be a very best case scenario in terms of revenue funding (for reasons set out above it is likely to be an overestimate).

5.63 Note that this analysis is based on the core scenario (i.e. an elasticity of -0.74). Applying Welsh Government's range of elasticity (-0.38 to -1.12) would results in a wider range of impacts using the STEAM data.

5.64 The main analysis (following the Welsh Government approach and guidance) remains the preferred approach but the STEAM data demonstrates the uncertainty (and potentially top end) of the likely impact.

Table 5.14: Change in annual GVA and employment combined effect

	Main analysis Core scenario (elasticity of -0.74)	**STEAM 2024** (elasticity of -0.74)
Decrease due to loss of spending	-£0.7m	-£1.8m to -£4.2m
Increase due to spending of the levy	+£0.5m to +£0.6m	+£1.4m to +£3.1m
Change in annual GVA	**-£0.1m to -£0.2m**	**-£0.4m to -£1.1m**
Gwynedd GVA (2023)	£1,455m	£1,455m
Approx percent of Anglesey Economy GVA	-0.01%	-0.03% to -0.07%
Decrease due to loss of spending	-18 to -21	-52 to -119
Increase due to spending of the levy	+6 to +7	+18 to 39
Change in FTE Employment	**-12 to -14 jobs**	**-34 to -80**

Gwynedd FTE Total	18,065	18,065
Approximate percent of Anglesey employment	-0.07% to -0.08%	-0.2% to -0.4%
Revenue (excl VAT)	**£1.2m** *£1.1m accounting for contribution to WG*	**£3.4m to £6.9m** *£3.1m to £6.2m accounting for contribution to WG*

Visitor levy entirely borne by the accommodation provider

5.65 This scenario assumes that businesses absorb the cost of the Visitor Levy which means that there is no change to the level of visitors to Anglesey. This means that the businesses absorb £1.5m including VAT (this is worst case as some businesses will pass VAT on).

Table 5.15: Total cost to be absorbed by the business

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	International	TOTAL
Eligible Anglesey bed nights ('000)	697	149	169	1,015
Levy per person per night (inc VAT)	£1.56	£0.90	£1.56	
Total levy = total cost to be absorbed	**£1.1m**	**£0.1m**	**£0.3m**	**£1.5m**

5.66 Businesses absorb £1.5m of additional cost and this is paid for business revenues – the Welsh Government appraisal assumes that this is 'found' from within the value added and so in the same as GVA. In reality, it would likely there would also be some reduction in jobs.

5.67 The Welsh Government appraisal also assumes that neither input prices change, nor do visitor volumes, nor economic scale. This means that there are no 'Type 1' supply chain multiplier effects. There are however some indirect effects consequent on the Levy squeeze, reducing income to be spent (in part) across the Anglesey economy and so a multiplier of 1.2 is applied to include direct and induced, but excludes indirect GVA. This results in a loss of £1.7m in annual GVA.

Table 5.16: Change in annual GVA due to impact of Levy being absorbed by the business

	TOTAL
Direct annual GVA	-£1.5m
Multiplier (direct and induced, excludes indirect)	1.2
Total annual GVA	-£1.7m

5.68 As set out above, the spending of the levy is expected to result in an increase of £0.5 to £0.6m in GVA per year in the core scenario and an increase of 6 to 7 jobs (accounting for contribution to WG operating costs and leakage). This results in a combined impact of a loss of £1.2m in annual GVA and an increase in 6 to 7 jobs.

Table 5.17: Change in annual GVA and employment combined effect – core scenario

	Annual GVA	Employment
Change due to impact of Levy being absorbed by the business	-£1.7m	0
Change due to spending of the Levy	+£0.5m to +£0.6m	6 to 7 jobs
Net change	**-£1.2m**	**6 to 7 jobs**

5.69 The relevant sensitivities set out above are included in the table below. The higher leakage, change in contribution to Welsh Government operating costs and approach to VAT changes results in a jobs impact of between 5 and 8 jobs and a loss of between -£0.9m and -£1.4m of annual GVA.

5.70 Again the STEAM data has a much larger impact (driven by a larger current tourist economy) and shows the bookends (both positive and negative) of potential impacts.

Table 5.18: Sensitivity tests

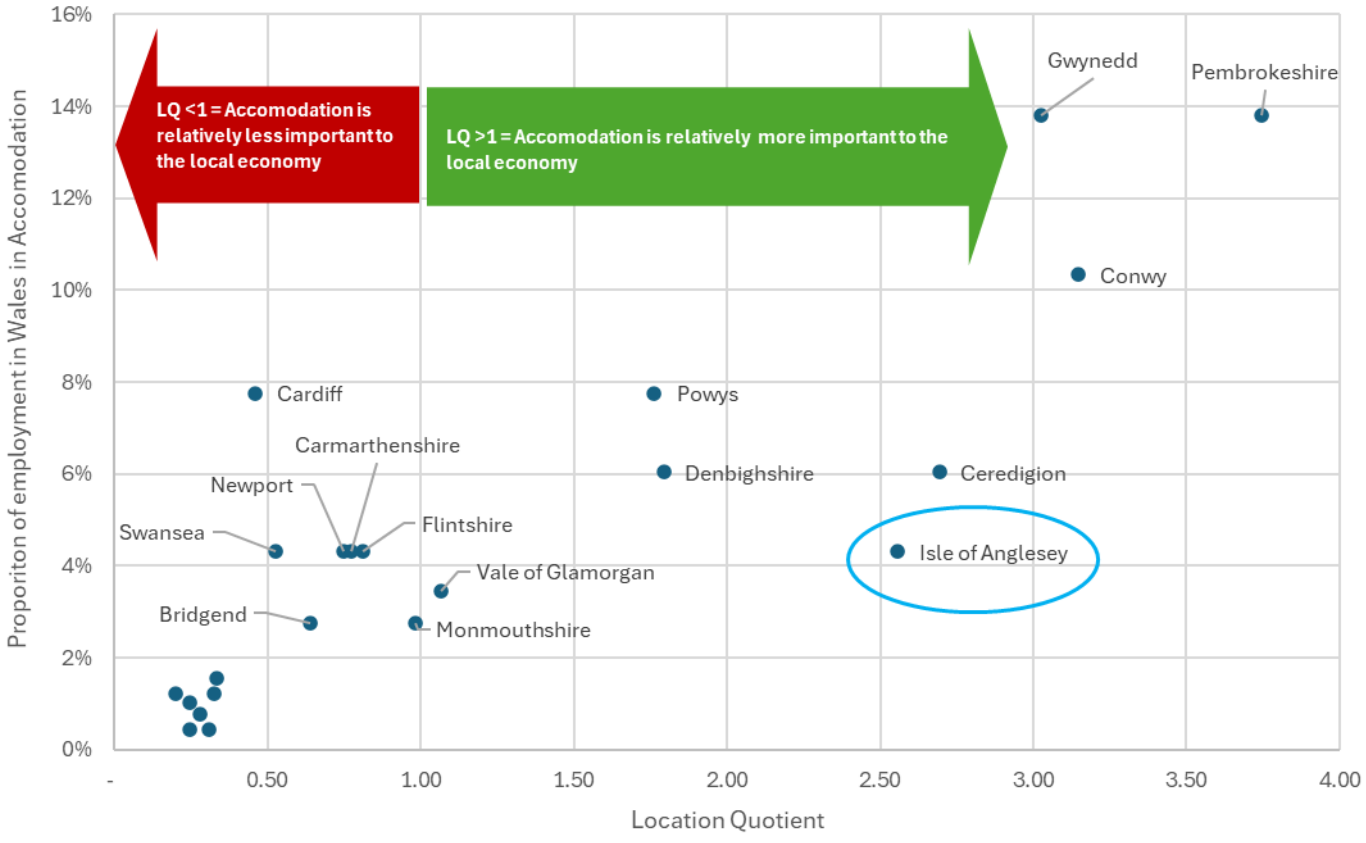
	Annual GVA	Employment
Core	-£1.2m	6 to 7 jobs
Higher level (45%) of leakage is applied	-£1.3m to -£1.4m	5 jobs
Lower proportion in standard accommodation	-£1.0m	5 to 6 jobs
Contribution to WG operating costs reduced to 0%	-£1.1m to -£1.2m	7 to 8 jobs
Businesses do not 'absorb VAT'	-£0.9m	6 to 7 jobs
STEAM	-£3.3m to -£6.9m	18 to 39 jobs

6 Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Anglesey

6.1 We have conducted 'sense checks' which uses the overall impact of the Visitor Levy on the Welsh economy (from the Welsh Government analysis) to estimate the likely impact on Anglesey. Note this does not address the caveats with the Welsh Government analysis, or its applicability at a more local level, but it does provide additional confidence in the analysis.

6.2 First, it should be noted that while Anglesey has a relatively small proportion of the overall Welsh tourism market (and therefore employment), its economy is disproportionately reliant on it. This is shown in Figure 6.1 which shows that Anglesey has just over 4% of Wales' total employment in Accommodation but that it has a location quotient of 2.54 which means that accommodation employment is disproportionately important to the local economy.

Figure 6.1: Accommodation employment in Wales - Location Quotient and proportion of employment in Wales



6.3 The table below shows that based on a number of different measures (employment, visitor nights and spend); the Anglesey tourism sector is between 3% and 7% of the Welsh tourism economy.

Table 6.1: Anglesey tourism sector as a proportion of Wales total

	Proportion of Welsh total tourism sector
Employment in Accommodation (BRES 2024)	4%
Employment in Accommodation and Food (BRES 2024)	3%
Domestic - nights (all trip types)	5%
Domestic - spend (all trip types)	5%
International - nights (excl own home and family and friends)	5%
International - spend (excl own home and family and friends)	7%

6.4 As a sense check, we have applied this to the findings of the Welsh Government 2024 Appraisal. In the appraisal that passed on 100% of the levy to the customer, it found that:

- Across Wales, the Levy would result in between a loss of 400 and an increase of 100 jobs
- And a change in annual GVA of between -£7.5m and an increase of £11.1m

6.5 If we applied the range above (3% to 7%) we would expect an impact of between -28 and plus 7 jobs and a change in GVA of between a loss of £0.5m and a gain of £0.8m. This compares to the estimates in Section 5 of -3 to -25 FTEs and between a loss of £0.6m to a gain of £0.2m in annual GVA.

6.6 This approach of pro-rating the Welsh Government analysis would be expected to be higher than the analysis set in Section 5 because prorating the Welsh Government analysis assumes that Anglesey claims its (relative) share of the spending of the visitor levy (once non-regional spending is accounted for).

6.7 The analysis in Section 5 assume that there is leakage of the spending of the Anglesey levy outside of Anglesey and does not account for Anglesey business 'gaining' as a result of the levy from other local authorities (for example an Anglesey business being employed on a project in Gwynedd paid for by the levy).

6.8 It should be noted that these estimates are only indicative – the approached are not like for like. Nonetheless the similarity of the figures provides confidence in the analysis set out in Section 5.

Table 6.2: Cross checking compared to Welsh Government Approach - 100% of the Levy passed on

		Pessimistic	Core	Optimistic
Employment	WG approach - Welsh level	-400	-140	100
	WG approach - Anglesey level 3%	-12	-4.2	3
	WG approach - Anglesey level 7%	-28	-9.8	7
	Caveated Anglesey approach (passing Levy onto visitors) – Section 5	**-22 to -25 jobs**	**-12 to -14 jobs**	**-3 to -4 jobs**
Annual GVA (£m)	WG approach - Welsh level	-£7.5m	£2.1m	£11.1m
	WG approach - Anglesey level 3%	-£0.2m	£0.1m	£0.3m
	WG approach - Anglesey level 7%	-£0.5m	£0.2m	£0.8m
	Caveated Anglesey approach (passing Levy onto visitors) – Section 5	**-£0.5m to -£0.6m**	**-£0.1m to -£0.2m**	**+£0.2m**

6.9 Taking the same approach for the scenario where businesses absorb the levy, then applying the 3% to 7% range would result in between 11 and 25 additional jobs (compared to 6 to 7 in Section 5) and between -£1.0m and -£2.3m (compared to -£1.2m in Section 5).

Table 6.3: Cross checking compared to Welsh Government Approach – 0% of the levy passed on

		Core
Employment	WG approach - Welsh level	360
	WG approach - Anglesey level 3%	11
	WG approach - Anglesey level 7%	25
	Caveated Anglesey approach (businesses absorb) – Section 5	6 to 7 jobs
Annual GVA	WG approach - Welsh level	-£32.3m
	WG approach - Anglesey level 3%	-£1.0m
	WG approach - Anglesey level 7%	-£2.3m
	Caveated Anglesey approach (businesses absorb) – Section 5	-£1.2m

7 Conclusion

7.1 The evidence on the impact of visitor levies on local economies is relatively limited, and there are some significant gaps and uncertainty in the data. Therefore this appraisal should be read in that light.

7.2 We have sought to replicate the appraisal methods used by Welsh Government, making them relevant at a local level where possible, and including assumption and caveats transparently. We have also added sensitivity tests and sense checks to add robustness to the appraisal.

7.3 Despite the caveats associated with the evidence base and methodology, we are confident that the impact on the Anglesey economy will be relatively small in terms of both the impact on employment and annual GVA. The table below reflects the likely range using the IPS and the GTBS (in line with the approach used by Welsh Government).

7.4 This analysis is relatively conservative in that it assumes there is no growth in the visitor economy and allows for a reduction in response to the levy. In practice, if the visitor economy grows then the funding raised by the levy will increase (and vice versa[18]), and indeed the levy spending could drive higher tourism through an improved visitor experience. There is evidence of year on year growth in other locations where visitor levies have been introduced.

7.5 Any growth in the visitor economy would also offset any losses to the economy (jobs and GVA) as a result of the visitors who do not come as a result of the levy and result increase the levy revenue.

Table 7.1: Summary of likely impacts

		Main analysis - Core scenario	Main analysis - Likely range[19]
Employment	Caveated approach (passing Levy onto visitors)	-12 to -14 jobs	-25 to -3 jobs
	Caveated approach (businesses absorb)	6 to 7 jobs	6 to 7 jobs
	Combined range	**-14 to +7 jobs**	**-25 to +7 jobs**
Annual GVA (£m)	Caveated approach (passing Levy onto visitors)	-£0.1m to -£0.2m	-£0.6m to +£0.2m
	Caveated approach (businesses absorb)	-£1.2m	-£1.2m
	Combined range	**-£1.2m to -£0.02m**	**-£1.2m to +£0.2m**
Visitor Levy revenue	**Combined range**		**£1.1m to £1.2m**

[18] Conversely if tourism reduced for reasons other than the levy, the revenue funding would decrease.
[19] This includes a range of pessimistic to optimistic based on the elasticities in the Welsh Government analysis

7.6 The STEAM data estimates the current Anglesey visitor economy is 3 to 4 times larger than the IPS / GBTS data – therefore using the STEAM data results in significantly higher impacts. For example the change in jobs is -14 to +7 in the core scenario of the main analysis, and this becomes -80 to +39 using the STEAM data. Similarly the revenue increases to £3.1m to £6.2m (although note this is likely to be an overestimate). This highlights the uncertainty in the data and therefore the inherent uncertainty in forecasting the impact of the levy.

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Evaluation of the Potential Impacts of the Visitor Levy on the Environment

Destination
Regulation and Economic Development

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Evaluation of Potential Impacts of the Visitor Levy on the Environment of Anglesey

1.0 Purpose

To outline the potential impacts of the introduction of the visitor levy on the Welsh Language including positive and negative indicators.

2.0 Introduction

Anglesey's tourism offer draws heavily on the availability of high-quality natural resources and healthy ecosystems.

The main visitor usage is centred upon the islands National Landscape which encompasses large parts of Anglesey's dramatic coastline. It includes most of the island's cliffs and beaches, and much of the farmland and forests that form the backdrop to the island's coast. Anglesey maintains its status as a popular holiday destination for its expansive beaches and hidden coves. But it is also, crucially, a working landscape of farms and villages, with a varied and thriving rural and coastal economy.

• The Anglesey National Landscape (AONB) has one of the most distinctive, attractive and varied landscapes in the British Isles. It was designated as an AONB in 1966 to protect the aesthetic appeal and variety of the island's coastal landscape and habitats from inappropriate development.

• The areas designated in Anglesey are approximately 83 square miles in extent and lie along the coast of the island with breaks around the urban areas and in the vicinity of Wylfa. The coastline of Anglesey, many stretches of which are isolated, contributes much to the island's appeal. Rugged cliffs, sandy bays, marshes, dunes, the sheltered shores of Menai Strait and the windswept slopes of Holyhead and Bodafon mountains give great variety of scene.

• The AONB is predominantly a coastal designation, covering most of Anglesey's 201 kilometre coastline. It includes Holyhead Mountain and Mynydd Bodafon, along with substantial areas of land which form the essential backdrop to the coast. The total coverage of the AONB is approximately 221sq kms (22,100 hectares).

Ynys Mon National landscapes accommodates 5SACs, 3 SPAs, 1 NNRs, 32 SSSIs, and 3 LNRs

The National Landscape also encompasses the UNESCO-recognised Geo Mon Global Geopark, and is working towards Dark Sky Reserve status. It boasts one of the highest densities of Scheduled Ancient Monuments of all national Landscapes and historic landscapes, alongside iconic sites such as Ynys Llandwwyn and the cliffs of Gogarth on Ynys Cybi.

Visitors come to engage with Anglesey's areas of natural beauty, and to explore the natural environment that Wales has to offer. It is perceived as a destination for outdoor activities – a perception which is supported by the green and natural environment

While the introduction of a visitor levy itself is not intended to directly impact the environment, there may be secondary impacts from its introduction, should there be a rise or fall in tourism demand for areas that introduce a levy. As explored within the economic impact assessment

The intention of the visitor levy is not to change visitor behaviour, although additional resource to develop regenerative tourism models, and through educating visitors about the importance of the natural environment. If there is a fall in visitor numbers to Wales because of the introduction of the levy, this may in turn, have a reduction in some of the negative impacts of tourism on natural resources, which are discussed in more detail below.

3.0 Impacts of Over Tourism

Tourism generally can impact negatively on natural resources through over-tourism – for example, the large numbers of visitors who visit environmentally sensitive sites including Newborough Warren and Ynys Llanddwyn, Holyhead Mountain and Y Fenai, or large volumes of people visiting the beaches during good weather.

There are numerous consequences from these activities, such as increases in litter, physical damage to the natural environment (for instance to footpaths from walkers), or heightened levels of pollution from increased traffic and parking. A recent study undertaken by Natural Resources Wales looked at key visitor areas, comparing the lockdown period in June 2020 with the busy tourist season that followed in June 2021. Although only a snapshot, the assessment showed that the increase in tourist numbers in 2021 had a negative impact on biodiversity.

3.1 Main Impacts of Tourism on the Natural Environment

- Littering and waste management challenges, as visitor numbers increase so does the amount of litter and impact on waste management services.
- Congestion, where transport infrastructure is unable to support visitor traffic in popular destinations
- Carbon emissions, caused by tourism related travel, estimated to account for 5% of all carbon emissions globally in 2016

- Soil and footpath erosion, as large volumes of tourists visit popular tourist sites tourism offer in Wales could be adversely impacted as natural environments decline and are inevitably affected by increasing footfall and traffic.

4.0 Potential Positive Impacts of the Levy on the Natural Environment

The Welsh Government suggest that positive impacts are anticipated across the Welsh economy as the tax revenue is re-spent by local authorities across Wales.

The Act proposes that the revenue is spent on projects related to destination management and improvement which includes actions that:

• mitigates the impact of visitors.

• maintains and promotes the use of the Welsh language.

• promotes and supports the sustainable economic growth of tourism and other kinds of travel.

• provide, maintain and improve infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

However, how local authorities using a levy intend to use the revenues will be up to elected officials in consultation with their local areas. Therefore, the revenues raised by the levy may be used to address some of these impacts, helping to ensure resources are sustainability managed. This could be done by using revenues from the levy to help preserve areas, fund local conservation projects, or mitigate the impacts of tourism – though the scale and nature of any benefits would depend on exact projects or activity funded by local authorities and

5.0 Examples of Visitor Levy Funding Positive Environmental Work

Visitor levies are used successfully in more than 40 countries and travel destinations worldwide and there are several examples of destinations that have used the revenues generated by a levy to benefit and enhance the natural environment.

New Zealand funded 10 projects in 2019-20 through its International Visitor Conservation and Tourism Levy. These projects aim to protect sensitive and ecologically valuable landscapes, upgrade visitor amenities footpaths and signs and protect endangered species.

In Iceland, a place well known for its unique environment, its natural attractions are viewed as its primary appeal to tourists. The Tourist Site Protection Fund (TSPF) finance projects that involve access to and preservation of natural tourist attractions. Typical projects include the construction of footpaths and trails; access ramps, bridges, and handrails; viewing platforms and safety barriers; parking and toilet facilities; and signage and information boards

A further example is the Black Forest community of Münstertal, who have successfully used part of its local tourist tax to promote traditional agricultural measures such as open farming, helping support nature and species protection whilst also preserving and enhancing the attractiveness of the area for tourists

There are clear benefits that a visitor levy in Wales could provide. Use of public spaces and services are integral to the overall visitor experience. Investing and maintaining these can improve the reputation of the destination benefiting visitors, residents, businesses, and Wales' natural resources.

The introduction of a levy could help address some of national challenges and opportunities for the sustainable management of natural resources, however, as previously noted, this will depend on how local authorities implementing the levy choose to spend the additional revenue.

6.0 Impacts on Biodiversity

Direct impact of visitor behaviour on biodiversity is hard to accurately determine, however disturbance to wildlife from activities is unfortunately reasonably common with birds such as Chough and seabird colonies and marine life such as Dolphins most often impacted. Trampling of rare flora is also well recorded.

Biodiversity is not a direct aspect of the decision making in relation to the visitor levy, however given that the revenues arising from these taxes can be directed to fund specific projects that support the visitor economy, these could include managing any negative impacts of tourism such as environmental degradation.

Local authorities will have responsibility for spend and must account for biodiversity factors as part of their decision making in accordance with their duties under the Environment (Wales) Act 2016 Part 133.

7.0 Impact of Fewer Visitors

Should fewer visitors come to Wales (or a specific local authority within Wales), then this could see a reduction in Greenhouse Gas Emissions (GHGs)34, lower levels of littering and biodiversity erosion in that area (depending on how both businesses and visitors respond). It is well recognised that tourism can impact tourist destinations in both positive and negative ways, encompassing economic, socio-cultural and environmental dimensions.

The revenues generated by a levy could be used to support this resource gap, relating directly to the maintenance and restoration of local natural environments and supporting facilities to ensure that visitors want to return to Wales, thereby potentially

increasing the levels of revenue as more tourists return to Wales over the long term and as a consequence the funding available to spend on improving the local area.

Additionally, although unintended, if visitor numbers decreased in some areas this may have a positive environmental impact including reducing pollution and other negative externalities of tourism.

There may be different impacts on different local authorities depending on the number of tourists in each area.

Alternatively, enhancing an area and its amenities using the revenue from the levy might attract more visitors, so there may be a higher amount of environmental impact, but this is difficult to estimate.

Or, if the introduction of the levy leads to visitors opting for day visits, this may exacerbate the negative environmental impacts associated with day tourism, without the funding of the revenue to help mitigate these impacts (given the charge is on overnight stays). An example could be increased traffic and pollution at hot spots including Brittania Bridge, Newborough village and in and around villages such as Benllech.

This scenario could be evident if the Levy was introduced in one authority but not in a neighbouring authority so potentially causing an increase in staying visitors in the authority who chose to adopt, and an increase in day visitors in the authority who opted to adopt the Levy.

If the enabling conditions for tourism are not protected, then this could lead to a decline in visitor numbers. The landscape and natural beauty that attracts visitors to Anglesey is that which can be most impacted by visitors. If funding is not available to ameliorate impacts, then there could be an impact on tourism attractors leading to a longer-term decline for tourism.

Additionally, some areas may wish to enhance their local offering or services provided to tackle unique local issues to the benefit of visitors and residents but lack the resources available to currently do this.

8.0 Conclusion

The expectation is that the introduction of the visitor Levy could have both positive and negative impacts on the natural environment of Anglesey. If income generated is targeted at enhancements to alleviate visitor pressures, restore nature, and develop a regenerative tourism model, then the Levy could significantly enhance the environment.

Given the importance of the environment and natural beauty to attracting visitors to Anglesey, it is important that provision to protect and enhance these assets is available

so that the tourism offer does not diminish. The Levy could fulfil part of this enabling function.

If overnight visitor numbers are seen to reduce this could have a positive impact from an environmental perspective in terms reducing impacts of unsustainable visitor numbers on sites of environmental importance and neighbouring communities.

Conversely an increase in day visitors may be seen which would potentially offset these gains and reduce economic gain and the resource to manage the environmental assets effectively.

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Isle of Anglesey Destination Management Plan 2023 -2028

Mae'r ddogfen hon ar gael yn Gymraeg. This document is available in Welsh

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Setting the scene

The Destination and visitor economy are essential to the prosperity and unique offering of Anglesey.

We are blessed with a diverse environment which is matched only by the scope for varied tourism offers and visitor experiences. Anglesey is the county most reliant in the UK on this industry, generating upwards of £360m per annum in the local economy, and directly supporting ~3,698 jobs. As such, it is vitally important that this plan supports and delivers meaningful benefits to the people and communities so economically reliant on this sector.

There is, however, an underlying fragility to the economy on Anglesey, characterised by high levels of migration amongst young people, as well as unemployment and social deprivation. One of the major difficulties facing peripheral economies like Anglesey is the ability to generate new employment. Tourism is one of these sectors that can, and has, contributed to local prosperity and quality of life in Anglesey.

This fragility is mirrored in the natural environment, with habitats and species becoming ever more threatened and fragmented. Tourism can play a significant role in highlighting the importance of Anglesey's natural environment, and as such help address the 'nature crisis' as well as bring health and wellbeing benefits

However, the visitor economy can also have negative impacts. The continued growth in visitor numbers can create unwelcome pressures for the local community.

Tourism cannot therefore be left to grow unchecked; it must be managed in a sustainable way, to maximise the benefits for long-term prosperity and mitigate potential negative impacts.

Through a collaborative approach, Anglesey has the opportunity to act now through clear forward-planning and actions. There is a need to enhance the existing offer by ensuring that basic needs such as highway infrastructure, enhanced public access, public conveniences and information provision are fit for purpose, and resilient against pressures such as climate change.

By ensuring this basic need is provided, we have the opportunity for existing offers to be strengthened, safe in the knowledge that the experience will be further enhanced by the Anglesey welcome which is already a cornerstone of the visitor offer.

New opportunities will grow from this strengthened position, and in conjunction with partners and communities, we can grow the offer based around the unique qualities of Anglesey in a sustainable manner

Who does the plan represent?

68,900
Residents

50Km
Heritage
Coast

32
SSSI's
(sights of special scientific
Interest)

221 Sq Km
Size of our
AONB

3,698
Employees in
Tourism

5.2 Million
Visitors

1
UNESCO
Global Geopark

75
Scheduled
Ancient Monuments

.
Busiest
Cruise Port in Wales

35,843
Bed Spaces

125 Miles
Coastal Path

55.8%
Speak Welsh

A Vision for Anglesey 2023-2028

The Isle of Anglesey is a uniquely special place, with a rich history, culture and heritage, coupled with unspoilt and ecologically diverse landscapes.

We seek a visitor economy which is empathetic to the Island's sense of place, and is seen to benefit the people, environment, culture, heritage and language, and continues to play a pivotal role in the economic stability of the island.

This plan seeks to enhance a spirit of collaboration and holistic thinking to develop an offer which enhances these key qualities, and delivers economic and social benefits to the local communities.

What is Destination Management?

- Destination management is about ‘managing the destination in its widest form for the benefit of all’.
- This is a place-centred concept, concerned with the whole environment in which visitors, locals and tourists interact.
- It focuses on the elements that attract visitors, as well as the infrastructure and services that support their visit. The term ‘visitor’ applies to those spending their holidays in an area as tourists, but it also includes local people visiting an area just for a day or less.
- Destination management therefore not only involves tourists, but the wider impact of people, including locals and nearby visitors, who use services, infrastructure and enjoy local assets. It extends to all aspects of the economy and requires collaboration to run effectively and sustainably.
- It involves the physical, financial and operational management of a destination, but also its planning, development and marketing.

Why Destination Management ?

There are many factors driving the need to update Anglesey's destination management plan to make it ready to work with the challenges and opportunities of 2023 and beyond.

The visitor economy, and wider political, economic and environmental context is very different than it was in 2015 when the last plan was drafted.

These changes, amongst others, are shown in the graphic opposite and illustrate the need for an updated plan and delivery model.

Policy context

- This Destination Management Plan is needed to acknowledge the changing policy context since the last Destination Management Plan in 2016, including but not limited to:
- Key national, regional and local policies (explored on the following page)
- Reduced capacity for Local Authority support / delivery
- Protection of the Welsh language
- Levelling Up Funding & investment in Holyhead
- Second home policies and taxes

Sustainability and net zero

The physical risk of climate change, along with the increasing pressure of visitor numbers on the environment is driving the need adopt more environmentally sustainable practices and transition to net zero. This is reflected in :

- IACC Towards Net Zero Plan 2022-2025
- Biodiversity Plan
- Need for resilience and natural resource management

Visitor economy

The visitor economy has changed since the 2016-2020 Destination Management Plan. This plan will have to respond to:

- The changing visitor profile: day visitors vs. overnight stays
- Increasing second home ownership
- Growth in short term lets (Airbnb & VrBo) properties
- Digital transformation

Economic context

The Covid-19 pandemic highlighted the need to embed resilience into destination management, with a need to address:

- Infrastructure and capacity: how to get the basics right, ensuring benefits and no disruption to locals while delivering a quality visitor experience
- Skills and employment gaps in the sector

A strategic approach

This Destination Management Plan aims to take into account and support the wider strategic objectives laid out in the local, regional and national policies shown in the diagram opposite. Key policies and plans are starred and include:

Welsh Government Wellbeing of Future Generations Act, 2015

A key aspect of Anglesey's visitor offering is highlighting the thriving culture and language of Wales, which links directly to the aspirations of this Act.

Welcome to Wales: Priorities for the Visitor Economy, 2020-2025

encourages the sector to combine a local-first focus celebrating culture, home-grown skills and businesses and community (Bro) with international levels of quality and ambitions (Byd). This, along with Visit Wales' key priorities are reflected in Anglesey's Destination Management Plan.

IACC Corporate Plan (2023-2028)

Tourism is a vital part of Anglesey, therefore the Island's policies and plans will need to and support existing tourism infrastructure and businesses as well as facilitate opportunities for future development. Equally, this plan will need to align closely with the aims Isle of Anglesey County Council are seeking to achieve for the local community.

At the time of preparing this plan, there is no clarity on the implementation of a tourism levy or statutory registration scheme. If relevant, this plan will support our work with the Welsh Government on the successful implementation of the scheme.

Legislation

Well-being of Future Generations (Wales) Act 2015

National

- Welcome to Wales: Priorities for the Visitor Economy 2020-2025
- National Events Strategy for Wales 2022 to 2030
- The Economic Resilience and Reconstruction Mission
- *Tourism Levy & Statutory Registration (tbc)*

Local

ISLE OF ANGLESEY COUNTY COUNCIL PLANS

- Destination Management Plan 2023-2028
- IACC Council Plan
- Towards Net Zero Plan 2022 – 2025
- Area of Outstanding Natural Beauty (AONB) Plan 2023- 2028
- North Anglesey Economic Regeneration Plan (NAERP)
- Biodiversity Plan (2021-2022)
- Visitor Management Operational Plan 2022
- Anglesey Energy Island Programme
- MoU between IACC & Grŵp Llandrillo Menai

This graphic shows examples of policies, plans and legislation relevant to the Destination Management Plan - it is not an exhaustive list

Council Plan 2023-2028

The Council Plan's vision is to:

'Create an Anglesey that is healthy and prosperous where people can thrive.'

The Council Plan is the key document serving as a focal point for decision-making at all levels; providing a framework to plan and drive forward priorities; shape annual spending; monitor performance and progress.

At its core is our desire to work with Anglesey residents, communities and partners to ensure the best possible services, improve the quality of life for all and create opportunities for future generations.

Its six main objectives reflect the key areas the Council should be focusing its efforts on.

Council Plan 2023 to 2028 (gov.wales)

Council Plan 2023-2028

The Council Plan 2023-28 is underpinned by the organisation's core values, which are used to develop and guide the vision, strategic plans and services.

Values

Respect
We are respectful and considerate towards others regardless of our differences.

Collaborate
We work as a team, with our communities and partners to deliver the best outcomes for the people of Anglesey.

Honesty
We are committed to high standards of conduct and integrity.

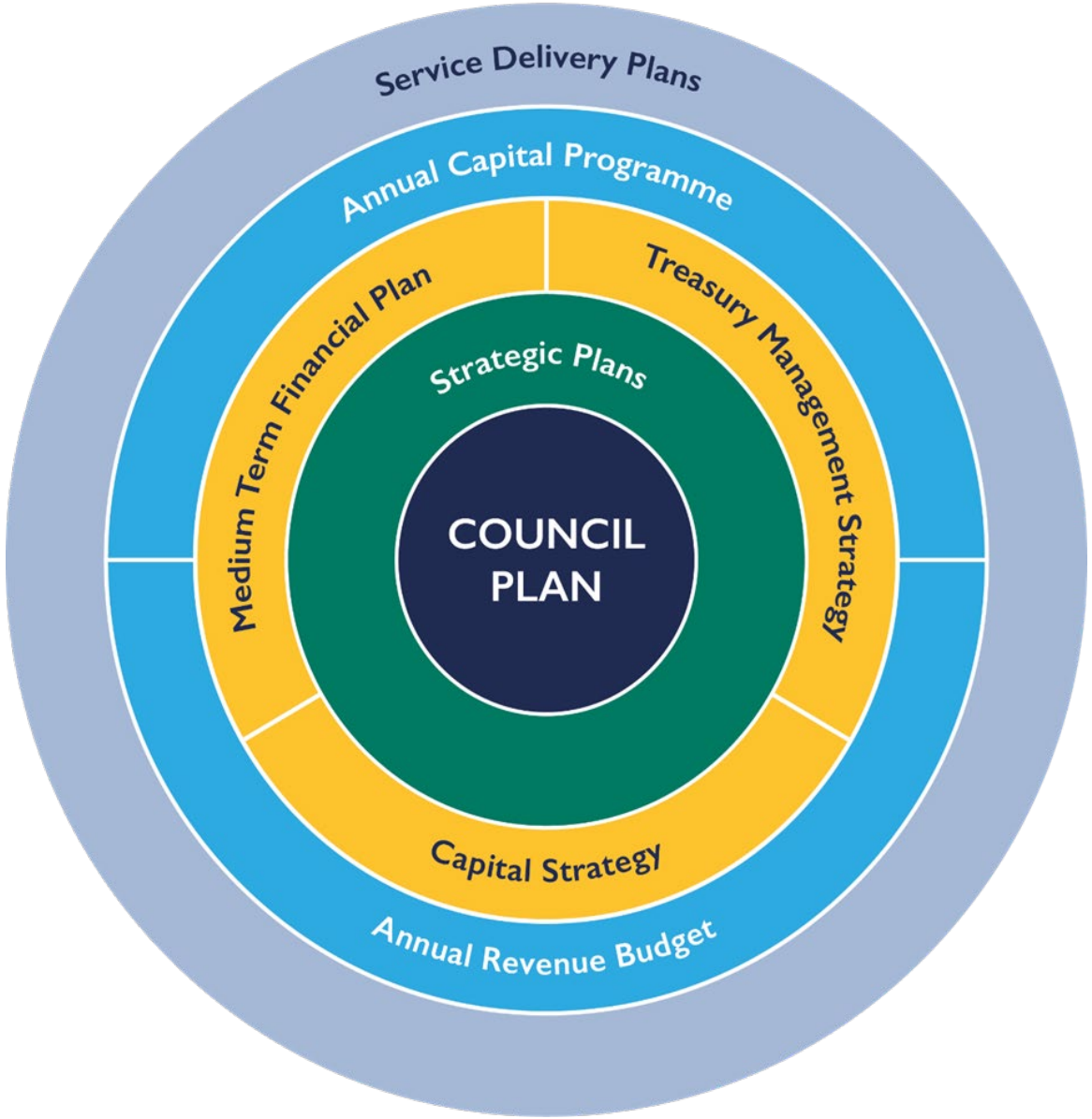
Champion the Council and the Island
We create a sense of pride in working for the Council and present a positive image of the Council and the Island.

[Council Plan 2023 to 2028 (gov.wales)]

Strategic Circle

The strategic circle identifies the plans in place to ensure we are able to achieve our priorities and objectives.

This plan is a key strategic plan that aligns with the Council's Plan and contributes to the achievement of the strategic objectives and vision.



[Council Plan 2023 to 2028 (gov.wales)]

The impact of Anglesey's visitor economy

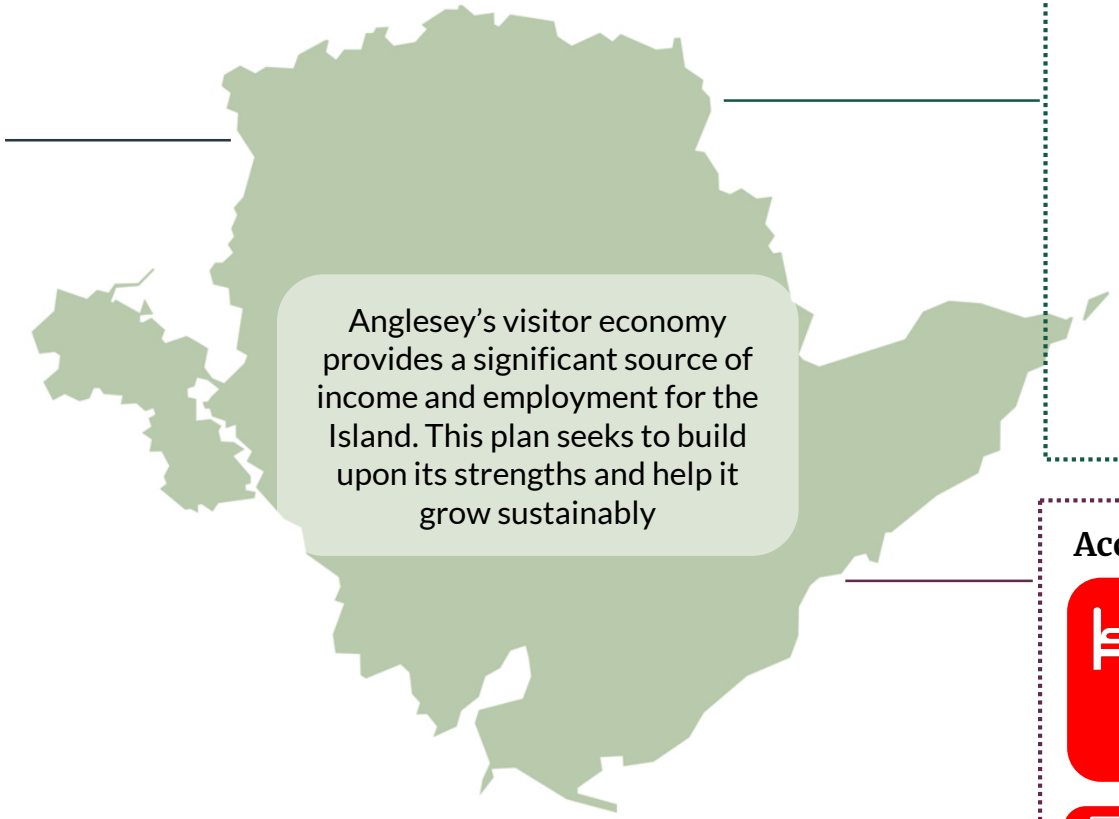
Economic impact in 2021:

£342.87 million economic impact

3,698 full time employees (tourism related sectors)

2021 saw a 46.7% increase in economic impact compared to 2010

90% of economic impact comes from 53% of visitors (those staying over night). Staying visitors contribute much more per person in terms of economic impact



Anglesey's visitor economy provides a significant source of income and employment for the Island. This plan seeks to build upon its strengths and help it grow sustainably

Visitor numbers in 2021:

1.48 million visitors, 91% of pre-2020 level

5.28 million visitor days

15% of the year's visitors (over 250,000) visit in August

Accommodation figures in 2021:

0.76 million visitors (50% of total) staying in paid accommodation

97% of visitors with accommodation are in non-serviced accommodation

1,067 Short term let (AirBnB &VrBo) listings

A 53% increase in listings since 2017*

*Source: the Bevan Foundation
All other figures 2021 STEAM data

Challenges & opportunities for Anglesey's visitor economy

This plan considers both the challenges facing Anglesey's visitor economy, as well as the opportunities for collaboration, innovation and sustainable growth.

CHALLENGES:

Available funding for the local authority has fallen significantly in the period since the last DMP, especially on non-statutory functions (such as tourism) and the funding profile is often short term, limiting the ability for strategic change

- Over tourism and **capacity** constraints
- **Inclusivity** - the shift to **digital** technologies can exclude some demographics. Age profile and language must be considered
- **Environmental fragility –** climate change and development is increasingly threatening local habitats and species.
- **Perceptions** of tourism – there is little recognition amongst the wider community of tourism's contribution to the Island; as a key employer, entrepreneurial incubator and contributor to wider employment in retail, finance, telecommunications and Holyhead Port.
- **Profile** of visitors – there was a greater drop in staying visitors compared to day visitors in 2021 compared to 2019*. 2021 share of day visitors is 47%, despite being only 10% of spend (contributes to challenges around capacity and infrastructure
- **Second home & Airbnb** ownership increasing
- Sectoral **skills** shortages

OPPORTUNITIES:

- Consumers have long been encouraged to 'discover what's on your doorstep' and 'think global, **act local**', however during the covid-19 pandemic this became much more tangible concept
- **Becoming a sustainable destination** – embracing sustainability is an opportunity for Anglesey to further develop its brand, for instance through promotion of active and more sustainable travel, embracing the lack of roadbuilding and becoming a "green island"
- The visitor economy bring multiple **benefits to the local community**, but there is an opportunity for these to be further developed and better communicated.
- **Culture, heritage, uniqueness** is undersold (history, Welsh language, UNESCO Geo Park, AONB). Opportunity to improve awareness of place through signage and celebrate local identity and brand
- **Dark Sky tourism** Further support and promote the benefits of the dark sky
- **Digital** transformation and marketing
- **Food Tourism** Strategy
- **Increase in adventure sports** & wellbeing tourism
- **School involvement and education** – increase engagement of children learning about their place
- **Strength and performance** of the tourism sector in Anglesey: historically outperformed Wales and North Wales averages (over the period 2006-2017)
- **Welsh Coast Path** Investment in the infrastructure, marketing and development of the coastal path

Guiding Principles & Priorities 2023-2028

1.Celebrate, Respect and Protect our Communities, History, Language, Culture and Heritage

- A visitor economy where the local communities feel ownership and empowered to drive forward the regenerative tourism model.
- A visitor economy which embraces and sustainably utilises the existing strengths of our language and culture and brings our heritage to a wider audience.
- A visitor economy where the culture is embraced, and at the heart of all product and promotional activities

2. Enhance the Visitor Experience Offer and Economic Sustainability

- A visitor economy which can grow sustainably based around a high-quality offer where visitors value and respect Anglesey's culture, heritage and environment.
- A visitor economy which is based around activities and experiences which take advantage of, but do not degrade the culture, heritage and environment.
- A visitor economy where quality visitor infrastructure and access provision offer enhanced recreational opportunities and with this improved health and wellbeing

3. Maintain, Enhance and Respect our Environment, and plan to mitigate impacts of Climate Change

- A visitor economy where the natural environment is understood and enhancements to natural capital bring about benefits in terms of wellbeing to all.
- A visitor economy where activities are in harmony with the natural environment, and enhance both the offer and the land and sea upon which they take place.
- A visitor economy which becomes more 'climate change ready' and is increasingly carbon neutral.
- A visitor economy where users are empowered to directly contribute to tackling both the nature and climate crises.

4. Ensure that the advantages to Anglesey communities outweigh any disadvantages, and as a result social and well being benefits are seen.

- A visitor economy whose infrastructure and resources are enhanced to the benefit of local communities, and adapts to mitigate the impacts of climate change.
- A visitor economy where local people are given the opportunities to be at the heart of the offer, taking advantage of new skilled roles and local supply chains.
- A visitor economy with sustainability at its core and able to grow in economic and social value and provide health and wellbeing opportunities for all.

High-level Action Plan

Celebrate and protect our culture, language and heritage

Why is this important ?

Nothing embodies the spirit of place more than its people, its language and its culture.

Anglesey's unique culture and heritage is key to its sense of place, making it a memorable destination. This, along with our natural environment, is the foundation of the visitor offer. There is opportunity to communicate and celebrate this further.

What are we going to do?

- We will deliver this destination management plan in close collaboration with local community stakeholders to ensure they feel empowered to drive forward a regenerative tourism model.
- We will embracing the existing strengths of our language and culture to bring our heritage to a wider audience.
- We will develop a visitor economy where culture is embraced, and at the heart of all product and promotional activities.
- In doing so, we aim to create a destination that is distinctive and authentic to be enjoyed by the people of Anglesey and future generations.

How are we going to do it?

- We will work with partners to improve the, heritage, history and cultural offer, developing better information for visitors and using cultural stories and place setting to develop new visitor experiences.
- We will embed and promote the Welsh language and our unique cultural heritage across all elements of the visitor offer, ensuring inclusivity and the culture are core components.
- We will continue to build on and celebrate the investment in the Anglesey Food Tourism Strategy, the Welsh Coast Path, Dark Sky Tourism, adventure sports and wellbeing tourism. We will manage these itineraries with a focus on local heritage and sustainability.

Enhance our quality visitor experiences and economic sustainability

Why is this important ?

Sustainable all year visitor infrastructure ensures visitors can experience Anglesey at its finest. Getting these right, with an inclusive welcome and a sense of being in a unique natural environment, will drive longer stays and repeat visits.

Ensuring this infrastructure and offer serves to protect and enhance the environment will be key in growing the visitor economy in a sustainable manner.

What are we going to do?

- We will develop and promote a shared Anglesey brand and shared commitment, celebrating the local community, language and landscape.
- We will build a dynamic and inspiring visitor experience offer based around sustainable enjoyment of the unique qualities of Anglesey, starting with getting the basics right.
- We will ensure key facilities and visitor infrastructure are high quality.
- We will capitalise on Holyhead's position as a gateway for international visitors.
- We will strengthen Anglesey's all-year round product, extending the season and developing an increased number of compelling experiences for visitors and residents to enjoy indoors and outdoors.

How are we going to do it?

- We will improve visitor facilities including car parking, toilets, and electric vehicle charging, as well as a network of quality, accessible footpaths and cycle routes.
- We will consider better ways to signpost attractions, either through digital technology or improved signage and wayfinding
- We will explore opportunities to integrate destination management considerations into all planning decisions in to ensure public transport, infrastructure and development projects support the visitor economy and the people of Anglesey.
- We will collaborate to ensure cruise and transient visitors provide economic and social benefits to the Island in the most sustainable and environmental way possible.
- Engage with partners to collect, interrogate and share data about tourism in Anglesey, particularly to understand tourism impacts in different parts of the county.

Maintain and respect our environment and act to mitigate the impacts of climate change

Why is this important ?

The landscapes, seascapes and natural environment of Anglesey is diverse and dramatic, but under threat from a multitude of factors including climate change, over-tourism and tourism offers which degrade these special qualities.

The value of an authentic, coherent destination so rich in natural assets cannot be underestimated. Nature is a core element of Anglesey's brand identity, connecting visitors and locals to the place, its values and character. This can drive measurable wellbeing, economic, social and cultural benefits and must be celebrated and protected.

What are we going to do?

- We will embed effective sustainable destination management principles across all areas of our work, and ensure that the offer enhances rather than degrades the natural environment.
- We will utilise the natural and cultural resources of Anglesey to create and promote a special, distinctive place, distinguished from other destinations.
- We will work with partners to plan projects focussed on delivering a landscape which is healthier, more ecologically rich and connected, and able to act as a catalyst for new visitor opportunities and a reconnection between people and nature.
- We will ensure that the impacts of climate change on destination management are fully understood and that we can make our visitor economy resilient to these impacts.

How are we going to do it?

- We will manage sensitive sites and develop interventions to protect, enhance, and conserve them.
- Through the planning process, we will control development which could threaten the quality of the coastal environment, the Island's visitor appeal, or disproportionately impact individual tourism businesses.
- We will ensure the importance of destination management is embedded in the work of the AONB and natural environment partners.
- We will draw upon research to appraise the likely impacts of projected changes to seasonality of weather on the visitor offer, and plan to mitigate these impacts.
- We will explore opportunities to link destination management with coastal adaptation/natural flood management projects.

Ensure the visitor economy delivers social, economic and wellbeing benefits to our communities

Why is this important ?

The tourism and hospitality sector are vital to Anglesey's local economy, employing many people. However, support is required to address skills shortages and realise the visitor economy's full potential in delivering social, cultural and economic wellbeing for Anglesey.

Whilst training may be one issue behind this, there are also other more complex factors, such as the seasonal nature of many businesses, or indeed the way young people see tourism as a future career.

What are we going to do?

- We will engage with the community to promote the importance of the visitor economy and supporting infrastructure and services, so residents, partner bodies and businesses alike are bought into the delivery of the experience.
- We will collaborate with education, further and higher education establishments and work with partners to identify both immediate and future key skill sets and resource issues.
- We will work with partners to encourage greater engagement with food producers and local supply chains.
- We will support private sector-led initiatives that deliver economic growth, fair work, employee upskilling and a reduction of carbon footprints on the Island: the kind of behaviours we need for a sustainable tourism industry.

How are we going to do it?

- We will foster opportunities for skilled year round employment
- We will collaborate with the education sector to coordinate action on skills, the perception of careers in tourism, skill shortage and raising awareness of opportunities that the tourism and hospitality sector can offer.
- Ensure that local people are given the opportunities to be at the heart of the offer, taking advantage of new skilled roles and local supply chains.
- We will work to ensure that local low carbon, sustainable supply chains are developed across the industry.
- Ensure that the tourism offer contributes to the viability of services and facilities which are essential to the host communities.

Next steps

The first step to delivering the Destination Management Plan is to establish a new partnership model for a Destination Management Organisation (DMO).

A new partnership model is recommended in order to:

- ensure collaboration and buy-in from key private, voluntary and public sector partners;
- make best use of existing resources;
- facilitate effective ways of working which may attract further investment when needed to deliver the objectives of the Destination Management Plan.

Once the DMO is established and supported with a Terms of Reference, the group will work in collaboration to define priority next steps with a SMART action plan.

Mae'r ddogfen hon ar gael yn Gymraeg. This document is available in Welsh

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