

Gwynedd Residents' Survey 2024



Wedi ei ariannu gan
Llywodraeth y DU

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Introduction

Tourism plays a key part in everyday economy, culture and life here in Gwynedd.

Understanding the viewpoints of local communities is essential to ensure that tourism develops in a way that is beneficial for residents, whilst addressing any potential challenges.

This report presents the findings of the Gwynedd Residents' Tourism Survey 2024. The questions were designed to follow the format of a pilot research survey to collect the opinions of residents conducted by Visit Wales in 2023 in three areas of Wales that included Gwynedd. The aim of the survey was to gather insights into the impact of tourism on communities, including the benefits and challenges, in order to identify local priorities and concerns. The questions were based on a format similar to the 2023 questionnaire using the TRAVELSAT technique in terms of the resident's opinion index model (RSI). This technique aims to assess all aspects that are important to residents when considering their own community.

The results will assist us to draw-up future tourism policies which reflect the needs of Gwynedd residents.

The survey was carried out electronically by LimeSurvey on Cyngor Gwynedd's website between September 2024 and mid November 2024. It was promoted by:

- Sending an electronic invitation to complete the survey to Gwynedd Business Bulletin recipients.
- Notifications in Cyngor Gwynedd bulletins
- Through press releases and via Cyngor Gwynedd social media accounts and web site
- Paper copies of the survey were distributed through the network of libraries the county has

1,506 Gwynedd residents responded to the survey.

A copy of the survey can be seen in **Appendix A**

This report has been produced on behalf of the Business Support Service, Department of Economy and Community by the Research and Information Service, Gwynedd Council.

Results

1. Characteristics of Respondents

1.1 Numbers

1,506 survey responses were received. In terms of numbers per area, the highest percentage of responders came from the Pen Llŷn area (22.8%), and the lowest number of responses came from the residents of Bro Ogwen (1.6%). A map of the areas can be seen in **Appendix B**.

Table 1 : Number of respondents per Gwynedd Regeneration Area

| Area | Number | As a % |
|-------------------------------|--------------|---------------|
| Pen Llŷn | 343 | 22.8% |
| Porthmadog / Penrhyndeudraeth | 203 | 13.5% |
| Bro Ardudwy | 199 | 13.2% |
| Bro Dysynni | 190 | 12.6% |
| Pwllheli Catchment Area | 183 | 12.2% |
| Bro Peris | 75 | 5.0% |
| Dolgellau Catchment Area | 68 | 4.5% |
| Bro Lleu / Nantlle | 62 | 4.1% |
| Caernarfon Catchment Area | 52 | 3.5% |
| Bro Ffestiniog | 45 | 3.0% |
| Bala / Penllyn Catchment Area | 32 | 2.1% |
| Bangor Catchment Area | 30 | 2.0% |
| Bro Ogwen | 24 | 1.6% |
| Total | 1,506 | 100.0% |

Of these, **415 (27.5%)** of them lived within the boundaries of **Eryri National Park**, **191 (12.7%)** lived within the boundaries of the **Area of Outstanding Natural Beauty of Llŷn**, and **109 (7.2%)** lived within the boundaries of the **Slate Areas of Gwynedd**.

1.2 Communities

The residents were asked about the number of years they had lived in their community, and 62.5% said that they had lived in their community for over 15 years. Only 1.3% of the responders had lived in their community for less than a year. 17.5% had lived in their community for between 1 and 6 years, with 18.4% having lived in their community for between 7 and 15 years.

They were also asked whether they believed they lived in communities that were visited by tourists. 80.3% of all responders believed that they lived in a community that was often visited by tourists.

Table 2: Tourist visits to communities

| Sector | Number | As a % |
|---------------------------------|--------------|---------------|
| Tourists visit often | 1,210 | 80.3% |
| Tourists visit relatively often | 250 | 16.6% |
| Tourists do not visit often | 34 | 2.3% |
| Tourists never visit | 2 | 0.1% |
| I prefer not to say | 10 | 0.7% |
| Total | 1,506 | 100.0% |

1.3 Visitor accommodation

The individuals were asked to note whether they provided tourist accommodation in their homes or in a property they owned. 52.3% of the respondents noted that they would prefer not to say.

Table 3: Provision of visitor accommodation

| Structure | Number | As a % |
|---------------------|--------------|---------------|
| I prefer not to say | 801 | 53.2% |
| No, never | 499 | 33.1% |
| Yes, regularly | 135 | 9.0% |
| Yes, sometimes | 71 | 4.7% |
| Total | 1,506 | 100.0% |

1.4 Working in the tourism industry

They were asked whether they, or a member of their household, worked in the tourism industry. The highest number of responders noting that a member of the household worked in the tourism industry was in the Bro Ffestiniog area. On the level of Gwynedd as a whole, 38.0% had noted that a member of their family worked within the tourism sector.

Table 4: Percentage of family working in the tourism industry

| Area | Yes | No | I prefer not to say |
|-------------------------------|--------------|--------------|---------------------|
| Bro Ffestiniog | 48.9% | 51.1% | 0.0% |
| Porthmadog / Penrhyndeudraeth | 47.3% | 52.2% | 0.5% |
| Bro Ardudwy | 42.2% | 56.3% | 1.5% |
| Bro Peris | 40.0% | 58.7% | 1.3% |
| Dolgellau Catchment Area | 39.7% | 60.3% | 0.0% |
| Pen Llŷn | 37.3% | 60.9% | 1.7% |
| Bro Dysynni | 34.7% | 64.7% | 0.5% |
| Caernarfon Catchment Area | 34.6% | 65.4% | 0.0% |
| Bro Lleu / Nantlle | 32.3% | 66.1% | 1.6% |
| Bala / Penllyn Catchment Area | 31.3% | 68.8% | 0.0% |
| Pwllheli Catchment Area | 30.6% | 68.9% | 0.5% |
| Bangor Catchment Area | 30.0% | 70.0% | 0.0% |
| Bro Ogwen | 29.2% | 66.7% | 4.2% |
| Gwynedd | 38.0% | 61.0% | 1.0% |

1.5 Profession

Responders were asked what their profession was. Almost a third (30.3%) noted that they were directors / managers. Only 0.1% of the responders noted that they were unemployed.

Table 5: Respondents Profession

| Profession | Number | As a % |
|----------------------|--------------|---------------|
| Director / Manager | 457 | 30.3% |
| Retired | 375 | 24.9% |
| Employee | 357 | 23.7% |
| Freelance | 72 | 4.8% |
| Manual Worker | 49 | 3.3% |
| Academic | 23 | 1.5% |
| Stay-at-home partner | 22 | 1.5% |
| Student | 9 | 0.6% |
| Unemployed | 2 | 0.1% |
| I prefer not to say | 140 | 9.3% |
| Total | 1,506 | 100.0% |

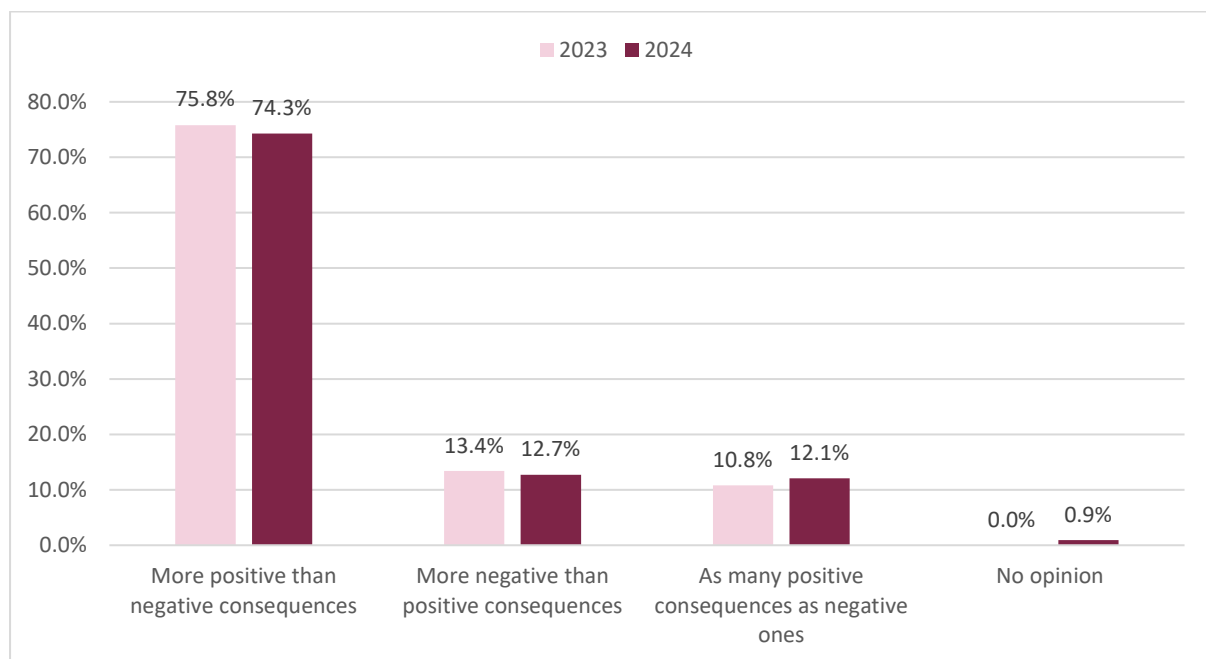
See details about the responders' equality characteristics in **Appendix C**.

2. The impact of tourism

2.1 General Opinion

The responders were asked to note in general whether they believed that tourism was having a positive, negative or neutral impact on their community. Since the 2023 survey, a smaller percentage believed that there were more positive outcomes than negative outcomes by the 2024 survey. A smaller percentage also believed that there were more negative outcomes than positive outcomes, compared with 2023. A larger percentage believed that there were the same positive and negative outcomes. (740 responded to the survey in 2023)

Figure 1: Impact of tourism on communities



When looking at different areas, the pattern is slightly different. Table 6 shows the results of 2024 for the regeneration areas. The Bala/Penllyn Catchment area had the highest percentage (87.5%) believing that there were more positive outcomes deriving from tourism in their community whilst the Bro Ogwen area had the lowest percentage (33.3%).

In specific areas it was noted that:

- **75.9%** of those living within the boundaries of **Eryri National Park** believed there were more positive consequences than negative consequences;
- **84.8%** of those living within the boundaries of the **Llyn Area of Outstanding Natural Beauty** believed there were more positive consequences than negative consequences;
- **61.5%** of those living within the boundaries of the **Gwynedd Slate Areas** believed there were more positive consequences than negative consequences.

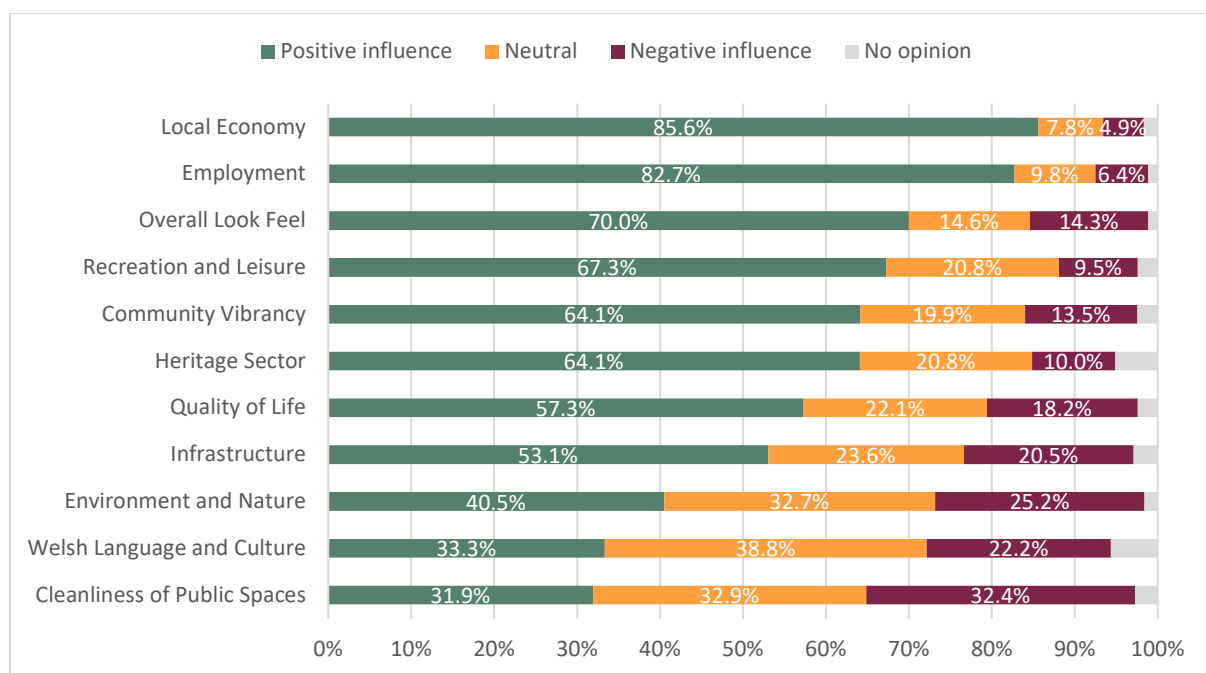
Table 6 : Impact of tourism by regeneration area

| Area | More positive outcomes | More negative outcomes | Neutral | No opinion |
|-------------------------------|------------------------|------------------------|--------------|-------------|
| Bala / Penllyn Catchment Area | 87.5% | 9.4% | 3.1% | 0.0% |
| Pen Llŷn | 83.4% | 6.4% | 9.3% | 0.9% |
| Bro Ardudwy | 79.4% | 8.5% | 10.6% | 1.5% |
| Bro Dysynni | 76.8% | 11.1% | 11.6% | 0.5% |
| Dolgellau Catchment Area | 76.5% | 11.8% | 10.3% | 1.5% |
| Porthmadog / Penrhyndeudraeth | 75.4% | 11.3% | 12.3% | 1.0% |
| Pwllheli Catchment Area | 72.7% | 15.3% | 10.9% | 1.1% |
| Caernarfon Catchment Area | 61.5% | 15.4% | 21.2% | 1.9% |
| Bro Lleu / Nantlle | 61.3% | 19.4% | 19.4% | 0.0% |
| Bro Ffestiniog | 60.0% | 20.0% | 20.0% | 0.0% |
| Bro Peris | 57.3% | 32.0% | 10.7% | 0.0% |
| Bangor Catchment Area | 50.0% | 13.3% | 33.3% | 3.3% |
| Bro Ogwen | 33.3% | 50.0% | 16.7% | 0.0% |
| Gwynedd | 74.3% | 12.7% | 12.1% | 0.9% |

2.2 Influence of Tourism

The responders were asked, for a list of aspects, noting whether they had a positive, neutral or negative influence on their community. See the results of the areas in **Appendix D**.

Figure 2: Influence of Tourism



2.3 Negative Outcomes

It was asked whether the residents believed that tourism causes negative outcomes in their community. Of the 1,506 responders, 572 (38.0%) believed that there were negative outcomes throughout the year or specific times of the year. 10.9% believed that there are negative outcomes throughout the year. The response was different in some areas compared to others.

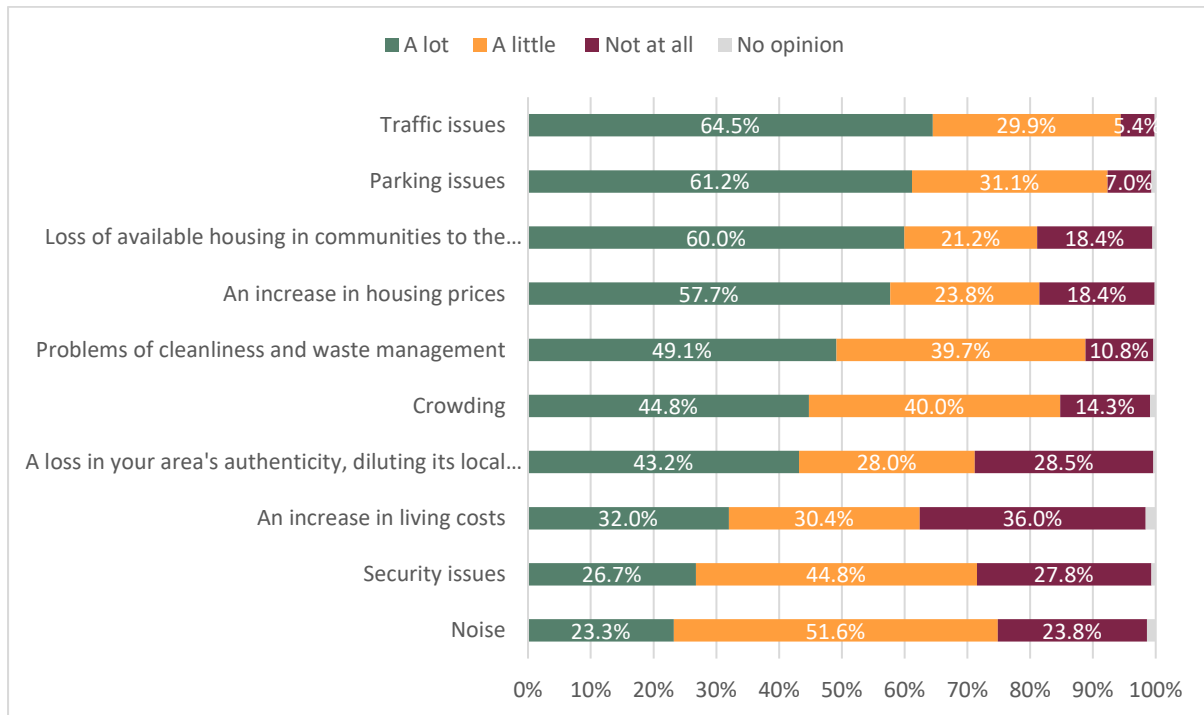
Table 7: Does tourism cause negative outcomes in your community?

| Area | Yes - throughout the year | Yes - at specific times | No | No opinion |
|-------------------------------|---------------------------------|----------------------------|--------------|---------------|
| Bro Ogwen | 37.5% | 37.5% | 25.0% | 0.0% |
| Bro Peris | 24.0% | 38.7% | 37.3% | 0.0% |
| Bangor Catchment Area | 6.7% | 50.0% | 43.3% | 0.0% |
| Caernarfon Catchment Area | 17.3% | 38.5% | 44.2% | 0.0% |
| Bro Ffestiniog | 17.8% | 33.3% | 46.7% | 2.2% |
| Bala / Penllyn Catchment Area | 9.4% | 31.3% | 56.3% | 3.0% |
| Porthmadog / Penrhyndeudraeth | 9.9% | 32.5% | 57.6% | 0.0% |
| Pwllheli Catchment Area | 12.0% | 25.7% | 62.3% | 0.0% |
| Bro Dysynni | 12.1% | 25.3% | 62.6% | 0.0% |
| Bro Ardudwy | 8.0% | 29.1% | 62.8% | 0.0% |
| Bro Lleu / Nantlle | 6.6% | 27.9% | 65.6% | 0.0% |
| Dolgellau Catchment Area | 8.8% | 22.1% | 69.1% | 0.0% |
| Pen Llŷn | 7.0% | 17.3% | 74.9% | 0.8% |
| Gwynedd | 10.9% | 27.1% | 61.6% | 0.4% |

For those who noted that negative outcomes derived from tourism in their area, there was an opportunity for them to note what problems arose and the extent to which they were problems. Traffic matters was the main issue noted with 64.5%, and parking matters a close second, with 61.2%. See Figure 3 for more details.

In terms of specific areas:

- **10.8%** of those living within the boundaries of **Eryri National Park** believe that tourism causes negative outcomes throughout the year;
- **8.4%** of those living within the boundaries of the **Llŷn Area of Outstanding Natural Beauty** believe that tourism causes negative outcomes throughout the year;
- **18.4%** of those living within the boundaries of the **Gwynedd Slate Areas** believe that tourism causes negative outcomes throughout the year.

Figure 3: Negative Outcomes

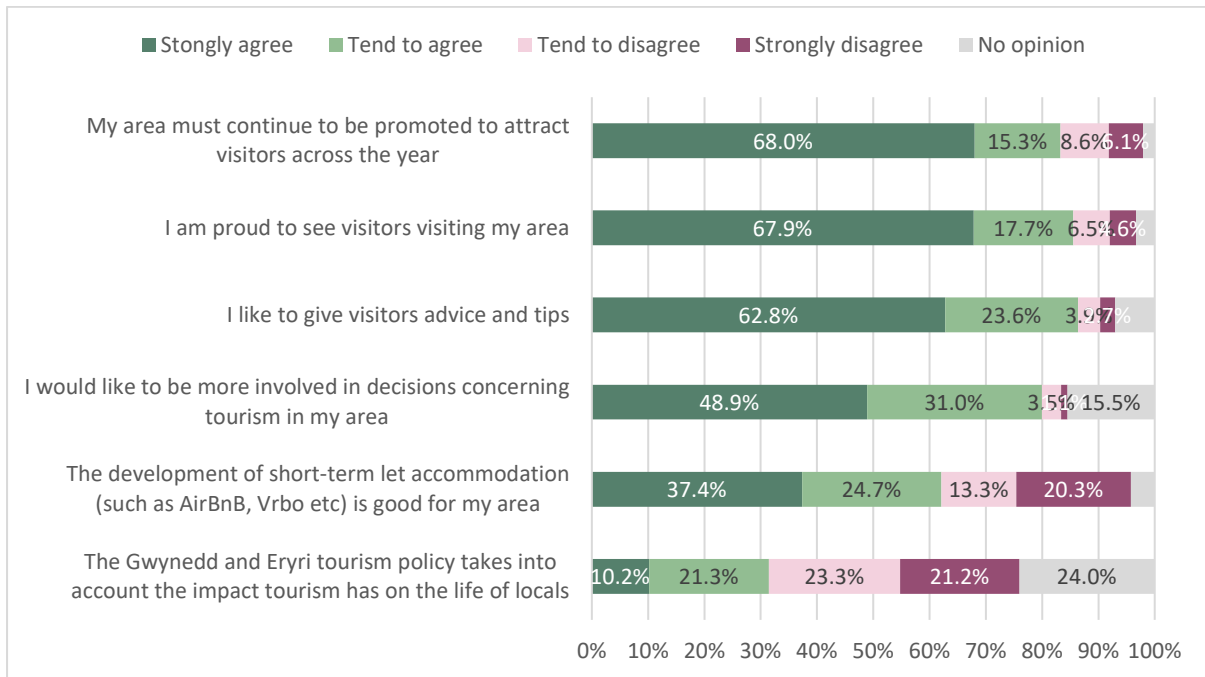
2.4 Attitude towards Tourism

There was an opportunity for responders to agree or disagree with a series of statements for their attitude towards tourism.

- 68% strongly agree that they must continue to promote their area to attract more tourism
- 67.9% strongly agree that they are proud to see visitors in their area
- 62.8% strongly agree that they like to give advice and tips to visitors

There are two statements where the response pattern is different.

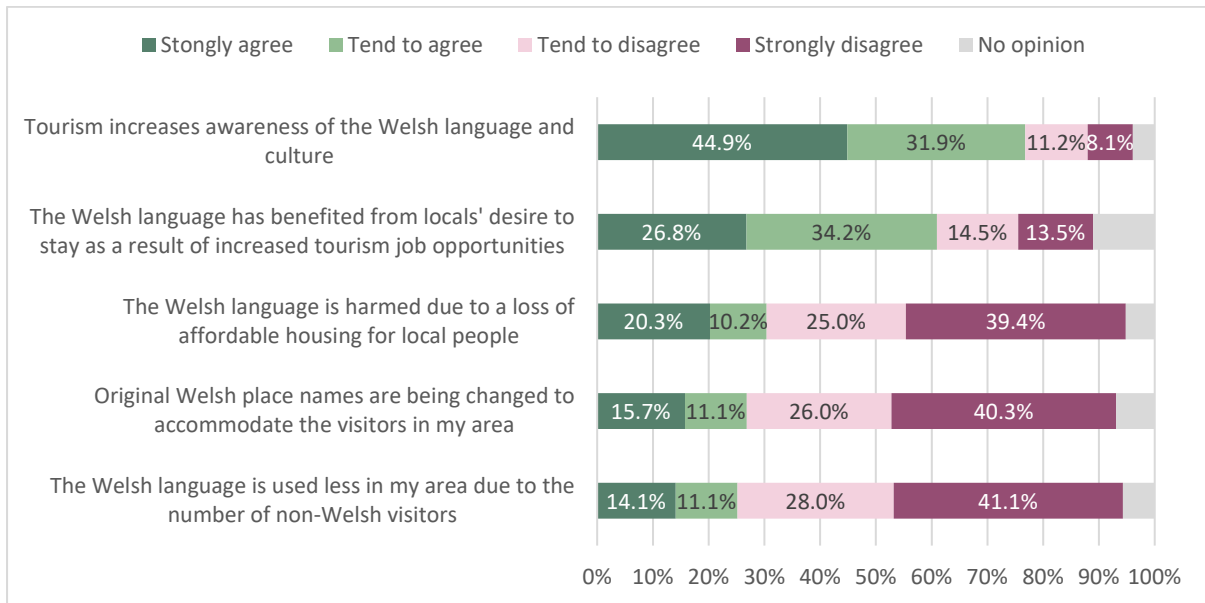
- 20.3% strongly disagree that short-term let accommodation is a good thing for their area
- 21.2% strongly disagree that Gwynedd and Eryri's tourism policy considers the impact tourists have on local people's lives

Figure 4: Attitude towards Tourism

2.5 The Welsh Language

There was an opportunity for responders to agree or disagree with a series of statements on the impact of tourism on the Welsh language.

- 76.8% agreed (to varying degrees) that tourism increases the awareness of the Welsh language and culture
- 61.0% agree (to varying degrees) that the Welsh language has benefited from local people staying as a result of job opportunities in the tourism sector
- 26.8% of the responders agreed (to varying degrees) that the original Welsh place names had been changed to satisfy the visitors
- 25.2% agreed (to varying degrees) that the Welsh language is being used less in their area due to the number of non-Welsh-speaking visitors.

Figure 5: Impact of tourism on the Welsh language

2.6 Type of Visitor

There was an opportunity for responders to note whether they wanted to attract more, less or the same number of visitors to their area. Attracting more visitors was the most popular opinion for every category of visitor, with the highest at 73.8% for international visitors, and the lowest at 51.1% for day visitors.

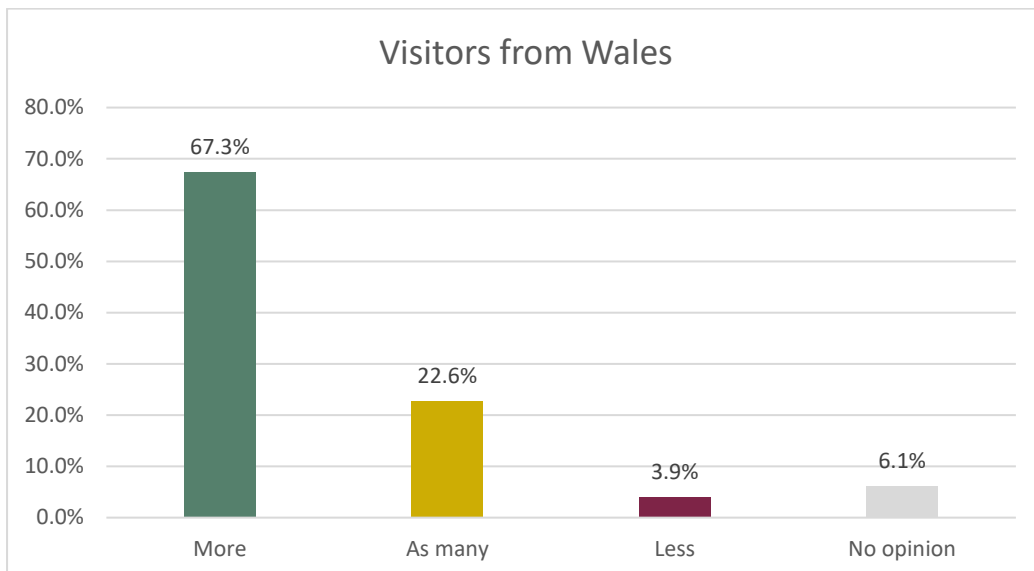
Figure 6: Visitors from Wales

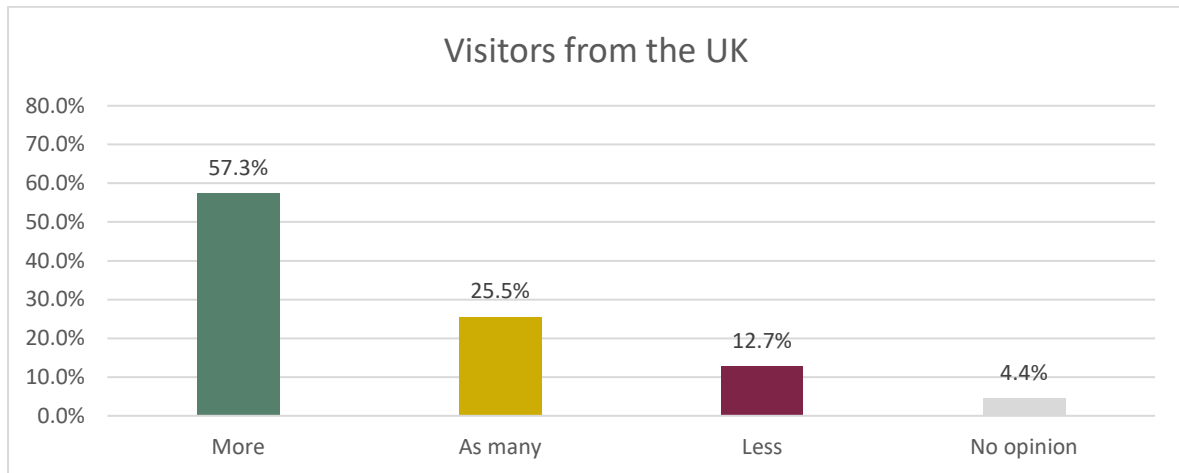
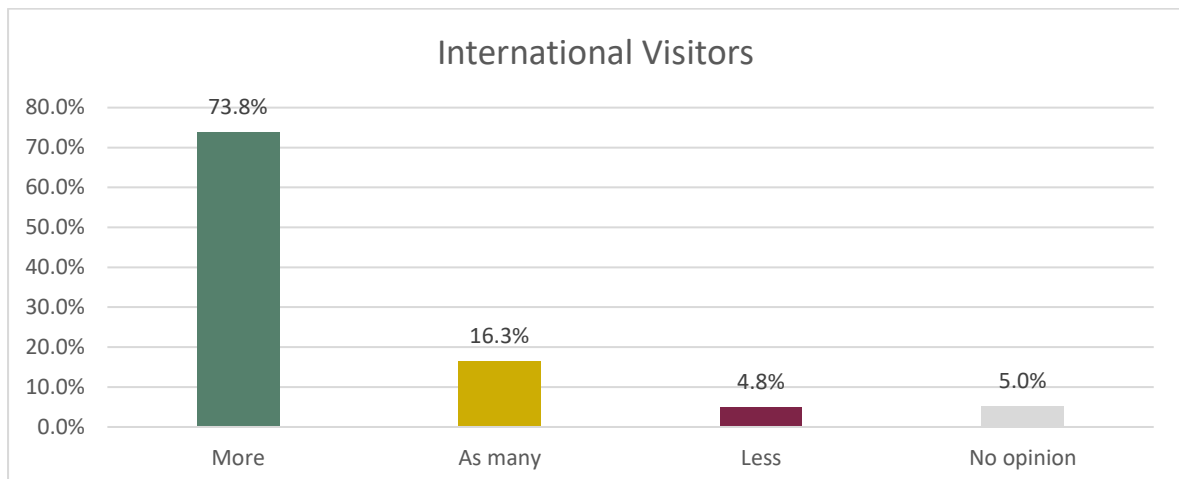
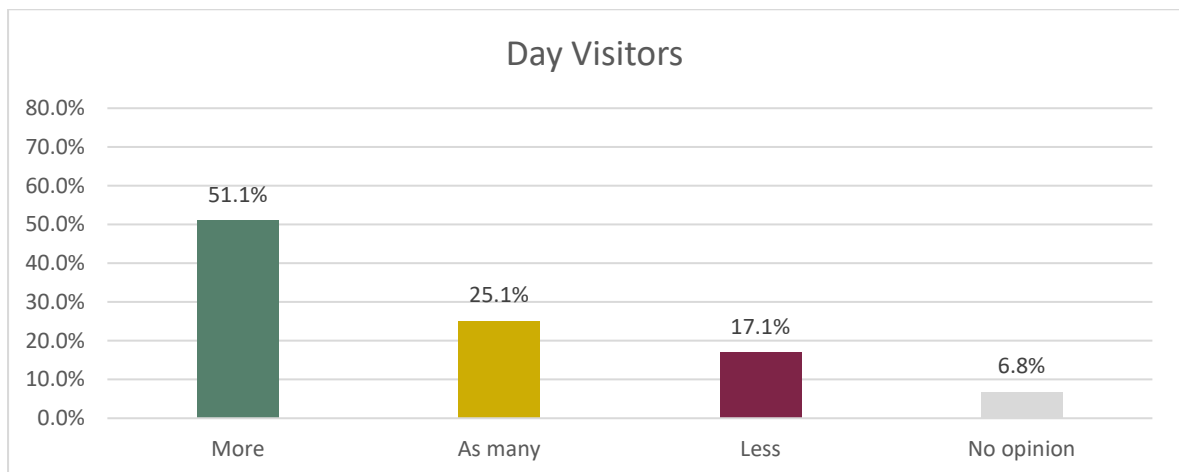
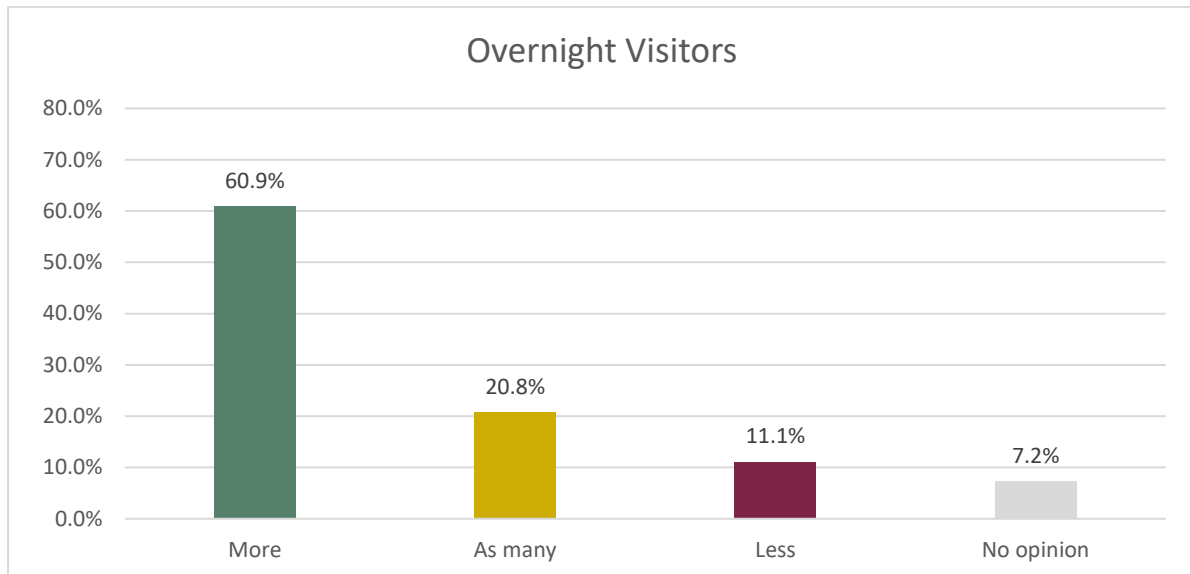
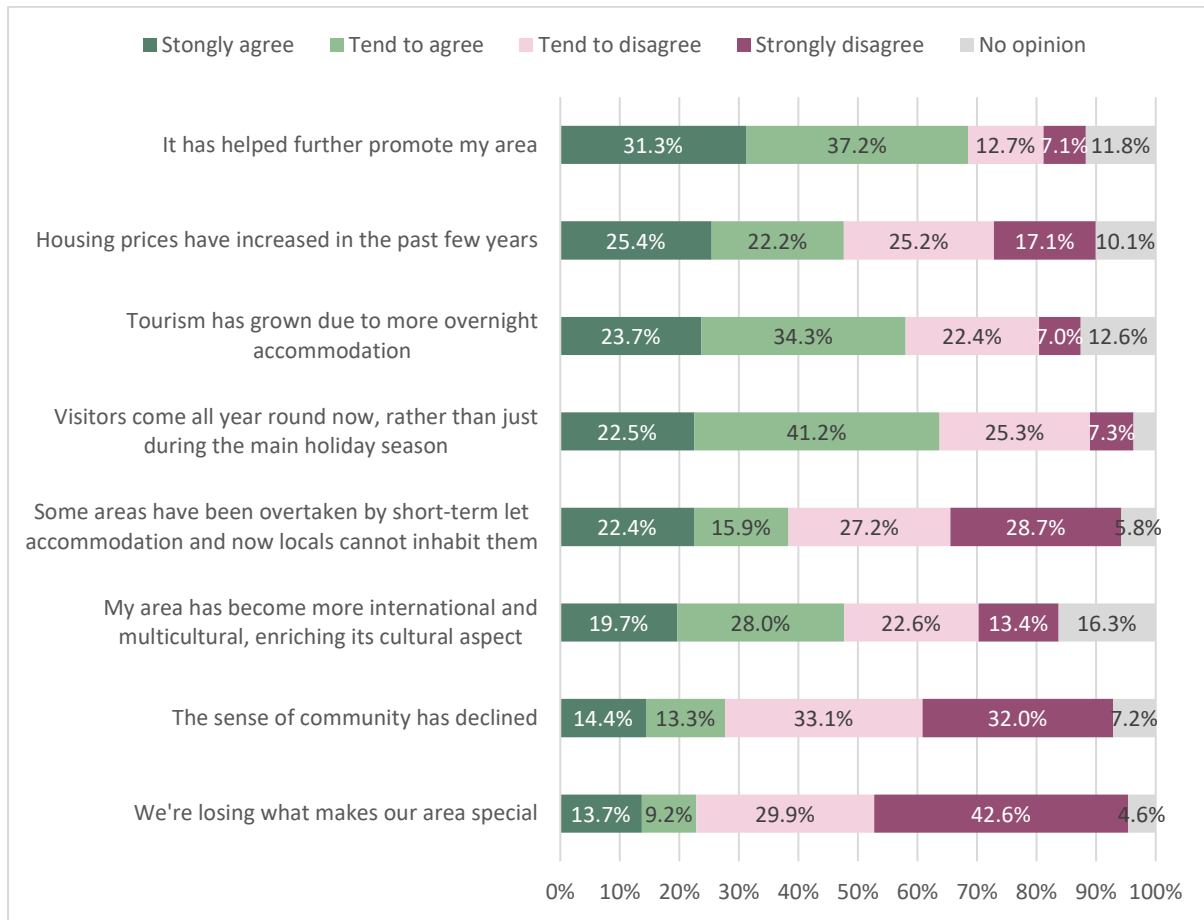
Figure 7: Visitors from the United Kingdom (outside Wales)**Figure 8: International Visitors (outside the UK)****Figure 9: Day Visitors**

Figure 10: Overnight Visitors

2.7 Short-term Accommodation

A series of statements about short-term accommodation was given to the responders and they could agree or disagree with them. 68.5% of the responders agreed (to varying degrees) that short-term accommodation had helped promote their area further. 63.7% agreed (to varying degrees) that short-term accommodation had led to visitors coming throughout the year now, rather than only during the main holiday season. A smaller percentage (27.7%) agreed (to varying degrees) that short-term accommodation had led to the decline in the sense of community.

Figure 11: Short-term Accommodation

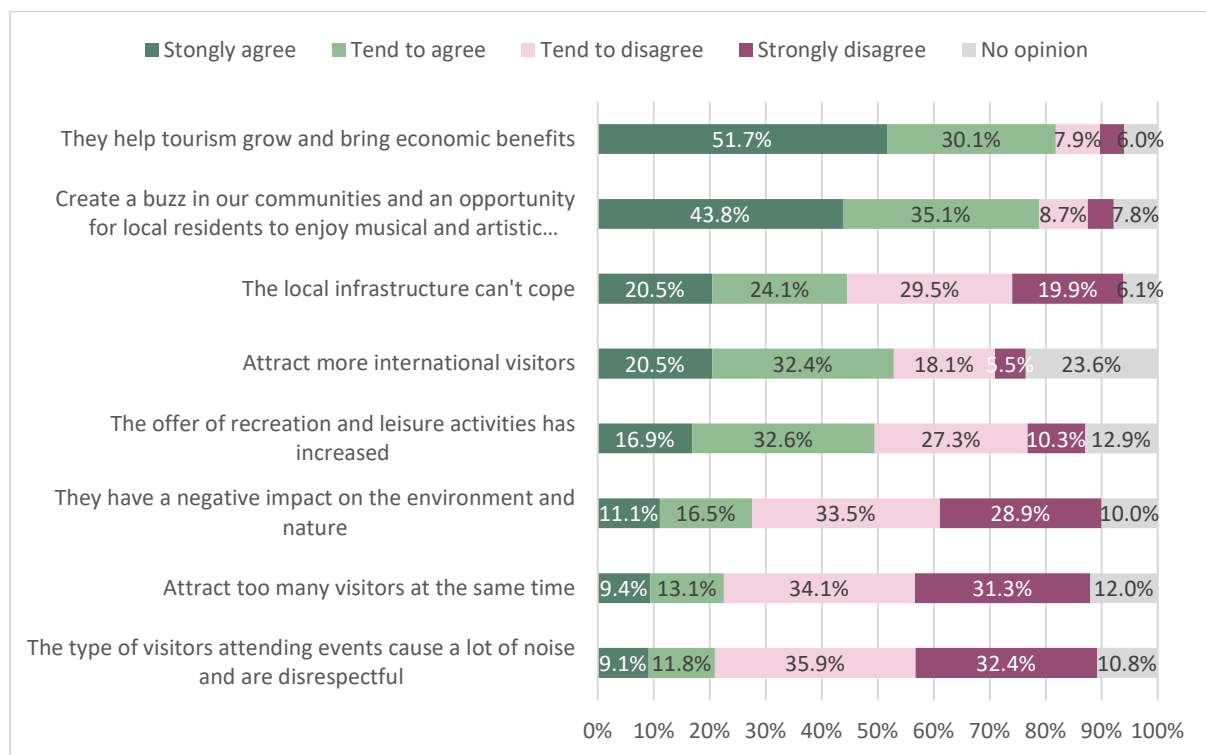
3. Events

A question was asked about the outcomes of holding events such as outdoor/leisure events, cultural and musical events in the communities of the responders. 81.8% agreed (to varying degrees), that holding events in their area helped tourism to grow and create economic benefits. 78.8% agreed (to varying degrees) that holding events created vitality in their communities and offered an opportunity for local residents to be able to enjoy the activity as well.

On the other hand, 44.6% agreed (to varying degrees), that holding events in their communities caused the infrastructure to fail - such as public transport, public toilets and parking problems). 68.3% disagreed (to varying degrees) that the types of visitors who attend events cause a lot of noise and are disrespectful.

The outcomes from area to area vary, and the results can be seen in full per area in **Appendix E**.

Figure 12: What are the outcomes of holding events in your community?



4. Arosfan Sites (Aires)

In order to respond to the 'wild camping' challenges, Cyngor Gwynedd has developed four 'Arosfan' sites (Caernarfon, Cricieth, Llanberis and Pwllheli). The purpose of the 'Arosfan' sites is to trial overnight stays (a maximum of 48 hours) in Council-owned car parks for self-contained motorhomes in key 'urban' destinations which opened during 2024/5. It was asked about the type of impact that 'Arosfan' (Aires) sites have had on 'wild camping' in the responders' communities. Of the responders, 62.0% noted that there was an Arosfan site in their community.

Table 8: Is there an Arosfan site in your community?

| | Number | As a % |
|--------------|--------------|---------------|
| Yes | 933 | 62.0% |
| No | 573 | 38.0% |
| Total | 1,506 | 100.0% |

For those who answered "yes", they had an opportunity to note whether they had noticed any changes in the number who had been wild camping since the establishment of Arosfan. Over half the responders had not seen any changes, whilst 30.3% stated that the situation had improved and 17.9% stated that the situation had worsened.

Table 9: Impact of Arosfan on wild camping

| | Number | As a % |
|---|------------|---------------|
| We have not noticed any changes in the number of wild campers. | 470 | 50.4% |
| It has had a positive impact by obtaining better control and reducing the number of vehicles who wild camp. | 283 | 30.3% |
| It has not had any impact. The wild camping situation is out of control and the number of wild campers is increasing. | 167 | 17.9% |
| Not answered | 13 | 1.4% |
| Total | 933 | 100.0% |

For those where there was no Arosfan in their community, it was asked whether wild camping was an issue in their community. Of the 573 responders, 21.5% of them believed that wild camping was a problem in their community. Differences can be seen within areas with 41.2% of the Bala/Penllyn catchment area believing that wild camping is a problem in their communities, but only 3.6% believe this in the Pen Llŷn area.

Table 10: Is wild camping a problem in your community?

| Communities within the area... | Yes | No | Not answered |
|------------------------------------|--------------|--------------|--------------|
| Bala / Penllyn Catchment Area | 41.2% | 58.8% | 0.0% |
| Bro Dysynni | 34.5% | 65.5% | 0.0% |
| Bro Ogwen | 33.3% | 66.7% | 0.0% |
| Bro Peris | 33.3% | 66.7% | 0.0% |
| Bro Ffestiniog | 29.2% | 70.8% | 0.0% |
| Dolgellau Catchment Area | 28.9% | 68.9% | 2.2% |
| Caernarfon Catchment Area | 25.0% | 75.0% | 0.0% |
| Pwllheli Catchment Area | 19.2% | 80.8% | 0.0% |
| Bro Ardudwy | 18.5% | 80.6% | 0.9% |
| Porthmadog / Penrhyndeudraeth Area | 17.9% | 82.1% | 0.0% |
| Bro Lleu / Nantlle | 14.3% | 85.7% | 0.0% |
| Bangor Catchment Area | 7.7% | 92.3% | 0.0% |
| Pen Llŷn Area | 3.6% | 93.7% | 2.7% |
| Gwynedd | 21.5% | 77.7% | 0.9% |

5. Heritage Sites

The Slate Landscape of Northwest Wales has been designated as a World Heritage Site since 2021. The site encompasses six areas of Gwynedd, from the quarries to the ports, from the railways to the communities. (Dyffryn Ogwen, Dinorwig Quarry, Dyffryn Nantlle, Gorseddau and Bwlch y Ddwy Elor (Prince of Wales), Ffestiniog/Porthmadog and Abergynolwyn/Tywyn). If a heritage site was relevant to their community, they were asked to answer a few questions on the impact of the heritage site.

Table 11: When you consider your community, do you believe that the World Heritage Site has:

| | Yes | A little | No |
|--|-------|----------|-------|
| Created vitality and added pride amongst residents | 39.8% | 33.8% | 26.3% |
| Increased the number visiting | 42.0% | 35.7% | 22.3% |
| Created challenges in terms of infrastructure | 19.9% | 26.4% | 53.7% |

For those who responded (yes or a little) that a heritage site caused challenges in terms of infrastructure, they were asked what type of challenges these were. 486 responders answered "yes" or "a little", and of these, 88.1% created that there were parking challenges, 66.7% noted refuse challenges, and 26.5% noted damage or vandalism.

Table 12: Challenges caused by World Heritage Sites

| Challenge | Number | As a % |
|------------------|--------|--------|
| Parking | 428 | 88.1% |
| Litter | 324 | 66.7% |
| Damage/Vandalism | 129 | 26.5% |

Conclusions

In terms of conclusions, the main findings are as follows:

- 1,506 persons responded to the Residents' Survey. This was an increase of 104% of the 740 who responded to the survey in 2023.
- The responders came from across Gwynedd, with the highest % of responders coming from the Pen Llŷn area.
- 80.3% of all responders believed that they lived in a community that was often visited by tourists.
- 62.5% of the responders noted that they had lived in their community for over 15 years.
- 74.3% of responders believed that there were more positive outcomes than negative outcomes because of tourism in their community. There was a slight reduction of 2% since 2023.
- Having said that, fewer believed that there were more negative outcomes than positive outcomes also. 12.7% compared with 13.4% in 2023.
- More believed that there were the same number of positive and negative outcomes than in 2023. 12.1% compared with 10.8% in 2023.
- In terms of the influence of tourism, 85.6% of the responder believed that tourism had a positive impact on the local economy. In parallel, 82.7% believed that tourism had a positive influence in their communities.
- 38.0% of the responders believed that tourism caused negative outcomes in their communities. 10.9% of them believed that there were negative outcomes throughout the year and 27.1% at specific times of the year only.
- Traffic issues was the main negative outcome, according to the responders, with 64.5% noting that. 61.2% believed that parking was a problem in their communities. 60.0% believed that tourism led to losing houses being available in communities, for the benefit of short-term holiday accommodation.
- 68.0% of the responders strongly believed that there was a need to continue to promote their area to attract visitors throughout the year. 67.9% of the responders noted that they strongly agreed that they felt pride when they saw visitors visiting their area.
- In terms of the impact of tourism on the Welsh language, 44.9% strongly believed that tourism increased awareness of the Welsh language and culture. 14.1% strongly believed that tourism

had meant that the Welsh language was being used less in their area due to the number of non-Welsh-speaking visitors.

- In terms of the type of visitor, the responders believed there was a need for more of all types of visitors. 73.8% wanted to see more international visitors, 67.3% visitors from Wales and 57.3% visitors from the UK (outside Wales).
- In terms of overnight visitors, 60.9% believed that there was a need to attract more, and the percentage for day visitors was 51.1%.
- 31.3% strongly agreed that short-term holiday lets had helped to further promote their area. 25.4% strongly agreed that house prices had risen due to the increase in the number of short-term holiday lets, with 17.1% strongly disagreeing with this.
- 51.7% strongly agreed that holding events in their area had helped tourism to grow and had led to resulting economic benefits. 43.8% also strongly agreed that they had created vibrancy and an opportunity for local residents to enjoy activities and music and artistic performances.
- 9.4% strongly agreed that the type of visitors attending events caused a lot of noise and behaved disrespectfully.
- Of the responders with an Arosfan site in their community, 50.4% had not noticed any changes in the number of wild campers since Arosfan had been established. 30.3% believed that there was a positive impact, and 17.9% believed that the situation had gotten worse.
- Of the responders without an Arosfan site in their community, 21.5% believed that wild camping was a problem in their community.
- 73.6% believed that the World Heritage Site had created / created some vibrancy and pride amongst residents, and 77.7% believed that it had increased / slightly increased visitor numbers.
- 46.3% believed that the World Heritage Site had created / created some challenges in terms of infrastructure in their community. 88.1% believed that parking was a challenge, 66.7% believed that refuse was a challenge and 26.5% believed that damage/vandalism was a challenge.

Appendix A – Resident Survey

Cyngor Gwynedd wishes to understand the views of local communities in Gwynedd about tourism. It's important for us to hear what you think.

The 2024 survey follows on from the research conducted by Visit Wales in 2023 into resident sentiment on tourism. The survey is managed wholly by Cyngor Gwynedd and funded by UK Shared Prosperity Fund.

We'd like to learn more about the impact that tourism has on our communities and what are the benefits and drawbacks that stem from it. Findings will be used to inform future tourism policy, so as to best respond to the local needs of all communities involved.

Your participation is entirely voluntary, and you are free to withdraw from the survey at any time.

The information you provide when completing this questionnaire will be treated in accordance with the requirements of the data protection act.

1. Do you live in Gwynedd? *

Please choose **only one** of the following:

- Yes, as a full time resident
- Yes, as a second homeowner
- No

**we are only seeking the opinion of full time residents of the county*

2. In which village/town/city do you live?

3. Please provide your postcode

4. In general, would you say that tourism in your community generates...

- More positive than negative consequences
- More negative than positive consequences
- As many positive consequences as negative ones
- No opinion

5. For each of the following aspects, would you say that tourism has a positive or negative influence in your community?

| | Positive influence | Neutral | Negative influence | No opinion |
|--|--------------------|---------|--------------------|------------|
| The overall look and feel | | | | |
| The heritage sector | | | | |
| The local economy | | | | |
| Employment | | | | |
| Quality of life | | | | |
| The environment and nature | | | | |
| The cleanliness of public spaces | | | | |
| Recreation and leisure activities | | | | |
| Welsh language and culture | | | | |
| Community vibrancy | | | | |
| The infrastructure (such as public transport, public toilets, parking) | | | | |

6. In your view, does the tourism generate negative consequences in your community?

- Yes, throughout the whole year or most of the year
- Yes, at certain times of the year
- No

7. What type(s) of negative consequence(s) does tourism generate in your local community?

Please choose the appropriate response for each item:

| | A lot | A little | Not at all |
|---|-------|----------|------------|
| Noise | | | |
| Crowding | | | |
| Traffic issues | | | |
| Problems of cleanliness and waste management | | | |
| Security issues, disrespectful behaviour | | | |
| An increase in living costs | | | |
| Parking issues | | | |
| Loss of available housing in communities to the benefit of short-term let accommodation | | | |
| An increase in housing prices | | | |
| A loss in your area's authenticity, diluting its local identity, language and way of life | | | |

8. Please express the extent to which you agree or disagree with each of the following statements.

Please choose the appropriate response for each item:

| | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|----------------|---------------|------------------|-------------------|------------|
| My area must continue to be promoted to attract visitors across the year | | | | | |
| I am proud to see visitors visiting my area | | | | | |
| I like to give visitors advice and tips | | | | | |
| The Gwynedd and Eryri tourism policy takes into account the impact tourism has on the life of locals | | | | | |
| I would like to be more involved in decisions concerning tourism in my area | | | | | |
| The development of short-term let accommodation (such as AirBnB, Vrbo etc) is good for my area | | | | | |

9. In your opinion, should your community attract more, as many, or less of the following types of visitors in the future?

Please choose the appropriate response for each item:

| | Less | More | As many | No opinion |
|---|------|------|---------|------------|
| Visitors from Wales | | | | |
| Visitors from the United Kingdom (from outside Wales) | | | | |
| International visitors (from outside the UK) | | | | |
| Overnight visitors | | | | |
| Day visitors | | | | |

10. Which of the following consequences has short-term let accommodation had in your community?

Please choose the appropriate response for each item:

| | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|----------------|---------------|------------------|-------------------|------------|
| Housing prices have increased in the past few years | | | | | |
| Tourism has grown due to more overnight accommodation | | | | | |
| Visitors come all year round now, rather than just during the main holiday season | | | | | |
| Some areas have been overtaken by short-term let accommodation and now locals cannot inhabit them | | | | | |
| It has helped further promote my area | | | | | |
| The sense of community has declined | | | | | |
| We're losing what makes our area special | | | | | |
| My area has become more international and multicultural, enriching its cultural aspect | | | | | |

11. What are the consequences of hosting events (such as outdoor/recreation activities or events & cultural and musical events) in your community?

Please choose the appropriate response for each item:

| | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|----------------|---------------|------------------|-------------------|------------|
| Attract too many visitors at the same time | | | | | |
| They help tourism grow and bring economic benefits | | | | | |
| They have a negative impact on the environment and nature | | | | | |
| The type of visitors attending events cause a lot of noise and are disrespectful | | | | | |
| Attract more international visitors | | | | | |
| The offer of recreation and leisure activities has increased | | | | | |
| The local infrastructure can't cope (such as public transport, public toilets, car parks) | | | | | |
| Create a buzz in our communities and an opportunity for local residents to enjoy musical and artistic activities and performances | | | | | |

12. Please express the extent to which you agree or disagree with each of the following statements

Please choose the appropriate response for each item:

| | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|----------------|---------------|------------------|-------------------|------------|
| <p>The Welsh language is harmed due to a loss of affordable housing for local people</p> <p>The Welsh language has benefited from locals' desire to stay as a result of increased tourism job opportunities</p> | | | | | |
| <p>Original Welsh place names are being changed to accommodate the visitors in my area</p> <p>Tourism increases awareness of the Welsh language and culture</p> | | | | | |
| <p>The Welsh language is used less in my area due to the number of non-Welsh visitors</p> | | | | | |

13. What kind of impact have the 'Arosfan' (Aires) sites had on 'wild camping' in your community? Which of the statements below is most relevant?

Please choose **only one** of the following:

- It has had a positive impact by gaining better control and reducing the number of vehicles camping wildly
- We have not noticed any changes in the number of wild camping
- It has had no effect. The 'wild camping' situation is out of control and the number of wild campers is increasing
- There are no Arosfan sites in my community

14. Is 'wild camping' a problem in your community?

Please choose **only one** of the following:

- Yes
- No

15. When considering your community, do you think the World Heritage Site has:

Please choose the appropriate response for each item:

| | Yes | A little | No | Not applicable to my community |
|---|-----|----------|----|--------------------------------|
| Created an extra buzz and pride among residents | | | | |
| Increased the number visiting | | | | |
| Created infrastructure challenges | | | | |

16. What are these challenges?

Please choose **all** that apply:

- Littering
- Parking
- Damage/Vandalism
- Other:

17. What is your profession?

Please choose **only one** of the following:

- Director / Manager
- Employee
- Manual worker
- Freelance
- Student
- Academic
- Stay-at-home partner
- Retired
- Unemployed
- I prefer not to say

18. How long have you lived in your community?

Please choose **only one** of the following:

- Less than a year
- 1 to 3 years
- 4 to 6 years
- 7 to 9 years
- 10 to 15 years
- More than 15 years

19. In your opinion do you live in a community where

Please choose **only one** of the following:

- Tourists often visit
- Tourists visit fairly often
- Tourists don't often visit
- Tourists never visit

20. Other than friends and family, do you ever host visitors in your home or in a property in the Gwynedd area owned by you?

Please choose **only one** of the following:

- Yes, regularly
- Yes, sometimes
- No, never
- I prefer not to say

21. Do you, or any other member of your household work within tourism?

Please choose **only one** of the following:

- Yes
- No

22. Note your sex

Please choose **only one** of the following:

- Woman / Female
- Man / Male
- I identify in a different way
- I prefer not to say
- Other

23. Note your age group

Please choose **only one** of the following:

- 15 years old or younger
- 16 - 24 years old
- 25 - 34 years old
- 35 - 44 years old
- 45 - 54 years old
- 55 - 64 years old
- 65 - 74 years old
- 75 + years old
- I prefer not to say
- Other

24. How would you describe your skills in Welsh?

Please choose **only one** of the following:

- Speak, read and write fluently
- Speak, read and write, but not very confidently
- Speak, read and write - I'm learning
- Speak, but can't read or write
- Can't speak or understand Welsh
- I prefer not to say
- Other

25. Your Nationality or National Identity

Please choose **only one** of the following:

- Welsh
- English
- Scottish
- Northern Irish
- British
- I prefer not to say
- Other

26. What is your race?

Please choose **only one** of the following:

- White
- Black / African / Caribbean
- Asian
- Gypsy / Irish traveller
- Mixed / several ethnic groups
- I prefer not to say
- Other

27. What is your religion?

Please choose **only one** of the following:

- No religion
- Christian
- Muslim
- Buddhist
- Hindu
- Jewish
- Sikh
- I prefer not to say
- Other

28. Which of these best describes you?

Please choose **only one** of the following:

- Heterosexual / Straight
- Gay man
- Gay woman / lesbian
- Bisexual
- I prefer not to say
- Other

29. Has your gender identification changed from that assigned to you at birth? (for example are you trans or transgender etc)

Please choose **only one** of the following:

- Yes
- No
- I prefer not to say
- Other

30. Section 6 (1) of the Equality Act 2010 states that a person is disabled if: a. The person has a physical or mental impairment, b. and the impairment has a substantial and long-term effect on the person's ability to carry out normal day-to-day activities. Using this definition, do you consider yourself a disabled person?

Please choose **only one** of the following:

- Yes
- No
- I prefer not to say
- Other

The survey has come to an end.

Thank you for completing it.

Appendix B – Map of the 13 Regeneration Areas of Gwynedd



1:500,000

Adran Cefnogaeth Gorfforaethol, Cyngor Gwynedd
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Corporate Support Department, Gwynedd Council
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Appendix C – Equality Characteristics of respondents

| Gender | Number | As a % |
|-------------------------------|--------------|---------------|
| Woman / Female | 762 | 50.6% |
| Man / Male | 578 | 38.4% |
| I identify in a different way | 10 | 0.7% |
| I prefer not to say | 156 | 10.4% |
| Total | 1,506 | 100.0% |

| Age Group | Number | As a % |
|---------------------|--------------|---------------|
| 16 – 24 years | 22 | 1.5% |
| 25 – 34 years | 92 | 6.1% |
| 35 - 44 years old | 195 | 12.9% |
| 45 - 54 years old | 292 | 19.4% |
| 55 - 64 years old | 448 | 29.7% |
| 65 - 74 years old | 270 | 17.9% |
| 75+ years old | 69 | 4.6% |
| I prefer not to say | 118 | 7.8% |
| Total | 1,506 | 100.0% |

| Welsh Language Skills | Number | As a % |
|---|--------------|---------------|
| Speak, read and write fluently | 541 | 35.9% |
| Speak, read and write – learning | 279 | 18.5% |
| Speak, read and write, but not very confident | 198 | 13.1% |
| Speak, but unable to read or write | 98 | 6.5% |
| Can't speak or understand Welsh | 137 | 9.1% |
| Other | 76 | 5.0% |
| I prefer not to say | 177 | 11.8% |
| Total | 1,506 | 100.0% |

| Race | Number | As a % |
|-------------------------------|--------------|---------------|
| White | 1,337 | 88.8% |
| Mixed / several ethnic groups | 14 | 0.9% |
| Gypsy / Irish traveller | 2 | 0.1% |
| Black / African / Caribbean | 1 | 0.1% |
| Other | 13 | 0.9% |
| I prefer not to say | 139 | 9.2% |
| Total | 1,506 | 100.0% |

| Disabled under the Equality Act | Number | As a % |
|---------------------------------|--------------|---------------|
| Yes | 101 | 6.7% |
| No | 1,224 | 81.3% |
| I prefer not to say | 181 | 12.0% |
| Total | 1,506 | 100.0% |

Appendix D - Influence of Tourism

| The Local Economy | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|-------------|--------------------|-------------|
| Pen Llŷn Area | 91.5% | 2.3% | 4.1% | 2.1% |
| Porthmadog / Penrhyndeudraeth Area | 90.1% | 6.9% | 2.5% | 0.5% |
| Bro Ardudwy | 91.0% | 5.0% | 2.5% | 1.5% |
| Bro Dysynni | 86.3% | 5.3% | 6.3% | 2.1% |
| Bro Ffestiniog | 75.6% | 20.0% | 4.4% | 0.0% |
| Bro Lleu / Nantlle | 83.9% | 9.7% | 4.8% | 1.6% |
| Bro Ogwen | 50.0% | 20.8% | 25.0% | 4.2% |
| Bro Peris | 65.3% | 20.0% | 13.3% | 1.4% |
| Bala / Penllyn Catchment Area | 84.4% | 6.3% | 3.1% | 6.2% |
| Bangor Catchment Area | 73.3% | 16.7% | 10.0% | 0.0% |
| Caernarfon Catchment Area | 78.8% | 9.6% | 9.6% | 2.0% |
| Dolgellau Catchment Area | 85.3% | 11.8% | 2.9% | 0.0% |
| Pwllheli Catchment Area | 83.1% | 11.5% | 3.3% | 2.1% |
| Eryri National Park Area (within Gwynedd) | 86.9% | 8.8% | 4.1% | 0.2% |
| Llŷn AONB Area | 92.0% | 4.3% | 3.2% | 0.5% |
| Gwynedd Slate Area | 73.4% | 18.4% | 8.2% | 0.0% |
| Gwynedd | 86.5% | 7.8% | 4.9% | 0.8% |

| Employment | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|-------------|--------------------|-------------|
| Pen Llŷn Area | 90.7% | 5.2% | 3.5% | 0.6% |
| Porthmadog / Penrhyndeudraeth Area | 84.2% | 8.9% | 5.9% | 1.0% |
| Bro Ardudwy | 86.9% | 7.5% | 4.0% | 1.6% |
| Bro Dysynni | 82.6% | 10.0% | 5.8% | 1.6% |
| Bro Ffestiniog | 73.3% | 13.3% | 11.1% | 2.3% |
| Bro Lleu / Nantlle | 77.4% | 14.5% | 8.1% | 0.0% |
| Bro Ogwen | 54.2% | 20.8% | 20.8% | 4.2% |
| Bro Peris | 68.0% | 18.7% | 13.3% | 0.0% |
| Bala / Penllyn Catchment Area | 84.4% | 6.3% | 6.3% | 3.0% |
| Bangor Catchment Area | 70.0% | 20.0% | 10.0% | 0.0% |
| Caernarfon Catchment Area | 71.2% | 13.5% | 11.5% | 3.8% |
| Dolgellau Catchment Area | 85.3% | 13.2% | 1.5% | 0.0% |
| Pwllheli Catchment Area | 79.8% | 10.4% | 8.7% | 1.1% |
| Eryri National Park Area (within Gwynedd) | 82.5% | 10.7% | 6.1% | 0.7% |
| Llŷn AONB Area | 90.5% | 6.3% | 3.2% | 0.0% |
| Gwynedd Slate Area | 78.0% | 11.9% | 10.1% | 0.0% |
| Gwynedd | 82.7% | 9.8% | 6.4% | 1.1% |

| The overall perception and feeling | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 82.8% | 8.7% | 8.2% | 0.3% |
| Porthmadog / Penrhyndeudraeth Area | 68.0% | 16.7% | 14.8% | 0.5% |
| Bro Ardudwy | 75.9% | 12.1% | 12.1% | 0.0% |
| Bro Dysynni | 73.2% | 12.1% | 13.2% | 1.5% |
| Bro Ffestiniog | 51.1% | 24.4% | 22.2% | 2.3% |
| Bro Lleu / Nantlle | 51.6% | 33.9% | 14.5% | 0.0% |
| Bro Ogwen | 16.7% | 33.3% | 41.7% | 8.3% |
| Bro Peris | 53.3% | 10.7% | 34.7% | 1.3% |
| Bala / Penllyn Catchment Area | 78.1% | 9.4% | 12.5% | 0.0% |
| Bangor Catchment Area | 46.7% | 30.0% | 20.0% | 3.3% |
| Caernarfon Catchment Area | 61.5% | 15.4% | 21.2% | 1.9% |
| Dolgellau Catchment Area | 72.1% | 17.6% | 10.3% | 0.0% |
| Pwllheli Catchment Area | 67.2% | 15.8% | 13.7% | 3.3% |
| Eryri National Park Area (within Gwynedd) | 68.4% | 15.4% | 15.4% | 0.7% |
| Llŷn AONB Area | 84.8% | 8.4% | 6.8% | 0.0% |
| Gwynedd Slate Area | 57.8% | 17.4% | 22.9% | 1.8% |
| Gwynedd | 70.0% | 14.6% | 14.3% | 1.1% |

| Leisure Activities | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 77.8% | 13.7% | 6.7% | 1.8% |
| Porthmadog / Penrhyndeudraeth Area | 71.4% | 18.7% | 8.4% | 1.5% |
| Bro Ardudwy | 69.3% | 19.1% | 8.5% | 3.1% |
| Bro Dysynni | 71.6% | 17.9% | 8.4% | 2.1% |
| Bro Ffestiniog | 55.6% | 31.1% | 11.1% | 2.2% |
| Bro Lleu / Nantlle | 62.9% | 24.2% | 9.7% | 3.2% |
| Bro Ogwen | 33.3% | 37.5% | 25.0% | 4.2% |
| Bro Peris | 45.3% | 30.7% | 20.0% | 4.0% |
| Bala / Penllyn Catchment Area | 75.0% | 18.8% | 6.3% | 0.0% |
| Bangor Catchment Area | 36.7% | 33.3% | 23.3% | 6.7% |
| Caernarfon Catchment Area | 46.2% | 38.5% | 15.4% | 0.0% |
| Dolgellau Catchment Area | 69.1% | 26.5% | 2.9% | 1.5% |
| Pwllheli Catchment Area | 62.8% | 23.0% | 10.4% | 3.8% |
| Eryri National Park Area (within Gwynedd) | 67.0% | 23.1% | 8.3% | 1.7% |
| Llŷn AONB Area | 80.1% | 13.1% | 5.8% | 1.0% |
| Gwynedd Slate Area | 63.6% | 22.4% | 12.2% | 1.8% |
| Gwynedd | 67.3% | 20.8% | 9.5% | 2.4% |

| Community Vitality | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 76.4% | 13.4% | 7.0% | 3.2% |
| Porthmadog / Penrhyndeudraeth Area | 62.6% | 23.2% | 12.3% | 1.9% |
| Bro Ardudwy | 72.4% | 13.6% | 11.1% | 2.9% |
| Bro Dysynni | 68.4% | 18.9% | 12.1% | 0.6% |
| Bro Ffestiniog | 31.1% | 42.2% | 24.4% | 2.3% |
| Bro Lleu / Nantlle | 58.1% | 24.2% | 16.1% | 1.6% |
| Bro Ogwen | 12.5% | 45.8% | 41.7% | 0.0% |
| Bro Peris | 40.0% | 21.3% | 33.3% | 5.4% |
| Bala / Penllyn Catchment Area | 68.8% | 18.8% | 9.4% | 3.0% |
| Bangor Catchment Area | 43.3% | 30.0% | 26.7% | 0.0% |
| Caernarfon Catchment Area | 50.0% | 30.8% | 13.5% | 5.7% |
| Dolgellau Catchment Area | 63.2% | 26.5% | 10.3% | 0.0% |
| Pwllheli Catchment Area | 63.4% | 18.0% | 15.8% | 2.8% |
| Eryri National Park Area (within Gwynedd) | 64.3% | 20.4% | 14.6% | 0.7% |
| Llŷn AONB Area | 80.9% | 12.2% | 6.4% | 0.5% |
| Gwynedd Slate Area | 52.3% | 27.5% | 17.4% | 2.8% |
| Gwynedd | 64.1% | 19.9% | 13.5% | 2.5% |

| The Heritage Sector | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 60.6% | 25.1% | 9.0% | 5.3% |
| Porthmadog / Penrhyndeudraeth Area | 71.9% | 16.7% | 7.9% | 3.5% |
| Bro Ardudwy | 69.8% | 17.6% | 8.0% | 4.6% |
| Bro Dysynni | 64.7% | 17.9% | 11.6% | 5.8% |
| Bro Ffestiniog | 57.8% | 24.4% | 8.9% | 8.9% |
| Bro Lleu / Nantlle | 69.4% | 16.1% | 11.3% | 3.2% |
| Bro Ogwen | 37.5% | 50.0% | 12.5% | 0.0% |
| Bro Peris | 50.7% | 22.7% | 21.3% | 5.3% |
| Bala / Penllyn Catchment Area | 78.1% | 9.4% | 9.4% | 3.1% |
| Bangor Catchment Area | 53.3% | 23.3% | 20.0% | 3.4% |
| Caernarfon Catchment Area | 69.2% | 9.6% | 11.5% | 9.7% |
| Dolgellau Catchment Area | 70.6% | 20.6% | 4.4% | 4.4% |
| Pwllheli Catchment Area | 59.0% | 24.6% | 9.8% | 6.6% |
| Eryri National Park Area (within Gwynedd) | 68.0% | 19.4% | 10.2% | 2.5% |
| Llŷn AONB Area | 64.9% | 26.1% | 6.9% | 2.1% |
| Gwynedd Slate Area | 68.2% | 17.8% | 14.0% | 0.0% |
| Gwynedd | 64.1% | 20.8% | 10.0% | 5.1% |

| Quality of Life | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 74.6% | 14.3% | 10.5% | 0.6% |
| Porthmadog / Penrhyndeudraeth Area | 55.7% | 25.6% | 16.7% | 2.0% |
| Bro Ardudwy | 61.3% | 20.6% | 15.6% | 2.5% |
| Bro Dysynni | 54.2% | 24.7% | 17.4% | 3.7% |
| Bro Ffestiniog | 35.6% | 37.8% | 24.4% | 2.2% |
| Bro Lleu / Nantlle | 50.0% | 25.8% | 21.0% | 3.2% |
| Bro Ogwen | 16.7% | 29.2% | 54.2% | 0.0% |
| Bro Peris | 33.3% | 14.7% | 46.7% | 5.3% |
| Bala / Penllyn Catchment Area | 62.5% | 21.9% | 12.5% | 3.1% |
| Bangor Catchment Area | 33.3% | 43.3% | 23.3% | 0.1% |
| Caernarfon Catchment Area | 40.4% | 26.9% | 28.8% | 3.9% |
| Dolgellau Catchment Area | 61.8% | 22.1% | 16.2% | 0.0% |
| Pwllheli Catchment Area | 54.6% | 24.0% | 16.9% | 4.5% |
| Eryri National Park Area (within Gwynedd) | 56.2% | 23.0% | 19.8% | 1.0% |
| Llŷn AONB Area | 80.1% | 12.6% | 6.8% | 0.5% |
| Gwynedd Slate Area | 42.1% | 32.7% | 24.3% | 0.9% |
| Gwynedd | 57.3% | 22.1% | 18.2% | 2.4% |

| The Infrastructure | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 61.8% | 23.6% | 9.6% | 5.0% |
| Porthmadog / Penrhyndeudraeth Area | 61.1% | 18.7% | 18.7% | 1.5% |
| Bro Ardudwy | 55.8% | 24.1% | 18.6% | 1.5% |
| Bro Dysynni | 52.6% | 22.1% | 22.6% | 2.7% |
| Bro Ffestiniog | 46.7% | 24.4% | 26.7% | 2.2% |
| Bro Lleu / Nantlle | 48.4% | 22.6% | 27.4% | 1.6% |
| Bro Ogwen | 25.0% | 16.7% | 58.3% | 0.0% |
| Bro Peris | 36.0% | 26.7% | 36.0% | 1.3% |
| Bala / Penllyn Catchment Area | 46.9% | 28.1% | 15.6% | 9.4% |
| Bangor Catchment Area | 33.3% | 30.0% | 30.0% | 6.7% |
| Caernarfon Catchment Area | 32.7% | 38.5% | 28.8% | 0.0% |
| Dolgellau Catchment Area | 45.6% | 29.4% | 17.6% | 7.4% |
| Pwllheli Catchment Area | 51.9% | 21.3% | 25.1% | 1.7% |
| Eryri National Park Area (within Gwynedd) | 52.5% | 23.5% | 21.3% | 2.7% |
| Llŷn AONB Area | 62.6% | 20.5% | 12.7% | 4.2% |
| Gwynedd Slate Area | 44.0% | 22.9% | 30.3% | 2.8% |
| Gwynedd | 53.1% | 23.6% | 20.5% | 2.8% |

| The Environment and Nature | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 49.3% | 35.6% | 14.0% | 1.1% |
| Porthmadog / Penrhyndeudraeth Area | 33.5% | 38.9% | 25.1% | 2.5% |
| Bro Ardudwy | 44.7% | 32.2% | 20.6% | 2.5% |
| Bro Dysynni | 44.7% | 28.9% | 25.8% | 0.6% |
| Bro Ffestiniog | 28.9% | 35.6% | 35.6% | 0.0% |
| Bro Lleu / Nantlle | 35.5% | 29.0% | 33.9% | 1.6% |
| Bro Ogwen | 8.3% | 29.2% | 58.3% | 4.2% |
| Bro Peris | 26.7% | 17.3% | 53.3% | 2.7% |
| Bala / Penllyn Catchment Area | 46.9% | 25.0% | 28.1% | 0.0% |
| Bangor Catchment Area | 33.3% | 26.7% | 40.0% | 0.0% |
| Caernarfon Catchment Area | 28.8% | 26.9% | 42.3% | 2.0% |
| Dolgellau Catchment Area | 36.8% | 41.2% | 17.6% | 4.4% |
| Pwllheli Catchment Area | 42.1% | 32.8% | 24.6% | 0.5% |
| Eryri National Park Area (within Gwynedd) | 38.7% | 33.8% | 26.3% | 1.2% |
| Llŷn AONB Area | 55.2% | 31.6% | 13.2% | 0.0% |
| Gwynedd Slate Area | 32.7% | 33.6% | 32.7% | 1.0% |
| Gwynedd | 40.5% | 32.7% | 25.2% | 1.6% |

| The Welsh Language and Culture | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 37.6% | 41.1% | 14.6% | 6.7% |
| Porthmadog / Penrhyndeudraeth Area | 35.0% | 36.0% | 25.6% | 3.4% |
| Bro Ardudwy | 32.7% | 44.7% | 15.1% | 7.5% |
| Bro Dysynni | 27.4% | 41.6% | 23.2% | 7.8% |
| Bro Ffestiniog | 24.4% | 37.8% | 33.3% | 4.5% |
| Bro Lleu / Nantlle | 40.3% | 29.0% | 27.4% | 3.3% |
| Bro Ogwen | 12.5% | 25.0% | 54.2% | 8.3% |
| Bro Peris | 29.3% | 28.0% | 37.3% | 5.4% |
| Bala / Penllyn Catchment Area | 37.5% | 46.9% | 9.4% | 6.2% |
| Bangor Catchment Area | 26.7% | 26.7% | 40.0% | 6.6% |
| Caernarfon Catchment Area | 28.8% | 40.4% | 28.8% | 2.0% |
| Dolgellau Catchment Area | 44.1% | 38.2% | 16.2% | 1.5% |
| Pwllheli Catchment Area | 32.2% | 38.8% | 24.0% | 5.0% |
| Eryri National Park Area (within Gwynedd) | 33.0% | 42.0% | 20.6% | 4.4% |
| Llŷn AONB Area | 41.0% | 42.6% | 12.2% | 4.2% |
| Gwynedd Slate Area | 30.3% | 32.1% | 30.3% | 7.3% |
| Gwynedd | 33.3% | 38.8% | 22.2% | 5.7% |

| Cleanliness of public spaces | Positive influence | Neutral | Negative influence | No opinion |
|---|--------------------|--------------|--------------------|-------------|
| Pen Llŷn Area | 39.7% | 36.7% | 20.4% | 3.2% |
| Porthmadog / Penrhyndeudraeth Area | 30.5% | 32.5% | 34.5% | 2.5% |
| Bro Ardudwy | 33.2% | 31.7% | 31.2% | 3.9% |
| Bro Dysynni | 32.6% | 29.5% | 36.3% | 1.6% |
| Bro Ffestiniog | 20.0% | 35.6% | 44.4% | 0.0% |
| Bro Lleu / Nantlle | 35.5% | 32.3% | 29.0% | 3.2% |
| Bro Ogwen | 8.3% | 25.0% | 62.5% | 4.2% |
| Bro Peris | 16.0% | 22.7% | 60.0% | 1.3% |
| Bala / Penllyn Catchment Area | 18.8% | 37.5% | 37.5% | 6.2% |
| Bangor Catchment Area | 26.7% | 20.0% | 50.0% | 3.3% |
| Caernarfon Catchment Area | 11.5% | 32.7% | 51.9% | 3.9% |
| Dolgellau Catchment Area | 27.9% | 44.1% | 25.0% | 3.0% |
| Pwllheli Catchment Area | 38.8% | 33.3% | 26.2% | 1.7% |
| Eryri National Park Area (within Gwynedd) | 29.7% | 33.1% | 36.0% | 1.2% |
| Llŷn AONB Area | 43.9% | 33.3% | 20.1% | 2.7% |
| Gwynedd Slate Area | 24.8% | 33.0% | 41.3% | 0.9% |
| Gwynedd | 31.9% | 32.9% | 32.4% | 2.8% |

Appendix E - Impact of events on local communities

| Helps tourism to grow and bring resulting economic benefits | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|----------------|---------------|------------------|-------------------|-------------|
| Pen Llŷn Area | 59.2% | 26.5% | 4.4% | 3.2% | 6.7% |
| Porthmadog / Penrhyndeudraeth Area | 44.8% | 40.9% | 8.4% | 2.0% | 3.9% |
| Bro Ardudwy | 57.8% | 25.6% | 7.0% | 3.0% | 6.5% |
| Bro Dysynni | 60.5% | 28.9% | 4.2% | 3.7% | 2.7% |
| Bro Ffestiniog | 37.8% | 37.8% | 6.7% | 8.9% | 8.9% |
| Bro Lleu / Nantlle | 40.3% | 41.9% | 8.1% | 1.6% | 8.1% |
| Bro Ogwen | 8.3% | 33.3% | 25.0% | 16.7% | 16.7% |
| Bro Peris | 34.7% | 25.3% | 14.7% | 17.3% | 8.0% |
| Bala / Penllyn Catchment Area | 65.6% | 18.8% | 6.3% | 3.1% | 6.3% |
| Bangor Catchment Area | 40.0% | 36.7% | 16.7% | 3.3% | 3.3% |
| Caernarfon Catchment Area | 36.5% | 38.5% | 7.7% | 7.7% | 9.6% |
| Dolgellau Catchment Area | 54.4% | 26.5% | 11.8% | 1.4% | 5.9% |
| Pwllheli Catchment Area | 51.9% | 26.8% | 11.5% | 3.8% | 6.0% |
| Eryri National Park Area (within Gwynedd) | 52.5% | 28.7% | 9.2% | 3.6% | 6.0% |
| Llŷn AONB Area | 60.7% | 28.8% | 4.2% | 2.6% | 3.7% |
| Gwynedd Slate Area | 40.4% | 37.6% | 9.2% | 5.5% | 7.3% |
| Gwynedd | 51.7% | 30.1% | 7.9% | 4.2% | 6.0% |

| Create vibrancy in our communities and an opportunity for local residents to be able to enjoy activities and music and artistic performances | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|----------------|---------------|------------------|-------------------|-------------|
| Pen Llŷn Area | 51.0% | 32.4% | 6.7% | 3.2% | 6.7% |
| Porthmadog / Penrhyndeudraeth Area | 39.9% | 36.5% | 7.9% | 3.9% | 11.8% |
| Bro Ardudwy | 49.2% | 34.7% | 6.5% | 1.6% | 8.0% |
| Bro Dysynni | 44.7% | 37.4% | 7.4% | 4.7% | 5.8% |
| Bro Ffestiniog | 37.8% | 28.9% | 17.8% | 4.4% | 11.1% |
| Bro Lleu / Nantlle | 33.9% | 43.5% | 4.8% | 9.7% | 8.1% |
| Bro Ogwen | 20.8% | 25.0% | 25.0% | 16.7% | 12.5% |
| Bro Peris | 22.7% | 37.3% | 22.7% | 12.0% | 5.3% |
| Bala / Penllyn Catchment Area | 56.3% | 31.3% | 3.1% | 9.4% | 0.0% |
| Bangor Catchment Area | 33.3% | 50.0% | 6.7% | 3.3% | 6.7% |
| Caernarfon Catchment Area | 36.5% | 42.3% | 9.6% | 3.8% | 7.7% |
| Dolgellau Catchment Area | 48.5% | 30.9% | 5.9% | 5.9% | 8.8% |
| Pwllheli Catchment Area | 43.7% | 33.3% | 10.4% | 4.4% | 8.2% |
| Eryri National Park Area (within Gwynedd) | 44.6% | 35.2% | 7.2% | 4.8% | 8.2% |
| Llŷn AONB Area | 51.8% | 34.6% | 6.3% | 3.1% | 4.2% |
| Gwynedd Slate Area | 29.4% | 42.2% | 15.6% | 7.3% | 5.5% |
| Gwynedd | 43.8% | 35.1% | 8.7% | 4.6% | 7.8% |

| Attract more international visitors | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|-----------------------|----------------------|-------------------------|--------------------------|-------------------|
| Pen Llŷn Area | 20.4% | 33.2% | 19.5% | 5.8% | 21.0% |
| Porthmadog / Penrhyndeudraeth Area | 21.7% | 36.9% | 16.3% | 2.4% | 22.7% |
| Bro Ardudwy | 23.1% | 27.1% | 20.1% | 3.5% | 26.1% |
| Bro Dysynni | 13.7% | 33.2% | 20.0% | 8.4% | 24.7% |
| Bro Ffestiniog | 15.6% | 24.4% | 15.6% | 8.9% | 35.6% |
| Bro Lleu / Nantlle | 17.7% | 27.4% | 19.4% | 4.8% | 30.6% |
| Bro Ogwen | 20.8% | 25.0% | 20.8% | 12.5% | 20.8% |
| Bro Peris | 22.7% | 30.7% | 21.3% | 2.6% | 22.7% |
| Bala / Penllyn Catchment Area | 21.9% | 31.3% | 18.8% | 3.1% | 25.0% |
| Bangor Catchment Area | 16.7% | 23.3% | 43.3% | 0.0% | 16.7% |
| Caernarfon Catchment Area | 17.3% | 34.6% | 9.6% | 7.7% | 30.8% |
| Dolgellau Catchment Area | 19.1% | 38.2% | 8.8% | 5.9% | 27.9% |
| Pwllheli Catchment Area | 26.2% | 35.0% | 13.1% | 7.7% | 18.0% |
| Eryri National Park Area (within Gwynedd) | 18.6% | 30.6% | 16.9% | 5.8% | 28.1% |
| Llŷn AONB Area | 18.9% | 36.1% | 16.8% | 5.2% | 23.0% |
| Gwynedd Slate Area | 20.2% | 37.6% | 15.6% | 5.5% | 21.1% |
| Gwynedd | 20.5% | 32.4% | 18.1% | 5.5% | 23.6% |

| The local infrastructure is unable to cope | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|-----------------------|----------------------|-------------------------|--------------------------|-------------------|
| Pen Llŷn Area | 12.0% | 18.1% | 37.9% | 24.5% | 7.6% |
| Porthmadog / Penrhyndeudraeth Area | 15.3% | 26.1% | 32.5% | 19.2% | 6.9% |
| Bro Ardudwy | 19.6% | 25.6% | 25.6% | 21.6% | 7.5% |
| Bro Dysynni | 19.5% | 29.5% | 28.9% | 18.9% | 3.2% |
| Bro Ffestiniog | 24.4% | 24.4% | 17.8% | 22.2% | 11.1% |
| Bro Lleu / Nantlle | 33.9% | 14.5% | 25.8% | 21.0% | 4.8% |
| Bro Ogwen | 54.2% | 25.0% | 8.3% | 4.2% | 8.3% |
| Bro Peris | 50.7% | 24.0% | 13.3% | 10.7% | 1.3% |
| Bala / Penllyn Catchment Area | 18.8% | 28.1% | 31.3% | 18.8% | 3.1% |
| Bangor Catchment Area | 20.0% | 26.7% | 30.0% | 20.0% | 3.3% |
| Caernarfon Catchment Area | 32.7% | 21.2% | 23.1% | 13.5% | 9.6% |
| Dolgellau Catchment Area | 14.7% | 29.4% | 35.3% | 14.7% | 5.9% |
| Pwllheli Catchment Area | 20.8% | 26.8% | 27.9% | 19.7% | 4.9% |
| Eryri National Park Area (within Gwynedd) | 19.8% | 28.7% | 26.0% | 18.3% | 7.2% |
| Llŷn AONB Area | 16.2% | 15.7% | 35.1% | 26.7% | 6.3% |
| Gwynedd Slate Area | 29.4% | 22.9% | 26.6% | 17.4% | 3.7% |
| Gwynedd | 20.5% | 24.1% | 29.5% | 19.9% | 6.1% |

| The offer in terms of leisure events has increased | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|----------------|---------------|------------------|-------------------|--------------|
| Pen Llŷn Area | 17.2% | 27.7% | 29.7% | 11.7% | 13.7% |
| Porthmadog / Penrhyndeudraeth Area | 18.2% | 40.9% | 22.2% | 7.9% | 10.8% |
| Bro Ardudwy | 14.6% | 25.6% | 29.6% | 16.6% | 13.6% |
| Bro Dysynni | 12.1% | 35.3% | 34.2% | 8.4% | 10.0% |
| Bro Ffestiniog | 20.0% | 33.3% | 17.8% | 6.7% | 22.2% |
| Bro Lleu / Nantlle | 16.1% | 27.4% | 32.3% | 8.1% | 16.1% |
| Bro Ogwen | 12.5% | 37.5% | 29.2% | 4.2% | 16.7% |
| Bro Peris | 29.3% | 45.3% | 12.0% | 8.0% | 5.3% |
| Bala / Penllyn Catchment Area | 18.8% | 34.4% | 18.8% | 12.5% | 15.6% |
| Bangor Catchment Area | 26.7% | 23.3% | 23.3% | 3.3% | 23.3% |
| Caernarfon Catchment Area | 23.1% | 42.3% | 19.2% | 5.8% | 9.6% |
| Dolgellau Catchment Area | 14.7% | 29.4% | 25.0% | 8.8% | 22.1% |
| Pwllheli Catchment Area | 14.2% | 32.8% | 30.6% | 11.5% | 10.9% |
| Eryri National Park Area (within Gwynedd) | 15.2% | 29.9% | 28.7% | 12.1% | 14.1% |
| Llŷn AONB Area | 20.9% | 33.0% | 27.8% | 6.8% | 11.5% |
| Gwynedd Slate Area | 19.3% | 42.2% | 20.2% | 7.3% | 11.0% |
| Gwynedd | 16.9% | 32.6% | 27.3% | 10.3% | 12.9% |

| Negative impact on the environment and nature | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|---|----------------|---------------|------------------|-------------------|--------------|
| Pen Llŷn Area | 6.1% | 10.5% | 37.9% | 35.3% | 10.2% |
| Porthmadog / Penrhyndeudraeth Area | 12.3% | 22.7% | 35.0% | 20.7% | 9.4% |
| Bro Ardudwy | 7.5% | 14.1% | 33.2% | 33.2% | 12.1% |
| Bro Dysynni | 11.1% | 15.8% | 36.8% | 31.1% | 5.3% |
| Bro Ffestiniog | 22.2% | 17.8% | 26.7% | 22.2% | 11.1% |
| Bro Lleu / Nantlle | 11.3% | 22.6% | 27.4% | 24.2% | 14.5% |
| Bro Ogwen | 45.8% | 12.5% | 16.7% | 4.2% | 20.8% |
| Bro Peris | 26.7% | 28.0% | 21.3% | 16.0% | 8.0% |
| Bala / Penllyn Catchment Area | 9.4% | 15.6% | 59.4% | 15.6% | 0.0% |
| Bangor Catchment Area | 10.0% | 26.7% | 26.7% | 26.7% | 10.0% |
| Caernarfon Catchment Area | 9.6% | 28.8% | 23.1% | 25.0% | 13.5% |
| Dolgellau Catchment Area | 5.9% | 16.2% | 33.8% | 32.4% | 11.8% |
| Pwllheli Catchment Area | 12.0% | 12.6% | 31.1% | 33.3% | 10.9% |
| Eryri National Park Area (within Gwynedd) | 11.8% | 17.4% | 34.2% | 26.5% | 10.1% |
| Llŷn AONB Area | 7.9% | 6.3% | 37.7% | 40.3% | 7.8% |
| Gwynedd Slate Area | 16.5% | 22.9% | 33.0% | 19.3% | 8.3% |
| Gwynedd | 11.1% | 16.5% | 33.5% | 28.9% | 10.0% |

| Attracts too many visitors at the same time | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|-----------------------|----------------------|-------------------------|--------------------------|-------------------|
| Pen Llŷn Area | 5.5% | 12.2% | 37.6% | 33.8% | 10.8% |
| Porthmadog / Penrhyndeudraeth Area | 10.3% | 11.8% | 38.4% | 23.6% | 15.8% |
| Bro Ardudwy | 6.0% | 11.6% | 36.2% | 35.2% | 11.1% |
| Bro Dysynni | 6.8% | 12.6% | 38.4% | 35.8% | 6.3% |
| Bro Ffestiniog | 11.1% | 13.3% | 26.7% | 26.7% | 22.2% |
| Bro Lleu / Nantlle | 14.5% | 8.1% | 33.9% | 25.8% | 17.7% |
| Bro Ogwen | 25.0% | 20.8% | 16.7% | 16.7% | 20.8% |
| Bro Peris | 26.7% | 20.0% | 21.3% | 21.3% | 10.7% |
| Bala / Penllyn Catchment Area | 9.4% | 9.4% | 40.6% | 28.1% | 12.5% |
| Bangor Catchment Area | 10.0% | 20.0% | 20.0% | 36.7% | 13.3% |
| Caernarfon Catchment Area | 9.6% | 28.8% | 26.9% | 23.1% | 11.5% |
| Dolgellau Catchment Area | 8.8% | 14.7% | 29.4% | 38.2% | 8.8% |
| Pwllheli Catchment Area | 10.4% | 10.9% | 30.6% | 35.0% | 13.1% |
| Eryri National Park Area (within Gwynedd) | 8.7% | 12.3% | 34.0% | 32.0% | 13.0% |
| Llŷn AONB Area | 7.3% | 12.6% | 36.7% | 35.6% | 7.8% |
| Gwynedd Slate Area | 12.8% | 19.3% | 33.9% | 22.9% | 11.1% |
| Gwynedd | 9.4% | 13.1% | 34.1% | 31.3% | 12.0% |

| The types of visitors attending events cause a lot of noise and are disrespectful | Strongly agree | Tend to agree | Tend to disagree | Strongly disagree | No opinion |
|--|-----------------------|----------------------|-------------------------|--------------------------|-------------------|
| Pen Llŷn Area | 6.4% | 6.1% | 41.1% | 36.4% | 9.9% |
| Porthmadog / Penrhyndeudraeth Area | 9.9% | 12.8% | 37.4% | 30.5% | 9.4% |
| Bro Ardudwy | 8.5% | 9.0% | 34.2% | 39.2% | 9.0% |
| Bro Dysynni | 6.8% | 9.5% | 39.5% | 35.3% | 8.9% |
| Bro Ffestiniog | 13.3% | 15.6% | 24.4% | 22.2% | 24.4% |
| Bro Lleu / Nantlle | 12.9% | 11.3% | 32.3% | 27.4% | 16.1% |
| Bro Ogwen | 25.0% | 16.7% | 25.0% | 8.3% | 25.0% |
| Bro Peris | 21.3% | 22.7% | 30.7% | 16.0% | 9.3% |
| Bala / Penllyn Catchment Area | 6.3% | 18.8% | 37.5% | 25.0% | 12.5% |
| Bangor Catchment Area | 10.0% | 26.7% | 23.3% | 30.0% | 10.0% |
| Caernarfon Catchment Area | 11.5% | 17.3% | 32.7% | 23.1% | 15.4% |
| Dolgellau Catchment Area | 4.4% | 14.7% | 33.8% | 32.4% | 14.7% |
| Pwllheli Catchment Area | 8.2% | 14.8% | 33.3% | 35.0% | 8.7% |
| Eryri National Park Area (within Gwynedd) | 8.9% | 12.8% | 34.5% | 30.8% | 13.0% |
| Llŷn AONB Area | 6.3% | 7.3% | 40.3% | 40.8% | 5.3% |
| Gwynedd Slate Area | 16.5% | 12.8% | 31.2% | 25.7% | 13.8% |
| Gwynedd | 9.1% | 11.8% | 35.9% | 32.4% | 10.8% |