Gwynedd & Eryri 2035

Cynllun Economi Ymweld Cynaliadwy
Sustainable Visitor Economy Plan

Gwynedd and Eryri Sustainable Visitor Economy 2035

Strategic plan

PARC CENEDLAETHOL ERYRI
SNOWDONIA NATIONAL PARK

CYNGOR GWYNEDD

Gwynedd and Eryri Sustainable Visitor Economy Plan 2035

- **Foreword**
  - Leader of Cyngor Gwynedd
  - Chair of Eryri National Park

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Foreword

It is our pleasure to present this Sustainable Visitor Economy Plan on behalf of Cyngor Gwynedd and the Eryri National Park Authority.

The Plan is the result of many years of discussion and joint planning and we have consulted widely with elected members, communities, businesses and other key partners in developing it.

This Strategic Plan sets out the core principles for the visitor economy in the which will in turn lead to a series of actions to be agreed upon by the Sustainable Visitor Economy Partnership.

We recognise the importance of the visitor economy to this special area, but we are also keen to ensure that the area and its special qualities are protected and safeguarded - so that what is so unique about the area remains protected today and for future generations.

This is a plan that breaks new ground and introduces a new way of measuring the impact of the visitor economy as a whole on our area taking into account effects on our language, culture and heritage, the environment and on our communities.

Pressures from the visitor economy on our communities, our environment and more broadly on the area's infrastructure have been acutely experienced in recent times. Indeed, the period following Covid-19 proved that the visitor economy needed to be re-examined to ensure a greater balance for all. We are confident that this Plan will help to identify and respond to issues and opportunities that have arisen or will arise in the future.

This Plan has been developed whilst taking into account research and key statistics as well as national, regional and local strategic priorities and international good practice. These considerations can be found in the Appendices.

By working together on developing the Plan and identifying new collaboration arrangements, Cyngor Gwynedd and the National Park Authority commit to action in order to achieve "a visitor economy for the benefit and well-being of the people, environment, language and culture of Gwynedd and Eryri".

However, we know that successful action cannot be achieved by us alone, and therefore we will establish the Gwynedd and Eryri Visitor Economy Partnership 2035, in order to help us realise the vision and our new visitor economy principles. The partnership will have a key role in developing and agreeing an Action Plan over a period of 5 years and it will have responsibility for agreeing on balanced measurements and for reviewing performance indicators every 12 months.

This is a plan that breaks new ground and presents a new way of measuring the impact of the visitor economy as a whole on our area, taking into account effects on the language, culture and heritage, the environment and our communities.

We look forward to the continuation of our collaboration as two Authorities, but also to our collaboration with key partners across the community, private and public sectors so that we can realise our objectives. Clearly, much of our future work will be dependent on securing funding, but by co-working to agree on an Action Plan and to identify sources of funding - our intention is to convert this Strategic Plan into action to ensure that we have a balanced, sustainable and robust visitor economy for the benefit of all our communities and businesses.

Cllr. . Dyfrig Siencyn
Leader Cyngor Gwynedd

Cllr. Annwen Hughes
Chair National Park Authority

1. Our Vision

Cyngor Gwynedd and the National Park Authority has collaborated with communities, businesses and stakeholders on developing this Plan in order to promote a Sustainable Visitor Economy in our area for the future. Our vision for the future therefore is:

"A visitor economy for the benefit and well-being of the people, environment, language and culture of Gwynedd and Eryri"

Both bodies have reviewed international and local good practice while also considering the United Nations World Tourism Organisation's definition of sustainable tourism in order to create principles for the Cyngor Gwynedd and Eryri National Park to follow in future.

The Principles of the Gwynedd and Eryri National Park Visitor Economy

Following a number of consultation sessions with Elected Members, communities, the visitor economy sector and other organisations, we have agreed on the following Sustainable Visitor Economy Principles:

1. **Celebrate, Respect and Protect our Communities, Language, Culture and Heritage**
2. **Maintain and Respect our Environment**
3. **Ensure that the advantages to Gwynedd and Eryri's communities outweigh any disadvantages**

The new principles model can be seen here:

Objectives have also been developed to inform future priorities:

Celebrate, Respect and Protect our Communities, Language, Culture and Heritage: Objectives

- A visitor economy in the ownership of our communities with an emphasis on pride in one's area
- A visitor economy that is world-leading in Heritage, Language, Culture and the Outdoors

Maintain and Respect our Environment: Objectives

- A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on our environment today and in the future
- A visitor economy that is a world-lead leader in sustainable and low carbon developments and infrastructure and in responding to the climate change crisis.

Ensure that the advantages for communities outweigh any disadvantages: Objectives

- A visitor economy that ensures that infrastructure and resources contribute towards the well-being of the community all year round
- A visitor economy that thrives for the well-being of Gwynedd and Eryri residents and businesses and that offers quality employment opportunities for local people all year round
- A visitor economy that promotes local ownership and supports local supply chains and produce

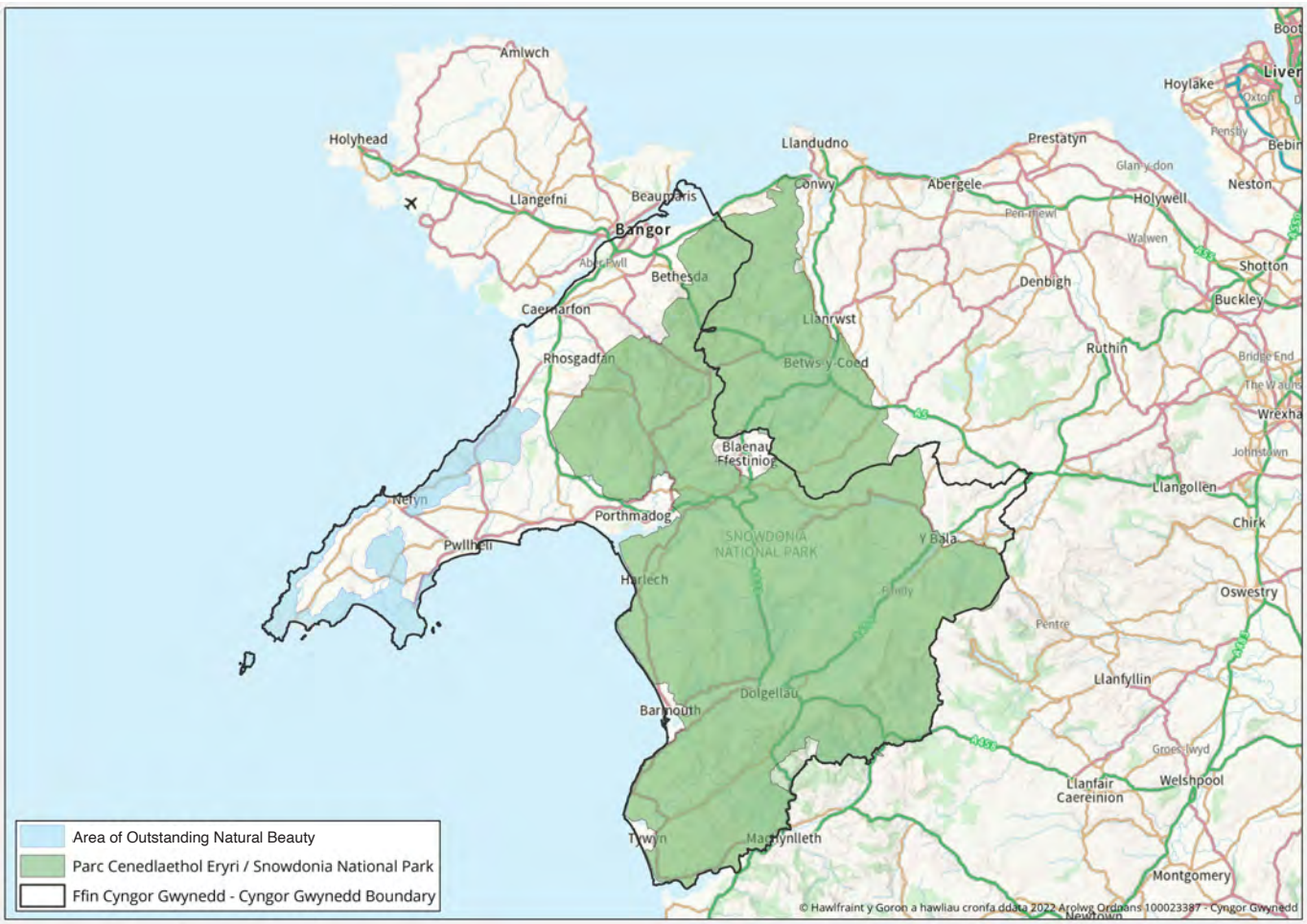
This Plan breaks new ground for the area and responds directly to the opinion of our communities and the desire of our businesses to operate in a different way in the future.

Our intention is for this new collaboration between Cyngor Gwynedd, Eryri National Park and community, business and public partners to lead to a sustainable visitor economy in the area which gives priority to the well-being and prosperity of our communities, language and culture.

Cynllun Eryri recognises the need for a Sustainable Tourism Plan and the Cyngor Gwynedd Plan gives priority to ensuring that Gwynedd's businesses and communities benefit from the visitors who come to the area as well as developing a Regeneration Plan for Gwynedd.

During the process of developing Our 13 Area Plans as part of implementing the Gwynedd Regeneration Framework, 13 areas in Gwynedd were consulted. The need for sustainable tourism arose in 9 of the 13 areas. In the 3 areas where Sustainable Tourism was not identified as a specific need, the issues regarding second homes, environmental protection, infrastructure, sustainable transport and the need for clean and tidy places were identified.

This Plan applies to the Cyngor Gwynedd area and the Eryri National Park - including the Conwy County Borough Council area which is part of the Park as you can see from the map below:

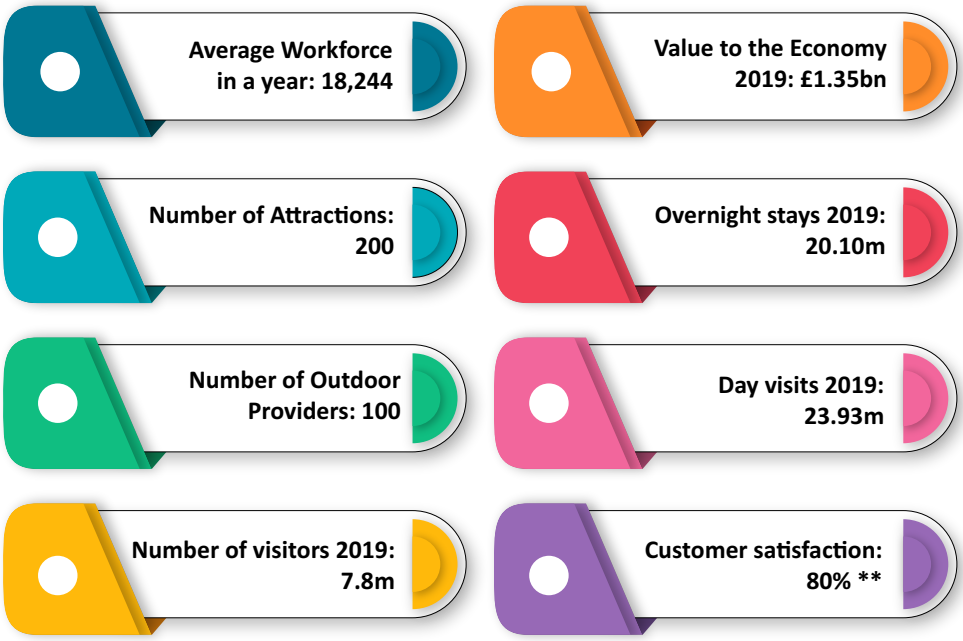


2. Measuring Indicators and Milestones

By adopting the Plan it is necessary to establish a way of indicating how the principles are embedded and implemented.

One of the main shortcomings of indicators for the tourism field at the moment is our reliance on reporting on economic and employment issues only through the use of the STEAM (Scarborough Tourism Economic Assessment Monitor) model. This data focuses on economic elements and there is insufficient consideration of the impact of the visitor economy sector in a holistic way.

The current data demonstrates the following. (There are more statistics in Appendix 1 – The Case for Action):



*STEAM Review Figures 2019

** Visitor review Visit Wales – Cyngor Gwynedd Beaufort Research 2019

The Skills and Employment Plan for North Wales 2023-2025 identifies the following when discussing the tourism and hospitality sector:

- The average salary across North Wales in all sectors is £24.8k
- 37% of people in the sector say that it is difficult to fill jobs

The information below provides the information for Gwynedd:

64.4% Welsh speakers* 2021 census (a decrease of 1% from 65.4% in 2011)

Considering the above and the information in the Case for Action (Appendix 1) we have identified comprehensive new indicators for measuring the impact of the visitor economy so that we have a much more balanced impression.

A number of the indicators are influenced by external matters - beyond the visitor economy - but they can offer important context when considering the action priorities of this Plan and partners' plans.

The Visitor Economy Partnership will be required to agree on a series of indicators to provide a more balanced image of the effects of the visitor economy on the area. The Action Plan will also set performance indicators to monitor delivery against the priorities of the Plan.

Examples of the new indicators could be:

1. Celebrate, Respect and Protect our Communities, Language, Culture and Heritage, for example:

- The percentage of residents who are satisfied with the effects of tourism on the community in general and the identity of the destination;
- The number of second homes (according to tax rates) and house price inflation;
- Number of Welsh speakers;
- The number of individuals and businesses who support the culture, protection, conservation and management of the area through the 'tourism ambassador' schemes for Gwynedd / Eryri.

2. Maintain and Respect our Environment for example:

- The numbers visiting / taking part in environmental / landscape activities i.e. coastal path, beach, Yr Wyddfa, paths;
- Biodiversity level (sampling some areas / species) marine and inland areas;
- Sea vessel registration - boats / jet skis;
- Number of public transport routes available (monthly);
- Number of electric car charging points;
- Number of reports / complaints about illegal camping.

3. **Ensure that the advantages for the communities of Gwynedd and Eryri are greater than any disadvantages for example:**

- Percentage of streets that are clean;
- Level of community deprivation;
- Parking numbers versus capacity;
- Number of road traffic incidents;
- Number of open public toilets / per 1000 of the total population;
- Number employed in the tourism industry;
- Average salary within the tourism industry;
- Number of tourism businesses / enterprises (or tourism-related businesses) in local or community ownership.

3. Establishing and Implementing the Principles for Gwynedd and Eryri

When adopting these Principles, it is necessary to establish new delivery arrangements in order to realise them in partnership, and in order to respond to the consultation process and the research.

In order to facilitate this, the Council and the Park Authority have signed a Memorandum of Understanding on 26 November 2021.

The Memorandum gives priority to the following:

- To agree on formal collaboration arrangements and structures between the two bodies;
- Establish collaboration arrangements with wider partners;
- Develop action plans;
- Develop appropriate measurements;
- Share good practice; and
- Agree on a Sustainable Visitor Economy Plan 2035.

This Plan cannot be implemented by the two partners in isolation, realising our vision depends on a broad and new partnership.

One of the first actions of this Plan will be the establishment of the Gwynedd and Eryri Sustainable Visitor Economy Partnership which will bring partners together for the first time to formally discuss this field of work for the future.

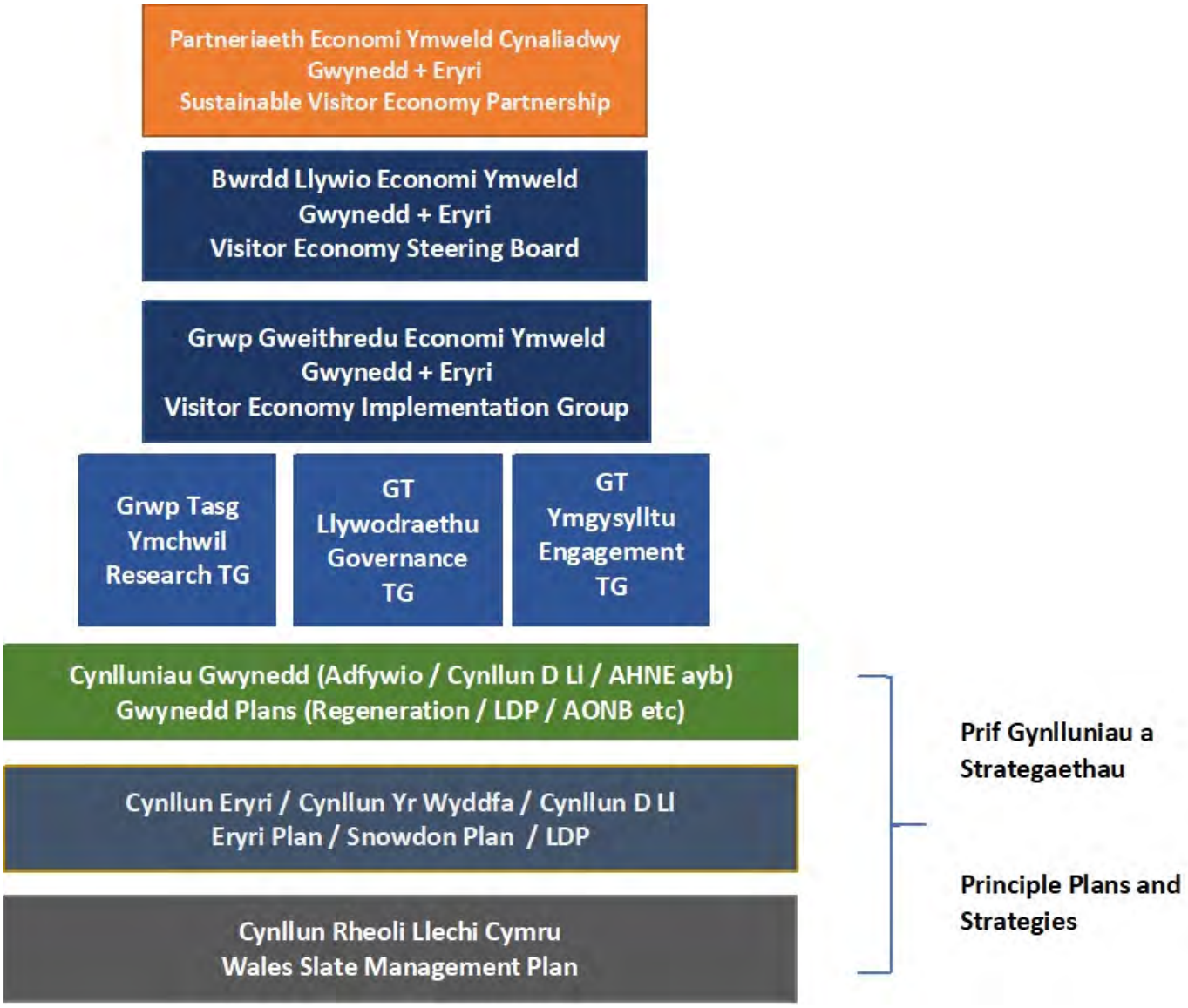
The new structure includes the following:

Gwynedd and Eryri Sustainable Visitor Economy Partnership - A new multi-sector partnership to deliver the Visitor Economy Plan by agreeing on delivery priorities, appropriate measurements and regular monitoring.

Gwynedd and Eryri Sustainable Visitor Economy Steering Board - A joint strategic Steering Board between Cyngor Gwynedd and the Eryri National Park Authority with political representation and senior officers to agree on the strategic direction of the visitor economy between the two authorities. A representation from the Partnership will sit on the Steering Board.

Gwynedd and Eryri Sustainable Visitor Economy Action Group - A group of officers to act on the strategic priorities set by the Steering Board and to support the realisation of the action priorities, the measurements and the monitoring work on behalf of the Partnership.

The following structure will be adopted in order to monitor and realise the Plan:



The Sustainable Visitor Economy Partnership will adopt a formal Terms of Reference and it is expected that it will have a central role in advising the Steering Board and the Action Group and monitoring progress in delivering the Plan and the relevant Action Plan. Membership of the Partnership will include:

- The two main partners
- Leaders from the private sector
- Community leaders and the third sector
- Public partners

Gwynedd and Eryri Sustainable Visitor Economy Action Plan 2035

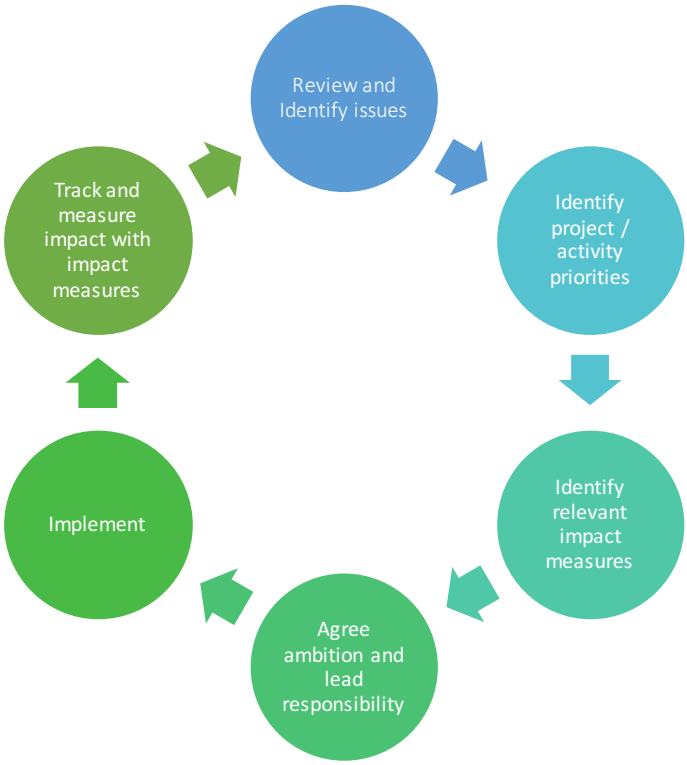
A number of actions are already taking place or have been scheduled by partners in order to respond to discussions on the development of this Plan and examples of these can be seen in the case studies.

One of the main responsibilities of the Sustainable Visitor Economy Partnership will be to develop and agree on an Action Plan to go along with this Strategic Plan. The objective of the Action Plan will be to ensure that we respond to the needs of the areas of Gwynedd and the National Park, the communities, businesses and the research that has been considered. The Action Plan will provide more detail of the practical steps and the priority projects and policies that we would like to see implemented in the area in the future.

The Action Plan will list priorities and identify a lead body for delivery. It will go hand in hand with this strategic overview and interweave with the 13 Area Regeneration Plans which have been jointly developed with all the areas of Gwynedd and Eryri in response to what is important to our communities and businesses.

The Action Plan will be a living document that will continuously develop in order to respond to the priorities of our communities and our businesses. It will be reviewed every 12 months by the Sustainable Visitor Economy Partnership.

It is expected that the Partnership will follow this procedure when reviewing priorities:



It is expected that an annual procedure will be followed, identifying issues, identifying the method of response and the method of measuring the impact of the response, before then agreeing the output of the action as seen below

For example, issues arising in relation to motor homes:

Finance

Despite the serious financial forecasts that lie ahead, it is expected that this Plan will also influence the other policies relating to sCyngor Gwynedd, Eryri National Park and partners in the planning, destination management, environmental management, training and skills, regeneration, business support, events fields etc, adding value by changing the emphasis of activities or policies. We are confident that the Strategic Plan and the prioritised Action Plan will open doors to the UK and Welsh Governments' funding and other sources of funding in the future.

During our discussions and consultations relating to the development of this Plan, the Tourism Levy was raised as a possible means of supporting the sector and our communities in the future. While the Welsh Government is consulting on this, and there is no guarantee that it will be adopted; the Sustainable Visitor Economy Partnership and its Action Plan could be an inclusive and fair way of identifying priority projects for investments from the Visitor Levy in the future, should it be established.

The main strategic actions

Below are the main strategic actions for Cyngor Gwynedd, Eryri National Park Authority and the new Sustainable Visitor Economy Partnership:

Action	Lead Body	By when?
Establishment of Gwynedd and Eryri Sustainable Visitor Economy Partnership	Cyngor Gwynedd with the support of Eryri National Park	Spring 2023
Develop and embed the formal collaboration arrangements between the Council and the Park	Cyngor Gwynedd and Eryri National Park	2023
Adoption of Balanced Measurements	Sustainable Visitor Economy Partnership	Spring 2023
Establish formal Monitoring Arrangements	Cyngor Gwynedd	Spring 2023
Approve an Action Plan that identifies a lead body to deliver priorities	Sustainable Visitor Economy Partnership	Summer 2023
Establishing Leaders within the communities of Gwynedd and Eryri	Sustainable Visitor Economy Partnership	Spring and Autumn 2023
Influencing partners' policies and strategies	Sustainable Visitor Economy Partnership	Continuous
Identify funding opportunities	Sustainable Visitor Economy Partnership	Continuous but during the annual review in December.
Continuous monitoring and review, but with an annual review of progress	Sustainable Visitor Economy Partnership with the support of Cyngor Gwynedd and Eryri National Park	Continuous but a report to be submitted every December.
Communicate with all stakeholders in the visitor economy	Cyngor Gwynedd and Eryri National Park	Continuous

4 Operational Case studies

Although the Action Plan has not yet been adopted by the Sustainable Visitor Economy Partnership, action is already taking place by partners in Gwynedd and Eryri. The Case Studies below show the activity that is already taking place which respond to this new Plan.

Care for Eryri Plan ✓ ✓ ✓.

Caru Eryri / Care for Eryri is a volunteer plan which is run in partnership with Cymdeithas Eryri / Snowdonia Society, the Outdoor Partnership and the National Trust. The aim of the plan is to help manage the effect that an increasing number of visitors is having on the National Park. Litter collections are organized across the National Park, focussing on the busiest paths, which include, all the main Yr Wyddfa, Ogwen, Cader Idris, and Llyn Tegid routes.

Volunteers can join the volunteer shift by using the online system. There are shifts arranged every Wednesday, Friday, Saturday and Sunday. Over the summer of 2021, volunteers spent 134 days caring for Eryri and collected 1033kg of rubbish. This is a huge achievement for which we are extremely grateful. The plan has been very successful in 2022, and includes conservation workdays.

Sustainable Parking and Transport in Eryri ✓ ✓ ✓

Putting the proposals into action has already been initiated for an ambitious and sustainable approach to getting to grips with parking and transport in the northern part of Eryri. The proposals outline how traffic, pollution and noise could be reduced tremendously inner area of the National Park during peak season whilst also significantly improving the visitor experience.

The proposals put forward in the Parking and Transport Review for the Wyddfa Partnership include:

- Seasonal management of parking in the 'inner area' with pre-booking options;
- An all-inclusive visitor access ticket which would encourage using local businesses via discounted prices and offers;
- A new zero carbon fleet of buses;
- Discuss ideas with communities re. parking improvements parking in the gateway villages;
- Transform the way information about parking and access is communicated;
- Infrastructure for electric vehicle charging;
- Management of on street and residents parking in the gateway villages;
- Public transport service, such as the network of shuttle buses, interchanges with long distance railway and bus services, improvements to the wider transport network, and

transport services' response to the demand from other sources;

- Review of improvements and work with taxi suppliers;
- Coach parking spaces (buses);
- Walking and cycling initiatives;
- Other complementary services to improve the visitor experience as part of the ethos of promoting sustainable access.

Gwynedd and Eryri Ambassador Schemes ✓ ✓ ✓

The Gwynedd and Eryri Ambassador Courses give people the opportunity to learn and improve their knowledge about the unique qualities of the area to explain what makes Gwynedd and Eryri a special area that indeed cannot be compared to anywhere else.

They are free online courses available for anyone to complete in their own time.

The course is divided into two parts - the learning part, which includes videos, pictures and text about different topics, and the testing/quiz part, where the users can show how much they've learned.

Modules as part of the courses include: Welcome to Gwynedd / Welcome to Eryri, Language and Culture, Communities, The Coast, Landscape, UNESCO Sites, Activities and Attractions, History and Heritage and Wales. Three modules (compulsory) must be passed to reach the Bronze level, six modules to reach the Silver level and nine modules to reach the Gold level.

https://www.ambassador.wales/ambassador-courses/

Timau Tacluso Ardal Ni (Our Area Tidy Up Teams): Clean and Tidy Communities ✓ ✓ ✓

Following an investment of £1.5 million from Cyngor Gwynedd, the Our Area Tidy Up Teams will be working in communities from Aberdyfi to Abergwyngregyn to carry out a range of tidying up tasks such as cleaning pavements and signs, removing graffiti, tidying up roadsides, repairing and installing bins, addressing fly tipping, weeding and the removal of chewing gum.

The intention of the work is to contribute to the goal of making Gwynedd's communities clean and tidy in accordance with the wishes of local residents.

With this investment, the Council will employ new staff who will work in communities across the county, together with specialist vehicles and equipment to carry out thorough tidying work. Small tasks like this can make a world of difference to the look and feel of a street or community and the Our Area Tidy Up Teams will help to provide clean and tidy communities across Gwynedd.

Community pride in our local areas is central to the work ensuring the best for the communities of Gwynedd and those people who visit the area.

Arosfan / Aires Scheme ✓ ✓ ✓·

As motor home visits to Gwynedd become more and more evident in our towns, villages and rural areas, better management of motor homes has been the subject of discussion in our communities.

This was investigated by Cyngor Gwynedd and a report was drawn up which included feedback from communities, businesses and users of motor homes in terms of how better management of the area can be ensured. Based on this evidence, a pilot scheme was developed to trial the use of assets owned by the Council - such as public car parks in appropriate destinations; in order to provide 'overnight' parking for the purpose of motor homes similar to "aires" schemes abroad and to bring benefits to local communities and businesses.

Through the pilot, it is intended to make simple modifications in car parks to provide basic services to motor-home owners such as fresh water, toilet emptying, disposal of grey water and rubbish. The Council is looking at around 6 sites across Gwynedd in urban locations where Motorhome management problems have been a challenge, and these will act as a network. Clear regulations will be set for length of stay and 'camping' activities will not be allowed.

Another scheme will run hand in hand with the development of the Lay-by locations to improve the Council's powers to regulate the area in order to respond to the challenges that arise in some locations in the county with these vehicles parking overnight without the right to do so.

5. Contact details and further information

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A Welsh language version of the document is available

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Appendicies

1. The case for action

Gwynedd and Eryri are home to iconic natural and heritage attractions, which include Yr Wyddfa, the National Park, the Llŷn Area of Outstanding Natural Beauty (AONB), one of the longest sections of the Wales Coast Path, blue flag beaches and marinas, the largest forest in North Wales, over 100 lakes, World Heritage Sites and the Dyfi Biosphere.

There are 17 National Nature Reserves in Eryri; more than in any other national park in Wales; and 56 Sites of Special Scientific Interest. The vast biodiversity reflects the variety of the landscape, geology, the climate and the land management methods. The wealth of plants and animals is fundamental to the history, culture, language, economy and continual well-being of everyone who lives in and visits the area.

There are a number of high standard businesses, attractions and food and drink producers here that have invested heavily over the past decade providing unique experiences for residents and visitors. The outdoor and heritage sectors are two of the county's strongest sectors.

The area is a stronghold of the Welsh language with over 69% of the population speaking Welsh fluently according to the 2011 census.

For centuries, the area has attracted visitors who have been fascinated by our natural and built environment and our communities. Today, there is a need to review our priorities for the visitor economy in future, work differently and create a new plan.

The visitor economy has an important contribution to make to the economy and communities of Gwynedd and Eryri - this contribution needs to be balanced and sustainable in order to protect our communities, our environment, language and culture for future generations.

Data and research highlight the need for a better balance in the visitor economy and within the economy generally in the Gwynedd and Eryri National Park area.

The review of Phase 1 of the Arfor programme funded by the Welsh Government highlights the following about the West Wales area:

The counties of Gwynedd, Anglesey, Ceredigion and Carmarthenshire are often referred to as strongholds of the Welsh language, although a number of counties or areas within other counties can be identified which share similar characteristics. There is a general consensus that these strongholds share similar social, economic and cultural characteristics, including:

1. A high percentage of Welsh speakers
2. Immigration of older people, young people who emigrate
3. Rural depending on agriculture, food and tourism
4. Market towns and University towns

5. High percentage of jobs in the public sector

6. Lowest wages in Britain, and among the lowest wages in Europe

In addition to the above, there is a consensus that the counties share the same challenge, and that there is a problem that needs to be responded to.

Although the development of this Plan has commenced since 2018, Covid-19 has put tremendous pressure on communities across Gwynedd and Eryri with unprecedented numbers of visitors to the area. This period has highlighted some issues that need to be addressed to support a sustainable visitor economy.

A climate change emergency was declared by Welsh Government, Cyngor Gwynedd and the National Park in 2019. The nature and biodiversity crisis as a result of climate change forces us to change our lifestyle and behaviour.

The Eryri Plan identifies the need for a Sustainable Tourism Plan and the Cyngor Gwynedd Plan places a priority on ensuring that Gwynedd's businesses and communities benefit from the visitors who come to the area and develop a Regeneration Plan for Gwynedd.

The Slate Landscape of North West Wales World Heritage Site Management Plan recognises the need to develop a plan to manage visitors to the area and the Llŷn Area of Outstanding Natural Beauty gives priority to sustainable tourism management.

We have a duty to protect the area's communities, environment and culture for the benefit of future generations, and new collaboration opportunities arise and an opportunity to learn from the experiences of other areas.

In November 2021, Cyngor Gwynedd and the National Park Authority signed an Agreement of Understanding. The Objective of the Agreement of Understanding is to collaborate effectively and efficiently in partnership to realise the Vision and Principles of the Gwynedd and Eryri Sustainable Visitor Economy Plan 2035 to protect and promote the area's special values.

This Plan is relevant to the Cyngor Gwynedd and Eryri National Park area - including the Conwy County Borough Council area which is part of the Park.

During the process of developing 13 Ardal Ni (Our Area) Plans as part of implementing the Gwynedd Regeneration Framework, 13 areas of Gwynedd were consulted. The need for sustainable tourism arose in 9 of the 13 areas. In the 3 areas where Sustainable Tourism was not identified as a specific need, the themes of second homes, environmental protection, infrastructure, sustainable transport and the need for clean and tidy places were identified.

Research and statistics

The development of this Plan has relied a great deal on research work and statistical analysis in order to draw up our principles and priorities for action.

The research and statistics include:

- Review of Local Tourism Accommodation (2018/19, Cyngor Gwynedd)
- Visit Wales and Cyngor Gwynedd Visitor Review (2019, Beaufort Research)
- Benefiting from Tourism Review - consideration of options to fund future priorities (May 2019, Blue Chip Tourism and RJS Associates Ltd).
- Review of the Destination Management Partnership (October 2019, Blue Chip Tourism and RJS Associates Ltd)
- Cynllun Eryri Plan (2020, Eryri National Park Authority)
- Yr Wyddfa and Ogwen Sustainable Parking and Transport Strategy (2020, Eryri National Park Authority)
- Cyngor Gwynedd Plan (2018, Cyngor Gwynedd)
- Managing the use of dwellings as holiday homes (December 2020, Cyngor Gwynedd)
- Research to the motor homes situation in Gwynedd (September 2021, Cyngor Gwynedd)

The main statistics of the Visitor Economy in Gwynedd can be seen below*:

- Average Workforce in a year: 18,244
- Number of Attractions: 200
- Number of Outdoor Providers: 100
- Number of Visitors 2019: 7.8m
- Value to the Economy 2019: £1.35bn
- Overnight stays 2019: 20.10m
- Day stays 2019: 23.93m
- Customer Satisfaction: 80% **

* STEAM Review Figures 2019

** Visit Wales Visitor Review – Cyngor Gwynedd Beaufort Research 2019

According to the review of the Destination Management Plan, these are the following headlines for 2013 - 2020 performance (2018 data unless noted differently):

- 11% increase in the number of visitors to 7.37 million
- Tourist nights and days have increased by 11%
- 23% increase in Economic value to £1.12 Billion
- 15,500 jobs supported by tourism spending
- 14% growth in the number of accommodation businesses to 3,194 (2011-2019)
- 6% increase in bed spaces to 132,611 (2011-2019)
- 47% increase to Yr Wyddfa summit visitor Centre (2014/2017)
- 102 activities supported by Cyngor Gwynedd, adding £34 million towards the local economy (2014-2018)
- 3.1 million users viewed the official website of Snowdonia Mountains and Coast during 4.1 million sessions (2015-2019)
- Average growth of 580% in official social media channels
- 1,925 AirBnB registered in Gwynedd in January 2019 (increase of 1,251 in August 2018 and 745 already on the accommodation research list)

The North Wales Skills and Employment Plan 2023-2025 states the following when talking about the tourism and hospitality sector:

- One of the most difficult sectors to fill employment gaps
- Average salary across North Wales in all sectors is £24.8k
- 37% of people in the sector say that it is difficult to fill jobs
- Retaining staff in the sector is difficult – as not enough people want jobs and as wages are lower compared to other sectors
- The sector shows high employment opportunities for the future and has seen steady growth since 2016 and shows growth beyond 2025
- Need to raise the profile of the sector in the future as a career
- Need to encourage employers to invest in their staff in order to retain them
- Need to encourage apprenticeship opportunities in the sector

Gwynedd Accommodation Review

The following provides information on the situation in Gwynedd:

Number of homes	61,645
Number of second homes	4,873
Number of self-catering Holiday units (non-domestic unit)	1,976
Merged Total	6,849
Merged total of holiday accommodation in Gwynedd (highest in Wales	10.76%

According to the 2021 Census, the number of Welsh speakers in Gwynedd was 64.4% (a reduction of 1% from 65.4% in 2011) 86.3% in the Seiont 2 ward in Caernarfon to 19.6% in the Deiniol ward Bangor and 36.1% in the Tywyn 1 ward

The main issues that arise in the area

In considering the case for action, the research and statistics the main issues affecting the area can be summarised as follows.

In some areas, there are exceptional pressures on communities and public services, for example on car parks, waste and recycling levels, roads, facilities and matters arising as a result of motor homes, pressure on emergency services, AirBnB and events. The Covid-19 period created tensions in some areas with unprecedented visitor numbers.

Salary levels are traditionally low within the visitor economy sector, although there has been a slight increase in recent years but, traditionally, it is also a sector that offers seasonal employment and interest to pursue a career in the field is decreasing.

According to some, there is a lack of diversity in the rural economy and possible over-dependence on tourism and negative feelings within some communities and areas.

Some are also concerned about the potential impact of the visitor economy on language, environment, communities and culture - but there may be opportunities if different actions are taken and new principles and way of working are followed in order to ensure sustainable growth.

Developing better measures could offer a new and improved way of measuring any negative and positive impacts that derive from the visitor economy on our areas and there is an opportunity here to integrate a Sustainable Visitor Economy Plan into the development of Area Regeneration Plans across Gwynedd.

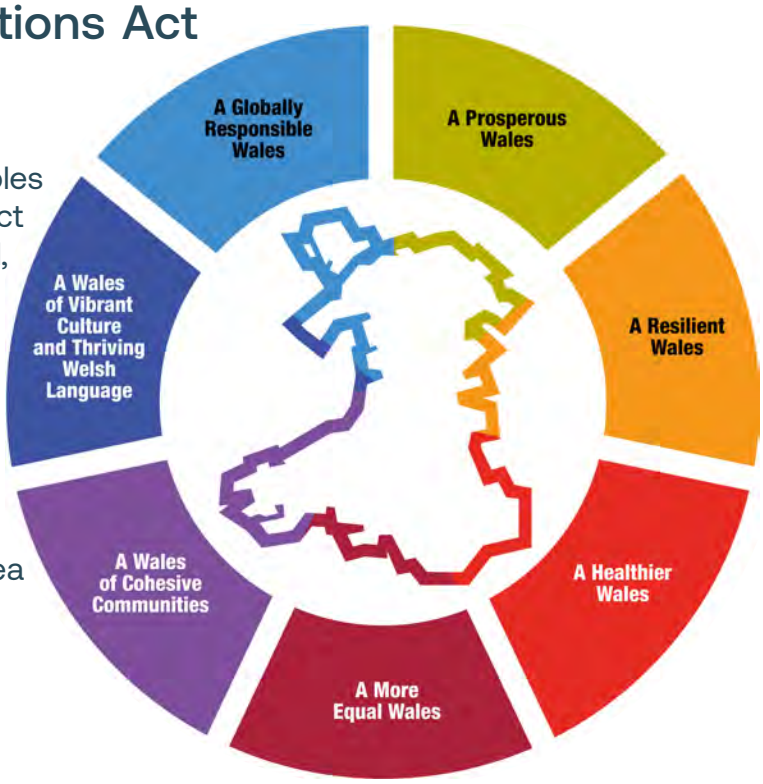
A review of the Gwynedd Destination Management 2013-2020 was undertaken in 2019 and more details about the conclusions can be found in the 'Developing the Plan and Consultation' section.

2. The Strategic Context and Good Practice

Well-being of Future Generations Act 2015

As a Council, we are committed to the principles within the Well-being of Future Generations Act (2015) in order to improve the economic, social, environmental and cultural well-being of communities in Gwynedd and Eryri. We will ensure that we consider the long-term by collaborating and considering people of all ages when resolving and preventing problems.

Our vision for the visitor economy in the area corresponds with the principles of the act.



The United Nations World Tourism Organisation (UNWTO)

The UNWTO defines sustainable tourism as:

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.".

UNWTO has three pillars that define sustainable tourism:

1. Make optimal use of environmental resources that constitute a key element in tourism development
2. Respect the socio-cultural authenticity of host communities
3. Ensure viable, long-term economic operations, providing socio-economic benefits to all

These pillars were redefined to respond to the needs and priorities of our area.

Welsh Governance Programme 2021-2026

The *Governance Programme* notes the commitments that Welsh Government will deliver over the next 5 years. These will address the challenges facing Wales and improve the lives of people across the country. The sustainable visitor economy principles respond to the priorities of the Governance Programme and the Co-operation Agreement with Plaid Cymru.

Our All Wales Plan

Following the Climate Emergency declared by Welsh Government in 2019, our first All Wales Plan was published alongside Net Zero Wales, Carbon Budget 2 (2021-25) - this involves a substantial change in the way we all live, work and visit other places.

Welcome to Wales

Visit Wales, Priorities for the visitor economy 2020-25 sets out the priorities of Welsh Government and Visit Wales for the tourism industry in Wales. It notes the need to collaborate in a way that supports the well-being of strengths that initially attract people here - our landscapes, culture and adventure, and notes that tourism that is good for our industry must also be good for Wales. The aim of the Government via the Plan, in future, is to use the visitor economy to obtain a broader benefit.

Ambition North Wales

The Ambition North Wales vision is to *'create a more vibrant, sustainable and resilient economy for North Wales'*. It hopes to see the region developing in a sustainable manner with opportunities for people to gain new skills for the future and have worthwhile careers. It hopes to see businesses growing and communities prosper and for this to take place while promoting our language, culture and heritage and in accordance with the well-being objectives for Wales.

The North Wales Skills and Employment Plan 2023-25

The three-year Skills and Employment Plan has been developed by the North Wales Regional Skills Partnership (RSP), in collaboration with businesses and employers across the region.

The vision within the Plan is that *North Wales is a region where the people, and specifically their skills and abilities, are a key driver of economic development and well-being. Employers in the region are thriving, developing and growing because of the skills of the local population. Businesses want to move into the region because of the skills of the local population. At the same time, people can achieve their ambitions and maximise their potential within North Wales.*

Eryri National Park's Local Development Plan Policy 2016-2031 (2019 update)

As a National Park, Eryri is required to have a development plan in place. The Park is within the Gwynedd and Conwy authorities and the plan defines permitted developments and management priorities.

Gwynedd and Anglesey Joint Local Development Plan 2011-2026 (31 July 2017)

The joint development plan for both local authorities identifies the key role of the visitor economy and notes a positive and proactive method for its development and management.

Good practice

When developing this Plan, we received support and advice from Professor Terry Stevens, an expert in the field of sustainable tourism. We have also considered the following good practice:

- New Zealand - Tiaki Promise
- Isle of Arran, Scotland

- Triglav National Park, Slovenia - an area that has twinned with Eryri
- Vadehavskysten, Denmark (Coastal Area of Wadden)
- Jackson Hole, USA
- Park City, USA
- Dolan (Ogwen Partnership, Siop Griffiths and Cwmni Bro Ffestiniog)

3. Developing the Plan and Consultation

Work to develop this Plan commenced in 2018 during a workshop that reviewed our Destination Management Plan 2013-2020 and examined our priorities for the future. This occurred at the same time as the consultation with stakeholders across the area to develop the Cynllun Eryri and the Gwynedd Plan.

Since then, a large number of workshops have been held to discover how a Sustainable Visitor Economy would look in Gwynedd and Eryri. These workshops have included the visitor economy sector, Gwynedd Destination Management Partnership, Members of Cyngor Gwynedd and Eryri National Park Authority, community councils and individuals.

As part of the Plan's development, our Destination Management Plan was reviewed in 2019 by the Blue Chip company and RJS Associates. The key outcomes of the review of the Destination Management Plan were as follows:

- A great investment had been achieved in the Gwynedd visitor economy since 2013 and there was a possibility that a number of strategic projects would deliver substantial impacts.
- Against the objectives of the Plan, strategic projects scored best in terms of visitor experience and extending the season; and more moderate against increasing spending and improving the environment.
- They have not scored as well in terms of skills and jobs and community integration. Partially, this was because delivering against these objectives would be a by-product of the strategic projects rather than their primary aim, and partially as the projects delivering these aims, in general, were purely local or small and, therefore, they were not categorised as strategic.

The review also identifies the following as potential objectives for the future:

- ✔ Extending the tourist season
- ✔ Increasing visitor spending per visit
- ✔ Improving the quality of the visitor experience
- ✔ Managing tourism for the benefit of Gwynedd communities and environment. This may include, e.g. marketing sites that receive fewer visitors, managing busier sites, dealing with second home ownership and AirBnB matters
- ✔ Promoting responsible, sustainable practice among the sector and its customers
- ✔ Developing a sense of place in Gwynedd (including its culture, heritage and Welsh language)

The above matters have also been raised during the work of developing Cynllun Eryri, as well as the need to develop a brand marketing strategy for Eryri based on the Special Qualities and implement it regularly across the public and private sectors - i.e. that there is consistency across the area with branding and marketing. The need was also noted to encourage visitors to visit at different times of the year and to different areas in order to reduce pressures during the busiest period and to help businesses to overcome seasonal difficulties.

Despite Covid-19 restrictions, the Council and the Park managed to engage with a vast number of people and bodies by holding events and workshops on Zoom and using 'Jamboard' software.

The main messages from these workshops are summarised below with feedback from other workshops in **Appendix A**.

What are the main challenges and opportunities for achieving a sustainable visitor economy in the future?

Resources challenge	An opportunity to extend the season	Language, culture, heritage - an opportunity to bring benefits to communities. The challenge of protecting them.
An opportunity to educate and develop skills among local people - create a career.	The challenge of an excess in some areas.	An opportunity to strike a balance if we operate sustainably. An opportunity for communities.
Climate change challenges.	A challenge and an opportunity to coordinate partners.	Opportunities for the third sector and communities.
An opportunity/challenge to change Planning policies and for homes for local people.	An opportunity to disperse people from areas that are too busy.	Avoid punishing communities, e.g. through additional parking measures.
A need to educate visitors about the special qualities of the area.	An opportunity for visitor management rather than marketing the area.	An opportunity for better infrastructure, e.g. transport/ toilets/bins, etc. for all.

What policies/activities need to be developed and prioritised?

A policy to bring tourism benefits to communities.	Twinning communities with attractions.	Policies needed to develop sustainable transport
Promote the use of the language, culture and history of the area.	World Heritage Site	Responsible destination marketing and visiting
Training to develop a career in the field.	Planning policies that support local communities and regulate second homes/Airbnb.	Regulate motorhomes.
A need to tax visitors to the area.	A tourist tax to support communities and infrastructure.	A need to develop a destination management plan and establish an accountable body/partnership.
A need to put sustainability at the heart of everything - language, culture, environment, heritage and community.		

Which partners need to hold discussions?

A strong voice for communities is needed.	Social enterprises.	Mountain/sea safety organisations, etc.
National organisations, e.g. Ramblers.	A need for schools and education to be involved in this.	It is important that this includes everyone - public, community, private.
Local companies need to have supply chain opportunities.	A need for clear leadership and a representative body.	Champions to promote the visitor economy.

4. Workshop feedback

Main Challenges and Opportunities deriving from Workshops with Members of Cyngor Gwynedd and the Eryri National Park Authority - February 25 and 27, 2020

Theme	Challenges	Opportunities
Marketing	• Attracting more visitors from Wales • A sustainable level of 'adventure holidays' • Quality assurance • Extend the season • Effective marketing • Too much marketing? • Accurate research and evidence • A risk of developing into one big play area • Developing the area's brand • Lack of vision • Marketing in a competitive world • Encourage more overnight stays • Conscientious marketing - no marketing of houses as second homes • Need to invest in the asset before marketing	• Unique cultural experiences • Unique Landscape and Heritage • A market for local produce • Open air and adventure (broad) • Targeting higher spending markets • A greener brand • More marketing and using technology • Enhanced packaging of the offer • Area and location for film and television

Theme	Challenges	Opportunities
Infrastructure	• The switch to electric vehicles • Relevant infrastructure for an ageing population • Too much pressure on the infrastructure from visitors • Coast path attracts people all year round - who is responsible for maintenance - is there enough money? • The impact of airbnb on local infrastructure e.g. litter • Improving paths	• Community transport and wi-fi • Improved public transport • Upgrading facilities for all • Water bottle filling resources • Electric charging points • Charging a fee to drive into the Park

Theme	Challenges	Opportunities
Infrastructure	• Attracting good standard hotels to the area • Road sizes in rural areas • Car parks / toilets / public transport • Improve the 'small things' e.g. litter / furniture etc • Too much emphasis and the 'big things' • Impact on the environment • Lack of public transport options • Erosion of paths • Improving infrastructure without affecting the environment • Supply chain • Cost to the Park and Council of maintenance • Creation of new cycle lanes (Dolgellau to Bala) • Speeding • Lack of control of second homes • Road condition • Development of area / town plansi	• Tourism tax to pay for community services • Better routes to connect communities with their local attractions • Charging for parking and toilets • Associated transport network

Theme	Challenges	Opportunities
Local Area	• Lack of properties for local people – Holiday Homes and house price increases for local people • Sustainable job development • Lack of visitor balance and management of this • Airbnb growth • Too many visitors • Maintain and manage any growth in visitors to communities	• Promoting the development of social enterprises • Improved diversity of accommodation • Keeping the benefits local more • Local enterprise • Do more 'ordinary' things e.g. livestock markets • Airbnb is an opportunity for locals if properly managed

Theme	Challenges	Opportunities
Local Area	• Pressures on local services • Preserving the character of communities • Tourism tax • Quality deteriorating due to lack of investment • Pressure on mountain rescue teams and emergency services • Moving people away from Snowdon • High taxes and VAT • Outsiders running the sector • How to spread the benefit to all? • Loss of hotels to be flats / self-catering	• Connecting producers and providers • Local ownership • Creating a buzz by connecting communities and businesses

Theme	Challenges	Opportunities
Planning	• Enforcement of planning conditions • Lack of Government planning policy • Developments in the right places • Limiting the numbers of holiday homes • Encourage 'appropriate' accommodation • Increase stock without disrupting local communities • Changing planning arrangements	• Improving the planning system • Improved management of holiday accommodation and second homes • Licensing? • Encourage more serviced accommodation • Larger self-service accommodation to attract families

Theme	Challenges	Opportunities
Economic Development and Employment	• Need benefit balance Vs local impact • Get quality work in the sector • How to include the community in the industry? • Improving salary levels and seasonal • Difficult to recruit locally to the sector • The impact of Brexit on the industry • Training not in line with needs • Lack of a career in the industry – for young people • Want to keep tourism money in the local economy • Improving visitor spend in the local economy • Extending the season • How to encourage local people to venture • Lack of capital for local businesses • Improving opportunities locally for businesses • Raising industry standards • Lack of quality experiences - food • Global issues: Coronavirus / climate change • Improving the standard of hotels • Visiting pattern changing • VAT and taxes a challenge • Review of touring caravan regulations April - October • Get more local producers supplying • Lack of tourism groups • Improve training for staff about local history and sense of place	• Attracting new markets • Local produce and seafood • Use of new technology • Improving local supply chains • Improved education and skills provision • Good employment for local people • Diversification opportunities in rural areas in the wake of Brexit • Creating unique opportunities for young people in the sector • Improving economic flow to 'local' businesses • Indoor facilities – weather! • Tourism tax • Serviced accommodation • Developing quality jobs • Creating 'suitable' tourism • Renewable energy • Outdoors • Businesses to open later hours in summer • Extending the season • Sustainable tourism • Developing a tourism career facilitator • Packaged guides and tours • Supporting Welsh communities with good jobs

Theme	Challenges	Opportunities
Culture and Language	• Lack of profile to the language • How to benefit from Welsh Slate status? • Reducing negative impacts on the language and culture • Risk of anglicising communities as older people move here. • Impact on the demographics of the county • How to get local ownership of the industry? • Ensure that development improves and is not detrimental to the area • Protect villages and towns from becoming holiday towns • Need to promote enterprise and unique experiences by local people to promote language and culture • Ensuring RESPECT for language, culture and communities • Having Welsh-speaking workers • Loss of local names • How do businesses be persuaded to use Welsh? • Need to better connect the sector with communities • How to better link the local market (products and services) with the sector?	• History of the area • Regeneration of slate areas • Setting up 'Paradores' as in Spain? • Increasing Cultural holidays • Selling the culture • Promoting the Welsh Language • Events • Mabinogi and legends • Sense of Place • The sector as a career in Welsh

Theme	Challenges	Opportunities
Sustainability	• What is sustainable tourism and how? • A challenge where there is insufficient public transport • Carbon footprint increases due to cars visiting • How do we improve local supply chains etc.? • Promote more on Gwynedd's 'quieter' areas as places to visit.	• The natural environment • Health • Connecting people and communities with the outdoors • Reducing carbon footprint • Development of the Gwynedd quality mark

Theme	Challenges	Opportunities
Sustainability	• Decline of community life leads to lack of 'authentic' tourism • How do we protect the landscape and the environment? • Risk of losing what makes us unique in terms of landscape and nature • Adverse impact on nature • Agricultural challenges • Reducing reliance on cars • Developing sustainable tourism that promotes health	• Filling water bottles • Green and eco-tourism • Nature and paths • Electrification

Theme	Challenges	Opportunities
Other	• Ensuring reliable research and statistics • Improved collaboration between the Council, Park and Government • Lack of collaboration within the sector • Lack of collaboration between community / town councils with the sector and the third sector • Lack of information sharing between businesses	• One vision for tourism - a balance between the economy, environment, community