

A photograph of a stone archway in a landscape. The arch is made of rough, stacked stones and frames a view of a green valley with sheep. In the background, there are rolling hills and a sunset sky with clouds. The sun is low on the horizon, creating a warm glow.

A New National Park for Wales

Economic Impact Review

Final Report

June 2025

Document Verification

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Executive Summary

Introduction

The Welsh Government has set out its intention to designate a new National Park in Wales based on the existing Clwydian Range and Dee Valley Area of Outstanding Natural Beauty (now known as a 'National Landscape'). Natural Resources Wales (NRW), as part of its formal designation programme, has appointed Arup to assess the potential economic impacts of designating a new National Park.

National Park – Purpose and Context

A National Park is an area designated by a national government to preserve the natural environment specifically for public recreation, enjoyment, and conservation purposes. Each one has a National Park Authority (NPA). An NPA would likely bring:

- A dedicated body with appointed members and express legal duties in relation to the National Park area, including the requirement to produce a Management Plan.
- Full planning powers for the National Park area being vested in the NPA, with responsibility for preparing a Local Development Plan and determining planning applications.
- Long-term funding support from Welsh Government and a local authority levy, with potential to secure additional funding from other sources.

The Candidate Area

The Candidate Area covers 1,200km² mostly in the North East of Wales and parts of Mid-Wales. Around a third of the area is already designated as a National Landscape, and in total almost half is subject to some form of significant protection. Designated in 1985 and expanded in 2011, the

area covers parts of five local authorities: Denbighshire, Flintshire, Wrexham, Powys, and a small section of Gwynedd.

It features a UNESCO World Heritage Site, Pontcystllte Aqueduct and Canal, Llangollen's International Musical Eisteddfod, scenic hills, trails, and historic sites like Offa's Dyke Path, Castell Dinas Bran, Eliseg's Pillar, Sycharth Castle and Valle Crucis Abbey.

Potential Impact

A National Park could be expected to significantly increase the profile of the area and provide better coordinated management and planning fully aligned to the park boundary. An NPA would bring dedicated funding and resources. This is likely to create an improved visitor offer and increase visitor numbers, bringing both benefits and pressures for the area. The creation of an NPA provides an opportunity to better integrate the management of transport, tourism, and land use, as well as to implement targeted mitigation measures. For example, planning tools such as Article 4 Directions could be used to address issues like the proliferation of second homes.

Specifically, this assessment has considered:

- **Tourism and visitor economy** – An estimated 3.3 million people visit the Candidate Area each year. International examples suggest that significant increases in visitor numbers can follow National Park designation. An uplift range of 15 – 30% is considered plausible for the Candidate Area, which would equate to an additional 500,000 to 1 million visitors per annum. This would have a range of impacts, one of which would be additional spend in the visitor economy, indicatively estimated at £8-15 million a year.



Clwydian Range and Dee Valley (Source: clwydianrangeanddeevalleyaonb.org)

Executive Summary

Potential Impact (contd.)

- **Employment and business** – As well as tourism, agriculture and construction are key employers in the area. Mining has traditionally been an important sector. In some areas there is potential for a more restrictive planning environment to impact future commercial development, but more visitors should also boost some sectors.
- **Property** – Some parts of the area have high house prices, and in common with other rural locations there are low levels of social housing. There are challenges with second home ownership in North and mid-Wales, and designating a National Park has potential to exacerbate this. There is mixed evidence on whether designation could lead to house price increases.
- **Transport** – There is high car dependency in the area and limited public transport provision. Designation could increase traffic, bringing associated issues such as congestion, verge parking, accidents and air quality impacts. However, there is potential for an NPA to manage these issues by adopting sustainable transport planning in the park area.
- **Social, culture and health** – The area has high levels of Welsh speakers. There is an ageing population, with lower levels of both deprivation and economic activity. A National Park could bring improved quality of place and better access to natural landscape but also creates risks around increased pressure on services.
- **Environment** – An NPA has the potential to attract additional funding for nature restoration initiatives to

enhance biodiversity. The NPA could adopt natural flood management as an objective in its Management Plan.

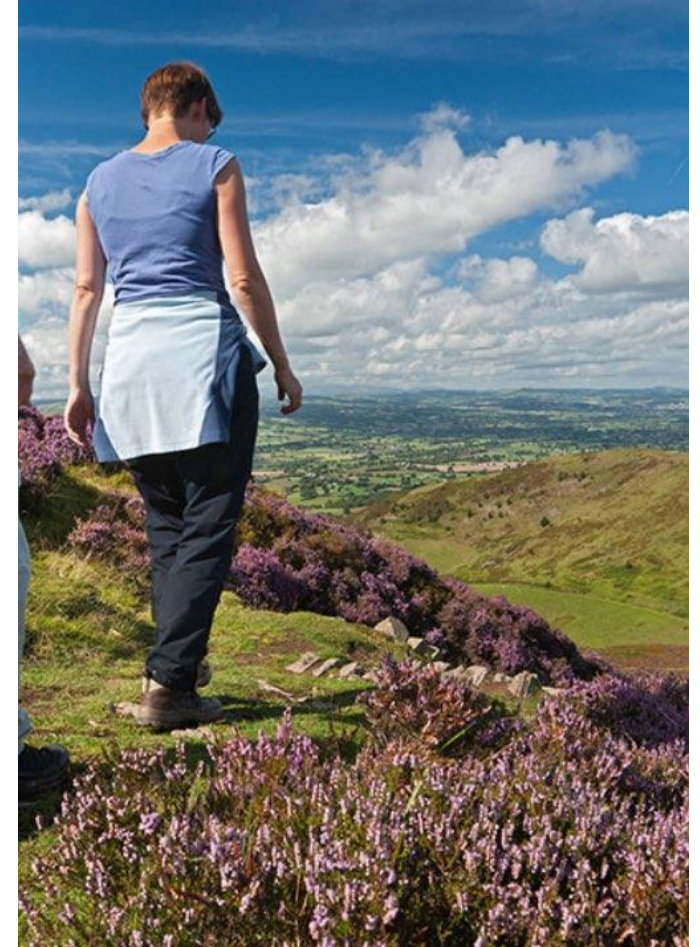
- **Fiscal and funding arrangements** – An NPA would be funded by a Welsh Government grant and a local authority levy. Though intended to be budget-neutral, the levy may still be seen as a slight pressure on local finances. However, it would provide dedicated resources and shift key functions like planning to the NPA, potentially allowing for more coordinated, place-based management.

Conclusion

Determining the economic impact of National Park designation is complex, but two key factors emerge from our analysis. First, designation could improve management and funding, potentially boosting the local economy. However, this must be balanced against the costs and inefficiencies of establishing a new governing body and its interaction with existing authorities.

Second, while data on visitor numbers is limited, designation is likely to attract more tourists, increasing local spending and visibility. This benefit must be weighed against added pressure on infrastructure, services, and the environment.

To develop these conclusions, further work is needed to quantify and compare potential impacts to better assess the value for money of designating a new National Park. This could be developed in more detail as the designation proposal develops and in response to future consultation. If a decision is made to proceed with designation, the findings of this review should help shape the priorities of any future NPA.



Clywdian Range and Dee Valley (Source: clwydianrangeanddeevalleyaonb.org)

00 Introduction

Background and approach

Our commission and report structure

Context to the commission

In its Programme for Government (2021-2026), the Welsh Government set out its intention to designate a new National Park in Wales based on the existing Clwydian Range and Dee Valley Area National Landscape. If established, it would be the fourth National Park in Wales, and the first since 1957.

NRW is the Welsh Government's statutory adviser on landscape and natural beauty and the designating authority for any new National Park and National Landscapes. The Welsh Government has asked NRW, as Designating Authority, to take forward a formal designation programme to assess the case for the proposed new National Park.

The area being assessed (the 'Candidate Area') is larger than the existing National Landscape and brings in additional areas in Gwynedd, Wrexham, Denbighshire and Powys. NRW held a consultation on a Candidate National Park Area between October and December 2024.

The NRW Designated Landscapes Programme Team has appointed Ove Arup & Partners Ltd ("Arup") to assess the potential economic impacts of designating a new National Park to inform their designation programme.

Report structure

This report is structured in three parts:

1. Description of National Park context and functions, with a focus on the mechanisms through which they effect change.
2. Baseline economic profile of the Candidate Area as it exists today.
3. Assessment of potential economic impacts should a National Park be designated.

Sections 2 and 3 are organised around eight themes:

- Tourism and visitor economy: Importance of the sector for the Welsh economy and employment. Estimated impact of designation on visitor numbers.
- Employment and Businesses – Agriculture: Overview of employment in agricultural sector within the region and impact of designation on the planning environment.
- Employment and Businesses – Minerals: Overview of Category 1 and 2 minerals present within the Candidate Area as well as employment in the mining industry. Potential impact of planning restrictions on future mineral developments.
- Local Property: Characteristics of properties within the Candidate Area and local house prices and affordability ratios. Potential impact of designation on house prices and second home ownership.
- Local Transport: Local transport context including local bus networks and key road and rail infrastructure. Impact of high car use within the Candidate Area and opportunities for sustainable transport.

- Cultural, social and health: Demographics of those living in the Candidate Area and impact including Welsh speaking ability, deprivation and age structure.
- Environment: Overview of the ecology of the Candidate Area including woodland and peatland coverage. The potential impact of designation on carbon sequestration, biodiversity and natural flood mitigation.
- Funding and organisational: Overview of existing Welsh NPA funding structures, local authority budgets and organisational structure. Potential impact due to designation and budgetary pressures.

Background and approach

Methodology

Overall approach

The commission has sought to understand the economic impacts of designating a new National Park. In doing this, the study has explored three key questions:

1. What are the mechanisms through which National Park designation could effect change?
2. What are the current conditions in the National Park Candidate Area, and how might these change in the absence of intervention?
3. What impact could designating a new National Park have?

It has not sought to systematically quantify all impacts associated with designating a new National Park, nor to make any overall assessment of whether designation is likely to be economically beneficial. Instead, it sets out the types of impact that may occur against a series of thematic areas.

Methodological considerations

There are several cross-cutting methodological considerations in answering the above questions.

First, the starting point differs across the Candidate Area. Around a third is already designated as a National Landscape and significant proportions are subject to other designations. The analysis has sought to understand how, in broad terms, these differences effect the impact assessment.

Second, the geographic scope and nature of potential designation could change. The assessment is therefore based on the assumption that a National Park Authority is designated for the Candidate Area as currently proposed, but it is acknowledged that the impact could differ if, for example, a decision was taken instead to designate a new National Landscape over a wider area.

Third, the assessment primarily relies on existing literature, analysis of secondary data sources and stakeholder engagement. No detailed primary research or economic modelling has been carried out. This means the conclusions should be seen as indicative of the nature of potential change, rather than seeking to quantify or forecast specific changes.

Fourth, the study draws on as wide a range of data sources as possible. Given the rarity with which National Parks are designated (there has not been a new National Park in Wales for almost 70 years and the last one in England was designated in 2010), the work draws on international studies in places to understand potential impacts. These need to be treated with caution given the presence of locally specific factors that may not be relevant to the Welsh context.

Literature review

A literature review was undertaken to supplement both the baseline and the potential impact methodology. This included reviewing National Park visitor numbers and existing economic impact assessments.

Secondary data sources

To establish the baseline, a mixture of primary and secondary socio-economic data sources were used. These secondary data sources include; Office of National Statistics (ONS), Business Register and Employment Survey (BRES), Stat Wales and Data Map Wales.

Engagement

In developing this report, engagement took place with the five Local Authorities within the Candidate Area, as well as with the Welsh Government, South Downs National Park, and Natural Resources Wales.

Study area

A Candidate Area has been defined for the proposed National Park incorporating the Clywdian Range and Dee Valley National Landscape and an area to the south of it. The focus has predominantly been on potential economic impacts in the Candidate Area and surrounding authorities.

Unless otherwise specified, the baseline study dashboard figures have been generated specifically for the Candidate Area. Where data is available at LSOA and MSOA levels, it has been proportionally allocated based on the share of land area within the Candidate Area, using GIS spatial analysis.

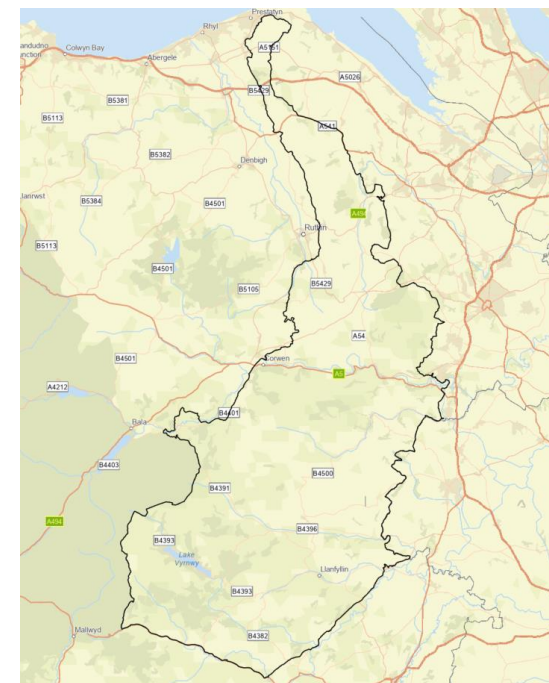


Figure 0.1. The Candidate Area (Source: Arup)

National Park— Context and Functions

Overview of National Parks in Wales

Existing National Park in Wales

National Parks cover 20% of the total area of Wales, have a resident population of over 80,000 people and account for over half a billion pounds of Wales's Gross Value Added (1.2% of the Welsh economy). The three National Park in Wales are visited by an estimated 12 million people each year and nearly three quarters of the population of Wales make a visit to a National Park each year¹.

Following the National Park and Access to the Countryside Act 1949, the UK government launched a new era of countryside conservation and public access². The Act provided the framework for creating National Parks, AONBs, and Public Rights of Way across England and Wales. In Wales, it led directly to the designation of the first National Parks.

The three National Parks in Wales cover an area of approximately 4,122km sq.

Eryri (Snowdonia) National Park – designated 1951. The oldest National Park in Wales, it is known for Yr Wyddfa (Mount Snowdon), scenic hiking trails, and dramatic slate quarries—some of which now form the UNESCO-listed Slate Landscape of Northwest Wales. Spanning parts of Gwynedd and Conwy, the Park also offers adventure attractions like the world's fastest zip-line at Zip World and the historic Ffestiniog Railway, the world's oldest narrow-gauge railway.

Pembrokeshire Coast National Park – designated 1952.

The UK's only coastal National Park, it follows much of the Pembrokeshire coastline. It includes nature reserves, prehistoric sites, and a variety of beaches, from the busy harbour town of Tenby to the more isolated Marloes Sands. The Pembrokeshire Coast Path, now part of the Wales Coast Path, is a well-known route for walkers, while activities such as coasteering—combining climbing, swimming, and jumping—are also associated with the area.

Bannau Brycheiniog (Brecon Beacons) – designated 1957.

Wales's youngest National Park spans central Wales and is marked by ancient hillforts, farmsteads, and burial mounds that hint at long-standing human presence. The landscape supports diverse wildlife, including red kites and rare wildflowers like the purple saxifrage. The park is also recognised for its night skies, designated as Wales's first International Dark Sky Reserve due to its clear views of the stars.

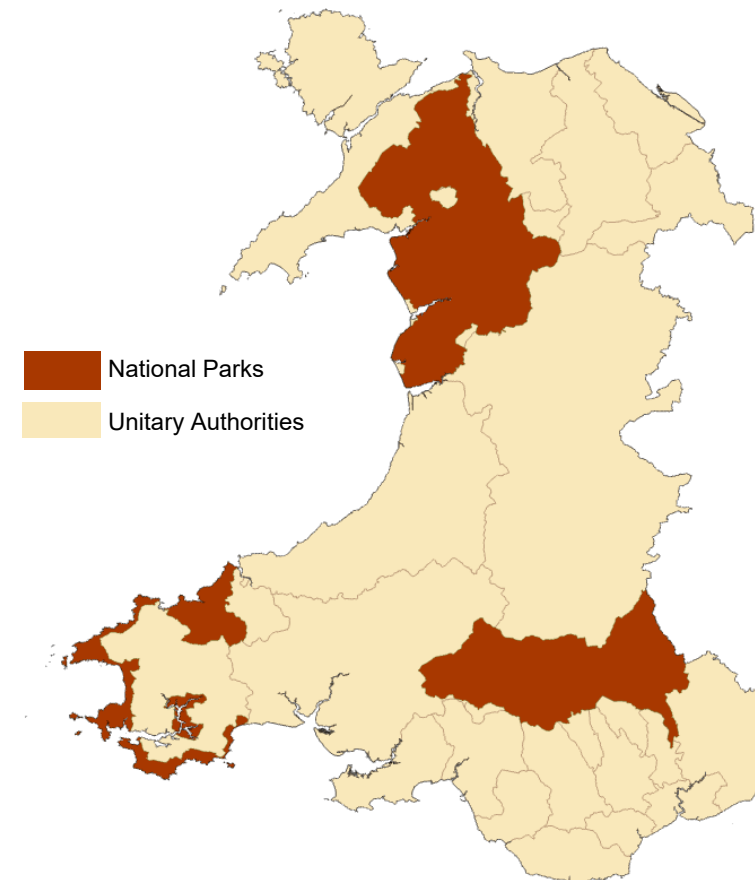


Figure 1.1. Map of existing Welsh National Park (Source: Arup)

Overview of National Parks in Wales

Description and Legal & Statutory Duties of a National Park

National Parks overview

A National Park is an area designated by a national government to preserve the natural environment specifically for public recreation, enjoyment, and conservation purposes. They are extensive tracts of landscape, often covering parts of different Local Authority areas.

There are areas which contain nationally important and highly valued habitats and landscapes that are sensitive to change from human pressure or climate change. In the UK, National Parks are 'living places' with diverse economies and with the majority of land in private ownership¹.

The purpose of designating a National Park is to preserve and enhance the natural landscape specifically for the recreational benefit of people. Therefore, National Park designation will support and encourage developments that conserve the natural environment and enhance the visitor's ability to enjoy the natural landscape recreationally.

This is helpful in improving the planning and legal tools in areas of existing pressure from recreational visitation.

Key legislation

The statutory purposes of National Parks are set out in the Environment Act 1995 (Section 61):²

1. To conserve and enhance the natural beauty, wildlife and cultural heritage of the area.

2. To promote the opportunities for the understanding and enjoyment of the special qualities of their area by the public.

Where there is conflict between these two purposes, the Environment Act 1995 sets out that any relevant authority "shall attach greater weight to the purpose of conserving and enhancing the natural beauty, wildlife and cultural heritage of the area comprised in the National Park".³

National Park Authority legal duties are as follows:

- Prepare, consult and publish a Management Plan for the National Park area.
- Seek to conserve the natural environment and enhance the visitor's ability to enjoy and understand its special qualities.
- Prepare, consult and publish the Local Development Plan.
- Undertake the local development management planning function.



Eryri National Park (Source: storymaps.arcgis.com)

1. <https://www.nationalparks.uk/what-is-a-national-park/>

2. [Environment Act 1995](#)

3. <https://www.gov.uk/government/publications/landscapes-review-national-parks-and-aonbs-government-response/landscapes-review-national-parks-and-aonbs-government-response>

National Park Authorities

Role and Responsibilities

Overview

Each National Park in Wales has its own National Park Authority (NPA). The NPA is a free-standing body corporate and executive within the local government framework. NPAs must set out a Management Plan setting out strategic objectives and policies for managing the Park. NPAs have a duty to seek to foster the economic and social prosperity of local communities within their area but must do so without incurring significant additional expenditure.

All NPAs are the statutory local planning authority for land within their boundary, responsible for all aspects of planning, including development management, with their own local development plans framing their planning policy.

Responsibilities

Specific responsibilities of NPAs include:

- Setting a long-term vision for the National Park, captured in the Management Plan which is a key document.
- Conservation of both the natural and built environment in partnership with agencies such as Natural Resources Wales and local authorities.
- Supporting local communities, preserving heritage and safeguarding cultural traditions.
- Promoting understanding and enjoyment, including through management of visitor centres, public rights of

way, and learning resources.

- Producing a Local Development Plan and assessing planning applications with the National Park area.

Appointment of NPA members

The following protocol has been agreed between the NPAs, Welsh Local Government Association and Welsh Government regarding the appointment of councillors¹.

Under Schedule 2 of the National Park Authorities (Wales) Order 1995, the Welsh NPAs are single purpose authorities with one third of their members appointed by the Welsh Government and two-thirds being councillors nominated by the constituent local authorities of the National Park area¹.

Sections 15 and 16 of the Local Government and Housing Act 1989 also require the Local Authority to appoint County Councillors according to the political balance of the individual Local Authority.

Members of the NPA are expected to represent the interests of the park rather than their principal authority. Table 1.1 shows the member composition of the current three Welsh National Parks.

Funding and structure

The Welsh Government sets the NPA’s approved level of net revenue expenditure for the year and funds 75% of this amount through a National Park Grant. The remaining 25% is

raised via a levy on the constituent local authorities. This levy forms part of the overall annual budget settlement and is reflected in the funding each local authority receives, meaning it should have a neutral financial impact. Additional income may also be generated through bids for supplementary grant funding, asset sales, trading activities, fees, and interest from financial instruments.

Each NPA has its own dedicated team. For instance, Eryri NPA employs 100 staff members distributed across 12 departments, handling functions such as finance, human resources, property services, planning policy, development management, and cultural heritage.

Table 1.1 Member composition of existing NPA (Source: Arup)

Member composition	Bannau Brycheiniog	Pembrokeshire Coast	Eryri
No. appointed from constituent local authorities	12	12	12
No. appointment by Welsh Government	6	6	6
Total Members	18	18	18

1. [Download.aspx](#)

National Park Authorities

Management Plan and other corporate documents

Role of Management Plan

The National Park Management Plan is the single most important corporate document for each National Park. It is the principal vehicle for ensuring that the statutory provisions of the Environment Act 1995 are met, including the duties imposed on all public bodies under Section 62(2)¹.

The Management Plan sets out proposals for sustainable land management, access and recreation, communities, wildlife, and heritage, often with case study examples of projects in their area. It is a plan for the geographic area of the Park and not for any one authority.

Legal requirements

All National Park Authorities are required to prepare and publish a Management Plan (S66(1) Environment Act 1995), setting out the vision, objectives, and special qualities of the area which are to be conserved and enhanced.

New NPAs must produce a National Park Management Plan within three years of being established. There is a statutory duty to review the National Park Management Plan “at intervals of not more than five years” (s66 of the Environment Act 1995). This is ideally done in co-ordination with the Local Development Plan. The land use planning dimension of the National Park Management Plan is put into effect through the statutory Local Development Plan for each National Park.

Management Plan contents

Management Plans should include:

- A description of the role of the National Park Management Plan and the National Park purposes and socio-economic duty that set the prime focus of the Plan.
- Identification of the special qualities of the National Park.
- Description of the issues facing the National Park and associated trends.
- Identification of the ambition of the National Park – vision and objectives.
- Identification of the means of delivering the ambition for the ambition – policies and an Action Plan.

Other corporate documents

NPAs are required to produce a range of other corporate documents, including financial reports, an annual corporate and resources plan, a well-being statement, planning documents, and reports on Welsh Language and equality.

Collectively these help guide the activity of NPAs and report on progress to relevant stakeholders.

Welsh language standard

NPAs are required to adhere to the Welsh Language Standards. The two key principles of this are that the Welsh language should be treated no less favourably than the English language and people living in Wales should be able to live their lives through the medium of Welsh if they choose to do so.

The NPA receives a Compliance Notice from Welsh Language Commissioner, which explains how the Authority is expected to provide such services in Welsh, consider the Welsh language when making decisions, and provide more opportunities for people to use the Welsh language in the National Park.



Eryri National Park (Source: www.visitsnowdonia.info)

National Park Authorities

Planning authority role

Overview

National Parks have similar status to National Landscapes in terms of landscape protection. However, NPAs in Wales are responsible for all aspects of forward planning and development management within the National Park. This is a significant difference to National Landscapes, where constituent local planning authorities have responsibility for planning but may consult National Landscape authorities such as the Clywdian Range and Dee Valley Joint Committee.

In practice, this means that planning within National Park operates contiguously with the National Park landscape, whereas in National Landscapes it operates on existing administrative boundaries which intersect the statutory landscape to varying degrees.¹

Forward planning

Planning Policy Wales (PPW) provides national planning policy guidance for Wales. This sets out, for example, that major developments should not take place in National Park or National Landscapes except in exceptional circumstances.

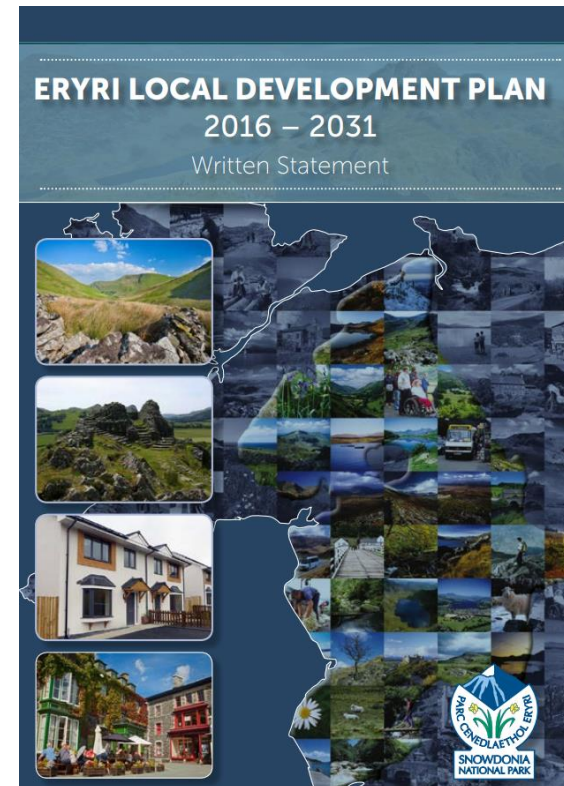
For each National Park, a Local Development Plan (LDP) must be prepared which provides the policy framework for the development and use of land within the National Park. The Plan comprises text and maps, and together with national planning policy will guide decisions on planning applications.

As an example, the Eryri Local Development Plan for 2016 – 2031 (pictured right) sets out policies in the following areas:

- Social and physical infrastructure
- Protecting, enhancing and managing the natural environment
- Employment and training development
- Tourism and recreation
- Protecting and enhancing the cultural and historic environment

Development management

Following designation, the NPA would generally be responsible for determining all planning applications within the National Park area, although this responsibility may vary depending on the chosen model for the NPA. Within the Candidate Area, in the last five years there has been a total of approximately 2,000 planning applications. Of this total, the vast majority have been minor planning applications, which is comparable to Eryri National Park with an average of 400-500 planning applications a year, equivalent to 2,000-2,500 across five years (also mostly minor planning applications).²



Eryri LDP (Source: eryri.gov.wales)

1. [planning-statutory-landscapes.pdf](#)

2. Arup Planning Services Review in the context of a proposed National Park in Wales

The Candidate Area

Overview of the Candidate Area

Geographical location of the proposed National Park

The new National Park has been proposed in Wales, incorporating the existing Clwydian Range and Dee Valley National Landscape. If designated it will be the first new National Park in Wales for nearly 70 years.

The Clwydian Range and Dee Valley, Wales's largest and newest National Landscape, spans 390km². It features a UNESCO World Heritage Site, Pontcystllite Aqueduct and Canal, Llangollen's International Musical Eisteddfod, scenic hills, trails, and historic sites like Offa's Dyke Path, Castell Dinas Bran, Eliseg's Pillar, Sycharth Castle and Valle Crucis Abbey.

Designated in 1985 and expanded in 2011, the area covers parts of five local authorities: Denbighshire, Flintshire, Wrexham, Powys, and a small section of Gwynedd.

The Candidate Area covers 1,200km², similar in size to Greater Manchester. This is three times the size of the existing Clwydian Range and Dee Valley Natural Landscape, incorporating parts of the same five local authorities.

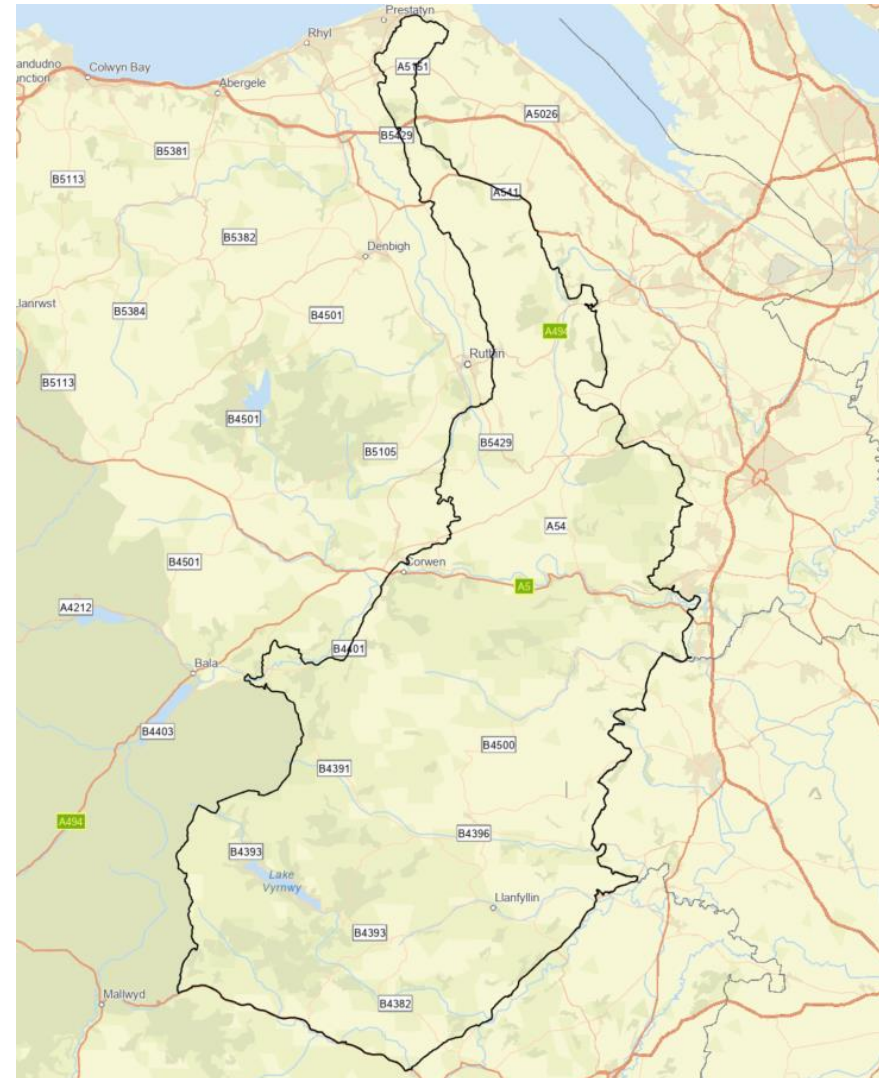


Figure 2.1. The Candidate Area (Source: Arup)

Overview of the Candidate Area

Special Qualities within the 'Area of Search'

The statutory role of National Parks refers to the promotion of opportunities for the understanding and enjoyment of 'Special Qualities'. These define what makes a National Park distinctive and explain why it is of so much value to the nation. They help promote the National Park and provide a framework for developing policies.

Natural Resource Wales (NRW) held a series of workshops to engage local authority staff, along with strategic stakeholder and specialists to determine a list of proposed Special Qualities for the new National Park. These are outlined below¹:

1. An inspiring space that promotes mental, physical and spiritual health and wellbeing

This area reflects the cultural, linguistic, and environmental heritage of Wales. Shaped by rural life, poetry, and storytelling, it remains a stronghold of the Welsh language. Its diverse landscapes support wildlife and outdoor recreation. Historical links to Liverpool and Birmingham, particularly during WWII, and a tradition of scattered communities and literary heritage, mark it as both a cultural and natural landmark.

2. A place with cohesive communities and distinctive settlement patterns

The area is defined by a strong sense of community and place, shaped by distinctive valley cultures and close-knit settlements. Welsh identity is expressed through language,

agriculture, and daily life, while border influences enrich local traditions. Community energy, local communications, and hubs for arts and outdoor activity foster resilience and cultural vitality.

3. A story of human interaction with the landscape over millennia

The area is rich in history, with ancient burial mounds, Bronze Age landscapes, medieval farming, and notable features like hillforts, stone circles, and castles. It also includes WWII and Cold War sites, World Heritage elements, and the continued presence of hefted sheep.

4. A home to internationally and locally important species and habitats

The area is home to protected habitats and species, showcasing global leadership in peatland restoration. It supports IUCN Red List species and features the managed reintroduction of species such as beavers and ospreys. The landscape also offers opportunities for nature-based solutions to environmental challenges.

5. A distinctive, complementary and contrasting landscape

The area offers panoramic views and a diverse array of landscape features, including dunes, crags, waterfalls, rivers, and caves. Uninterrupted skylines, scenic valleys, and headwaters are complemented by woodlands and

scrub, all listed in the SSSI catalogue.

6. A landscape providing benefits beyond its borders

The area supports rich biodiversity, benefits from clean air and water, and plays a crucial role in providing essential ecosystem services. These include storing organic carbon, reducing food miles, offering green spaces for urban communities, and helping regulate the flow and distribution of water.



Glaslyn Osprey (Source: [Visit Mid Wales](#))



Otter (Source: [Vale of Glamorgan Council](#))

Overview of the Candidate Area

Protected areas within the proposed Park Boundary

The National Park boundary encompasses several existing protected areas. Currently, almost half (49%) of the land within the Candidate Area is already under significant protection. These protected areas include the following:

Protected Area	Description
Natural Landscapes (formerly AONB)	Legally protected for their exceptional landscapes, wildlife, geology, and geography. They have the same scenic value as National Park and receive strong planning protection.
Sites of Special Scientific Interest (SSSIs)	SSSIs are protected UK areas of scientific interest for their wildlife, plants, or geology, under the Wildlife and Countryside Act 1981. NRW identifies them and must be consulted before nearby development.
National Nature Reserves (NNRs)	NNRs conserve and support study of important wildlife, habitats, and geology. In Wales, all are SSSIs, with many also protected as SACs, SPAs, or Ramsar sites for added legal safeguards. Natural Resources Wales selects and designates NNRs.
Special Protection Areas (SPAs)	Areas that have been designated to conserve wild birds that are listed as rare and vulnerable by the Birds Directive. They also include sites in Wales that migratory birds use as stop-off points.
Special Area of Conservation (SACs)	Have been chosen to make a significant contribution to conserving habitats and wildlife species that live there, named in the EC Habitats Directive. SPAs and SACs sites in Wales on land are also Sites of Special Scientific Interest, which means that they have legal protection and guidelines for management
Country Parks	An area designated for people to visit and enjoy recreation in a countryside environment. Usually found close to or on the edge of built-up areas. Most designated in the 1970s, under the Countryside Act 1968. Majority are managed by local authorities although other organisations and private individuals can also run them.

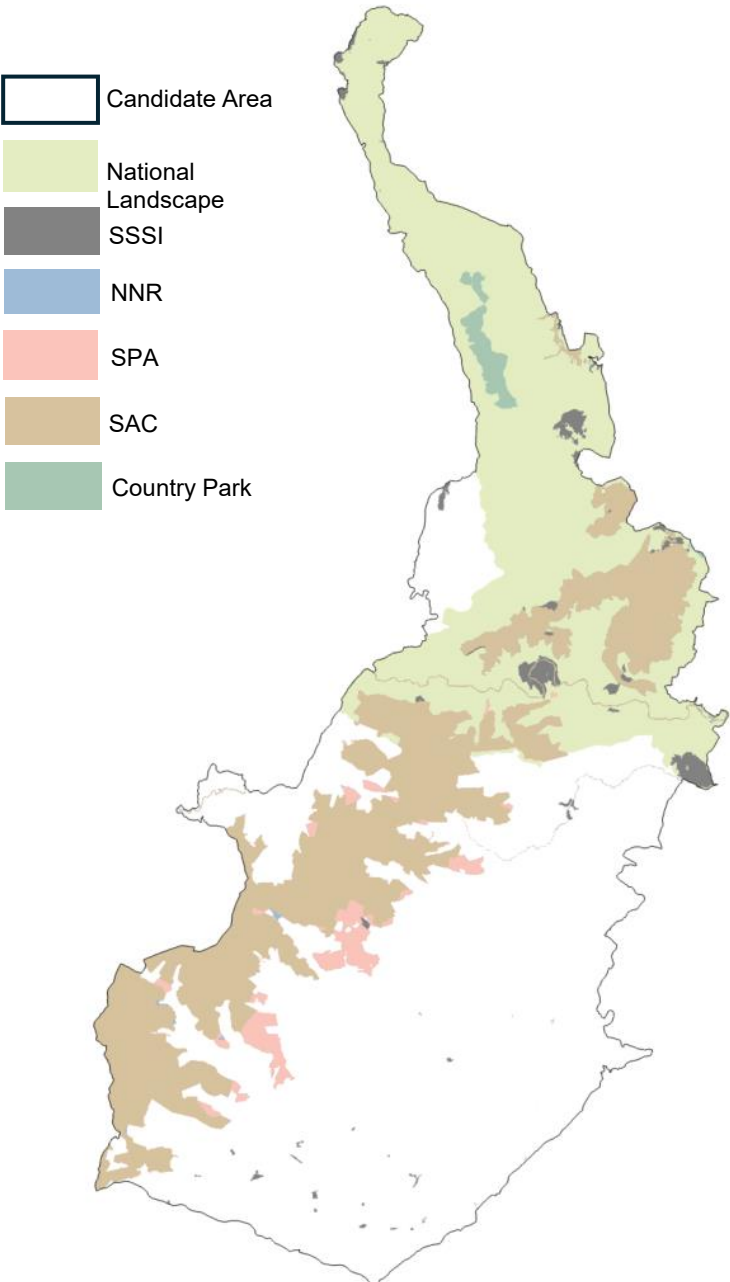


Figure 2.2. Protected areas in the National Park (Source: Arup)

Overview of the Candidate Area

Historic and cultural assets within the proposed Park Boundary

The Candidate Area contains a wealth of historic and cultural assets. Based on data from DataMapWales¹, the area includes:

- **21 Grade I** Listed Properties
- **1,229 Grade II** Listed Properties
- **91 Grade III** Listed Properties
- **21** Historic Parks and Gardens
- **198** Scheduled Monuments
- **1 UNESCO** World Heritage Site

There are 1,341 listed properties within the Candidate Area that are managed under the *Managing Change to Listed Buildings in Wales*² supplementary guidance.

Historic parks and gardens are key to Wales's identity, reflecting its cultural, social, and economic history while enriching the landscape. There are several within the Candidate Area boundary which include Chirk Castle, Eyarth House, Golden Grove, Trevor Hall Sycarth Castle and Bodfach Hall. Conwy Castle, part of the Castles and Town Walls of King Edward in Gwynedd UNESCO World Heritage Site is located just outside the Candidate Area. Archaeological sites of national importance are given legal protection by being placed on a 'Schedule' of monuments. Some of these within the Candidate Area include Creigiau Eglwyseg Round Barrows & Earth Circle, Bryn Gwyn Deserted Rural Settlement, Llanwddyn Hospitium and Moel y Gaer. The Pontcysyllte Aqueduct and Canal is a UNESCO World Heritage Site constructed between 1793 and 1808, spanning eleven miles across the River Dee.

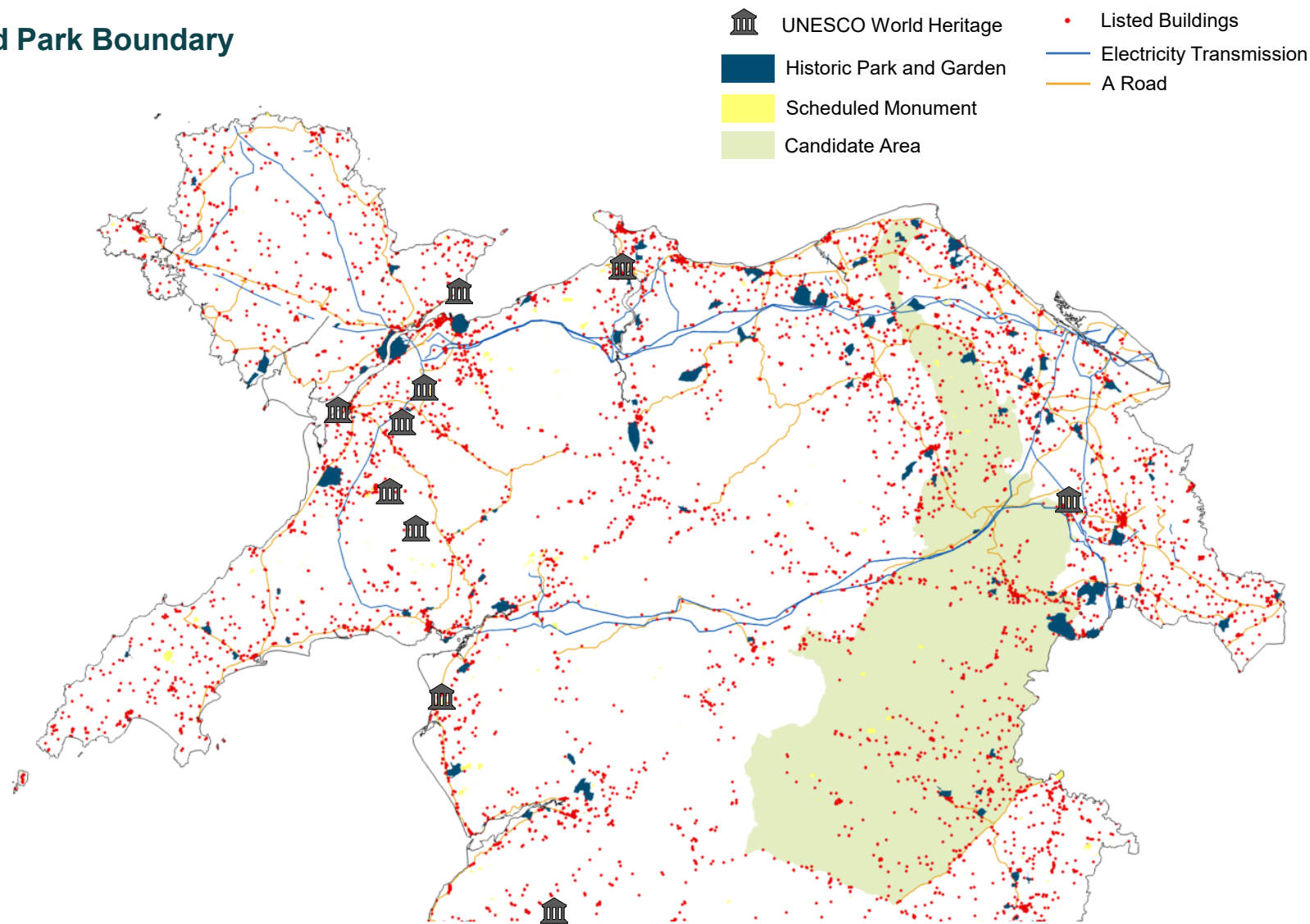


Figure 2.3. Historic and cultural assets (Source: Arup)

1. [Listed Buildings | DataMapWales](#)

2. <https://cadw.gov.wales/sites/default/files/2019-05/20170531Managing%20Change%20to%20Listed%20Buildings%20in%20Wales%2024303%20EN.pdf>

Tourism and visitor economy

Catchment area

Arup has mapped broad driving catchment areas for the proposed Candidate Area using PODARIS. Drive-time catchments were modelled at intervals of 30, 60, and 120 minutes from the park boundary. Catchment area maps for resident populations (Census 2021) were overlayed on the travel time area to produce population estimates for the three drive time catchment areas.

To produce these catchment areas, key attractions in the proposed new National Park (see Table 2.1) were identified and a spatial area was created by joining these attractions together. Average car journey times for the road types (e.g. A or B) to this area were estimated using PODARIS. Three catchment areas, local (30 minutes drive), regional (1-hour drive) and national (2-hour drive) were produced.

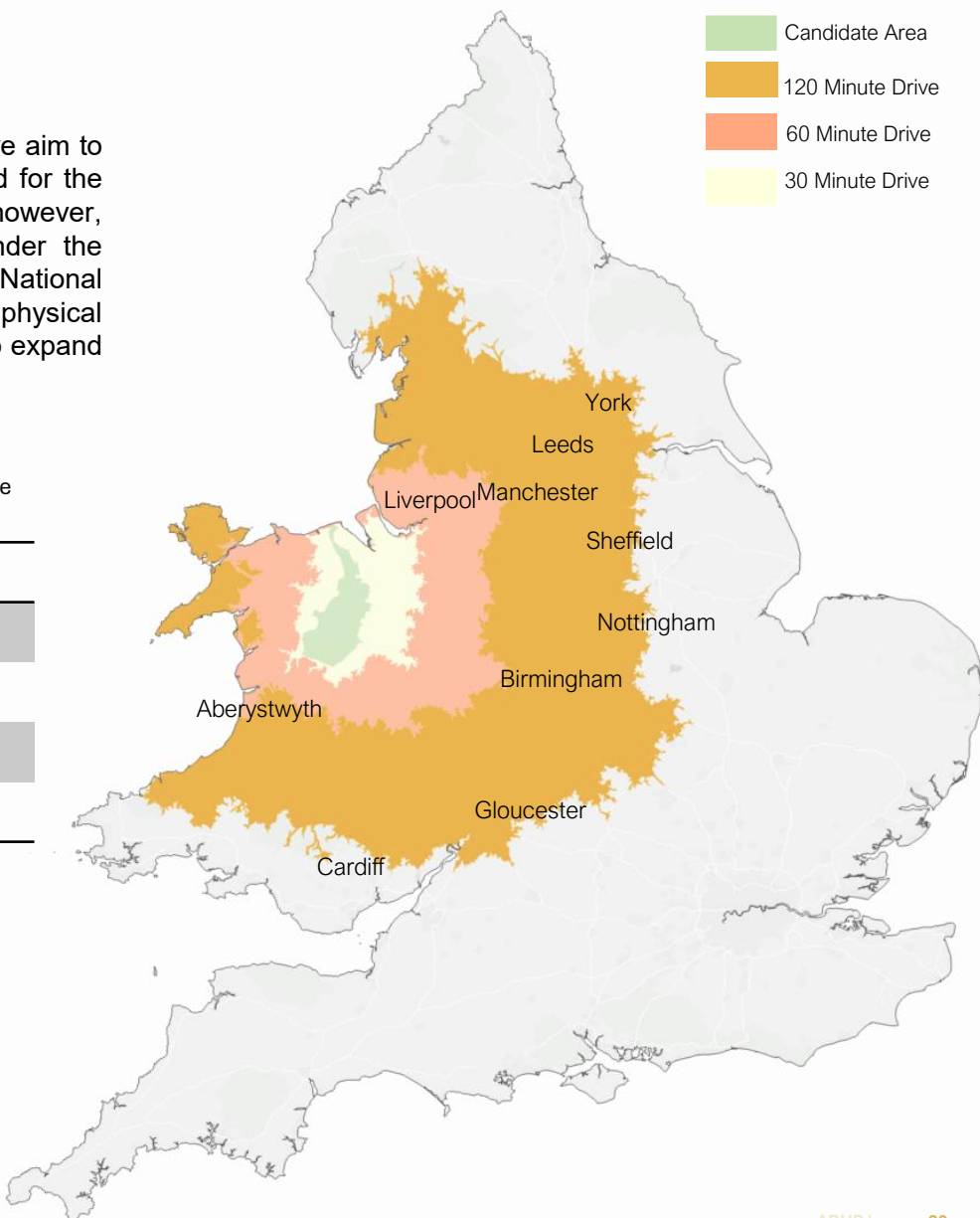
This is indicative analysis that does not reflect local traffic conditions or live traffic conditions; hence the catchment areas are likely to over-estimate the size of the catchment area population and vary according to the time of day and season.

The Candidate Area is large with 24 million people living within a 2-hour drive. For comparison, an estimated 20 million people live within one hour's journey of the Peak District and more than 50 million people live within four hours' journey¹. This comparison is used because the Peak District represents a well-established and accessible National Park whose visitor patterns and proximity to large population centres offer a meaningful benchmark.

By comparing drive-time catchment populations, we aim to contextualise the potential scale of visitor demand for the proposed National Park. It is important to note, however, that this level of accessibility already exists under the current National Landscape designation. While National Park status may raise the area's profile, the physical catchment and potential visitor base are unlikely to expand significantly beyond existing parameters.

Table 2.1. Estimated Population and Annual Visitors per Drive Time (Source: Census 2021, PODARIS)

Drive Time	Estimated Population
0-30 Minute	1,086,297
31-60 Minute	6,593,343
61-120 Minute	16,692,418
Total	24,372,058



1. Media Centre Facts and Figures: Peak District National Park
2. Wales as a global tourist destination

Figure 2.4. Drive Time Zones (Source: PODARIS and Arup)

Drivers for National Park Designation

Overview of key drivers for designation

As part of its work to assess the case for a new National Park, NRW conducted an initial engagement exercise in October to November 2023. The Engagement Report following this designation summarised the key drivers for designation as follows.¹

1. Set a framework for the protection and enhancement of our finest landscapes

A National Park manages the area through a dedicated NPA. Given the proposed park spans multiple Local Authorities, suitable governance arrangements are needed for national and local representation.

2. To conserve and enhance wildlife and biodiversity

A new National Park would help protect and enhance the area's rich wildlife and habitats, from garden species like tawny owls and badgers to rare flora and fauna.

It would offer greater protection from pressures such as game bird rearing and play a role in tackling the wider biodiversity crisis.

3. Preserve and protect the landscape

Protect rural areas, and the rural way of life and ensure the countryside is well maintained.

4. Protect from inappropriate development

Limited new housing developments would be built, and the

area would be protected from industrialisation by wind farm developments.

5. Economic boost to the area

Bring local investment. A new National Park would bring more visitor and increased investment to the area. This would also help develop infrastructure in these towns, generate more, and benefit existing local businesses and jobs.

6. Diversification of farming activities

There is a need to help maintain viable farm businesses by developing a more diverse and resilient local economy. Designating the area as a National Park would create new opportunities through leisure and outdoor activities, while promoting sustainable tourism.

7. Bring recognition to the area

National Park status would raise the profile of the area and give people more of a reason to stop and not just travel straight through to Eryri National Park.

8. Increase resources

A National Park could help secure more stable funding and resources for managing the area, while also strengthening the ability to enforce regulations.

9. Protect culture and heritage

Conserve and safeguard local architecture and historic buildings. Conservation of the Welsh language.



Sheep Farming (Source: [Welsh Food & Drink](#))

¹ [wales---s-new-national-park-proposal---2023-engagement-period-report---natural-resources-wales.pdf](#)

Potential impact of the proposed National Park

Introduction

Economic impact of National Parks

National Park is the leading designation recognised across the world for places of the highest national importance for natural or cultural heritage. As a result, National Parks are a recognised brand capable of attracting significant national and international awareness to an area. This can lead to increased visitors, local spend and inward investment.

A 2024 report by National Parks England estimates that the UK's National Parks attract around 90 million visitors each year, contributing approximately £6 billion to the national economy¹. The 2023 STEAM (Scarborough Tourism Economic Activity Monitor) reports, provided by the respective National Park Authorities, use a recognised methodology for assessing the economic impact of tourism. These reports indicate that the three Welsh National Parks collectively received 11.9 million visitors, generating an estimated £2 billion in economic value and supporting around 12,000 full-time equivalent (FTE) jobs (see Table 3.1).

The return on investment in National Parks is well established. A report by National Parks England found that every £1 of government funding provided to National Park Authorities (NPAs) yields £5.70 in public health benefits². Similarly, the Scottish Environment Link report (2024) estimated that Scotland's two existing National Parks generate over £700 million in annual economic impact—representing a return of approximately 30 times the Scottish

Government's investment³. While not all of this impact can be directly attributed to National Park status, international studies, including those from the United States and Finland, have demonstrated that investment in National Parks can deliver economic returns of up to 10:1. Together, Scotland's two National Parks also directly support around 250 jobs, spanning a wide range of roles, many of which require professional qualifications, practical skills, and specialist experience.

Beyond health, the environmental benefits of National Parks are also substantial. For example, healthy peatlands play a critical role in carbon capture, absorbing CO₂ through photosynthesis and storing an estimated 3.2 billion tonnes of carbon in the UK alone⁴. However, around 80% of UK peatlands have been degraded due to human activity. National Parks can play a key role in the restoration of these vital ecosystems, which also brings significant economic benefits. According to the Office for National Statistics, fully restoring the UK's degraded peatlands could result in savings of £19 billion through reduced carbon emissions⁴.

This study has estimated the current Gross Value Added (GVA) for the Candidate Area at £599 million, representing approximately 0.8% of Wales's total GVA. GVA reflects the economic contribution generated by individuals in employment who reside within the Candidate Area.

Table 3.1 Welsh National Park Economic contribution in 2023 overview (STEAM 2023)

National Park	Total visitors	Economic impact	Direct employment (FTE)
Bannau Brycheiniog	3.99 million	£412 million	3,318
Pembrokeshire Coast	3.06 million	£787 Million	8,755
Eryri	4.89 million	£822 million	7,569
Total	11.94 million	£2.02 billion	11,942

1. Valuing England's National Park- Cumulus Consultants Ltd
2. Our Value. Our Potential. — National Parks England
3. New report sets out socio-economic benefits of national parks for Scotland - Scotlink
4. <https://www.ceh.ac.uk/sites/default/files/Peatland%20factsheet.pdf>

Introduction

Summary of impact mechanisms

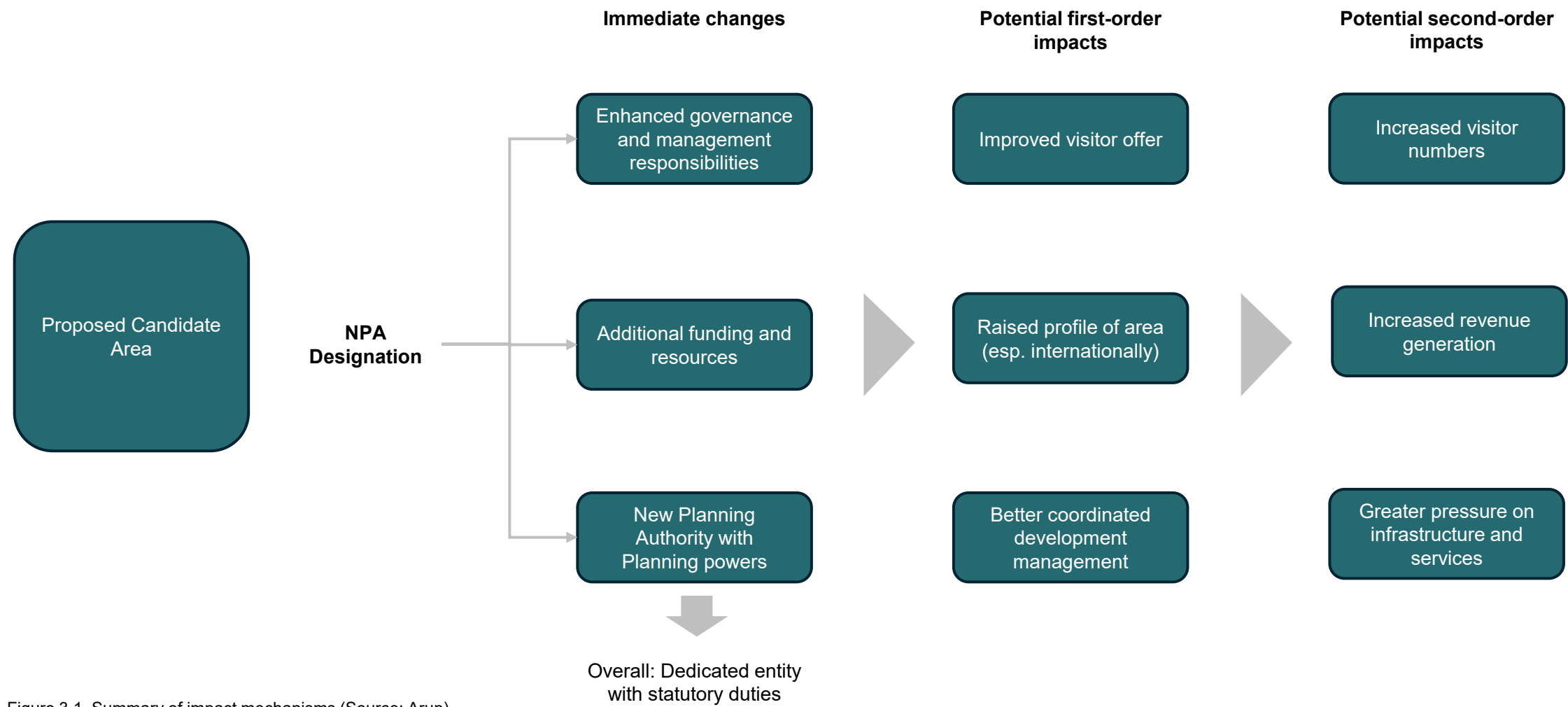


Figure 3.1. Summary of impact mechanisms (Source: Arup)

Tourism and Visitor Economy

Baseline conditions

Tourism and visitor economy are important sectors for the Welsh Economy. In 2023, it was estimated 11.8% of all employment in Wales is tourism related, with 77% of this employment in the hospitality/food and beverage sector¹. Welsh Government found that the food and drink industry grew by 10% in 2023, and businesses in the sector had a total turnover of £24.6bn in 2023². The food and drink supply chain employed 228,500 people in Wales in 2023, equivalent to 17% of Wales's total workforce².

Other important sub-sectors relate to accommodation services and recreational activities. Employment in the accommodation sector for the Candidate Area is 0.8% compared to the Welsh average of 0.5%, reflecting the higher number of tourism-related activities. The tourism sector in North and mid-Wales is a vital part of the region's economy, attracting visitors with its stunning landscapes, rich history, and cultural heritage. Key attractions include Eryri National Park, the coastal towns of Llandudno and Conwy, and numerous castles and heritage sites.

Tourism is a major source of employment in North East and Mid Wales, particularly in sectors such as hospitality, outdoor recreation, heritage conservation, and transport. The region boasts several notable attractions, such as Rhuddlan Castle, Denbigh Castle and Town Walls, Rug Chapel, Llangar Old Parish Church, and Valle Crucis Abbey. Additionally, visitors can explore the industrial heritage at Minera Lead Mines and Country Park in Wrexham and the Pontcysyllte Aqueduct, a World Heritage Site. A new visitor centre has been approved at Moel Famau Country Park.

The growth of social media in the past decade has significantly increased the exposure of local beauty spots to a global audience. 75% are inspired to travel to a specific destination because of social media and half (48%) are primarily motivated by whether the destination will look great in photos/videos³. However, social media 'viral' trends can cause very high peaks of tourist visits. This can be particularly challenging for the attraction and supporting infrastructure to manage, exacerbating the negative impacts with visitors i.e. litter and congestion.

Although visitor data for the Candidate Area is limited, a 2018 study by NEF Consulting estimated visitor numbers for the six primary attraction sites within the Clwydian Range and Dee Valley. The study found that these key sites (highlighted in pink in Figure 3.2) attracted approximately 1.1 million visitors, generating nearly £32 million in visitor expenditure in 2018⁴.

The study also provided insights into the visitor profile and the key activities undertaken in the area. It found that the majority of visitors engaged in walking and hiking, with many specifically visiting the World Heritage Site. A primary motivation for visiting was to experience the area's scenic beauty, including its natural landscape and fresh air. Most visitors were day-trippers; however, the Pontcysyllte Aqueduct World Heritage Site attracted a higher proportion of overnight visitors, many of whom travelled from outside the surrounding local authority areas.

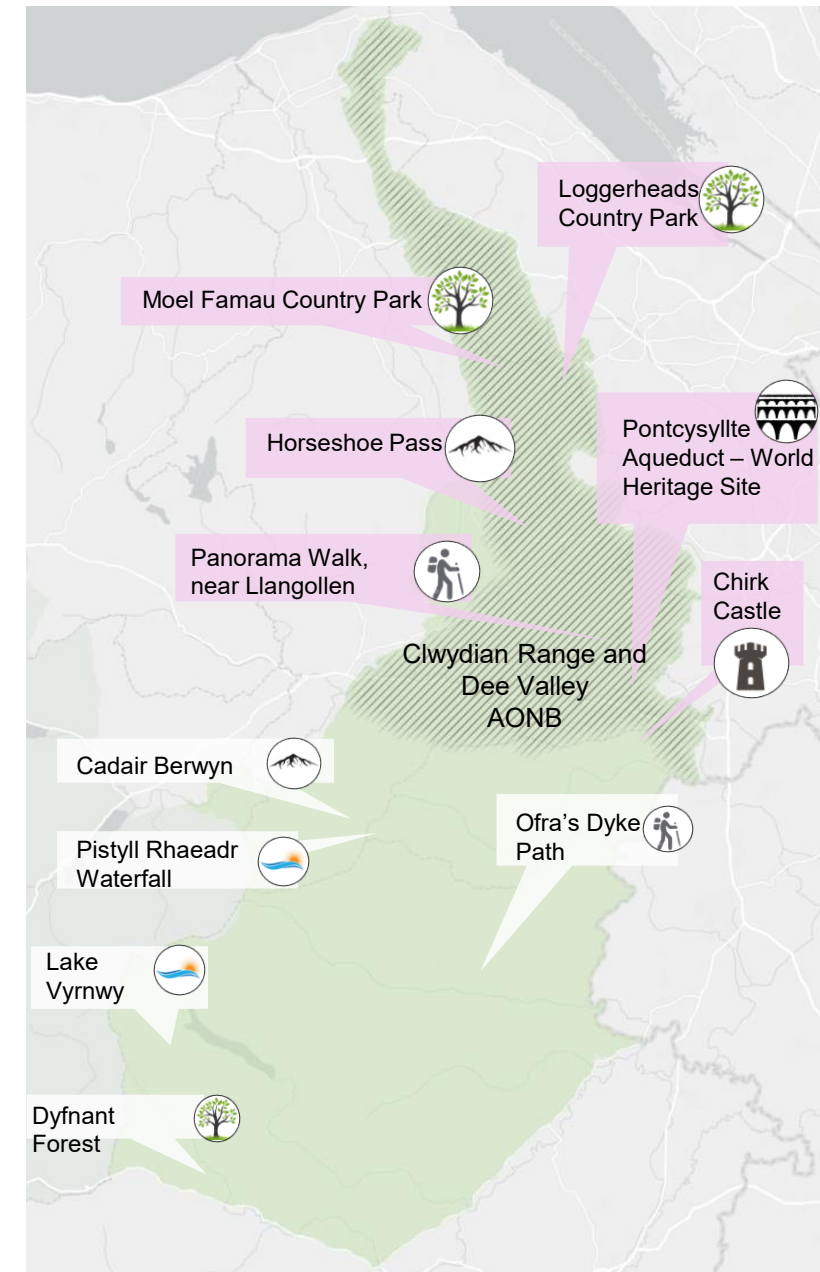


Figure 3.2. Key attractions in the proposed new National Park Source: Arup)

1. [Wales visitor economy profile: 2024 \[HTML\] | GOV.WALES](#)

2. [Welsh food and drink industry grows by 10% | GOV.WALES](#)

3. [Chart: Social Media has the Greatest Influence on Travel Destination Choices | Statista](#)

4. [AONB-Visitor-Appraisal-Report-April-2019-FINAL-with-logo.pdf](#)

Tourism and Visitor Economy

Baseline conditions

Establishing a baseline of current visitor numbers is a key step in understanding potential economic impacts of designation. No single, accepted data source is available so two methodologies have been explored.

The first methodology uses the Outdoor Recreation Valuation (ORVal) tool, a web-based application developed by the Land, Environment, Economics and Policy Institute (LEEP) at the University of Exeter, with DEFRA funding. ORVal estimates the number of visits to existing and potential greenspaces in England and Wales using an econometric model based on data from the annual Monitor of Engagement with the Natural Environment (MENE) survey, with the most recent data from 2018¹.

For this study, ORVal visitor estimates were aggregated for Middle Layer Super Output Areas (MSOAs) within the Candidate Area, with adjustments made for MSOAs only partially within the boundary. This produced an estimated 3.3 million visits in 2018 – a figure broadly consistent with visitor numbers to existing National Parks in Wales, which range from 3.1 to 4.9 million (see Table 3.2). This estimate should be interpreted with caution due to the inherent limitations of survey-based data. The model is also not capable of distinguishing between historical/archaeological sites of greater and lesser interest. It is not able to distinguish between sites with unique characteristics such as cultural significance or visitor facilities.

The second approach is based on visitor estimates to key attractions. According to NEF Consulting’s 2018 Visitor Study, six major attractions in the Clwydian Range and Dee Valley National Landscape received approximately 1.1 million visitors in 2018.

For the southern part of the proposed National Park, Visit Wales statistics were reviewed; however, data was only available for Lake Vyrnwy. Visit Wales’ 2018 statistics estimated an additional 200,000 visitors to Lake Vyrnwy, a key attraction within the Candidate Area but outside the National Landscape.

Combined with the 1.1 million visitors to attractions in the Clwydian Range and Dee Valley, this gives a total estimate of 1.3 million visitors in 2018. While this likely underestimates total visitor numbers – since it only accounts for key attractions – it still serves as a useful reference point.

To reflect current visitor numbers, the 2018 estimates were adjusted using visitor trends from the three existing Welsh National Parks between 2018 and 2023 – the most recent year with available data for UK tourist attractions. Over this period, changes in visitor numbers ranged from a 9% decrease to an 8% increase, averaging a modest 0.4% growth (see Table 3.3). However, as this timeframe includes the impacts of the COVID-19 pandemic and the subsequent recovery, these trends should be interpreted with caution.

Table 3.2 Estimated visitor numbers to the Candidate Area 2019 and 2023 (Source: NEF Consulting, Visit Wales, Exeter University and Arup)

Candidate Area visitor baseline estimate	Annual visitor numbers	Year	Status
Orval tool v2 by Exeter University	3.3 million	2018	Central estimate, based on econometric modelling of survey data
NEF Consulting + Visit Wales	1.3 million	2018	Under-estimate, captures visits to key attractions only

Table 3.3. Total Visitor numbers to Welsh National Park 2018 and 2023 (Source: STEAM 2023 reports)

National Park	2018	2023	2018-2023 % change
Bannau Brycheiniog	4.4 million	4.0 million	-9%
Pembrokeshire Coast	3.0 million	3.0 million	+3%
Eryri National Park	4.5 million	4.9 million	+8%
Welsh National Park average			+0.4%

1. ORVal | Land, Environment, Economics and Policy Institute (LEEP) | University of Exeter

Tourism and Visitor Economy

Potential impact

National Parks are among the most powerful and trusted brands for natural landscapes worldwide¹. This status conveys quality, protection, and unique experiences, making these areas instantly recognisable and desirable to visitors, investors, and conservation partners. However, specific evidence on the impact of National Park designation's impact on visitor numbers is extremely limited.

In the UK, the most recently designated National Park is South Downs (2010). A report produced by Tourism South East examined visitor patterns through detailed surveys of both residents and visitors². Over the period 2003/04 to 2011/12, the findings indicated an 18.2% increase in visitor days, though no evidence is available on how designation may have contributed to this or how the growth trend continued in subsequent years.

Internationally, analysis has been found of visitor number changes following National Park designations in Sweden and the US. In Sweden, the designation of Fulufjället National Park in 2002 was followed by a nearly 40% increase in visitation, based on on-site tourist counter data⁴. In the US, four National Parks have been designated since 2018³. Analysis of visitor data for these parks shows an uplift ranging from 15% to 58% following designation. These international examples should be treated with caution, especially the US National Parks given the recently designated parks are much smaller in size and designated just before or during the COVID-19 pandemic. As one example, Indiana Dunes National Park, which had the highest increase, is a 61km² park located near the Chicago metropolitan area which had no prior designation status.

Nonetheless, the evidence suggests a range in uplifts between approximately 15% and 60%, with an average around 30%. These comparators must be applied to the Candidate Area with care. The Candidate Area is already partially designated as a National Landscape and attracts a relatively large number of visitors today. It is therefore considered unlikely that National Park designation would lead to an increase at the upper end of the range of examples reviewed.

Taking the average uplift, 30%, would raise visitor numbers to approximately 4.3 million. Taking the lowest uplift, 15%, would bring the total to around 3.8 million. These numbers fall either side of current visitor numbers to Bannau Brycheiniog, which like the Candidate Area is located close to major population centres. Eryri is higher but has unique attractors, notably the highest mountain in Wales.

Taking these figures as an indicative potential range would give a range of uplift following designation from 500,000 and 1 million additional visitors per annum.

There are several important caveats to note:

1. There will be several factors beyond designation that impact visitor numbers, and the evidence reviewed has made limited or no attempt to control for these.
2. The baseline visitor figure for the Candidate Area is uncertain, as it relies on modelled estimates from the ORVal tool rather than actual counts.
3. Any increase in visitor numbers is likely to occur over several years, and will be limited to some extent by the

capacity of local infrastructure and services.

4. This analysis considers overall numbers only, without distinguishing between types of visitors (for example, day trips versus overnight stays).

To generate a more robust estimate, further work would be needed to gather data and control for the different variables at play.

An increase in visitor numbers would be expected to generate a rise in visitor spending. The NEF Consulting report estimated that the average daily spend per visitor across the six key attractions was £13.34 in 2018, equivalent to approximately £16.72 in 2023 prices. Applying this figure to visitor estimates from the ORVal model, and assuming a range of a 15% to 29% increase in visitor numbers, suggests a potential gross additional annual visitor spend of between £8 million and £15 million. When projected over a 30-year period, assuming constant visitor numbers and applying standard discounting, this equates to between £55 million and £105 million of additional spend. These figure is illustrative and intended to convey the potential scale of economic uplift.

As well as increased spending, additional visitors also bring a risk of over-tourism. This could create pressure in particular locations and on transport and services (as explored later). However, the introduction of an NPA could also help mitigate these impacts by providing targeted management of the area, along with wider policies such as the proposed visitor levy in Wales.⁵

1. Research note: Protected area labels as brands in tourism – ScienceDirect
 2. learning.southdowns.gov.uk/wp-content/uploads/sites/2/2015/08/SDNP-Visitor-Survey-2011-12.pdf
 3. US National Park Visitor Numbers - NationalPark.World
 4. Increased Visitation from National Park Designation: Current Issues in Tourism: Vol 10, No 1
 5. <https://www.gov.wales/VisitorLevy>

Tourism and Visitor Economy

Summary of potential impact

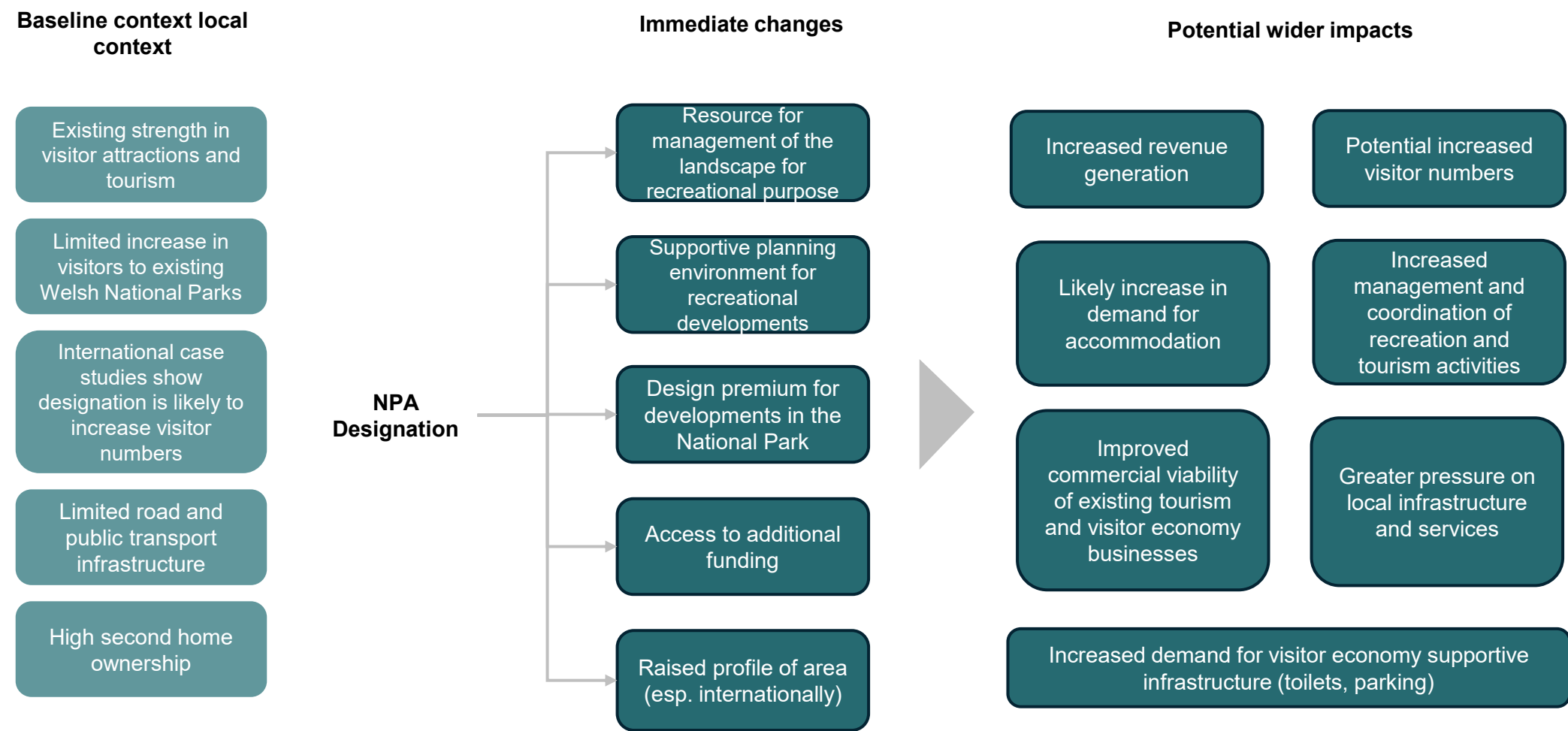


Figure 3.3. Wider Economic Impact for Tourism and Visitor Economy (Source: Arup)

Employment and Businesses

Baseline conditions

Approximately 48% of residents in the Candidate Area are economically active, which is lower than the national average of 56.5%¹. This disparity is likely due to the area's rural nature, which correlates with fewer job opportunities and a higher proportion of retired people compared to more urban areas. This is also likely driven by young people born in rural communities moving to cities in order to find work or to study. In a report produced by Virgin Media O2, 66% of 18–24-year-olds living in rural areas said they were considering leaving in the next 12 months².

Table 3.4 presents the number and percentage of individuals employed in the top six industries within the proposed National Park area. Education emerges as the leading employment sector, which broadly aligns with the education sector being the fourth largest industry in Wales, accounting for 8.9% of all employee jobs³. There are several primary and elementary schools located in the prominent built-up areas including Ceiriog, Llangollen and Llanfyllin. The construction sector is the second-largest employer, with numerous contractor and building companies situated in the Candidate Area, especially along the River Dee. Employment in human health is the second largest sector, supported by the presence of healthcare facilities within the Candidate Area, such as St. David’s Hospital and Llangollen Health Centre, as well as nearby facilities including Mold Community Hospital and Ruthin Community Hospital.

Employment within the tourism sector in the Candidate Area is relatively modest but present across several related industries. Retail trade accounts for 3.7% of total

employment, reflecting the role of local shops and services that cater to both residents and visitors. Accommodation services represent 0.8% of employment, while food and beverage services account for 1.5%. These figures suggest that while tourism contributes to the local economy, it is currently not the dominant sector.

The Candidate Area has a higher-than-average proportion of usual residents aged 16 or over who hold Level 4 qualifications or above, including degrees (BA, BSc), higher degrees (MA, PhD, PGCE), BTEC Higher qualifications, and other professional credentials. Additionally, only 17.2% of residents in the area have no qualifications, which is below the national average of 19.9%⁴. This likely reflects the older population, many of whom may have attained higher qualifications over time compared to younger populations.

Table 3.4. Top 6 Largest employers with the Candidate Area (Source: Arup and [ONS](#))

Industry	Number of People	Percentage
Education	2,008	4.3
Construction	1,969	4.2
Human Health	1,920	4.1
Retail Trade	1,727	3.7
Public Admin and Defence	1,307	2.8
Crop and Animal Production	1,254	2.7



17,815
Economically Active⁴
(48% of residents, 56.5% in Wales)



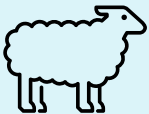
1,253
Employed in Crop and Animal Production⁵
(2.7%, 0.8% in Wales)



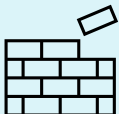
0.8%
Employed in Accommodation Sector⁵
(0.5% in Wales)



34.8%
Level 4 Qualifications or above
(31.5% in Wales⁴)



11.0%
Of Businesses in Agriculture and Forestry⁶
(10.8% in Wales)



13.9%
Of Businesses in Construction⁶
(11.7% in Wales)

1. [Labour market and travel to work in Wales \(Census 2021\) \[HTML\] | GOV.WALES](#)
2. [The rural economy - House of Lords Library](#)
3. [Labour market statistics \(Annual Population Survey\): 2021 \[HTML\] | GOV.WALES](#)
4. [Education in Wales \(Census 2021\) \[HTML\] | GOV.WALES](#)
5. [Industries of those in employment, by local area, working pattern, employment status, England and Wales, Census 2021 - Office for National Statistics](#)
6. [UK business; activity, size and location - Office for National Statistics](#)

Employment and Businesses

Baseline conditions - Agriculture

Agriculture and farming play a vital role in the economy and identity of the National Park Candidate Area. Approximately 11% of businesses in the region operate within the agriculture or forestry sectors, reflecting the area's strong rural character and land-based industries. Employment in crop and animal production stands at 2.7%—more than three times the Welsh national average of 0.8%. Figure 3.4 demonstrates a higher proportion of farming related employment in the southern part of the Candidate Area. However, due to the relatively low population density in this region, the overall impact of National Park designation on agricultural employment may be limited in scale.

Figure 3.4 illustrates the distribution of agricultural land quality within the Candidate Area. The Agricultural Land Classification Map categorises land based on factors such as climate, topography, and soil. Land classified as Best and Most Versatile (BMV) (grades 1 to 3a) is considered the highest quality for farming, while grades 3b to 5 indicate increasing limitations for agricultural use¹. Grade 3b land can still produce moderate yields of a limited selection of crops, primarily cereals and grass. It can also support lower yields of a wider variety of crops or high yields of grass suitable for grazing or harvesting. Although land graded 3b to 5 is less productive for agriculture, it plays a crucial role in providing valuable ecosystem services such as carbon storage, water regulation, and supporting biodiversity.

Only 8% of the land in the Candidate Area is designated as high-quality agricultural land, with the majority rated moderate to very poor (76%). This is largely due to the

mountainous terrain, which is better suited for pasture and livestock farming than for growing arable crops. The highlands are especially ideal for sheep farming, particularly for the resilient Welsh Mountain sheep. Additionally, the region is home to a significant number of dairy operations, with 20% of Wales's dairy holdings based in the North-East².

Table 3.5. Agricultural Land Classification (Source: Arup and [Natural England](#))

Agricultural Land Classification (ALC) ¹	Area (Ha)	Percent of Candidate Area
BMV Land (Grade 1 – 3a)	9,543.3	8.2%
Moderate to Very Poor (Grade 3b – 5)	88,656.2	76.0%
Non-agricultural Land	18,411.5	15.8%



Figure 3.4. BMV and Moderate to Very Poor Land (Source: ONS and Arup)

1. [Guide to assessing development proposals on agricultural land - GOV.UK](#)
2. [The Welsh Dairy Industry](#)

Employment and Businesses

Potential impact – Agriculture

Planning Implications

Welsh National Park Authorities (NPAs) support high-quality development, including farm buildings, by guiding and collaborating with developers. Their role is to balance development with the conservation of natural and cultural heritage, not to impose stricter controls than other planning bodies. While protecting the best and most versatile (BMV) land is a consideration, it is one of many factors in planning decisions. Only 8.2% of the Candidate Area is BMV land, and about 50% is already protected, limiting the impact of planning restrictions. Planning Policy Wales allows new farm and forestry buildings when essential or when existing structures are unsuitable, with a strong emphasis on reusing buildings to protect the landscape, particularly in National Parks.

Opportunities for Diversification

Agriculture in the Candidate Area is primarily focused on upland sheep farming, with some small-scale dairy production. However, the limited farm size often restricts income potential. Diversification into farm tourism, local food production, and other rural enterprises can help improve farm viability. The visitor economy in the National Park offers significant opportunities for local communities and businesses, including farming enterprises that wish to diversify into this market. This could involve offering self-catering or bed and breakfast accommodation, bike hire, or selling farm produce directly to visitors through farm shops

and cafés. Planning Policy Wales allows such diversification when it complements existing farming activities, and the Eryri NPA's Local Development Plan Policy 20 supports it, provided it forms part of a formal farm business plan.

Funding Implications

The Welsh Government offers several farming support schemes, including the Basic Payment Scheme (BPS) for environmentally responsible farming, the upcoming Sustainable Farming Scheme (SFS) launching in 2026, and additional support through the Agricultural Diversification and Horticultural Scheme, Habitat Wales Scheme, and various small grants¹. These funding pots are the same inside National Park as they are outside them. Historically, designated landscapes such as National Parks have also benefited from targeted measures like Tir Cymen, Tir Gofal, and Glastir, which provided tailored support to promote sustainable land management in these sensitive areas². Public expenditure on farm support within the English National Park is worth in excess of £160 million per annum and public investment in farming is essential for the economic sustainability of many National Park farms³.

Ffermio Bro Scheme

The new £1.8 million Welsh Government scheme will launch on 1 April 2025, offering targeted support for farming projects in Wales' National Parks and National Landscapes until March 2028⁴. Delivered in partnership with local landscape

bodies, the scheme will fund environmental improvements such as woodland planting, hay meadow creation, peatland restoration, and river protection. The first projects are expected to begin this summer, with most delivered between September 2025 and January 2026.

Advice and Support

Additional advice and support are available to land managers within all National Parks, with the help provided tailored to the specific circumstances of the National Park and the types of land management involved. The NPA also acts as an advocate for farmers and land managers, representing them in dealing with national government and agencies⁵.

Impact on Employment and Businesses

National Park status can elevate an area's recognition on an international level, offering promotional advantages for local products like beef, lamb, and venison, helping producers secure premium prices. For instance, over 200 businesses in the Cairngorms use National Park branding, and the NPA supports initiatives like the Cairngorms Farmers Market and the Creative Cairngorms artists and craft workers' association⁵. Eryri NPA also works closely with farmers and the agricultural sector to promote sustainable farming methods that enhance the quality of produce, making it more attractive to premium markets⁶. This could lead to increased employment within these farming sectors in the new National Park.

1. <https://www.gov.wales/rural-grants-payments>
 2. [Previous Conservation Projects | Eryri National Park](#)
 3. https://www.peakdistrict.gov.uk/__data/assets/pdf_file/0028/87463/Farming-in-the-English-National-Parks.pdf
 4. [Support for nature-friendly farming across Wales' most treasured landscapes | Welsh Government News](#) <https://cairngorms.co.uk/working-together/cairngorms-2030/>
 5. <https://aprs.scot/resources/farming-benefits-of-national-parks/>
 6. [Conservation, Trees and Agriculture - Park Authority](#)

Employment and Businesses

Baseline conditions – Mining and Extraction

The Candidate Area has a strong historical association with mining and quarrying. In the past, the area was known for lead, coal and limestone extraction, particularly in the Clwydian Range and Dee Valley, where remnants of industrial heritage can still be seen. For example, the landscape on the northern side of Ruabon Mountain has extensive traces of mining for lead, silver and zinc ores and disused slate quarries lay around the fringes of Llantysilio Mountain and the Horseshoe Pass¹. However, currently active mineral extraction in the Candidate Area is limited with just a small handful of active quarries remaining².

There remains a presence of important minerals in the region. Figure 3.5 overlays the Candidate Area with the Aggregate Safeguarding Map co-funded by the Welsh Government and British Geological Society (BGS). They show the distribution of Category 1 and Category 2 minerals. Category 1 minerals are nationally important and include high-quality aggregates (like Sandstone and Igneous Rock), often used for road building and construction. Category 2 minerals are of regional or local importance. Carboniferous limestone—a Category 1 mineral of national importance—is found in the northeast. The northwest contains sandstone and igneous rock, potentially falling under Category 1 or 2 depending on quality. Sandstone in the southeast and igneous rock in the south are classified as Category 2, contributing regionally to construction needs. In the centre, slate is also present. While not a Category 1 or 2 mineral, it holds local and historical significance.

To protect valuable mineral resources from sterilisation—where non-mineral developments like housing or commercial buildings are built over land containing important resources—Aggregate Safeguarding Zones are designated. These zones ensure that key mineral reserves remain accessible for potential future extraction, supporting sustainable development and long-term resource management. National Park designation could place strong restrictions on their extraction, prioritising environmental protection and landscape conservation.

The mineral sector is a relatively small proportion of employment, and mineral extraction in the region has been in long term decline with a shift away from extractive industries. Table 3.6 shows the percentages of people employed across mining related roles within the Candidate Area.

Table 3.6. Percentage Employment across the Mining Industry
(Source: ons.gov.uk)

Industry	Employment
Mining of coal and lignite	0.005%
Extraction of crude petroleum and natural gas	0.037%
Mining of metal ores	0.000%
Other mining and quarrying	0.055%
Mining support service activities	0.001%

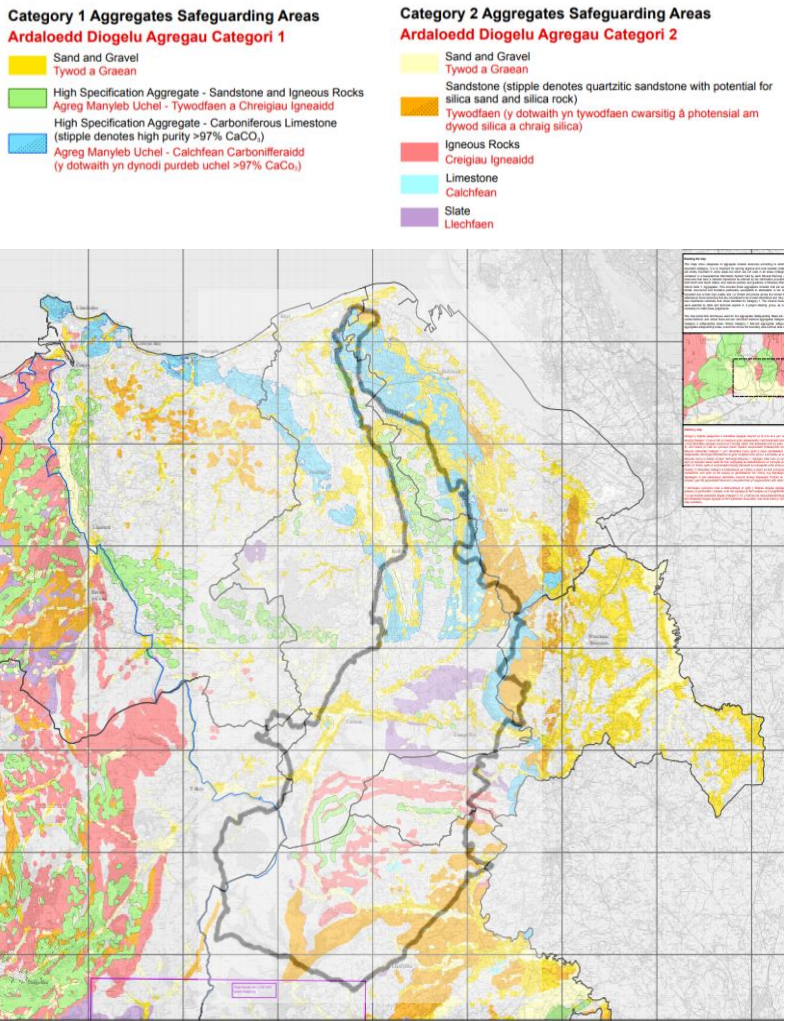


Figure 3.5. Aggregates Safeguarding North East Wales (Source: [NERC Open Research Archive](https://nerc.openresearcharchive.org/))

1. <https://www.clwydianrangeanddeevalleyaonb.org.uk/projects/evidence-of-industry/#:::text=Throughout%20the%20area%20water%20was,belonging%20to%20Valle%20Crucis%20Abbey.>
2. [GeolIndex - British Geological Survey](https://www.clwydianrangeanddeevalleyaonb.org.uk/wp-content/uploads/2020/07/1529897773-State-of-the-AONB-Report.pdf)
3. <https://www.clwydianrangeanddeevalleyaonb.org.uk/wp-content/uploads/2020/07/1529897773-State-of-the-AONB-Report.pdf>

Employment and Businesses

Potential impact – Mining and Extraction

More Restrictive Planning Environment

National Park designation brings significant planning restrictions on mineral development, including new quarries or extensions to existing sites. This reduces the likelihood of new mineral development in parts of the Candidate Area that are not already subject to equivalent protections. According to Planning Policy Wales (Edition 10, Dec 2018)¹, minerals development in National Parks and other protected areas should only occur in exceptional circumstances and must pass rigorous public interest tests (para. 5.14.35). As a result, even in areas with safeguarded Category 1 or 2 minerals, future extraction will be highly constrained, creating potential conflict between quarrying interests and the priorities of environmental protection and landscape conservation.

Mining is already restricted in the northern part of the Candidate Area due to the existing National Landscape designation. In addition, a significant portion of the Candidate Area falls within a Special Area of Conservation (SAC), which are subject to restrictions protecting the ecological integrity of these sites. For instance, any proposed mineral development must undergo a Habitats Regulations Assessment (HRA) to determine the impact on the designated site and there are additional restrictions to prevent increases in nutrient levels².

Around half of the Candidate Area is already covered by environmental designations, meaning much of the landscape is subject to high levels of planning control. Designating the entire area as a National Park would not alter the existing framework for areas already designated but would introduce

stronger and more consistent planning restrictions across parts of the region that are not currently protected, ensuring a unified approach to development control. Areas currently outside existing designations, such as the south-east section—which contains Category 2 mineral deposits including slate (purple), igneous rock (red), and sandstone (orange) (see Figure 3.5)—would be most affected. These areas, previously less restricted, would become part of a more prohibitive extraction environment, significantly limiting the potential for future mineral development.

Impact on Employment and Businesses

Figure 3.6, produced by the British Geological Survey, illustrates the distribution of active, ceased, dormant, and inactive mines and quarries across Wales. Within the Candidate Area, a small number of active sites remain, including Maes Mynan Quarry (sand and gravel) and Hendre Quarry, Fron Haul Quarry, and Halkyn Quarry (aggregates and slate) located in the north and near the border of the proposed area. In the central part of the Candidate Area, Moel y Faen Quarries Tip (aggregates) and Berwyn Slate Quarry (slate) are also operational. However, the majority of mineral sites in and around the area are ceased or inactive, reflecting a long-term decline in extractive industries. With relatively few active operations, current employment in the mineral sector is already limited. As such, National Park designation would likely have limited immediate impact on jobs but could accelerate the trend towards growth in other sectors such as tourism.

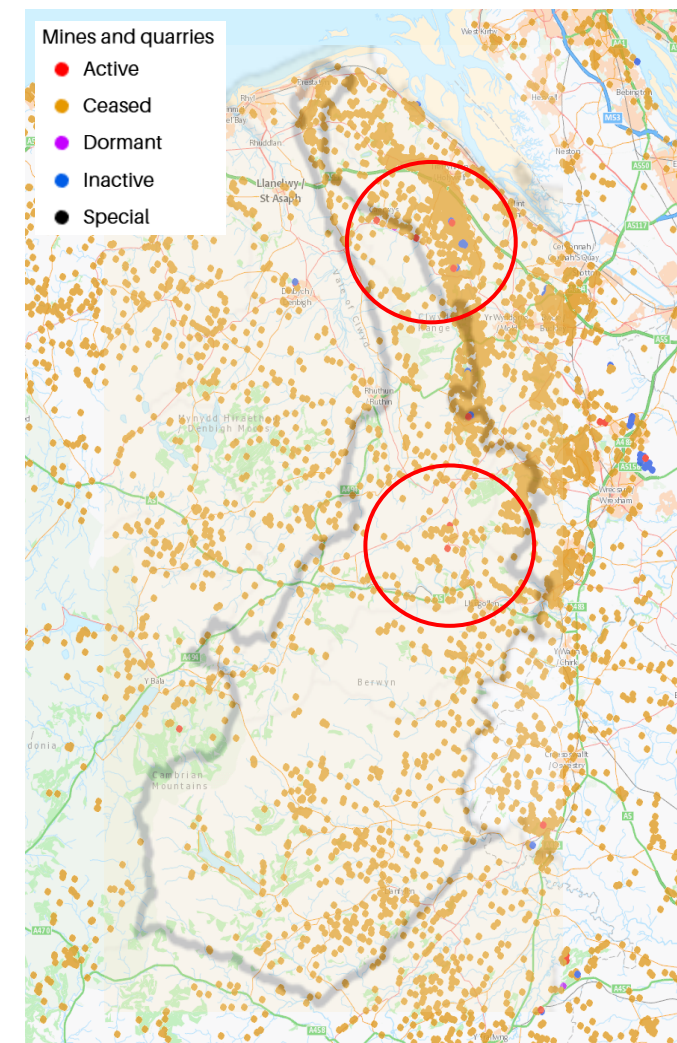


Figure 3.6. Active and Inactive quarries and mines (Source: [BGS](#))

1. <https://www.rtpi.org.uk/media/2239/planning-policy-wales-edition-10.pdf>
 2. <https://naturalresources.wales/guidance-and-advice/business-sectors/planning-and-development/our-role-in-planning-and-development/advice-to-planning-authorities-for-planning-applications-affecting-phosphorus-sensitive-river-special-areas-of-conservation/?lang=en>

Employment and Businesses

Summary of potential impact

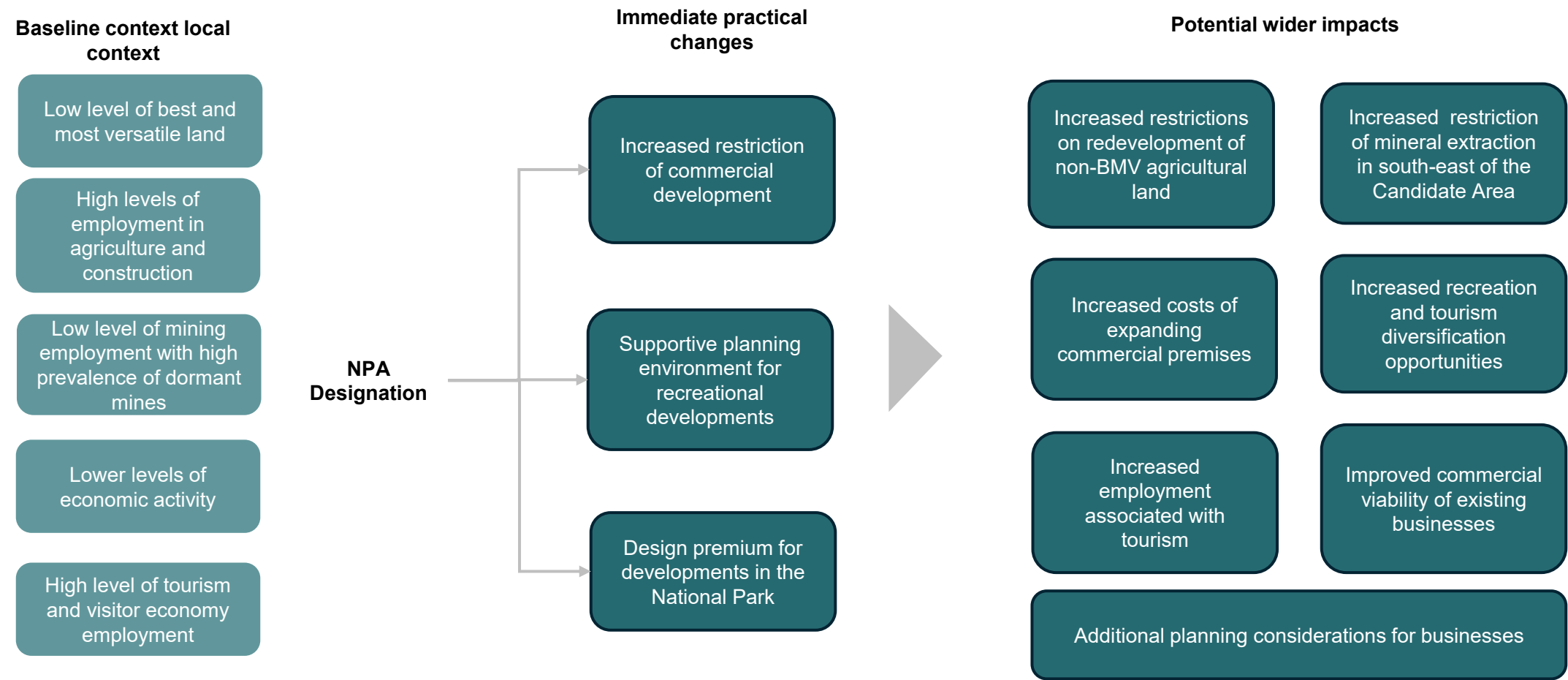


Figure 3.7. Wider Economic Impact for Employment and Businesses (Source: Arup)

Property

Baseline conditions

There are approximately 18,600 dwellings in the Candidate Area which represents 1.3% of dwellings in Wales. For comparison, Snowdonia National Park has approximately 13,000 homes¹. A greater share of dwellings within the Candidate Area are owned outright or with a mortgage (72.0%) compared to the Welsh average of 66.1%. Census 2021 data shows that homeownership is also higher in existing UK National Park than elsewhere in England and Wales. Social renting is less common in the Candidate Area, likely due to its rural setting. Rural areas often face shortages in social housing. This shortage contributes to long waiting lists and forces some residents to leave their communities².

High levels of holiday home ownership are a challenge for parts of North and mid-Wales. Table 3.7 outlines the total holiday homes per local authority. Powys, the main local authority within the National Park Candidate Area, has 740 holiday homes, ranking 5th out of 22 Welsh local authorities. Denbighshire, covering the next largest area, has 335 holiday homes, ranking 9th. Although Gwynedd has the highest second home ownership rates, it only covers 1% of the Candidate Area.

Table 3.7. Number of Holiday Homes (Source: [ONS 2021](#))

Local Authority	Number of Holiday Homes (2021)
Powys	740
Wrexham	60
Flintshire	160
Denbighshire	335
Gwynedd	2,590
Wales	10,070

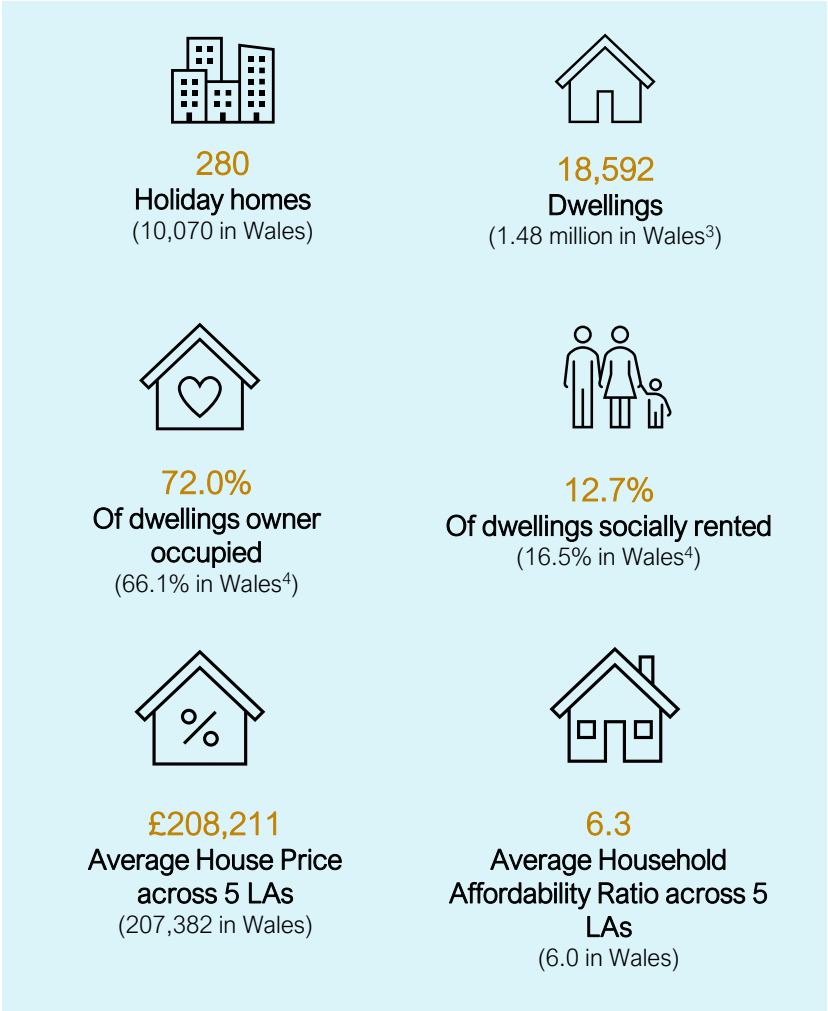
1. [Snowdonia-State-of-the-Park-Report.pdf](#)
2. [An Evaluation of the Rural Housing Enablers in Wales: Literature Review](#)
3. [Dwelling stock estimates: as at 31 March 2023 \[HTML\] | GOV.WALES](#)
4. [Household characteristics by tenure, England and Wales - Office for National Statistics](#)

Based on the proportion of each local authority that falls within the Candidate Area, it is estimated that approximately 280 holiday homes are located within the proposed National Park boundary.

An analysis of average house prices across the five local authorities within the Candidate boundary (Table 3.8) shows a mixed picture. Powys and Flintshire both have average house prices above the Welsh average of £207,382, while the other three local authorities fall below this benchmark. When averaged across all five authorities, the resulting figure is £208,211—closely aligned with the national average. In terms of housing affordability, Powys—the main local authority within the Candidate Area—has a ratio of 7.03, which exceeds the Welsh average and indicates comparatively poorer affordability. In contrast, Denbighshire, the next largest authority, has a lower affordability ratio, reflecting better housing affordability. Overall, the average affordability ratio across the five authorities is slightly above the national average, suggesting moderate affordability challenges in parts of the Candidate Area.

Table 3.8. Average House Prices (Source: [UK House Price Index](#))

Local Authority	Average House Prices 2025 (£)	Housing Affordability Ratio (2024)
Powys	235,878	7.03
Wrexham	202,484	7.49
Flintshire	215,481	5.04
Denbighshire	191,221	5.75
Gwynedd	195,991	6.36
Average of 5 local authorities	208,211	6.3
Wales	207,382	6.0



Property

Potential impact

House price premiums

Average house prices within National Park boundaries are generally higher than surrounding areas. Analysis by Nationwide found that properties located within a National Park command, on average, a 25% price premium compared to similar properties outside these areas — equivalent to approximately £66,700 based on current UK average house prices¹. However, a Lloyds Bank National Park Review (Table 3.9), showed there is considerable variation between the premium (and associated price to earnings ratio) across National Parks.

There are many factors that could explain the observed premiums. By definition, National Parks are located in areas of natural beauty that are likely to be attractive locations to live. They come with planning protections that may limit supply and therefore increase prices. The housing stock in these areas also tends to consist of older, larger properties, often with additional land. Around a quarter of homes in England and Wales's National Parks were built before 1900².

Premiums in Wales

In Wales, the premium is generally lower and more variable. Pembrokeshire Coast has the highest premium at 55%. Bannau Brycheiniog follows, with a 4% premium, still below levels observed in English National Parks. Properties within Eryri National Park do not appear to attract a price premium.

The relationship with the 'coastal price premium' is a significant consideration in Wales. Pembrokeshire Coast is the only Welsh National Park with a significant house price

premium and the only National Park in the UK designated primarily for its coastal landscape. It is especially desirable to second-home buyers. Coastal properties have outperformed the general UK housing market and there is a clear price premium for properties within 100 metres of the coast³. Coastal properties in Wales show a 13% price premium with northern Anglesey and southern Gower as popular coastal destinations³.

Policies to limit price premiums

NPAs can implement policies to limit price premiums. Eryri National Park implements planning and policy measures that may contribute to its limited house price premium. Its Local Development Plan prioritises housing for local communities, with new development typically limited to small-scale or affordable homes for local residents⁴. Through Section 106 agreements, the Park Authority requires occupants to meet local eligibility criteria, defined as having lived or worked full-time in the qualifying area for at least five continuous years⁵.

At a national level, the Welsh Government has announced changes to Land Transaction Tax that primarily target purchasers of additional residential properties, such as second homes and buy-to-let investments. At a local level, local authorities in Wales can charge council tax premiums of up to 300% on second homes and long-term empty properties, as enabled by the Local Government Finance Act 1992 and amended by the Housing (Wales) Act 2014. Additionally, Article 4 Directions can be applied to remove permitted development rights, requiring planning permission to convert a primary residence into a second home or holiday

let. There is some evidence that these measures are already having an impact on house prices⁵. These policies could play a role in explaining why house price premiums in Welsh National Parks are lower than those in England.

Overall assessment

Establishing a definitive view of potential house price impacts from National Park designation is challenging. Whilst the headline figures suggest a premium in National Parks, the underlying picture is more complicated, and the trend less pronounced in Wales. Several confounding factors are likely to play a role in driving premiums, notably coastal proximity, which does not apply to the Candidate Area given it is inland. Moreover, there are several policies available to limit house price pressures, and these could be implemented across the whole National Park by an NPA if needed.

Table 3.9. National Park House Price Premiums (Source: [Lloyds-2020](#))

National Park	Price premium to county (%)	Price to earnings ratio (2020)
Lake District	122	12.0
Peak District	109	11.7
New Forest	107	16.7
South Downs	83	14.9
Exmoor	31	10.4
Yorkshire Dales	23	7.9
Dartmoor	15	9.4
North York Moors	14	8.1
Pembrokeshire Coast	55	9.0
Eryri	0	6.8
Bannau Brycheiniog	4	7.5
England & Wales	N/A	7.9

1. [25% house price premium in National Parks](#)
2. [How much does it cost to live in a National Park in the UK?](#)
3. [Savills UK | The UK Waterfront Market: Coastal Focus](#)
4. [Adopted Eryri Local Development Plan](#)
5. [BBC News | House prices plunge as council acts on second homes](#)

Property

Summary of potential impact

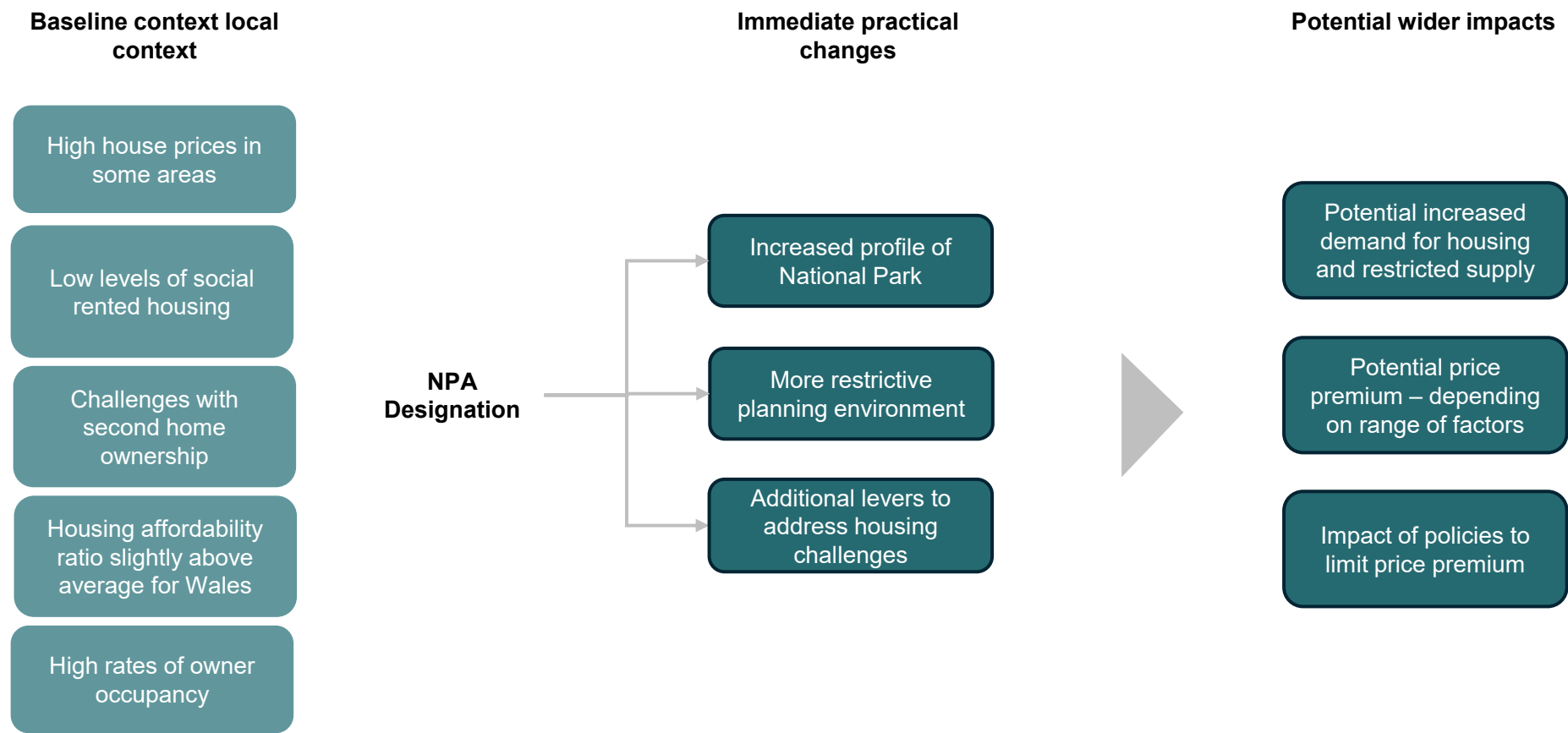


Figure 3.8. Wider Economic Impact for the property sector (Source: Arup)

Transport

Baseline conditions

Figure 3.9 illustrates the local bus and rail network in North East and Mid-Wales, alongside built-up area data. These built-up areas are defined as “irreversible urban in character,” typically representing settlements the size of a village, town, or city, and include land parcels of at least 20 hectares¹. Within the Candidate Area, the main built-up settlements include Cilcain, Gwernymynydd, Llanarmon-yn-Iâl, Llangollen, Llanfyllin, Pontrobert, and Meifod. The population is dispersed across the region, posing challenges for the delivery of public services such as healthcare, education, waste management, and other local authority functions. This dispersed settlement pattern also contributes to high levels of car dependency. Nevertheless, the area is surrounded by several major population centres—including Liverpool, Manchester, and Birmingham—offering significant potential for sustainable tourism development and investment in improved public transport connections.

There are limited local bus networks running through the south of the Candidate Area. The Llangollen Railway is a 16km scenic heritage railway that runs through the Clwydian Range and Dee Valley Natural Landscape, although it serves primarily as a heritage and tourist attraction. The lack of public transport infrastructure further contributes to high car use within the area.

An above-average proportion of people in the Candidate Area travel to work by car, largely due to limited alternative transport options and longer distances to employment. In rural communities, car ownership is often essential—not just for commuting, but also for accessing shops, services, and

schools. Within the Candidate Area only 0.7% of residents cycle to work—below the national average of 1.3%—likely due to fast, narrow roads with sharp bends and a lack of dedicated cycle lanes. Car ownership levels are also notably high, with 51.2% of residents owning two or more cars or vans (38.8% in Wales).

The proposed National Park enjoys strong road connectivity due to its proximity to the English border and major urban centres in northwest England. Key routes such as the A55, A5, M56, M62, and M53 provide direct regional access, while roads like the A5151, A541, A525, and A539 link towns including Wrexham, Mold, Denbigh, Ruthin, and Llangollen. These roads support both local communities and popular destinations such as the Ceiriog Valley and Pontcysyllte Aqueduct. As shown in Figure 3.9, the south is well served by B roads, and the north by a mix of A and B roads, ensuring good internal connectivity for residents and visitors alike.

However, the condition of local roads in Wales has deteriorated in recent years, as councils face growing repair backlogs and insufficient funding to maintain key routes. The nationwide backlog of necessary repairs now totals £953.7 million, with local authorities estimating it would take 13 years to address⁷. Limited investment in the development and upkeep of essential infrastructure could pose a significant challenge to long-term connectivity, economic resilience, and the viability of sustainable transport options within the proposed National Park.

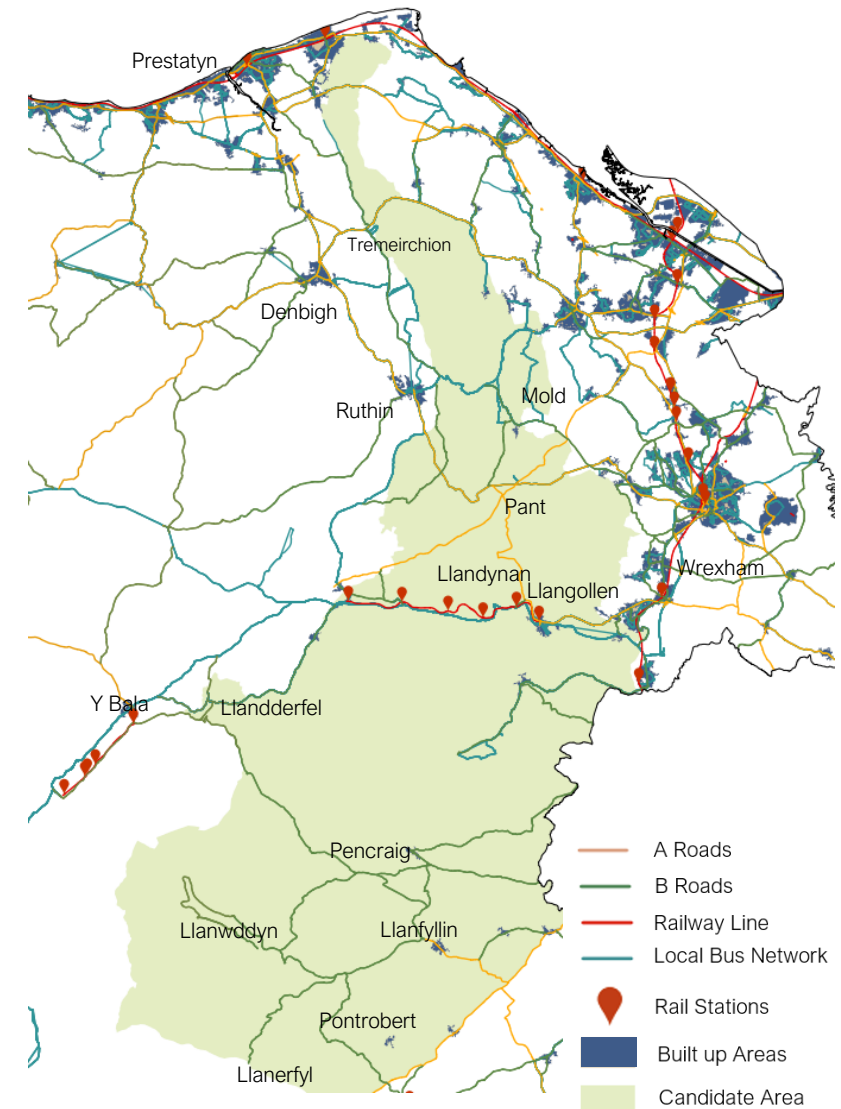


Figure 3.9. Local Transport Context and Built-Up Areas (Source: ONS and Arup)

Transport

Baseline conditions

High Level Road Network Review

Typical traffic data was obtained from Google (Google Maps API) to give an indication of possible vehicle traffic conditions around the proposed site. 6pm on Friday was chosen as a peak period. Although this is a non-typical peak period for traffic analysis, the day and time chosen reflect the leisure usage, with many recreational users likely to travel on Friday evening for weekend trips.

Figure 3.10 shows largely fast-moving traffic within the study area, indicating a lack of congestion at this time. The area around Deeside to the north-east of the site shows some congestion (circled red on Figure 3.10). The A494 Welsh Road southbound is particularly congested. However, there is an alternative route towards the site via the A55 North Wales Expressway which experiences less congestion. The North Wales Expressway passes through the north of the site.

Both roads are dual carriageway trunk road and hence suited to carrying strategic traffic, providing resilience if further trips were added to the network. Other roads in proximity to the site are largely single carriageway, 50 mph speed limit roads where vehicles may have lower speeds due to the regular bends. The centre of the Candidate Area is served by the A5, a major trunk road from London to North Wales. This road shows limited congestion at the assessed time. It is a single carriageway way that is broad well maintained but has some sharp turns between Llangollen and Berwen.

The road network to the south of the Candidate Area is particularly limited. This area has very limited road transport infrastructure. What is present is primarily narrow single lane B roads or ‘country lanes’ that are not suitable for larger volumes of traffic.

Local road network pressures

There are existing pressures on the local road network, particularly around Pistyll Rhaeadr waterfalls (to the northwest of Llanrhaeadr-ym-Mochnant along ‘Waterfall Street’), where car access is a well-documented issue. This has been a source of disruption and concern for local residents for many years, particularly during peak visitor periods. It is important to recognise that this problem persists largely due to a lack of effective management under current arrangements. This context suggests that any future changes in visitor numbers would need to be accompanied by a coordinated strategy for access and traffic management, potentially supported through enhanced planning and governance mechanisms such as those available through National Park designation.

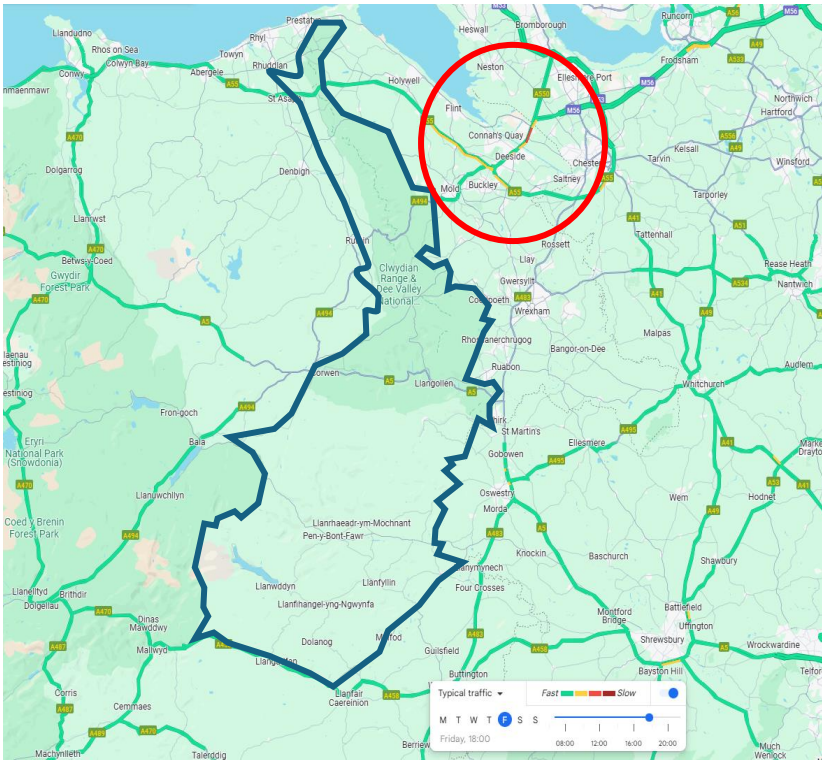


Figure 3.10. High-level Road Network Review (Source: Google)

Transport

Potential impact

National Park designation is likely to bring increased visitor numbers and greater public interest in the region, which will place new demands on existing transport infrastructure. This may lead to increased traffic congestion, pressure on rural roads and greater demand for parking especially at popular scenic spots. Higher visitor numbers may strain public transport services unless investment is made to improve connectivity and frequency.

Impact of High Car Use

Cars are important for sightseeing in National Parks, but at busy times visitors and their cars have an impact on the environment and the quality of life for local residents. Evidence from the New Forest National Park shows that high car use is linked to high volumes of traffic, verge parking, animal accidents and failure to observe speed limits¹. Similarly, in the Bannau Brycheiniog National Park, in the most popular areas the traffic congestion has created frustration for local residents. High car use was also found to cause damage to vegetation. A case study on traffic issues in the Lake District National Park also found the negative impacts of increasing traffic volumes included noise, pollution, reduced road safety and hazards to vulnerable road users, inconvenience in accessing work, leisure and services and visual intrusions². The main method of transport to and around National Parks is by car, with around 90% of visitors to the three existing National Parks in Wales travelling by private car³. High volumes of visitors in peak seasons, coupled with smaller roads and available parking, can lead to

congestion, and contribute to a poor quality visitor experience.

Sustainable Travel Opportunities

High car usage in National Parks contributes significantly to carbon emissions—visitor travel accounts for 41% of total emissions in the Lake District⁴. To reduce this impact, greater use of public transport and active travel is needed. Some parks are already taking action: the Peak District offers traffic-free, multi-user routes and has a cycling strategy in place. Cycling, now the most popular activity among residents (27%), supports health, carbon reduction, and better local access⁵. In the Lake District, the £6.9 million Go Lake Travel programme (2011–2015) cut vehicle mileage by 14.5% (4.8 million miles) and reduced carbon emissions by 7.8%, saving 41,000 tonnes of CO₂⁶.

Several existing National Parks have introduced visitor bus services, with evidence from the New Forest National Park Authority and the Department for Transport showing multiple benefits. These services help reduce traffic volumes and visual clutter, thereby preserving the tranquillity and natural character of the area. They also stimulate the local economy—surveys from the Gower Explorer and Dales Bus show that every £1 of public subsidy generates £3 in local spending⁷. Visitors travelling by bus tend to spend more time in villages and attractions, enhancing both their experience and economic impact. Additionally, these services improve access to the countryside, particularly for the elderly and low-income families.

Planning Implications

Local Development Plans for the existing National Parks in Wales include strategic policies aimed at promoting sustainable transport and guiding development accordingly⁶. These plans prioritise developments that are easily accessible by public transport, walking, or cycling, helping to reduce reliance on private cars. Planning permission is unlikely to be granted for proposals that would significantly worsen traffic congestion or generate traffic at inappropriate times—such as late at night or in quiet residential areas. Instead, developments that support low-carbon travel and enhance connectivity through footpaths, cycle routes, and public transport are encouraged.



Cycling in the Lake District (Source: [skedaddle](#))

1. [Cynllun-Datblygu-Lleol-Saesneg.pdf](#)
2. [Impacts of tourism : Lake District National Park](#)
3. [Brecon Beacons Transport Strategy - Integrated Transport Planning](#)
4. [National Parks: Four big transport issues and how to fix them – FIT](#)
5. [Cycle strategy: Peak District National Park](#)
6. [Sustainable tourism initiatives : Lake District National Park](#)
7. [Visitor_Bus_Toolkit.pdf](#)

Transport

Potential impact

Strategic role of the NPA

The NPA would have a clear responsibility to develop a strategic transport plan that aligns with the park's purposes—conserving the natural environment, promoting understanding and enjoyment, and supporting local communities. This would enable the NPA to coordinate transport infrastructure, active travel initiatives, and visitor movement strategies at a landscape scale, ensuring they support rather than undermine park objectives.

For instance, Bannau Brycheiniog has a transport strategy for visitor and residential travel across the National Park. A wide number of transport authorities, transport operators, leisure and tourism organisations collaborated to produce a shorter-term action plan and longer-term initiatives to align with Welsh Government / Transport for Wales net zero ambitions relating to transport¹.

Legal duty on public bodies – Section 245

Section 245 of the Levelling Up and Regeneration Act 2023 introduces a legal requirement for public bodies and statutory undertakers to actively support the purposes of National Parks and National Landscapes (collectively known as Protected Landscapes) when making decisions that affect these areas². This duty applies to a wide range of organisations, including local authorities, National Highways, and utilities providers.

In practice, this means that these organisations must take the National Park's objectives into account—particularly when

planning transport, infrastructure, and development projects. This new duty could enhance coordination between transport agencies, local councils, and the National Park Authority, encouraging more integrated planning of rural bus routes, cycling infrastructure, and transport hubs that benefit both local communities and visitors.



Eryri local bus (Source: [TfW](#))

1. Brecon Beacons Transport Strategy - Integrated Transport Planning

2. Levelling-up and Regeneration Act 2023

Transport

Summary of potential impact

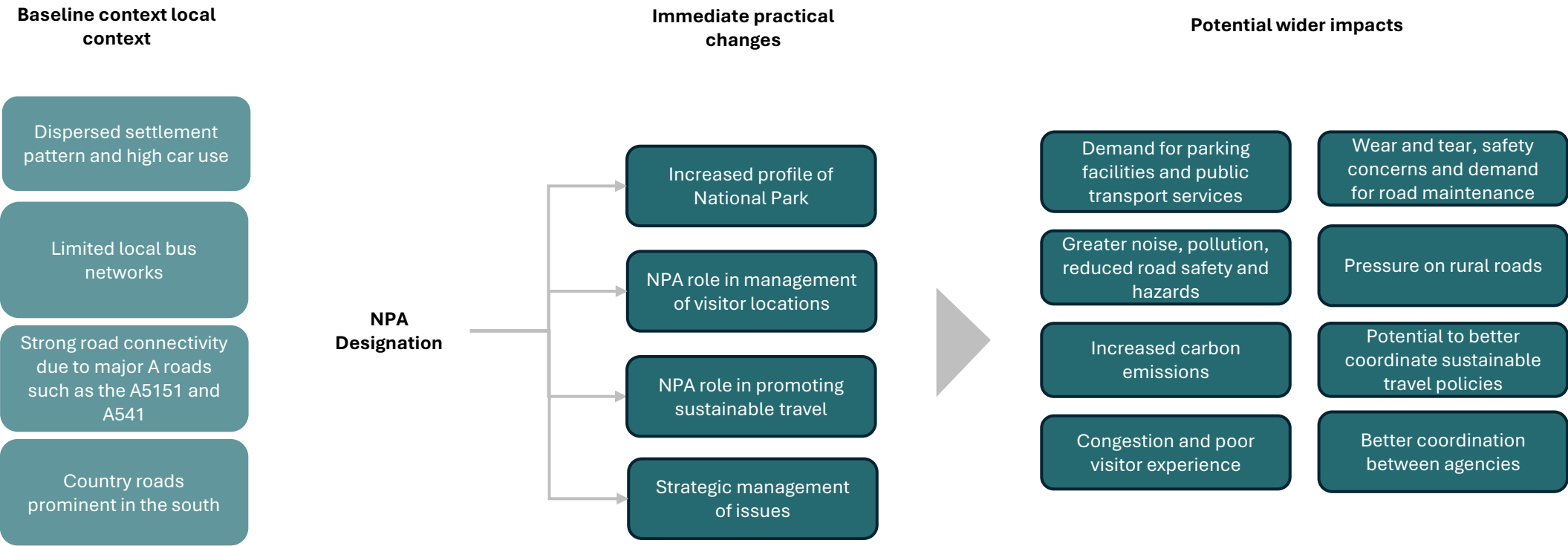


Figure 3.11. Wider Economic Impact for the transport sector (Source: Arup)

Social, culture and health

Baseline conditions

Approximately 37,000 people live within the proposed Candidate Area, representing around 1.2% of the total population of Wales. As shown in Table 3.10, this would make the new park the most populated of all existing National Parks in Wales.

Table 3.10. National Park populations (Source: [ONS](#))

National Park	Population (2021) ⁵
Pembrokeshire Coast	20,922
Bannau Brycheiniog	33,485
Eryri National Park	24,416
Proposed new National Park	Approx 37,000

The age profile of residents within the proposed boundary indicates a higher-than-average proportion of people aged 65 and over, and a lower-than-average proportion of those under 18. This demographic pattern aligns with trends seen in the existing National Parks across Wales and England, where populations tend to be older than the national average. For comparison, 33.1% of the population in Pembrokeshire Coast National Park are aged 65 or over¹. This ageing trend is likely to increase demand for healthcare and social services, as well as for housing that is suited to older residents. Labour shortages could also contribute to the threat to local farming traditions and practices.

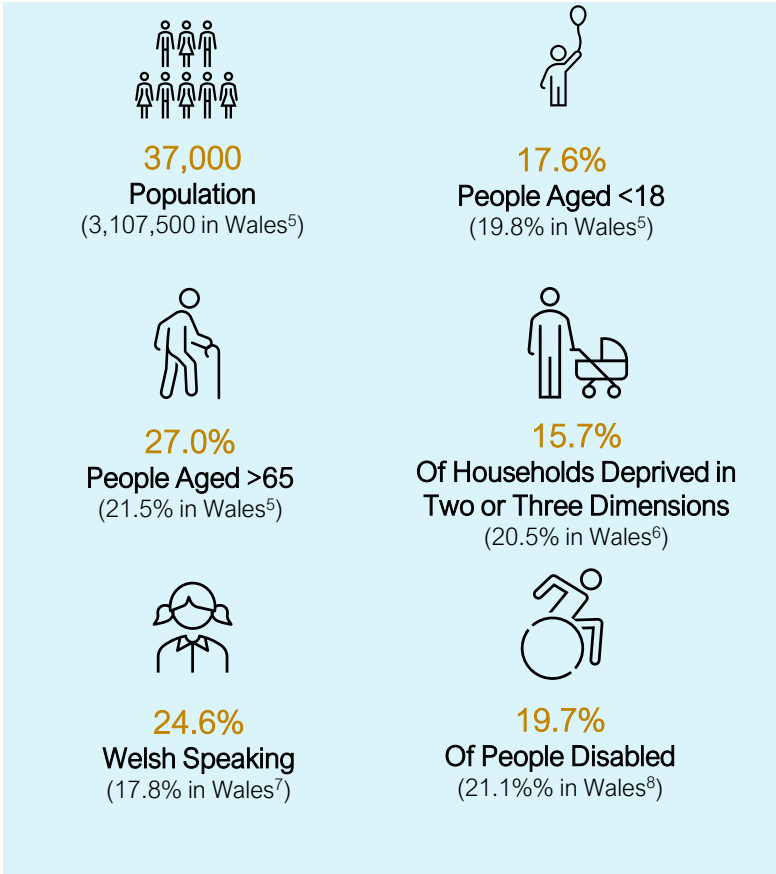
1. [National Park residents, England and Wales - Office for National Statistics](#)
2. [National Park facing mass exodus of young people over affordability issues | UK | News | Express.co.uk](#)
3. [An independent review of housing in England's AONBs-2012-17.pdf](#)
4. [Population and household estimates, Wales - Office for National Statistics](#)
5. [Household deprivation - Census Maps, ONS](#)
6. [Welsh language, Wales - Office for National Statistics](#)
7. [Disability, England and Wales - Office for National Statistics](#)

Many UK National Parks have seen young people move away to more urban areas due to challenges such as unaffordable housing, limited job opportunities, and a lack of essential amenities like reliable broadband, public transport, and social facilities³. Should the trend be for younger people to leave this could negatively impact sectors such as hospitality and tourism.

Households in the Candidate Area experience fewer instances of deprivation across two or three dimensions compared to the national average. Generally, residents in or near National Parks tend to face lower levels of deprivation. A study by Campaign to Protect Rural England (CPRE) found that almost half of England : socially deprived areas are more than 15 miles by road from 10 National Parks and 46 areas of outstanding natural beauty (AONB)⁴.

A significant proportion of residents in the proposed Candidate Area (24.6%) are Welsh speakers, which is notably higher than the national average of 17.8%. Welsh language proficiency tends to be more common in North Wales and in rural areas. According to the 2021 Census, the highest concentrations of Welsh speakers are found in Gwynedd and the Isle of Anglesey. The proportion of individuals in the Candidate Area identified as disabled under the Equality Act—meaning their day-to-day activities are either limited a lot or a little—is slightly lower than the national average. In the Candidate Area, 19.7% of the population falls into this category, compared to 21.1% nationally. In comparison, the proportion of the population identified as disabled in 2021 was 16.1% in Eryri, 17.4% in

Bannau Brycheiniog, and 17.5% in the Pembrokeshire Coast National Park¹.



Social, culture and health

Potential impact

Health related benefits

There is evidence that both natural and built environments significantly influence health and well-being. The rich natural environments in National Parks can encourage more outdoor activity, leading to healthier lifestyles, reduced NHS healthcare costs, and stimulated economic growth. According to the Wildlife Trust, nature-based health and wellbeing initiatives, often called 'green prescribing,' save the NHS and public services approximately £635 million annually¹. Research also shows that visiting National Parks supports general health promotion and offers particular benefits for people managing long-term conditions such as heart disease, dementia, diabetes, and mental health issues³.

As 'health assets,' National Parks offer access to resources that help individuals and communities maintain their health and wellbeing. National Parks in Wales are well positioned to support the objectives of the Well-being of Future Generations Act, which seeks to make Wales prosperous, resilient, healthier, more equal, with cohesive communities and a vibrant culture alongside a thriving Welsh language.

Economic impact of health benefits

Figure 3.12 illustrates the percentage of individuals in Wales who report being in poor health. The data shows that areas within existing National Parks have a lower proportion of people in bad health, suggesting that residents of National Parks generally experience better health compared to those living elsewhere in the country.

Researchers at the University of York estimated that for every £1 invested, the North York Moors National Park generates approximately £7.21 of health and well-being benefits for visitors and volunteers. Other groups who may also experience health and wellbeing benefits, such as school children, fell outside of the scope of the report, so the value is likely to be an underestimate of the social return on investment¹.

Similarly, a report by National Parks England found that every £1 of government funding to NPAs provides £5.70 in public health benefits². Many of these benefits would occur without needing to designate a new National Park, but it is likely that an NPA is particularly well placed to coordinate activity that could boost health and well-being outcomes.

Mental health benefits

Exposure to nature is known to improve mental health and wellbeing, offering significant economic benefits. Poor mental health currently costs the Welsh economy at least £4.8 billion annually, according to a Swansea University report⁵. Establishing a new National Park in Wales could enhance access to natural environments, helping to reduce these costs. Supporting this, a study from Australia found that without protected natural areas, government expenses related to poor mental health would be 7.5% higher⁴. This suggests that designating a new National Park could play a role in improving public mental health and easing economic pressures associated with it.

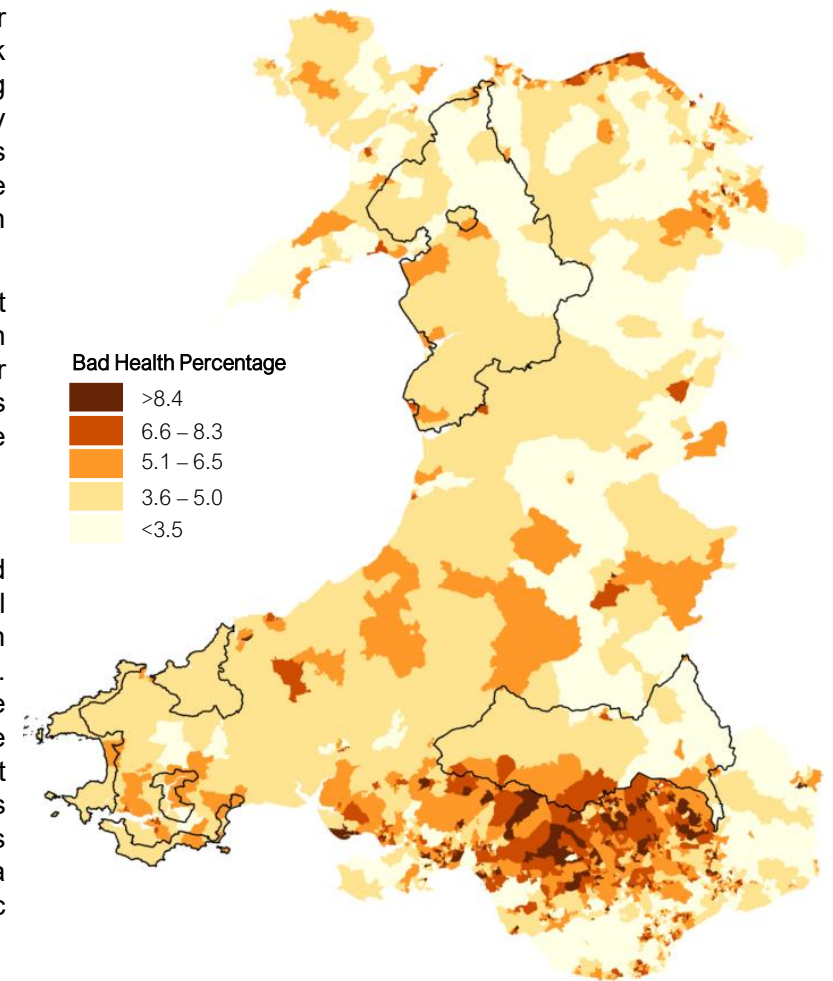


Figure 3.12 Percentage of individuals reporting poor health (Source: Arup)

1. [Researchers assess the value of National Parks to our health and happiness - News and events, University of York](#)
2. [Our Value. Our Potential. — National Parks England](#)
3. https://www.beacons-npa.gov.uk/wp-content/uploads/NPW_Health_and_Well-being_paper_E.pdf
4. <https://library.sprep.org/sites/default/files/science-environment-policy.pdf>
5. <https://www.mentalhealth.org.uk/sites/default/files/2024-06/Welsh%20MH%20Strategy%20Consultation%202024%20-%20MHF%20response.pdf>

Social, culture and health

Potential impact

Cultural ecosystem services

National Parks are key locations for cultural and heritage access which contribute to cultural ecosystem services. Cultural assets can be described as ‘*cultural factors that contribute to the vitality and robustness of the people living in a community*’. Each of the three existing National Parks has its own distinct culture and attributes; for instance, Bannau Brycheiniog hosts cultural events that celebrate local traditions, music and arts and the area has a vibrant arts and crafts scene. Similarly, Eryri is home to numerous historical landmarks, including prehistoric sites, Roman forts and medieval castles. The Park is also a stronghold of Welsh culture and traditions, and rich in myths and legends.

Historic England found that England’s heritage sector’s direct contribution to the UK’s GVA in 2022 stood at £15.3 billion¹. This is equivalent to 0.80% of England’s total Gross Value Added (GVA). England’s heritage sector supported £44.9 billion in 2022 when considering the combined effects of the direct GVA (£15.3 billion), indirect GVA (£14.9 billion) and induced GVA (£14.7 billion) contributions. Overall, for every £1 of GVA that the sector directly generates, an additional £1.93 is added into the wider economy. This is driven by indirect and induced spending impacts (from the supply chain), which occur when sector employees, visitors and businesses spend in the wider economy¹.

Similarly, research by the Department for Culture, Media and Sport (DCMS) delivered in partnership with the University College London’s Social Biobehavioural Research Group,

values the improvement in UK adults’ general health from engaging with culture and heritage at just over £18bn a year, with additional financial benefits for other more specific aspects of mental and physical illness. Frontier estimates that the health and wellbeing benefits associated with an individual adult engaging with culture and heritage every few months or more (e.g. visiting a museum, gallery or watching a concert) are worth around £1,000 per year². At the population level, societal benefits, which include increased productivity due to better health, are worth just over £8bn per year³.

The Candidate Area contains a wealth of historic and cultural assets, including Offa’s Dyke, Cistercian abbeys, medieval farmed landscapes, industrial heritage, and iconic sites like Chirk Castle and Craig Rhiwarth. These features, along with strong ties to Welsh language, literature, and folklore, contribute to the area’s distinct identity. Bringing these together within a National Park designation with better resourcing and coordination could help to increase the benefits stemming from these assets.

Welfare Value

The ORVal recreation tool provides estimates of the welfare value associated with existing National Parks in Wales. In ORVal the welfare value of a site is a monetary estimate of the extra welfare enjoyed by adults from being able to access the site. The welfare derived from visiting a green space is modelled as a trade-off between the benefits of enjoying time at the site and the costs incurred in getting there. In the

model, on-site benefits depend on a green space’s size, land cover, water features, designations, points of interest, and the socioeconomic characteristics of visitors. Table 3.11 compares current welfare values across the existing National Parks and the Candidate Area. The Candidate Area’s welfare value is similar to Eryri’s but lower than those of the other two Parks. Bannau Brycheiniog’s relatively high welfare value likely reflects strong visitor numbers, boosted by its proximity to major population centres such as Cardiff, Swansea, and the West Midlands. As ORVal uses a travel cost method, sites near large populations see more visits and higher welfare values. Additionally, visitors to Bannau Brycheiniog may have a higher willingness to pay, further raising its estimated value. National Park designation could increase visits to the Candidate Area, enhancing its welfare value.

Table 3.11. Welfare Value (Source: leep.exeter.ac.uk)

National Park	Welfare Value (£ per year)
Eryri	11,293,078
Bannau Brycheiniog	19,915,770
Pembrokeshire Coast	15,467,118
Candidate Area	11,578,606

1. The Economic Value of the Heritage Sector | Heritage Counts | Historic England
2. Engagement in culture and heritage creates £8BN in value per year for the UK | Frontier Economics
3. New research quantifies the benefits of cultural investment – SBRG

Social, culture and health

Summary of potential impact

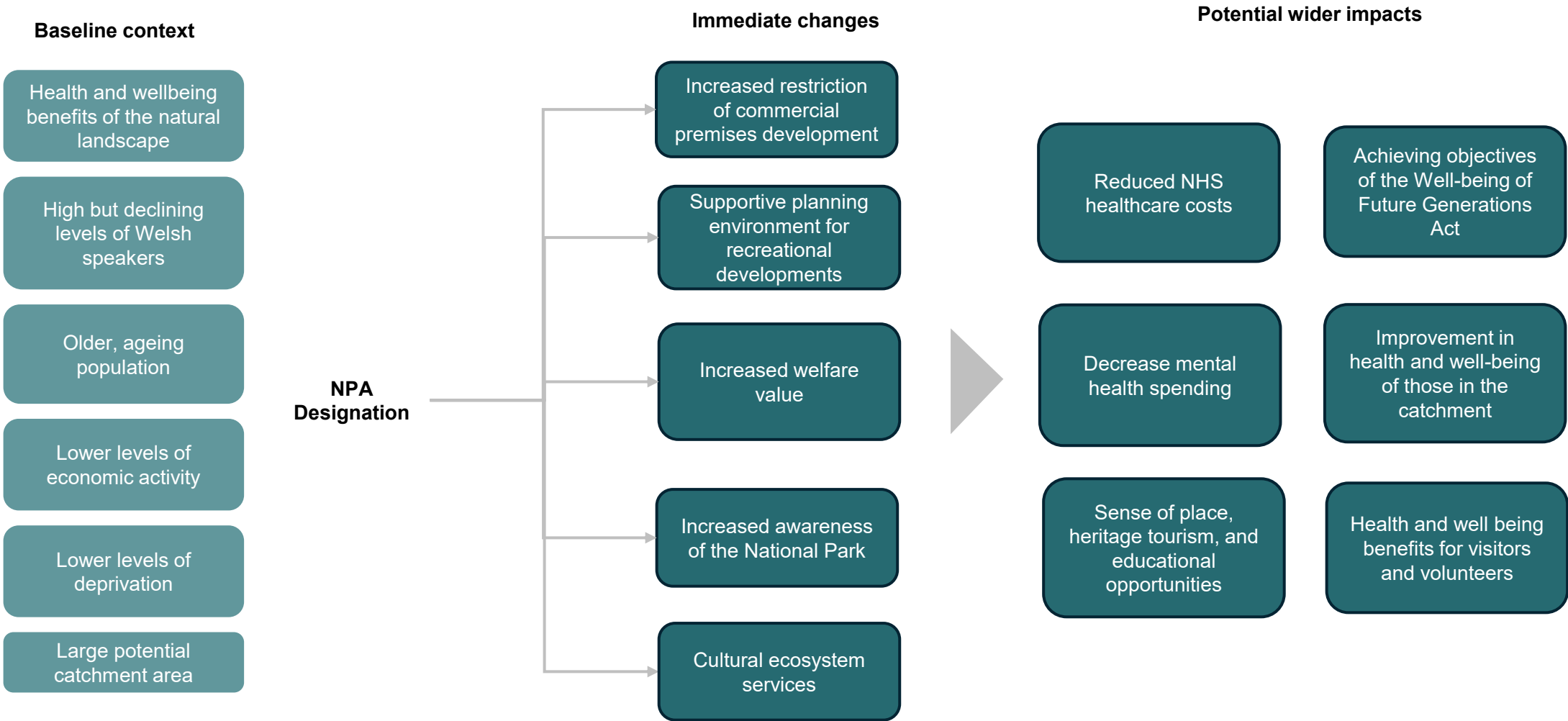


Figure 3.13. Wider Economic Impact for social, culture and health (Source: Arup)

Environment

Baseline conditions

Figure 3.14 shows the ecology of the Candidate Area, highlighting peatlands and woodlands—crucial for carbon storage and biodiversity. These habitats support climate regulation and a wide range of species. Yet, Wales has seen a 20% decline in wildlife since 1994, with 18% of species at risk of extinction and 42% of plant species found in fewer places¹. Protecting and restoring these landscapes is vital for reversing biodiversity loss and strengthening ecosystem resilience.

The peatland data shows the distribution of peat across Wales, with peat defined as having a thickness of more than 40cm of organic material within the upper 80cm of soil profile. There are significant peatlands in the south-west of the Candidate Area. The woodland data contains Forestry Commission's previous survey, the National Inventory of Woodland & Trees. This dataset shows all areas of woodland over 2ha in Great Britain and the Interpreted forest type (IFT) of those woodlands. This includes broadleaved, felled, mixed, coniferous and young trees². There are more woodlands in the south-west of the site where the Dyfnant Forest is located, on the edge of the Cambrian mountains just south of Lake Vyrnwy. It forms part of the National Forest for Wales which forms a connected ecological network running throughout Wales.

The ancient woodland data includes Ancient Semi Natural Woodland (ASNW), Restored Ancient Woodland Site (RAWS), Plantation on Ancient Woodland Site (PAWS) or Ancient Woodland Site of Unknown Category (AWSU). These trees are generally those that have been continuously

wooded since at least 1600 AD, meaning that many of these trees are over 400 years old. There are more ancient trees present in the south of the Candidate Area including in the Dyfnant Forest as well as along parts of the River Vyrnwy.

The flood risk data provides a national assessment of risk flooding from Rivers and surface water. The flood risk is categorised as:

- Low risk which means that each year, an area has a chance of flooding of between 1 in 1000 (0.1%) and 1 in 100 (1%).
- 'Medium' risk means that each year, an area has a chance of flooding of between 1 in 100 (1%) and 1 in 30 (3.3%).
- 'High' risk means that each year, this area has a chance of flooding of greater than 1 in 30 (3.3%)

There is high flood risk in areas around Lake Vyrnwy, the Afon Tanat, River Dee, and River Alyn.

The River Dee and its estuary are of high conservation value, designated as two Special Areas of Conservation (SACs) and three Sites of Special Scientific Interest (SSSIs). Notable features include floating water plantain, Atlantic salmon, lamprey, and otter. The Dee Estuary's intertidal habitats support large populations of wading birds and are also designated as a Special Protection Area and Ramsar site. Flood Risk Management Plans outline how authorities will work with communities to manage flood risk over the next six years, alongside a longer-term catchment flood management plan covering the next 50 to 100 years⁴.

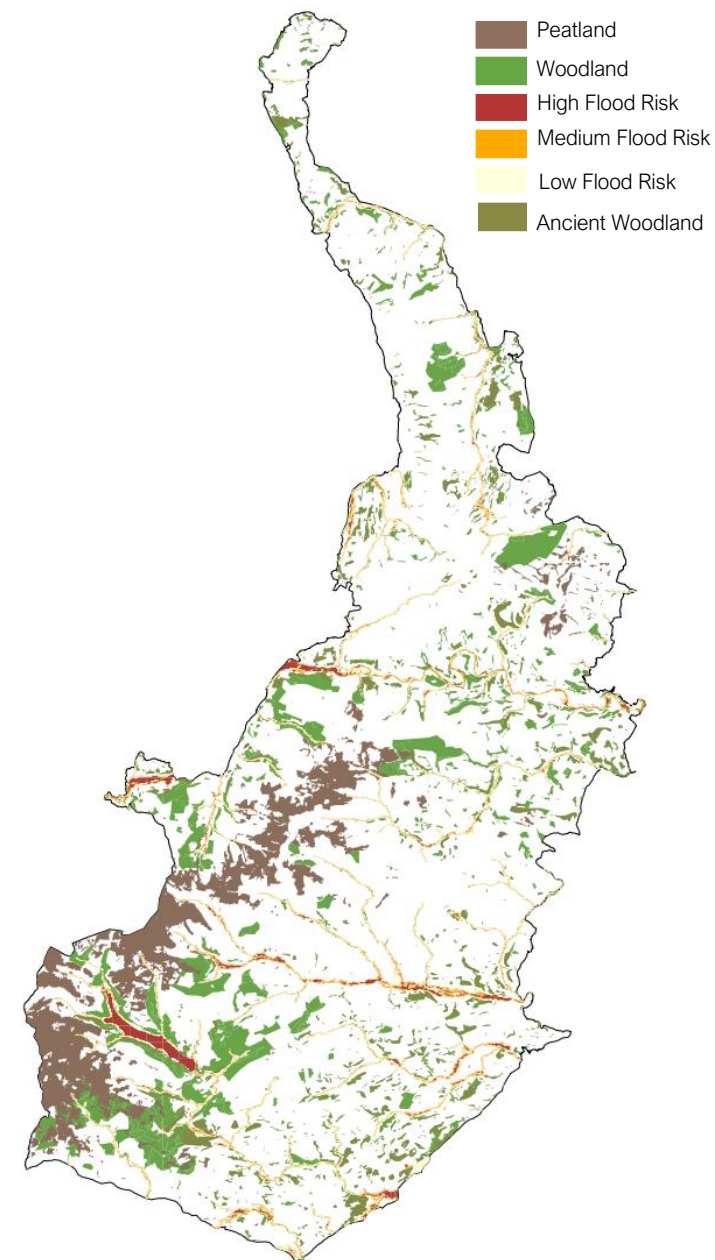


Figure 3.14. Ecology and flood risk (Source: Arup)

1. [Wales - State of Nature](#)
 2. [Understanding Ecosystem Services: Definition and Types – Decoding Biosphere](#)
 3. [Flood risk management plan](#)
 4. [River Dee: Catchment flood management plan - GOV.UK](#)

Environment

Potential impact

Overview

Natural resources play a vital role in enhancing economic prosperity and well-being. This is sometimes referred to as providing ecosystem services (ES)¹. These services include regulating activities such as water purification by wetlands, climate regulation through carbon storage, and flood control. They also include supporting services like soil formation, photosynthesis, and nutrient cycling. National Parks can enhance the function of these services through their environmental management role.

Carbon Storage and Sequestration Benefits

The two types of habitat with particular significance for carbon storage are Peatlands and Woodlands. This habitat is present in the Candidate area. We have estimated that there is approximately 16,090 hectares of woodland, 4,930 hectares of ancient woodland and 8,860 hectares of peatland.

Peatlands are highly effective carbon stores, holding more carbon in their soil than an equivalent area of forest. Although they cover only 4% of Wales, peatlands store up to 30% of the country's soil carbon². Research shows that peatlands play a crucial role in nature-based climate mitigation, storing an estimated 500 to 1,000 tonnes of carbon per hectare, making them one of the most efficient natural carbon sinks³. Restoring degraded peatlands could also prevent up to 1.91 gigatonnes of CO₂-equivalent emissions each year³.

Peatlands globally store more carbon than all the world's forests combined, but when they dry out, they release carbon and other greenhouse gases. At least 75% of the UK's peatlands are damaged and emitting emissions, so there is a great need to restore these ecosystems. Creating new National Parks in Wales could protect and restore these vital carbon sinks. For example, the Southwest Peatland Partnership is a £13 million project aimed at restoring 2,600 hectares of peatland, including areas covered by Dartmoor National Park⁵. Similarly, the Yorkshire Dales National Park has committed by 2030 to restore all degraded blanket bog/deep peat habitat to ecologically and hydrologically functioning bog that is actively sequestering and storing carbon and is being managed sustainably⁶.

Woodlands are important carbon sinks, with uptake varying by type. Fast-growing conifer plantations absorb the most CO₂ over 30 years, while native broadleaf and natural woodlands reach similar levels over time. According to a report by Scottish Forestry, lightly managed broadleaf woodland sequesters about 1.3 tCO₂ per hectare annually, compared to 4.9 tCO₂ for moderately growing conifer plantations. Evidence from the Lake District National Park found that the 28,000 hectares of woodland currently reduce greenhouse gas emissions by an estimated 165,750 tonnes each year. Establishing a new national park here could further protect and expand these woodlands, boosting their vital role in tackling climate change⁵.

The ONS has calculated an economic value for the UK's trees and woods – £382 billion⁸. This includes estimates for

trees' benefits to public health, air quality, flood regulation and urban heat regulation. Similarly, in a report valuing Wales' National Parks, the value of carbon sequestered through peat and woodland was estimated to be between £24.2m to £97.2m⁷. Protecting woodlands offers significant economic benefits, and National Parks can play a crucial role in ensuring their preservation. For example, Eryri National Park Authority has implemented a 100-year Tree and Woodland Strategy based on three core principles: safeguarding existing trees, improving woodland management, and expanding and connecting woodlands⁹.



Peatland (Source: lakedistrict.gov.uk)

1. Understanding Ecosystem Services: Definition and Types – Decoding Biosphere

2. How restoring Wales' bogs is improving water and wildfire security during dry weather | Welsh Environment News

3. <https://www.nature.com/articles/s41598-021-82004-x>

4. <https://www.dartmoor.gov.uk/wildlife-and-heritage/our-conservation-work/the-south-west-peatland-project>

5. Farming and carbon : Lake District National Park

6. D3 - Peatland Restoration - Yorkshire Dales National Park : Yorkshire Dales National Park

7. [Valuing Wales National Parks-.pdf](#)

8. UK's trees are a £383 billion asset - Woodland Trust

9. [Article - Park Authority](#)

Environment

Potential impact

Climate Change Mitigation

Changes to development and land management practices within the river catchment areas in National Parks can help reduce flood damage and its costs. The financial cost of flooding is significant, with an Environment Agency study finding that the total economic damage for all floods in England and Wales between January 2016 and November 2019 was between £504m and £924m, with a best estimate of £708m (2024 prices)¹. Climate change will affect Wales over the coming century by impacting on average temperatures, rainfall, extreme weather events, and flooding. The Environment Centre has estimated that rainfall is projected to increase in winter on average by 14% by 2050 and decreased by 16% in summer. By 2080 this could rise to 19% in winter and decrease by 20% in summer. Similarly, sea levels around Wales are predicted to rise by approximately 22cm by 2050 and 36cm by 2080. The frequency of extreme weather events is also expected to rise significantly and Storms Ciara, Dennis and Jorge in early 2020, for example, led to record rainfall and river flows across Wales and the most widespread flooding seen since 1979.

Natural Flood Management

Natural flood management is being promoted as a way of reducing flood risk. The Environment Agency's research on natural flood management concluded that river restoration, wetland creation, woodland planting, and soil management can slow runoff, enhance infiltration, and reduce peak flood

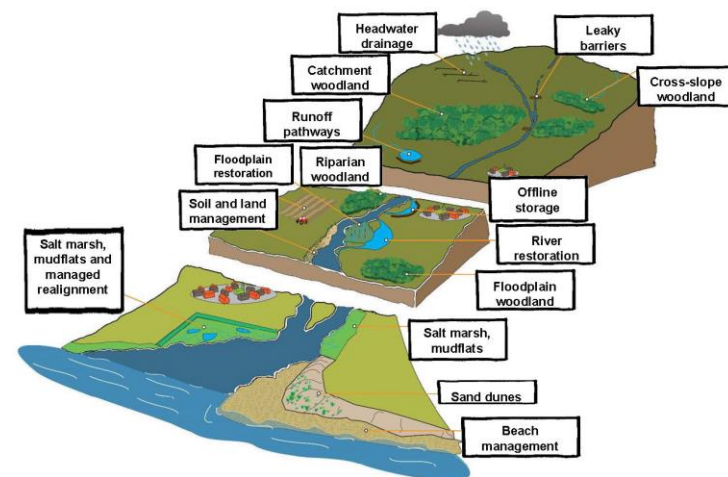
flows, offering a nature-based solution to flood risk. River restoration can which often involves re-meandering, removing artificial structures and reintroducing braided channels can lower flood peaks down stream. Case studies suggest that river restoration can significantly mitigate local flood risks; for example, a 25 km² catchment in the New Forest experienced a 21% reduction in flood peak following restoration efforts³.

A key objective of the Yorkshire Dales National Park Management Plan 2019–2024 was to deliver landscape-scale Natural Flood Management (NFM) projects. To support this, the Yorkshire Dales National Park Authority partnered with farmers, landowners, and local organisations⁴. Working with the Yorkshire Dales Rivers Trust, North Yorkshire County Council, the Environment Agency, and Natural England, they have produced a practical guide offering essential advice for those considering NFM features on their land. Similarly, in Dartmoor National Park, Natural Flood Management interventions were carried out at several sites, including the Mardle, Dean Burn, Hanger Down, Colley Brook, and Black Brook⁵. The project installed around 350 leaky dams using timber, stone, and willow, planted 6,000 trees to improve infiltration, and funded 75 hectares of peatland restoration, along with river restoration and floodplain reconnection.

Land Management

Changes to development and land management practices within river catchment areas in National Parks are crucial for

reducing flood damage and its related costs. Key approaches include reforestation and wetland restoration, which help increase the landscape's ability to absorb and manage floodwaters. National Parks support these efforts by contributing to targets for woodland creation, habitat restoration, and natural flood management. For example, the Lake District National Park has adopted a catchment-based approach to improve the water environment by restoring natural processes⁶. This includes efforts in river restoration, enhancing water quality, and improving habitats⁶. By 2030, their goals include achieving at least 75% of waterbodies at 'good' ecological status under the Water Framework Directive by 2027, creating 209 hectares of new woodland annually⁶.



Natural Flood Management (Source: research.reading.ac.uk)

1. Evidence on the costs of floods in England and Wales - GOV.UK
2. How will Climate Change affect the Wales? — Environment Centre Swansea
3. Natural Flood Management: EA Research Deep Dive & Analysis | Unda
4. Natural Flood Management - Yorkshire Dales National Park : Yorkshire Dales National Park
5. Dartmoor Headwaters Natural Flood Management Project | Dartmoor
6. Nature Recovery Delivery Plan : Lake District National Park

Environment

Potential impact

Biodiversity

National Parks help preserve natural beauty and protect ecosystems. Wales' landscapes support unique species such as the Radnor lily (*Gagea bohemica*) and the spotted rock-rose (*Tuberaria guttata*), found nowhere else on the British mainland. In Eryri, arctic-alpine plants like the Snowdon lily (*Lloydia serotina*) grow on cool, north-facing slopes. Wales' varied geology and mild climate also support an exceptional richness of mosses, liverworts, lichens, and fungi—surpassing many other European regions in species abundance.

The Welsh Government has made wildlife conservation a strategic priority, aligning with the Global Biodiversity Framework through its "30 by 30" target. This initiative commits to conserving and effectively managing at least 30% of Wales' land, freshwater, and marine environments for biodiversity by 2030². A variety of funding streams are available to enhance and restore nature within designated areas. One such initiative is the Nature Networks Fund, which has provided financial backing for activities such as woodland creation, water quality enhancement, and habitat restoration. Since its launch in 2021, the fund has supported over 90 projects, distributing more than £26 million in total³. Designation as a National Park could increase access to such funding, strengthening efforts to conserve biodiversity and improve ecological resilience across protected landscapes.

Net Benefit for Biodiversity (NBB)

In Wales, national planning policy requires that all developments deliver a net benefit to biodiversity (NBB) – the principle that development should leave biodiversity and ecosystems in a better state than before, through long-term, measurable, and primarily on-site improvements. National Park designation could reinforce biodiversity as a statutory management priority. For example, Eryri National Park has developed a Local Biodiversity Plan outlining strategies to conserve and enhance biodiversity across the Park⁴.

National Parks produce Supplementary Planning Guidance on biodiversity, ensuring that development proposals integrate biodiversity considerations – enhancing existing habitats and creating new ones to support local flora and fauna, in line with sustainable development goals. In addition, they could coordinate policies to support implementation of NBB. In England, the South Downs National Park Authority has introduced Voluntary Biodiversity Credits – a scheme that enables businesses to invest directly in nature recovery.⁵ The initiative funds on-the-ground biodiversity restoration and protection projects, aligning corporate environmental contributions with measurable conservation outcomes.

Green Infrastructure Assessment/Statement

Planning authorities are required to prepare a Green Infrastructure Assessment, including up-to-date maps and inventories of ecological assets and networks⁶. This supports efforts to enhance biodiversity and ecological resilience, and

to identify opportunities for habitat restoration. In line with Planning Policy Wales Edition 12 and Section 6 of the Environment (Wales) Act 2016, all development proposals must also include a Green Infrastructure Statement, outlining how features like trees, hedgerows, and SuDS have been incorporated into the design⁷.

Given their statutory duties to conserve and enhance natural environments, National Park designation would ensure Green Infrastructure assessments are more comprehensive, regularly updated, and closely integrated into local planning. For example, Eryri National Park incorporates specific strategic policies addressing Green Infrastructure requirements within its LDP⁸.

Economic Impact of Biodiversity Loss

The Green Finance Initiative has led an analysis revealing that the degradation of the UK's natural environment could result in a GDP loss of up to 12%⁹. The study examines the financial risks associated with the decline of nature and biodiversity, such as deteriorating soil health, water scarcity, threats to global food security, and the spread of zoonotic diseases like bird flu and swine flu. It also identifies that certain sectors—particularly agriculture, manufacturing, and utilities—are especially vulnerable to these nature-related financial risks.

1. [Wales Biodiversity Partnership - Biodiversity in Wales](#)
2. [Wales Biodiversity Partnership - 30 by 30 in Wales Monitoring and Evidence](#)
3. [Welsh environmental projects encouraged to apply for grant funding](#)
4. [Conservation, Trees and Agriculture - Park Authority](#)
5. [Buy - South Downs National Park Authority](#)
6. [16_23-PPW-Changes-re-Biodiversity-and-Major-Development.pdf](#)
7. [ENPA-Green-Infrastructure-Statement-Guidance-Note-2024-English.pdf](#)
8. [Assessing the Materiality of Nature-Related Financial Risks for the UK](#)
9. [Eryri-Local-Development-Plan-Review-Report.pdf](#)

Environment

Summary of potential impact

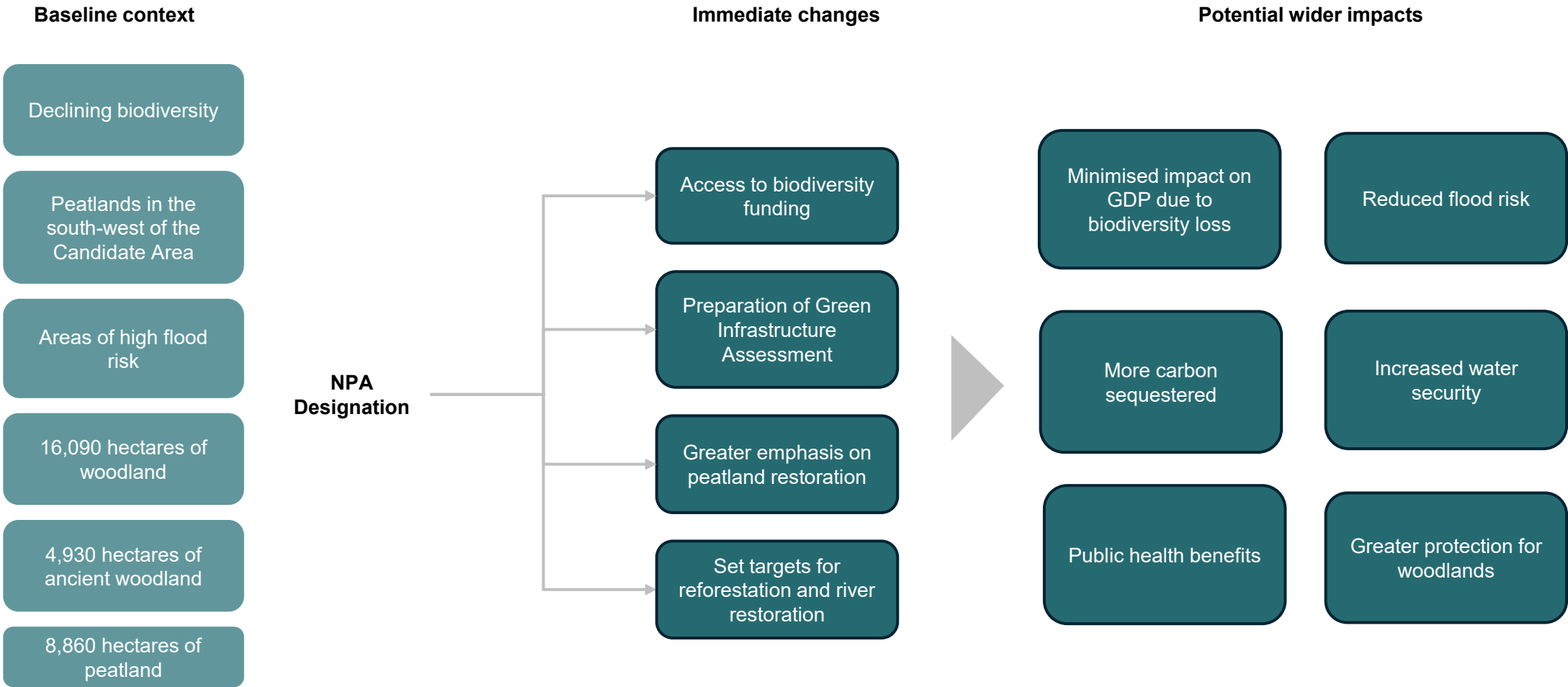


Figure 3.15. Wider Economic Impact for social, culture and health (Source: Arup)

Funding and organisational arrangements

Baseline conditions

NPA Funding

Core funding

As special purpose local authorities, National Park Authorities (NPAs) in Wales receive funding from a combination of sources, primarily through core allocations provided by the Welsh Government and their associated Local Authorities, as established under Section 72 of the Environment Act 1995. Typically, this funding model comprises a 75% contribution from the Welsh Government and a 25% share from the relevant Local Authorities. For the 2024–25 financial year, the three existing NPAs in Wales received National Park Grant allocations ranging between £3.3 million and £4.3 million, amounting to a total of £11.0 million. This, in turn, required local contributions (levies) from Local Authorities, which ranged from £1.1 million to £1.4 million—adding up to £3.7 million overall (Table 3.13).

For existing National Parks, the WG Grant is paid from the Designated Landscapes & Countryside Access budget (a branch of the Climate Change and Environmental Sustainability Directorate), while the levy forms part of the overall allocation to Local Government funding.

Other WG funding

In addition to core funding, NPAs receive supplementary support from the Welsh Government. This includes revenue funding for the day-to-day operational costs for National Parks. In 2024–25, this included £0.9 million to address pay and operational pressures, £3.3 million to support their statutory duties, and around £2.35 million through the Nature Networks Fund for five additional projects¹. They also receive

capital funding for long-term investments and infrastructure projects. This includes the Sustainable Landscapes, Sustainable Places Fund, which allocated £850,000 to each of the three National Park Authorities in 2024–25². In recent years, year-end funding has also been provided to help NPAs manage inflation and other pressures, allowing them to balance their budgets.

Other NPA funding

NPAs can also generate substantial income from non-Exchequer sources, including car parking, planning fees, commercial activities, and grants. In the year ending 2024, Pembrokeshire Coast NPA generated 23% of its income locally through car park charges and planning fees, and a further 17% from services such as café sales, admission fees, events and activities, merchandise, advertising, timber sales, and project-specific grants like those for maintaining the Coast Path (National Trail)³.

Table 3.12 presents the annual planning application fee income for local authorities in the Candidate Area. Denbighshire receives significantly more planning income than the other authorities. Pembrokeshire Coast reported a decline in planning income between 2023 and 2024, attributed to broader economic challenges and rising living costs, which have led to a general reduction in householder-type applications³.

Clwydian Range and Dee Valley National Landscape Funding

Funding data for the Clwydian Range and Dee Valley National Landscape is limited, but in 2017 it received

£272,037 from three sources: a Natural Resources Wales Salary Grant (£117,046), the Sustainable Development Fund (£54,545), and local authority contributions (£100,446)⁴. In 2024–25, it was allocated £70,000 for heritage and visitor sites, and £130,000 for the “Majestic Moorlands and Wild Woodlands” project—to support biodiversity, nature recovery, and decarbonisation efforts⁵.

Table 3.12. Local Authority Planning Application Income (Source: Arup Planning Report)

Local Authority	Planning Application Income (£)
Denbighshire	334,340
Flintshire	44,880
Gwynedd	N/A
Powys	99,815
Wrexham	7,625

Table 3.13. National Park Funding 2025-26 (Source: WG Officials)

	Pembrokeshire Coast (£)	Bannau Brycheiniog (£)	Eryri (£)
Core grant funding from WG	3,412,000	3,265,000	4,326,000
Other WG funding (revenue)	426,000	55,000	72,000
Other WG funding (capital)	1,028,000	1,106,000	1,191,000
LA Levy	1,137,000	1,088,000	1,442,000
Other non-WG funding (indicative)	2,565,000	1,398,000	3,468,000
Total	8,568,000	6,912,000	10,499,000

1. Decision Reports: 2025 | GOV.WALES

2. Sustainable Landscapes, Sustainable Places - Landscape Fund: grants allocated [HTML] | GOV.WALES

3. Signed-Audited-Accounts-PCNPA-23-24-1.pdf

4. Business Plan 2016-19 (1).pdf

5. Sustainable Landscapes, Sustainable Places - Landscape Fund: grants allocated [HTML] | GOV.WALES

Funding and organisational arrangements

Baseline conditions

Structure and Composition

National Park Authorities (NPAs) are special purpose local authorities with executive powers. Each NPA is made up of:

- Two-thirds local authority councillors and,
- One-third members appointed by the Welsh Government.

Councillors are selected based on political balance, ward location, and commitment to park purposes. Welsh Government appointees are chosen through a public recruitment process and bring expertise in areas like the environment, tourism, or farming. Local authority members typically serve four-year terms aligned with local elections, while Welsh Government appointees serve an initial four-year term, renewable up to a maximum of eight years with ministerial review¹. Table 3.14 shows the member composition for the existing Welsh National Parks.

Table 3.14 Member composition of existing NPAs (Source: Arup)

Member composition	Bannau Brycheiniog	Pembrokeshire Coast	Eryri
No. appointed from constituent local authorities	12	12	12
No. appointment by Welsh Government	6	6	6
Total Members	18	18	18

Roles, Responsibilities and Decision-Making

Members of an NPA represent the interests of the whole park, not individual councils or parties. They set strategy, approve budgets, develop policies, and ensure ethical governance. As advocates for the Authority's purposes, they support conservation, cultural heritage, and public enjoyment. Key decisions are made in full Authority meetings, with committees or working groups formed as needed. The Chair and Committee Chairs play a crucial role in maintaining effective governance.

Remuneration

An NPA can pay a senior salary to its chair, deputy chair and up to two committee chairs. The basic salary of a National Park member is £4,964, a chair's salary is £13,764 and a deputy chair or committee chair's salary is £8,704².

Case Study: Bannau Brycheiniog Committee Structure³

The National Park Authority is made up of all 18 members and makes all the key decisions on budgets and policy. It delegates some of its decisions to other committees, which are listed below.

- *Audit and Risk Committee:* Advises on governance, risk, audits, anti-fraud, complaints, and annual governance reviews.
- *Chairs Committee:* Oversees governance, reviews performance, manages CEO issues, and resolves CEO complaints.
- *Finance and Performance Committee:* Manages budgets, reviews performance, and oversees reserves.

- *NPA:* Sets policy, strategy, finances, and appointments; meets bi-monthly, mostly open to the public.
- *Planning Committee:* Meets every 8 weeks to decide planning applications, enforce controls, and handle minerals and waste policies.
- *Standards Committee:* Meets as needed (at least annually) for legal duties, procedural advice, and complaints

National Park Employees

Each NPA has a dedicated team: Eryri employs 100 staff across 12 departments including finance, HR, planning, and heritage; Pembrokeshire Coast has around 150 staff in roles like Planning Officers, Rangers, Conservation Officers, and more; Bannau Brycheiniog similarly employs over 100 staff.



Cllr Edgar Wyn Owen Authority Chair (Source: snowdonia.gov.wales)

1. National Park Authority Members - Pembrokeshire Coast National Park
2. Payments to elected members: National park authorities | GOV.WALES
3. BBNPA Governance

Funding and organisational arrangements

Potential impact

Local Authority Levy

Based on the figures presented in Table 3.13 we could expect if a new National Park were to be established it would likely require a total local authority levy in the region of £1.1m to £1.4m to align with the existing government grant and levy framework. These contributions are typically allocated according to factors such as the share of the park's area within each local authority though the final decision rests with the Welsh Government.

Percentage Area Coverage

Eryri National Park spans 213,969 hectares, distributed between two local authorities: Gwynedd (169,409 ha) and Conwy (42,781 ha), equating to approximately 80% and 20% of the park's area respectively. Levy contributions from these authorities reflect this split, with Gwynedd contributing £1,059,000 and Conwy £314,000 in the 2024 financial year.

Based on the share of the Candidate Area within their boundaries, the five local authorities would contribute proportionally to a future levy. The LA levies for the existing Welsh National Parks range from contributions of £1.1m to £1.4m. Assuming a similar total LA levy for the new National Park, and based on the percentage of the Candidate Area taken up by each of the five LAs, a range of indicative potential levy allocations has been estimated in Table 3.15. These indicative amounts would need to be saved, allocated by Welsh Government or earned in additional revenue achieve cost neutrality. Upon designation the NPA would consult the relevant local authorities to ensure their apportion reflects the costs of management and maintaining the park.

Local Authority Budgetary Pressures

The Local Authority levy is designed to be cost-neutral, but there are concerns it may need to be met from existing Welsh Government allocations. More widely, Local Authorities fear the levy could be top-sliced from the overall local government funding pot, slightly reducing all councils' budgets. Authorities within the Candidate Area are already facing major financial pressures for 2025–26—Flintshire plans a 9.5% council tax rise to close an £18m gap¹, Denbighshire faces a £23.9m shortfall², and Powys projects a £9.6m deficit rising to £50.9m over four years³. While the levy is modest—e.g. Conwy's £314,000 contribution against £44.5m in capital spending—it could add pressure to already stretched budgets. This has potential to be offset by visitor levy income (see overleaf) for local authorities that introduce this.

Loss of Planning Income

Some local authorities, notably Denbighshire—which earned £334,340 in planning fees—have expressed concern over potential loss of income from planning applications within the proposed National Park. While they would still receive fees from areas outside the park, any drop in revenue could be partly balanced by reduced planning service costs. NRW has commissioned a separate study to examine this issue further.

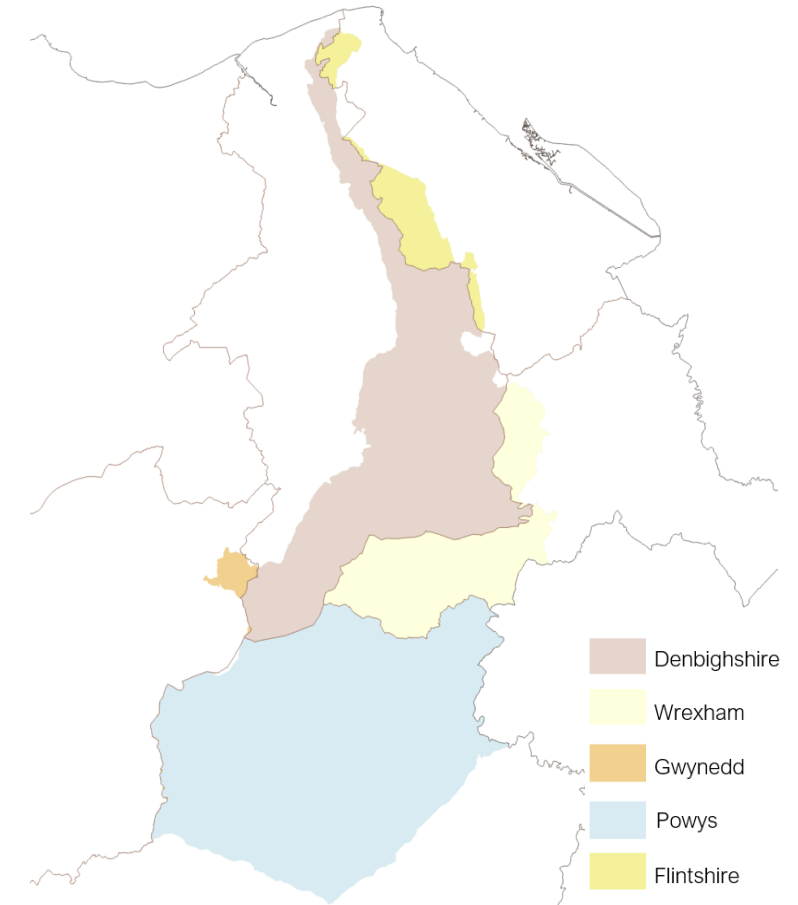


Figure 3.16. Local Authority area inside Candidate Area (Source: Arup)

Table 3.15. Local Authority area inside Candidate Area (Source: Arup)

Local Authority	Area (Ha)	Percentage of the Candidate Area taken up by each LA	Potential Indicative Local Authority Levy (£)
Powys	56,215.7	48.2%	525,000 – 700,000
Denbighshire	38,465.8	33.0%	350,000 – 480,000
Wrexham	15,571.2	13.4%	150,000 – 190,000
Flintshire	5,249.4	4.5%	50,000 – 65,000
Gwynedd	1,109.0	1.0%	10,000 – 15,000

- [Budget Infographic 2025-26](#)
- [Denbighshire facing bankruptcy, private letter reveals | Denbighshire Free Press](#)
- [Sustainable Powys - Powys County Council](#)
- [Nature Recovery in the Bannau Brycheiniog boosted by funding | Bannau Brycheiniog National Park Authority](#)
- [__SNOWDONIA NATIONAL PARK AUTHORITY](#)
- [Car parking income: Peak District National Park](#)

Funding and organisational arrangements

Potential impact

Additional Funding

NPAs are often well-placed to secure grant funding. For example, Bannau Brycheiniog NPA received £70,000 from the Local Places for Nature Fund in 2021⁴. That year, Eryri NPA secured funding from multiple sources, including £409,000 from NRW and smaller amounts from partners like the National Trust and RSPB⁵. NPAs can also access Welsh Government schemes such as the Brilliant Basics and Ffermio Bro funds.

In addition to grants, NPAs can generate income through car park fees, visitor centres, and rents. Eryri’s car parks are its largest income source, supporting initiatives like the Sherpa’r Wyddfa bus. The Peak District earned £467,733 from parking fees and £57,637 from permits in 2024⁶. Whether a new National Park would take ownership of assets such as car parks, with their associated revenue, is yet to be determined.

Visitor Levy

Wales plans to introduce a visitor levy on overnight stays¹. The levy is expected to be implemented starting in 2027. Local Authorities will have the option to charge the levy, and if implemented, it will be a per-person, per-night charge. The proposed levy rates are:

- Most Accommodations: £1.25 per person per night for hotels, B&Bs, and self-catering accommodation.
- Hostels and Campsites: £0.75 per person per night.

If all Local Authorities in Wales were to introduce a tourism levy, it could raise up to £33 million annually. This funding would be spent by Local Authorities, with a duty to consult NPAs where present in their area. This funding could help communities manage the costs of tourism, support the Welsh

language, and promote sustainable tourism growth. Revenue could improve local infrastructure—such as toilets, footpaths, beaches, and visitor centres—benefiting both residents and visitors.

A visitor levy could also provide direct funding for Local Authorities in the Candidate Area, especially in high-traffic locations. For example, Manchester introduced a £1 per room, per night City Visitor Charge in April 2023, becoming the first UK city to implement such a tax. It has since raised £2.8 million annually, used for street cleaning and tourism promotion. A similar levy in Wales could deliver targeted investment to support and enhance the visitor experience.

The 2023 STEAM reports from Welsh National Parks break down overnight visitors into serviced (hotels, guesthouses, B&Bs) and non-serviced accommodation (camping, caravanning, hostels, schools, colleges, cottages). The reports also provide average length of stay figures. To estimate the visitor levy for each existing Welsh National Park, a £1.25 charge per night has been applied to serviced accommodation visitors and a £0.75 charge per night to non-serviced accommodation visitors. These estimates are shown in Table 3.16, using 2023 tourism figures and 2025 prices, without accounting for inflation.

Based on these calculations, the potential indicative tourism levy revenue that could be raised in existing Welsh National Parks ranges from £1.1m to £6.4m.

The large range in potential revenue is driven by variance in proportion of overnight visitors. In 2023, 88% of visitors to Bannau Brechiniog were day trippers, so the levy would only apply to the 12% of overnight visitors. This results in lower estimated revenue in Table 3.16 compared to other National Parks. Given the new National Park's proximity to urban centres, a high share of day trippers could be expected, to whom the levy would not apply. The revenue from the levy would go to Local Authorities, which would have to consult any future NPA but would under no obligation to designate any of the income to the NPA or spend it in the National Park area.

Table 3.16. Indicative Potential Annual Tourism Levy (Source: Arup analysis based on STEAM 2023)

	Pembrokeshire Coast NP	Eryri NP	Bannau Brechiniog
Serviced Accommodation – Estimated Tourism Levy (£)	495,000	312,250	201,250
Non-Serviced Accommodation – Estimated Tourism Levy (£)	5,882,250	5,256,000	896,250
Total Estimated Annual Tourism Levy	6,377,250	5,568,250	1,070,500

1. <https://www.gov.wales/VisitorLevy>
2. <https://www.bbc.co.uk/news/uk-england-manchester-68739832>

Funding and organisational arrangements

Summary of potential impact

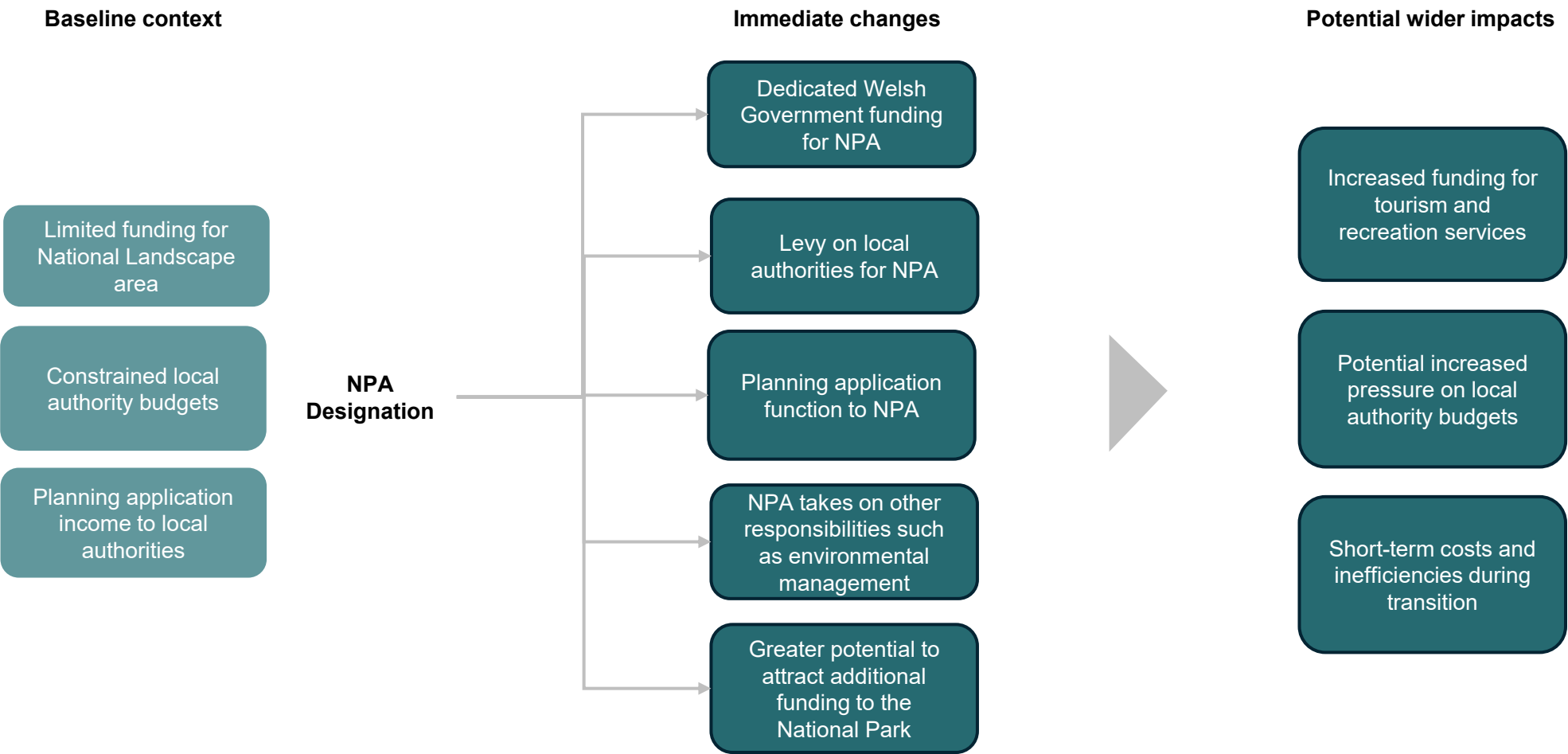


Figure 3.17 Wider Economic Impact for funding and organisational arrangements (Source: Arup)

04

Conclusion

Conclusion

Conclusions

This report has assessed the potential economic impacts of designating a new National Park for Wales. It has assessed these impacts against eight thematic areas; tourism and visitor economy, employment and businesses (agriculture and minerals), property, transport, social, culture and health, environmental, and funding and organisational arrangements. Across all thematic areas the review identified both potential positive and negative impacts.

Forming an overall assessment of whether designating a National Park is likely to be economically beneficial is challenging. However, the analysis undertaken suggests there are two key elements to consider.

First, designation will lead to a series of organisational changes. These have potential to bring better coordinated management of the proposed National Park area and more sustained funding, both of which in turn could drive wide-ranging economic benefits. This needs to be weighed against the disbenefits of creating a new body with transitional inefficiencies, potential increased running costs for the public sector, and new interfaces with existing local authority structures.

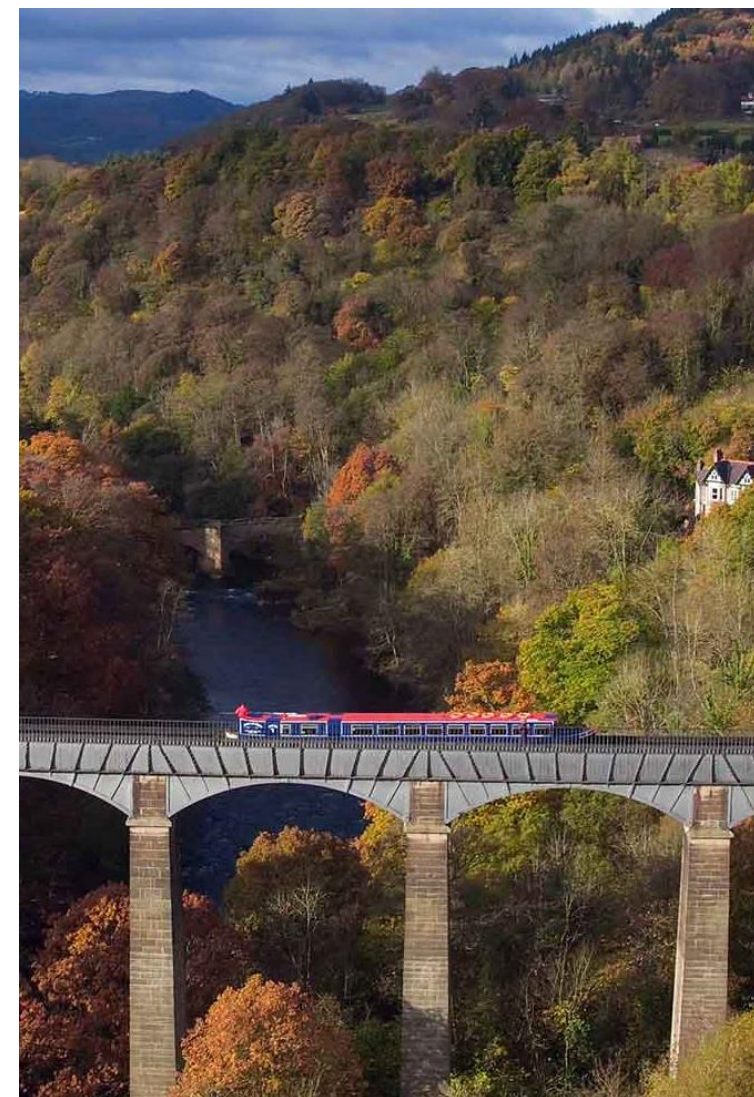
Second, although specific evidence on visitor numbers is limited, it seems likely that designation could lead to a significant increase. This would drive economic benefits linked to visitor spend and increased profile of the area. These need to be weighed against additional pressures on local infrastructure, services and the environment.

In forming judgement against these points, there are some notable areas of uncertainty. First, the rarity with which National Parks have been designated means there is a limited direct evidence base. Second, some important details of the designation are yet to be determined, and the actual policies that could be implemented by a potential NPA are as yet unknown. The latter will be a key factor in maximising benefits and mitigating disbenefits.

Recommended next steps

Arup recommends that NRW and/or Welsh Government, in collaboration with regional stakeholders, progresses further work to:

1. Quantify and compare impacts where possible. This has not been possible within the scope of this review, but is important to assessing the overall value-for-money associated with designating a new National Park.
2. Update and refine this economic impact review as the specifics of the designation proposal are developed and in response to future consultation. This could be produced as part of any future business case for the proposed designation.
3. Should a decision be taken to designate a National Park, use the findings of this review to help guide the priorities of a potential new NPA.



Clwydian Range and Dee Valley (Source: [visit-north-east-wales](https://www.visit-north-east-wales.com/))

Appendix

Appendix: Stakeholder Engagement

Summary of stakeholder engagement interviews

As part of the research for this report, Arup held interviews with each of the local authorities included in the Candidate Area boundary and selected other stakeholders.

A summary of their feedback is provided below.

Denbighshire

- **Tourism and Visitor Economy:** Visitor numbers are strong but the sector is seasonal with low wages, straining local infrastructure and causing pressures without always delivering a proportional local benefits. Interest in a visitor hub to better spread visitors and economic impact.
- **Social and Housing Issues:** House price rises are a concern, exacerbated by second home purchases. Rural deprivation exists, despite proximity to more affluent areas. Locals often commute long distances for work, indicating a mismatch between local jobs and resident needs.
- **Designation Concerns:** Costs of designation are a concern and uncertainty over the level of support and funding that would accompany designation.

Flintshire

- **Housing and Price Premiums:** English parks like the Lake District and Peak District show strong price premiums. In Wales the effect is mixed, Pembrokeshire shows some premium but is less evident than Eryri and Bannau Brycheiniog.
- **Limited Change for Flintshire:** Flintshire expects marginal changes; the boundaries are unlikely to shift significantly, planning and funding implications remain

unclear and this makes it difficult for local representatives to take a position.

Gwynedd

- **View on Designation:** Only a very small part of the Candidate Area lies within Gwynedd. Rarely featured in Gwynedd's marketing efforts.
- **Challenges and Concerns:** The region already faces complex planning and governance with multiple overlapping local plans creating barriers for business setup and investment. There is concern that businesses may prefer areas outside the designation to avoid added planning burdens.
- **Identity and National Park Dynamics:** Eryri has a strong, well-established National Park identity. There were some question whether visitors will distinguish between two national parks in close proximity. However, local pride in national park status is acknowledged.

Powys

- **Economic and Infrastructure:** Few large employers, predominance of micro-businesses, especially micro-farming. Minor road network is a major concern, particularly poor north-south connectivity. The existing path and road maintenance is underfunded.
- **Tourism Pressures:** Post lockdown tourism boom led to increased visitor numbers and surge in second home purchases. Social media driving influxes to hotspots and there is a question over where funding would come from for investment in tourism infrastructure.

- **House Prices and Demographics:** House prices rising due to second homes; housing affordability among the worst in the UK. Older population, low wage levels and high working hours common.
- **Funding Challenges:** Significant funding gaps across transport, housing, health and tourism.

Wrexham

- **View on Designation:** Generally positive about designation, seen as an opportunity to diversify Wrexham's image, moving beyond football-focused narratives.
- **Infrastructure and Funding:** Main road access is decent, but parking and road pressure could increase. Grant funding opportunities associated with national park status are attractive. Wrexham is already seeing growth in solar and battery installations—interest in sustainability aligns with national park goals.
- **Economic Considerations:** Wrexham is a major industrial hub with one of Europe's largest estates, strong public services, and recent Investment Zone status. However, concerns remain over business rates and whether benefits will outweigh the costs for local businesses.
- **Planning and Governance:** Fear that designation could add another layer of bureaucracy and slow down development.

Appendix: Stakeholder Engagement Continued

Summary of stakeholder engagement interviews

Ambition North Wales

- **Visitor Appeal:** Shared difficulties in drawing visitors off the A55 into Flintshire's rural areas, despite their natural beauty. Also noted a lack of rural tourism infrastructure (e.g., accommodation) to support visitor growth. It was noted that spend per head is currently low in Wales, and there is concern that tourists would come and not contribute to the local economy.
- **Tourism Potential and Competition:** NE Wales would offer a "subtle" tourism experience, distinct from Eryri (Snowdonia)'s established identity focused on adventure tourism. Proximity of two National Parks may create competitive dynamics—unclear if this would be positive (complementary) or negative (displacement).
- **Governance Challenge:** The proposed National Park would straddle two CJC jurisdictions, Mid Wales and North Wales. CJs are statutory regional bodies responsible for key functions such as economic well-being, transport, and strategic planning. If the new park spans both CJs: Who would appoint members to the NPA and how would strategic oversight and collaboration between CJs be structured?

Welsh Government

- **Risks of Non-Designation:** Increased deforestation and pollution, missed investment for farmers via agri-environment schemes.
- **Funding Structure:** 75% of NPA revenue from Welsh

Government; 25% from LA levy, impacting local budgets. Funding formula from 1996 still in use. Tourism levy (if implemented) could provide an additional funding stream, with local control.

- **Staffing:** Staffing levels depend on asset base—not necessarily equivalent to Eryri (c.100 staff). Example: Brecon Beacons has fewer staff due to fewer assets.

South Downs

- **Visitors:** The area was designated as a National Park in 2010, since becoming a National Park visitor numbers have increased. This rise is partly due to social media trends and international interest. Noticeable shift in visitor demographics, with more international visitors, particularly from Asia. This has led to challenges such as the need for multilingual signage and increased safety measures.
- **Funding:** The South Downs has faced a 12% cut in real terms, including a 9% cut in actual funding and a 3% cut due to tax changes. The South Downs has embraced income generation through nature markets, carbon credits, and partnerships with landowners.
- **Planning:** There are restrictions on developments, especially those impacting the landscape. However, some large projects, like housing developments, have been approved. For example, a major housing development outside Lewes was approved last year for 685 homes.
- **Conservation:** Efforts are being made to support nature recovery and sustainable practices among local

businesses and landowners. This includes working with farmers to diversify their income through nature recovery projects.

- **Renewable Energy Projects:** There is potential for the park to become more involved in renewable energy projects.