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Title: Marine Wildlife Boat Tour Operations in Wales

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Introduction

The purpose of this paper is to explore the current status of marine wildlife boat tour operations in Wales and to evaluate awareness and adherence to voluntary codes of conduct. This study also reviews the impacts of Covid on the sector and consequentially, tour operator ability to adhere to the codes.

Context

Welsh tourism has increased dramatically over the last three years. Welsh Government's Autumn 2021 Tourism Barometer Report (Welsh Government, 2021) stated that 48% of Welsh tourism operators reported an increase in the number of summer tourists, compared to 2019 figures. This is a direct consequence of Covid restrictions on international travel.

As domestic tourists flocked to coasts and generated much needed income for local economies, there were recognised negative impacts on marine wildlife (Marino, 2012; Parsons, 2012; New, 2015). Voluntary codes of conduct are one way to reduce these impacts (Reis, 2019).

Research approach

Desk-based research was used to identify marine wildlife boat operators in Wales using search terms "'boat trips Wales", "marine wildlife Wales", "cruise Wales", "sea safari Wales" and "charter boat Wales". Identified businesses were invited by email to complete an online Qualtrics questionnaire about commercial activities and awareness of marine wildlife codes of conduct.

In addition, semi-structured interviews were held with a selection of questionnaire respondents to explore the practicalities of implementing marine codes of conduct and examine how wider issues such as Covid have affected business practices, with consequential impacts on implementing codes.

Results

Desk based research (n=39)

Desk based research found that marine wildlife boat tour activities are distributed around the whole of Wales, but focussed around West Wales, the Menai Strait and Cardiff. 43 operators were originally identified, although two of these were no longer taking bookings and two were the same business operating under a different name. Very few operators advertised any codes of conduct on their websites. Most boat operators owned one or two boats, charged £5-£25 per adult per trip and seated twelve passengers at a time. Main species sighted were seabirds, seals, dolphins, porpoises and waders.

Questionnaire results (n=8)

After two weeks, eight questionnaires had been completed (21% response rate) and five respondents agreed to be interviewed. Most operators employed 2 full time and 2 part time staff members, offered 1 hour boat trips over 30 times per week and charged less than £25 per trip. Peak time was March- April and June- August. Customers were generally mid income, represented all age ranges, travelled in groups of 3-4 and were primarily from Wales and the UK. All respondents confirmed that customers travelled especially to take a boat trip. There were fairly low levels of awareness of the range of marine wildlife codes of conduct although there were fairly good levels of adherence to three of these Eg. NRW Seawise Code (5/8), Sea Watch Foundation (3/8) and the WISE code (3/8).

Interview results (n=3):

After two weeks, three interviews were completed. Interviewees were based in Menai Strait, Newquay and Cardiff. Key findings were as follows:

1. Boat operators did not spend much time online and preferred phone communication
2. Awareness of the range of codes of conduct was limited- owners follow Natural Resources Wales and Special Area of Conservation (SAC) guidelines which were enforced by police although this was shore based so often out of sight. “Toothless tiger”.
3. Respondents in SAC areas were supported by training but those elsewhere were not.
4. Although commercial tour boats followed codes of conduct, charter boats, private boat owners and paddleboards did not
5. Tour boat operations were suspended due to Covid March- June 2020 and operated on a reduced scale July-September 2020. Covid measures included shutting down,

installation of screens, mask wearing, 2m distancing and exclusive group bookings.

No financial support for businesses as boats do not pay rates. Lost experienced staff.

6. Unintended benefits of Covid- surge in number of domestic tourists since April 2021.

Tour boat operators overwhelmed as tourists discover parts of the UK previously unexplored. Expect that to continue. Some boat owners took the opportunity to refurbish boats while they were out of the water.

7. Covid did not affect adherence to the codes.

8. Tour boat owners plan to take on more staff and offer more trips in the future.

Conclusions

This research has provided initial insights into marine tour boat operations in Wales. It can be concluded that demand for marine wildlife boat tours is increasing although there is a lack of consistent awareness and adherence to codes of conduct. While it is recognised that there is a need to improve training and monitoring activities in relation to these codes, there is no indication of who should provide and pay for this. Covid has been a mixed blessing for the sector and while there were short term impacts and restrictions, longer term, many boat operators plan to expand to cater for the increase in domestic tourists. Consequently, there is an even greater need to ensure tour boat operators are aware of and adhere to codes of conduct.

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