



Llywodraeth Cymru
Welsh Government

Welcome to Wales:

Priorities for the visitor economy
2020 – 2025.

Integrated Impact Assessment

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What action is the Welsh Government considering and why?

Tourism is an important part of the Welsh economy. Over 11,500 businesses help bring nearly 11 million overnight visitors to Wales each year.

Those businesses and organisations include accommodation providers, attractions, events' organisers, heritage, sporting and cultural bodies, Local Authorities and other public bodies. Visitors spent around £6.3 billion in the local economy in 2018.

As part of Welsh Government Visit Wales leads on marketing, promotion and investment in tourism, and works to support the tourism sector in Wales. The work of Visit Wales is shaped by the current plan for tourism – *Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020* – which comes to an end in 2020.

Before beginning work on a new plan, Visit Wales embarked on an extensive process of review and engagement. This began with a review of the previous plan for tourism. 'Partnership for Growth' set five priorities – promotion, product development, people, profitable performance and place-building. Visit Wales tracked progress against those priorities, in 2016 and again in 2019. Those reviews showed that majority of commitments in the previous plan have been delivered, and Wales is currently on track to achieve the overall target of 10% growth in visitor expenditure, although there are still some challenges for the sector in Wales including issues such as skills.

In preparation for developing new priorities, Visit Wales also reviewed the current evidence base for the *performance of tourism* and initiated an extensive engagement process with the sector and stakeholders. The new priorities have been shaped by many of the issues that emerged from these activities.

The 'action' is the publication of an new Plan for tourism - *Welcome to Wales - Priorities for the visitor economy 2020-2025*. This new Plan will guide the work of Visit Wales and inform business planning and the allocation of resources. The priorities in the plan will be delivered in partnership with the tourism sector and others.

In brief, the overall ambition is to, 'Grow tourism for the good of Wales', through the goal of: 'Economic growth that delivers benefits to people and places, including environmental sustainability, social and cultural enrichment and health benefits'. This ambition has emerged directly from the engagement process where stakeholders asked us to take greater account of sustainability and the wellbeing goals.

We believe that what is good for visitors, can be good for people in Wales, so **making a difference for the people of Wales** is central to the Plan. We will do that through all of the actions in the Plan, continuing to promote Wales as a great place to live, work and invest, through investing in products and facilities that benefit people in Wales as well as visitors, and through supporting an industry that generates local jobs and contributes to the viability of local places. We will also measure it through capturing the perceptions of residents, as well as businesses and visitors.

The Plan will deliver visitor experiences shaped by two Welsh concepts – Bro and Byd. 'Bro' is about delivering wellbeing at a local level and 'Byd' is about ensuring that we also meet and respond to international quality standards in doing so. Culture, landscape, adventure and unique food and accommodation experiences are central to the core Welsh tourism offer.

The four main priorities in the Plan are:

- great products and places
- quality visitor experiences
- an innovative Cymru Wales brand
- an engaged and vibrant sector.

The Plan will encourage UK visitors to experience high-quality staycations here, and ensure that international visitors discover and choose Wales. The Plan positions tourism as a bedrock for the Welsh economy and a flag-carrier for projecting a positive message from Wales. The focus is on enabling the industry to improve the quality of Wales' welcome, supporting local supply chains, making our offer fit for international audiences and continuing to market Wales with a confident and distinctive brand in the UK and abroad.

Wellbeing goals will be delivered through each of the priorities – for example new investments will be expected to deliver social or environmental benefits as well as economic ones; our grading system will continue to help businesses reduce their carbon footprint; our new brand will continue to promote an inclusive view of Wales and wider opportunities for outdoor leisure and adventure, whilst our stronger policy focus will involve working with the sector to build links with other areas including social care and promoting sustainable transport.

Note that the priorities in the Plan are an evolution not a revolution – most are not new areas of work, but do represent a clearer focus.

The Plan has been shaped by the five ways of working:

The Plan is ultimately about the long term future of Wales as a place to live, work and invest, as it

- has been informed by responses to the ten questions which specifically asked about the visitors of the future
- seeks to address major long term issues such as over-tourism, and the environmental impact of tourism
- tackles long term challenges for the tourism sector including seasonality, spend and spread.
- has been informed by an analysis of the market demands shaping tourism including its future growth prospects and potential.
- is a living, evolving document and emerging data, such as the forthcoming visitor survey, will be used to inform immediate delivery as well as our long term policies.

The plan focuses on **prevention**, including:

- **Poverty** – tourism represents over 10% of jobs in some areas of Wales; it brings life to high streets, and encourages spend in often remote or rural areas. Tourism jobs are spread across Wales. Growing tourism will therefore contribute to the growth of local economies across Wales.
- **Poor Health** – Visit Wales contributes to health outcomes by supporting, promoting and improving access to outdoor leisure opportunities. The Plan notes that we will continue to promote adventure as a key platform for the brand, and includes a focus on walking routes such as the Wales Coast Path and Offa's Dyke Path, as well as other outdoor activities. Our new Brilliant Basics fund will support initiatives that improve access to outdoor leisure activities, including 'Changing Places' (fully accessible toilets), as well as car parks and other facilities.
- **Environment** – although international travel impacts on carbon emissions, in Wales road transport contributes a much higher proportion of transport emissions. We will work with Transport colleagues to promote more sustainable travel and continue to work with sector SMEs to promote our environmental toolkit that encourages them to use less water, reduce waste and be more environmentally sustainable.
- **Community cohesion** – a new element of the Plan is the focus on place-making and community engagement; through our surveys we will track community views of tourism and we will involve residents in closer working with tourism bodies.

The priorities in the plan are closely **integrated** with, and have been informed by, other Welsh Government priorities including:

- the ongoing consultation on the *International Strategy for Wales*.
- the *Prosperity for All: the national strategy* and the supporting *Economic Action Plan* – tourism is a Foundation sector, and the Plan builds the new economic contract into our working.
- *Prosperity for All: a low carbon Wales*.
- *Cymraeg 2050* – the strategy for Welsh Language.
- *Action on Disability*.
- *A Healthier Wales*.

This plan is built on **collaboration and involvement** through extensive programme of engagement with stakeholders including:

- the sector (businesses, public sector and voluntary bodies and others) through the four regional Tourism Forums (each involving around 20-50 people, many representing wider groups in tourism), each of which met twice to discuss the emerging Plan.
- the four regional Tourism Roadshows across Wales where the priorities have been presented and debated.
- a conversation with the sector, launched at the Tourism Summit in March 2019 which asked for responses to ten questions about the future of tourism. The 386 responses have been independently analysed.
- two internal seminars, one facilitated by the Future Generations Commissioner, involving teams from across Welsh Government including IT, planning, taxation, sectors, environment, museums and heritage, and many others.
- feedback to the Deputy Minister from Cabinet members and Assembly Members.
- meetings with external bodies including Disability Wales and others.
- an active programme of internal staff involvement with a regular working group and open discussions at staff events.

That **collaboration and involvement** will continue through the delivery phase. Visit Wales can't deliver this plan alone, so success will mean working with others including the sector, other policy areas such as transport and stakeholders. We also recognise the need to scale the commitments in the plan – depending on funding and resources.

The high level priorities in this Plan are based on our best understanding of **strategic impact** although some of the more specific actions in the plan are still at the development stage and will need further assessment. We are also committed to evaluating the impact of our investments, alongside our routine programme of research and insights such as the regular 'Tourism Barometer' and other surveys. As noted this is a live document that will need to flex evolve in the light of changing information and available resources.

Effect on social wellbeing

Our new Plan will have a positive effect on people and communities through the goal of ‘Economic Growth that delivers benefits for people and places including environmental sustainability, cultural and social enrichment and health benefits’. Under this Plan, Visit Wales will continue to invest in products and events that deliver local benefits to communities (Bro), but also put Wales on the world stage (Byd).

There are also specific commitments to making sure that the plan is benefiting local communities through:

- revitalised Destination Management structures that will engage with local communities,
- open regional Tourism Forum sessions once a year in communities facing the greatest pressures, to ensure that the best possible balance is achieved between visitor expectations and local satisfaction,
- a new survey to understand how people in Wales feel about tourism.

As part of the Foundation Economy under *Prosperity for All: economic action plan*, we also expect all tourism businesses receiving financial support to meet the requirements of the Economic Contract, demonstrating a commitment to growth, fair work, employee health and skills and reducing their carbon footprint, and reflecting the kind of business behaviours we need for a sustainable tourism industry in Wales.

The Plan will have a positive impact on children and young people generally through enabling children and young people to relax, play and to join in a wide range of activities, and more specifically through proposals to help more young people have a holiday in Wales and for a festival of free/ subsidised experiences for children. The Equality Impact Assessment concludes that the Plan will also have a positive impact on equality through projecting a welcoming view of Wales and ensuring our marketing portrays and inclusive country, as well as through proposals to improve access to tourism facilities through the Brilliant Basics fund.

The Plan will also have a positive impact on **rural communities** through sustaining jobs, and supporting local food and drink. Respondents to the ‘10 questions’ consultation felt that the economic impact of tourism made some rural communities viable, providing direct and indirect employment opportunities and enabling broader businesses not directly involved in tourism to supplement their income. One respondent stated:

Tourism for many small, rural businesses is an essential part of their economic viability and in rural areas, tourism’s holistic reach helps to sustain local non-tourism businesses, e.g. village shops, pubs. Tourism can be holistic by supporting and enabling resources, access and attractions for shared use by visitors and locals, whether in the public, private or voluntary sector.

High standards of local produce, and quality places to eat and drink are key elements of the visitor experience. The Plan includes proposals to continue to work with food and drink leaders, Destination Management Partnerships and food industry clusters to improve the food tourism offer in Wales, and to develop a new joint Food Tourism Action Plan by 2020 that fits with the new *Food and Drink Strategic Plan*, to ensure that the food and tourism sectors are working together. We will also continue to support micro and small businesses. Our four regional Tourism Forums include many businesses in rural areas and we will continue to work with them to help them grow. We will also work with the Welsh Government Chief Regional Officers to ensure that tourism is represented in the *Economic Action Plan Regional Business Plans*¹.

There is strong evidence linking **health** and wellbeing outcomes with the quality of the built and natural environments². Outdoor activity has clear benefits for mental and physical health. Whilst more than 80% of adults in Wales take part in some type of outdoor recreation at least once a year, only 18% do so regularly³. Results from the Great Britain Tourism Survey (GBTS) show that the most popular activities undertaken on trips to Wales are relaxing (27%), short walking (24%), sightseeing on foot (20%), visiting a beach (20%), longer walking (14%) and centre based walking (13%)⁴.

¹ A full rural proofing impact assessment has not been undertaken as the likely immediate impacts arising from the Plan are not significant enough to warrant a more detailed assessment.

² *Public Health Wales (2018). Creating healthier places and spaces for our present and future generations.*

³ Welsh Government (2018). *National Survey for Wales.*

⁴ GBTS, 2017 data

02 Effect on social wellbeing

We will continue to promote, support and improve access to Wales' outdoor leisure offering to a wide range of visitors including communities. We will support activity/ outdoor facilities near major population hubs as well as other initiatives such as the Wales Coast Path and Offa's Dyke Path. Adventure and outdoor activity will also be core to the Wales brand and our marketing work in Wales.

There are also commitments in the Plan to initiatives targeted at specific groups, including better access to leisure and tourism facilities for people with physical impairments and working with social care providers to improve opportunities for breaks for a wider range of people including carers.

In relation to **privacy**, the Plan will not alter the way in which Visit Wales collects and handles information from the businesses, organisations and individuals that we interact with. All current legislation that regulates data protection and freedom of information will be fully respected and adhered to in our interventions to support the tourism industry.

Effect on cultural wellbeing and the Welsh language

Cultural wellbeing and the Welsh language are at the heart of the new Plan through the goal of ‘Economic growth that delivers benefits to people and places including social and cultural enrichment’.

As well as being important in their own right, **culture and heritage** make Wales distinctive in the world and so help position Wales as an outward-facing destination. Over the past five years tourism has made a significant contribution to culture and heritage in Wales through for example supporting local cultural events and products, helping to revitalise historic towns, find creative new uses for historic buildings and supporting adventure activities in former industrial landscapes. There is evidence⁵ that more visitors are seeking out authentic and meaningful experiences, and culture and heritage are part of that, which is reflected in feedback from the tourism sector about the need to project the Welsh identity and culture more strongly as an essential point of difference. We have also received feedback from cultural organisations as part of the regional Tourism Forums, and from Cadw, in developing the Plan.

As a result, the Plan will have a positive impact on culture and heritage and the ability of people to participate in arts, sport and recreation through the focus on heritage tourism products, through projects that benefit the special places that are unique to Wales and through supporting cultural events. These elements interact to create an experience that is distinctive to Wales, and enables Wales to stand-out in a very competitive marketplace. The Plan will promote and protect culture and heritage through:

- retaining a focus on culture as one of three core product themes used to prioritise development and marketing resources up to 2025
- developing market-facing bookable cultural products for the future - taking these to new audiences digitally and at events
- working closely with Cadw on heritage tourism products, events and research, including new visitor accommodation in a historic building on the Spanish Paradores model
- working with Amgueddfa Cymru/National Museum Wales to develop new visitor experiences
- supporting a balanced and sustainable portfolio of events which celebrate the diversity and distinctiveness of Welsh culture
- encouraging participation in sporting and cultural activities through our Event Wales programmes

Cymraeg 2050 official document has been taken into account in drafting the Plan which capitalises on the role of tourism in presenting Welsh language and culture to visitors from overseas, the UK and Wales. Evidence from visitors, businesses and stakeholders, suggests that the plan will have a positive impact on Theme 3 of *Cymraeg 2050* by creating a positive context for promoting Welsh language and culture. We will monitor the extent to which the new Plan impacts on the Welsh language through evaluating our investments, using ‘Bro’ and ‘Byd’ as a framework.

Effect on economic wellbeing

The visitor economy is a key driver of the economy in Wales. 132,300 people are directly employed in the visitor economy - around 9% of the workforce. In 2018, £6.3 billion of visitor spending generated £3 billion in Gross Value Added (GVA) in Wales, which has grown much more strongly than the economy as a whole.

Economic wellbeing is the core aim of the Plan, through 'Economic growth that delivers benefits to people and places'. This goal aligns with the *Economic Action Plan* goal of growth with a purpose that improves wealth and wellbeing across Welsh regions. This also aligns with feedback from the tourism sector about the need to shift towards sustainable economic development which delivers wider wellbeing alongside commercial growth.

Our main aim is for a sustained level of growth with a focus on off-peak periods – and to contribute more, through tourism, to Wales' general GDP. Supporting the growth and sustainability of tourism in Wales through the Plan will have an indirect positive impact on economic wellbeing for relevant businesses, noting that it can be difficult to disaggregate, and attribute impact to tourism action in isolation.

The recent economic performance of the tourism sector suggests that continuing to invest in tourism through the new priorities in the Plan will improve economic wellbeing for tourism businesses. Overnight visitors to Wales in 2018 generated £2.258 billion of expenditure, an increase of £324 million since 2012, driven by similar levels of growth in spend by overnight GB domestic visitors and international visitors to Wales. That increase in visitor spending has driven growth for the visitor economy and employment.

However, there are continuing challenges that the Plan is aiming to address, including attracting new visitors from overseas, growing visitor yields, spreading visitor growth across the year and strengthening the Wales brand. Other priorities in the plan that are likely to impact on the economic wellbeing of tourism businesses include:

- the £50 million Wales Tourism Investment Fund, delivered in partnership with the Development Bank of Wales, which will help finance capital investment in tourism projects and so create a positive impact on growing the sector and the Welsh economy.
- a small number of Visit Wales-led public-sector direct investments in projects or events with the potential to promote Wales internationally, that bring the best of Wales together into a single offer for visitors. The first project to be considered and scoped is a project to develop accommodation along the lines of the Paradores model in Spain.
- A new approach to partnership delivery which will see Visit Wales move from a support grant structure of working with partners on revenue development, innovation and marketing programmes to a procured approach, to ensure that regional and destination-level activity fully aligns with the action Plan.
- Exploring the possibility of a shift to free grading as part of a wider move to streamline business support where grading advisers work with tourism businesses to help them grow and become more profitable.

The Plan will have a positive impact on the **public sector** in that it includes a commitment to our existing programme of engagement with local government and other public bodies including Local Authorities, National Parks, Welsh Water, Natural Resources Wales and other public bodies, through our regional Tourism Forums, through our regular updates and newsletters and through the tourism Roadshows. We will continue to provide support through our revenue funding where proposals meet our criteria. Proposals for a new Tourism Tax will impact on local authorities as well as on the sector, and the Plan commits Visit Wales to working with officials across Welsh Government to gather evidence on the impact of the proposals.

We engage with **Third Sector** bodies such as the National Trust, events organisations such as Pride, and others through our regional Tourism Forums and through our regular newsletters. We also support such organisations through funding for events, through revenue and capital funding where appropriate. There are no proposals to change our current approach.

There is no intention within the Plan to bring forward new primary legislation, introduce an offence or have any other impact on the **justice system**.

Effect on environmental wellbeing

The availability of high quality natural resources and healthy ecosystems in Wales is a key element of the core tourism offer for Wales of adventure, culture and landscapes.

Closely associated with our national identity, our environment supports the green and natural perception of Wales as a destination for outdoor activities.

Over the past five years, Visit Wales has supported initiatives to improve environmental wellbeing directly through supporting tourism businesses to improve their environmental performance and indirectly through promoting the environment as part of a core tourism offer for Wales. We engage with a range of environmental organisations including Natural Resources Wales, as well as with national parks and others through our four Tourism Forums across Wales, who have been involved in developing the new Plan. We also asked the tourism sector in Wales about environmental sustainability as part of the '10 questions' survey. We received a wide range of suggestions for safeguarding the environment through tourism, including campaigns to raise awareness of sustainability across Wales or campaigns that revolve around litter picking and recycling, as well as supporting more electric and sustainable transport options. For example, one respondent asked us to:

Promote eco/sustainable travel through working with local communities and providing incentives for local communities to provide sustainable modes of travel in rural areas and provide funding for research into electric transport systems. (Response 59: Q10)

Following that feedback, environmental wellbeing is at the heart of the plan through the goal of 'Economic growth that delivers benefits for people and places including... environmental sustainability'. Under the new Plan, we will maintain the focus on a high quality environment as part of the core tourism offer and support a range of other environmental initiatives.

We contribute indirectly to **natural resources** by working with, and supporting parks, wildlife and other natural heritage organisations to develop their visitor offer and thus contribute to their sustainability. We will continue to support new visitor experiences associated with natural resources, including 'green' tourism products and initiatives. We will also work more closely with environmental organisations through a new working group on environmental tourism including national parks and others.

However, of the potential ways in which tourism can impact negatively on natural resources is through **over-tourism** when large numbers of people choose to climb to the summit of Snowdon or one of the other popular mountains in Wales at peak periods. This can create issues resulting from the impact of walkers, car parking, litter etc. Respondents to the '10 questions' also expressed concern that particular areas, such as environmental places of interest, are at risk of being 'loved to death', and suggested this could be eased through promoting alternative areas. We will address over-tourism through a greater focus on off-season marketing in order

to encourage visitors to come at other times of the year, or visit less well-known places. We will also monitor over-tourism through capturing the views of local residents.

Whilst the new Plan will not have a significant direct impact on national priorities for the sustainable management of natural resources, such as reversing the decline in biodiversity, carbon stores in soils or soil quality, flood risk or noise pollution, we will contribute to others including:

- **taking action to reduce the pressures on natural resources** through our environmental toolkit which encourages businesses to consider resource efficiency and through our funding for tourism attractions and buildings which reduces waste by reusing existing buildings.
- **supporting preventative approaches to health outcomes** through promoting outdoor activity through our marketing campaigns, supporting activity projects and contributing to mental health through providing volunteering opportunities at events.

Working with organisations such as Welsh Water in relation to their outdoor leisure offer we also contribute indirectly to **improving the quality and quantity of our water**.

In relation to **Climate Change** and decarbonisation, emissions from international air travel represent 1% of transport emissions in Wales, and international visitors represent 10% of the overall visitors to Wales. However international visitors spend more and stay longer than domestic visitors. Rather than deter international visitors, we will encourage visitors who are already considering coming to the UK, to come to Wales.

A Low Carbon Wales sets out 100 policies and proposals that reduce emissions and support the growth of the low carbon economy, noting that sustainability will always be a key priority when developing tourism in Wales. In response to this, we will continue to require funded capital projects to commit to the 'economic contract', including 'progression in reducing carbon footprint', and continue to develop the sustainability **toolkit** for destinations and tourism businesses.

As tourism does not operate in isolation from other policy areas, we will also work with Transport colleagues to promote more sustainable travel around Wales including the use of charging points and encouraging rail travel. We will also contribute to the re-use of historic buildings, thus reducing waste and carbon emissions through the need for new concrete and steel.

Healthy, capable and innovative businesses in tourism industry will improve resilience and help embed **adaptability to climate change**.

Record of full impact assessments required

Impact Assessment	Yes/No	
Equality	Yes	Completed
Children's Rights Impact Assessment	Yes	Completed
Welsh Language	Yes	Completed
Biodiversity	No	As the Plan will not change the nature of how individual investment decisions take account of natural resources, this will still be taken into account on a project level and no further evidence gathering or impact analysis proposed.
Climate Change	No	The impact of the new plan on climate change is not significant to warrant separate assessment using the HM Treasury Green Book greenhouse gas evaluation methodology, as the actions reflect existing Welsh Government policies that have already been assessed on an individual policy basis (such as the Economic Contract (under the <i>Economic Action Plan</i>) which requires businesses to decarbonise, which will include the Tourism sector).
Strategic Environmental Assessment	No	We have not completed a Strategic Environmental Assessment, as the Plan has not been prepared for adoption through a legislative procedure.
Habitat Regulations Assessment	No	A Habitats Regulations Assessment is not required by law as the Plan will not impact on the Natura 2000 European protected site network.
Environmental Impact Assessment	No	An Environmental Impact Assessment is not required as the Plan does not propose specific buildings, development or intervention. However, where we do fund individual capital projects, they are expected to undertake the relevant environmental assessments.

Conclusion

As noted, the new Plan has been shaped by an extensive process of engagement with those most affected by it – the 11,500 tourism businesses and organisations across Wales, as well as many other stakeholders. The priorities in the Plan respond to those concerns, and also align with, and add value to other policies across Welsh Government.

The Plan will contribute directly or indirectly to wellbeing with **positive impacts** on the economy, cultural and social enrichment and health. Whilst the Plan will make a positive impact on environmental sustainability in some ways, tourism also has the potential to have a **negative impact** on decarbonisation through international travel and on natural resources through over-tourism, and these have been addressed in the Plan. The Plan also embodies the five ways of working through the focus on wellbeing, through the emphasis on partnership and collaboration, through the long term view and through the integration and close working with other areas of government.

More specifically, the Plan will maximise the contribution to wellbeing through our ambition to ‘Grow tourism for the good of Wales’ and through ‘Economic Growth which delivers benefits for people and places including environmental sustainability, cultural and social enrichment and health benefits’. Each of the priorities in the Plan will contribute to those goals. For example we will deliver

- **Economic benefits** through supporting the industry and through tackling challenges such as seasonality, spend and spread,
- **Environmental sustainability** through addressing over-tourism by encouraging year round visitation and better understanding the views of local residents,

- **Cultural enrichment** through raising awareness of the Welsh language and culture, and creating more distinctively Welsh experiences and opportunities, as well as promoting heritage tourism products,
- **Social enrichment** by investing in better access to tourism facilities, by working with social providers to find opportunities to enable a wider range of people to take a holiday in Wales and by promoting a more inclusive view of Wales,
- **Health benefits** through supporting, promoting and improving access to outdoor leisure opportunities including events, activities and features such as the Wales Coast Path.

In order to mitigate some of the potential negative impacts of tourism on carbon emissions we will also work closely with Transport colleagues to encourage sustainable transport options, and ensure that investment in facilities will meet environmental standards.

We will monitor and evaluate the Plan as it progresses. The priorities in the Plan have been shaped by a significant body of evidence which will be updated regularly so that we can align implementation with the current evidence. We will also collect more data on visitor satisfaction and resident’s perspectives of tourism to understand the impact of the Plan on social wellbeing, and develop a range of other measures aligned with the wellbeing indicators. We will regularly review and evaluate the key pillars of the Plan using Bro/Byd as a framework, and for where we are taking forward new initiatives that target specific groups (such as young people and carers), we will involve them in developing these proposals further.

