

# Welsh Language Impact Assessment

## The Regulation of Visitor Accommodation (Wales) Bill

**Welsh Language Impact Assessment reference number: 08/10/2025**

### Introduction

The Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill (“the Bill”) provides the legislative framework for a licensing scheme for visitor accommodation in Wales, starting with self-catering accommodation. This scheme will support tourism in Wales, by reassuring visitors that accommodation meets the standards they would expect and providing a clear regime for providers.

The licensing scheme will build upon the register of visitor accommodation providers as set out in its companion legislation, the Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (“the VARL Act”). Under that Act, the Welsh Revenue Authority (WRA) will establish, maintain and publish the register of providers, which will also detail the type and location of the premises they operate across Wales. This information may be of interest to local authorities, visitors, businesses and researchers, and will inform the future licensing scheme.

The Bill will complement other measures introduced by the Welsh Government to address the challenges arising from a concentration of second homes and short-term holiday lets in particular areas in Wales. A secondary outcome of this Bill will be to align more closely regulation of self-catering visitor accommodation with the regulation of the private rented sector, ensuring consistent standards for that accommodation, and monitoring compliance with those standards.

The Bill also creates a Code of Welsh law on tourism that will incorporate existing legislation on the development of tourism in Wales, with a view to improving the accessibility of tourism legislation.

[Cymraeg 2050](#) is the Welsh Government’s national strategy to increase the number of Welsh-speakers to a million by 2050. It also aims to increase the proportion of those that can speak more than just a few words of Welsh, from 10% (in 2013–15) to 20% by 2050.

The Welsh Government is fully committed to the strategy, with the target of a million speakers aimed at reversing the decline in the number of Welsh speakers over the twentieth century. A thriving Welsh language is also included in one of the seven well-being goals in the Well-being of Future Generations (Wales) Act 2015. The Welsh Government has a statutory obligation to fully consider the effects of its policies on the Welsh language and those who speak it. The Cymraeg 2050 strategy has three interrelated themes:

Theme 1: Increasing the number of Welsh-speakers

Theme 2: Increasing the use of Welsh

Theme 3: Creating favourable conditions - infrastructure and context

In [response](#) to the recommendations [Empowering communities, strengthening the Welsh language](#), the Welsh Government stated how important the tourism and visitor economy sector is to the Welsh language. This is especially the case in relation to the [foundational economy](#).

### **The visitor economy in Wales: key facts**

Tourism plays a vital role in Wales's economy. Tourism-related industries accounted for 11.8% of employment (159,000 jobs) and 5.1% of GVA in Wales in 2022 (£3.8 billion) in Wales in 2022.

There were over 69 million visits to Wales in 2023, representing a combined spend of over £4.95 billion in the Welsh economy. 8.65 million of these visits were overnight stays, representing a spend of over £2 billion.

Our ambition is to grow tourism for the benefit of Wales in a way which supports thriving local communities and is sustainable for the environment and people of Wales.

Visits to Wales, and their associated economic and social impacts are spread across the regions of Wales, however, the scale of tourism-related industries can vary significantly between local areas, representing up to 20% of employment in Pembrokeshire and Anglesey, but only 7.5% in Wrexham in 2022.

Even at the local authority level, these impacts are not evenly distributed. Listings of properties on Airbnb for example highlight a concentration in mountainous and coastal areas, with some local authorities having listings concentrated in a small number of areas. This concentration of holiday lets in particular communities can come with benefits, such as the potential to generate additional income and employment in associated industries, as well as cause concerns such as decreasing the availability of housing, causing parking disruption, and contributing to litter and pollution, as highlighted by a study on attitudes to visitor accommodation licensing in 2023.

The provision of visitor accommodation has changed significantly since the expansion of Airbnb to the UK in 2009 and the participation of other sites such as Booking.com, VRBO and Expedia in the same market. By May 2022 there were 21,718 properties in Wales listed on Airbnb alone<sup>6</sup> and in the May 2023 wave of our Tourism Barometer, 75% of accommodation providers interviewed promoted their accommodation via at least one online platform. 49% of self-catering accommodation providers interviewed reported using Airbnb. The reasons people choose to let out property via these platforms vary widely. However, this reflects the extent to which online booking platforms have opened up the visitor accommodation market to a range of new providers, some operating commercially, some very informally or occasionally.

## Welsh language and the tourism sector

The Welsh language is an inseparable part of the social fabric of many parts of Wales. Since 2019, the [ARFOR](#) programme has been supporting many of the communities which are referred to as the heartlands of the Welsh language (Ynys Môn, Gwynedd, Ceredigion and Carmarthenshire).

This reflects what we already know from the [Census 2021](#). Of those aged 16 years and over living in Wales and working in the accommodation and food services industry, 14% were able to speak Welsh. However, in the heartland communities, this figure rose to almost 44% (Gwynedd 59%; Ynys Môn 51%; Ceredigion 39%; Carmarthen 33%).

The February 2024 wave of the [Tourism Barometer](#) asked tourism businesses in Wales questions about use of the Welsh language. Of the 900 businesses surveyed 40% have at least one person using Welsh regularly in work. This proportion is much higher in north Wales (60%) and mid Wales (40%) than in south-west Wales (26%) and south-east Wales (21%).

As for speaking Welsh as a first language, 66% of businesses in north Wales have at least one person doing so, compared to 54% in mid Wales, and 46% in south-west and south-east Wales.

### **Does the proposal demonstrate a clear link with the Welsh Government's strategy for the Welsh language? – [Cymraeg 2050 A million Welsh-speakers and the related Work Programme for 2021-2026?](#)**

One of our [priorities for the visitor economy](#) is to highlight the distinctiveness of our culture and the Welsh language. We want visitors to feel this and for Welsh culture and language to enrich their experiences. The Welsh Government wishes to continue to promote Wales as a world-class destination for visitors and the benefits that brings.

Tourism, culture and language are closely interlinked, however, that must mean taking collective responsibility for managing the impact that tourism has on our environment and local communities. In an effort to make our cities, towns and villages even better places in which to live and work, the Welsh Government has a commitment to licence holiday lets. This will help reassure holiday makers, local communities and policy makers that accommodation in Wales meets the required standards.

The tourism sector provides the accommodation, facilities and infrastructure that enable people especially young people to work and gain valuable skills in their local communities. Tourism also provides opportunities for visitors to learn about, access and enjoy our unique heritage, culture and Welsh language.

**Describe and explain the impact of the proposal on the Welsh language and explain how you will address these impacts to improve outcomes for the Welsh language.**

Officials have engaged with stakeholders throughout the development of the legislation to help inform the design and scope of the licensing scheme. Due to the nature of the scheme, it is not expected to make an impact, either way, on the Welsh language.

However, there may be evidence to show that tourism in general positively impacts on the Welsh language. In 2001, Dr Dylan Phillips and Dr Catrin Thomas wrote about the [effects of tourism on the Welsh language](#) in North-West Wales. They outlined how the Welsh language as a living community language has been impacted, particularly in tourism hotspot areas where high levels of inward migration have occurred as a direct link to the tourism industry. It notes a significant effect on the number and percentage of Welsh-speakers in those areas.

A more recent article by Dr Dyfan Powell discusses the [effect of tourism on the language in Gwynedd](#). The article suggests a positive relationship between employment in the tourism sector and growth and sustainability of the language during the last twenty years. However, the article concluded that more research is necessary to enhance our understanding of this relationship.

**How will the proposal affect Welsh medium education and Welsh learners of all ages, including adults (both positive and/or adverse effects)?**

It is unlikely this policy will have a direct impact on Welsh medium education or on Welsh learners of any age (including adults). However, there may be opportunities to use the scheme to raise the profile of the Welsh language through education and training of visitor accommodation providers.

**How will the proposal affect services available in Welsh (both positive and/or adverse effects)? (e.g. health and social services, transport, housing, digital, youth, infrastructure, environment, local government etc.)**

It is unlikely that this policy will have a significant impact on the provision of Welsh language services in the realms of health, social services, transport, digital, youth, infrastructure, environment and local government.

However, we need to acknowledge the challenges associated with housing availability in some rural communities, both in terms of supply and affordability of homes for local people. Whilst the licensing scheme does not directly affect the supply or affordability of homes, many rural areas have witnessed growth in second home and holiday let ownership. In his report [Second Homes - Developing new policies in Wales](#), Dr Simon Brookes suggests that one of the disadvantages of this is a shortage of housing, which in turn creates a threat to the Welsh language as local people are seen to be priced out and excluded from the local housing market. [Research conducted on behalf of Gwynedd and Cardiff Councils in 2020](#) recommended licensing as one of the steps which should be taken to help understand the trends and manage this impact and ensure that, where houses are

used as visitor accommodation, they meet the required standards. This is explored further in the rural proofing impact assessment.

**How will you ensure that people know about services that are available in Welsh and are able to access and use them as easily as they can in English?**

As part of the design and creation of the licensing scheme the licensing authority will have the Welsh language at the heart of its development. It is envisaged that the scheme presents an opportunity to increase, or promote and facilitate, the use of the Welsh language. For example, any training for visitor accommodation providers could be used as a means of introducing the language to more people. Any such training will be made available bilingually.

The licensing authority will be responsible for developing the systems and content in both languages and working with users to make sure the services are fit for purpose. There will be no prospect that local operators of visitor accommodation will be disadvantaged by not being able to access the system in their preferred language. The customer facing services such as, call centre functions, correspondence, guidance, and events will be available bilingually to allow people to use their services in their preferred language. The licensing authority will be required to promote all services which will be available bilingually.

**What evidence / data have you used to inform your assessment, including evidence from Welsh speakers or Welsh language interest groups?**

Current research relating to the impact of tourism on the Welsh language is sparse and empirical evidence is limited. The [consultation](#) on the scheme, sought views on the effects of the proposals on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh no less favourably than English.

We received 1,595 responses, although these provided little or no factual evidence on this topic. The [summary of responses](#) to the consultation sets out the detail, but generally the majority of respondents were of the opinion that a licensing scheme would have no effect on the Welsh language.

Among those mentioning negative effects, the most common theme was adverse effects on small Welsh businesses and communities. The respondents raising these issues believed Welsh businesses and communities are reliant on the tourism sector, which would be adversely affected by the scheme. Among those identifying positive effects, the most common theme was a positive impact on the housing stock, as local authorities would be better able to balance residential and visitor accommodation.

**What other evidence would help you to conduct a better assessment?**

The Visitor Accommodation (Register and Levy) Etc. (Wales) Bill ([the VARL Bill](#)) provides an indirect link between the proposals set out in the Regulation of Visitor Accommodation (RVA) bill and Cymraeg 2050. The VARL Bill will capture all holiday accommodation operating in Wales. The statistics collated will in turn provide a clear picture of who is operating, and where they are located. This data will assist wider

Welsh Government and key stakeholders to better understand the nature of the industry in key geographical areas, and shape future policies including policies relevant to Welsh language.

## **Conclusions**

The Welsh Government aims to balance the interests of visitors, residents, and businesses and to support sustainable tourism and local autonomy. The Welsh Government has sought to avoid, reduce or mitigate any negative impacts by taking a cautious approach to setting up the licensing scheme and will monitor its impact over time. We will continue to work with stakeholders to understand any potential impacts.

## **Monitoring and evaluation**

The impact of this Bill will be reviewed as set out in Chapter 11 of the Regulatory Impact Assessment.