Introduction

1.1 Tourism is a traditional industry in Snowdonia and has been evolving over a number of years: moving away from the traditional coastal two week holiday to a mixture of short or weekend breaks with a growing emphasis on activities or mixed leisure combining sightseeing, beaches and activities.

1.2 Tourism is now the largest employer in the National Park with an estimated 6930 Full Time Equivalent jobs directly and indirectly reliant on the industry. It also generates expenditure of £446 million in the local economy. A total of 9.74 million visitor days are spent each year in the Park with an estimated 3.79 million individual visitors. (STEAM Report 2014 - See Appendix 1).

1.3 The majority of staying visitors stay in non-serviced accommodation i.e. self-catering cottages, chalets, caravans (static and touring) and tents. In July and August 20012 the maximum non-serviced accommodation bedstock (number of beds) was estimated to be 48,671. Serviced accommodation has declined over the past decade with the number of bedstock reducing from 6066 to 3723. This is an indication that the needs of visitors are changing. They are looking for a different kind of accommodation.

1.4 The National Park Authority, National Trust and Natural Resources Wales provide a range of facilities for visitors to the National Park and largely manage the tourism infrastructure of toilets, car parks, Information Centres, access networks and cycle routes.

1.5 The quality of the landscape is largely due to the care of the agricultural community and the public agencies working in partnership through advice and grant support networks. A challenge remains in Snowdonia to ensure the good health of the agricultural economy whilst at the same time providing a well managed attractive landscape to cater for the tourism industry.

1.6 The strategic lead for tourism throughout Wales is governed by Visit Wales’ Partnership for Growth-Strategy for Tourism 2013-2020. The strategy makes reference to the importance of the National Parks of Wales to the national tourism offer and identifies them as key drivers of Wales’ efforts to increase international visits. Locally, tourism development is guided by two Destination Management Plans (namely Gwynedd 2013-2020 and Conwy 2015-2018); both have been developed with input from the National Park Authority.

1.7 The approach of the National Park Authority towards tourism related recreation is guided by the Recreation Strategy. The Authority is also
involved in several relevant initiatives with the other two National Park Authorities and Areas of Outstanding Natural Beauty of Wales.

1.8 The strategies named above provide limited information regarding visitor trends and analysis. In the main, their findings are similar and highlight the key importance of landscape, natural beauty and cultural heritage as drivers within the visitor economy.

1.9 The information below is from the North Wales Visitor Survey carried out in 2004 and outlines the main reasons why people visit the National Park, and what they most like about it.

1.10 People visit Snowdonia because of:

Scenery and Landscape – 41%
Been before - 40%
Mountains and Valleys – 27%
Snowdon – 20%
Beaches and Coast – 19%
Engage in Outdoor Pursuits – 18%
Lots of things to do – 15%

1.11 The likes:

Scenery/Views/Natural Beauty – 44%
Hills/Countryside – 36%
Sea/Coast/Cliffs – 19%
Peace and Quiet – 14%
Walking – 8%
People – 8%
Unspoiled/Not commercialised – 4%

1.12 Visitors to attractions within the National Park

Bala Lake Railway (17664)
Coed y Brenin Forest Park (154204)
Dolwyddelan Castle (4573)
Ffestiniog Railway (129026)
Harlech Castle (92347)
Llanfair Caverns (16500)

1 North Wales Visitor Survey (2004)
2 ibid.
3 This information is taken from the Visits to Tourist Attractions in Wales 2010 by Visit Wales and does not take into account all attractions within the National Park.
1.13 Therefore in order to build upon the unique points offered by the National Park we must ensure that the landscape remains attractive and unspoilt, peace and quiet is maintained and the countryside remains accessible with attractions and a variety of things to do. This could lead to a possible conclusion that tourism and tourist provision should not move in the direction of new large scale facilities or attractions but build on the provision of a high quality local infrastructure of access opportunities, footpaths, cycle and touring routes, which are easily accessible.

1.14 In other words a sustainable model for tourism on which the local economy can build through marketing and the development of linked initiatives. These could be developed taking the following in to account;

- The strengths of the agricultural community and local society to support landscape protection and local business generation needs to be answered

- The need for investment by authorities in the public footpath and access networks as well as investment in cycle routes and systems of public transport.

- The need to ensure the protection of sensitive areas of the countryside through planning policies, non promotion and other management procedures.

- The need to get tourism businesses to work together to help one another in product provision, linked marketing etc.

- The need to promote sustainable land / food initiatives from farm to shop. These should ideally be locally generated and sustainable but through the development of co-operatives could supply wider markets.

- The need for local businesses to see the importance and potential of the tourist trade and to adapt their trading practices, opening hours, facilities provision to cater for it.

- The need for outdoor activity providers to group together to offer packages of activities and taster sessions.
• The need to begin to alter the perceptions of the friendliness of the welcome and for visitors to be helped to recognise the existence of a unique cultural “difference” in the area and to value it for its very difference.

2 Adventure Tourism

2.1 Adventure Tourism is a growing market, with new attractions opening on the boundary of the National Park and existing attractions expanding to cater for this new type of tourism, this is a field which the National Park Authority will have to give consideration to when reviewing existing policies. The Authority has supported new proposals on the edge of the National Park such as Surf Snowdonia in Dolgarrog. The Welsh Government wish to promote Wales as the world’s capital of adventure tourism, 2016 is the Year of Adventure and 2017 and 2018 have also been given themes. These themes are to promote Wales’s greatest strengths and focuses activities, events and attractions on the strongest qualities of the Welsh tourism offer. The Welsh Government has invested consistently in adventure tourism products in recent years, Many of these attractions lie within or adjacent to the National Park.

3 Visitor Accommodation

Serviced and Non Serviced Accommodation

3.1 According to STEAM figures from 2014, there were 734 accommodation establishments within the National Park. 32% of these were serviced accommodation and 68% were non serviced. The vast majority of the serviced accommodations were hotels, guesthouses or B&B with less than 10 rooms, of the Non Serviced accommodation the vast majority are self catering properties. Policies within the Local Development Plan support the improvement of existing serviced accommodation and will support new build tourist accommodation. The Local Development Plan recognizes the importance of maintaining a good range of holiday accommodation for visitors and this evidence from the Wales Occupancy Survey supports this aim. According to the Wales Occupancy Survey in 2015 occupancy rates in hotels, bed and breakfasts and guesthouses have rose overall during the peak summer months over the whole of Wales. North Wales saw an increase in July in hotels, guesthouses/B&B’s and self catering accommodation in July and increase in hotels during august. Overall the whole of Wales saw and increase during the first five months of 2015 also. The information from the Wales Occupancy Survey appears to be showing a trend where the occupancy of self catering accommodation is decreasing and the occupancy of hotels, guesthouses/B&B’s and hostels are up. While it is quite a small change it will be important to keep up to date with the data as it is produced.
4 Static Caravans, Touring and Camping sites

4.1 The number of static caravans, touring and camping sites across the National Park are very high and have a significant negative effect on the landscape of the park including both views to and within the National Park. Many of these sites have been in existence since before the 1960’s and many have a significant negative impact on the National Park, due to their poor standard of design, high density, stark white colour and lack of landscaping. As outlined in further detail below the Ardudwy coast is particularly affected by a significant number of high density static caravan sites which are prominent in the landscape. Maps have been produced in order to illustrate the number and distribution of both touring and static caravans across the National Park. The maps have been produced using evidence from planning applications and also aerial photographs from 2006. These numbers were then mapped using Map Info and the results are displayed in appendix 2. It was considered important to take account of the number of caravans outside of the National Park near to the park boundary specifically within Tywyn, Barmouth and Fairbourne due to the service they provide to the wider area. Including these areas within the evidence base increases the provision of static caravans within the area significantly and further supports the fact that there is an over provision of static caravans within the National Park especially along the Ardudwy Coast and the south of the National Park. It was not possible to gain a clear picture of the number of touring pitches outside of the National Park boundary using aerial photography alone therefore the study of areas outside of the National Park was limited to ascertaining the number of static caravans only.

5 Static Caravans

5.1 The number of static caravans within the National Park exceeds 5700 and if the number of statics in the towns and community councils adjacent to the national park boundary are taken into consideration this takes the number nearer to 12500. Whilst the highest number of statics is concentrated within the west of the National Park there are still a high number of statics across the National Park as whole. The community council with the highest number of static caravans is Dyffryn Ardudwy and Talybont which represents 37% (2116) of the overall number of static caravans.
6 Touring Caravans

6.1 The number of touring caravan pitches has a better distribution across the National Park although still concentrated along the Ardudwy coast stretching up to Porthmadog. In fact more than 50% of the touring caravans are located within the Porthmadog and Ffestiniog, Dolgellau and Barmouth and Machynlleth and Tywyn Zones of Influence. As with the static caravans the highest number of pitches are located within Dyffryn Ardudwy and Talybont Community Council see Appendix 3. It is recognised that touring caravans have less impact on the landscape of the national park due to the fact that they are not in use constantly and when not in use break up the appearance of the sites and reduce their impact on the landscape. The number of touring caravans within the National Park is around 2000 with the majority of them located along the Ardudwy Coast.

7 Zones of Influence

7.1 Maps have also been produced to illustrate the distribution of static caravans for the zones of influence (which have been identified in the spatial development background paper) see maps in appendix 4. The numbers of touring pitches have not been identified for the zones of influence, as it was harder to ascertain the number of pitches in areas outside of the national park due to a lack of information regarding touring pitches in these areas. The evidence does however show that there are a significant number of static caravans within each zone which provide more that sufficient accommodation to serve the need for this type of accommodation within and around the National Park. Through the work carried out it has been established that there are more than 12,500 static caravans across all of the zones of influence with the vast majority of those located, as expected along the coastal regions namely the Dyffryn Ardudwy coast and the Llandudno and Conwy coastline see appendix 4. Due to the exceptionally high number of static caravans within and around Tywyn (over 1200) Machynlleth and Aberdyfi zone holds the highest percentage of statics across the National Park (25%) which is closely followed by 23% of the total number of statics within the Dyffryn Ardudwy and Dolgellau zone with the majority being located along the Ardudwy coast. Dyffryn Conwy has a low number of statics in comparison with only 4% of the total number of statics, however this figure still translates to over 500 statics within the zone. Further more the number of statics provided by the adjacent zone to the north contributes 14% of the total number of statics. While the percentage numbers within the Caernarfon and Bangor zone are relatively low together they make up 10% of the total number of statics across the zone. The zones to the east of the National Park have some of the lowest percentage of statics within the whole area but this is not suspiring as they far more rural than many parts of the other zones.
8 Agricultural Diversification and Self Catering Holiday Accommodation.

8.1 The Authority recognize that some agricultural business like to diversify in order to provide additional income, this sometimes involves the conversion of existing underused buildings into short term self-catering holiday accommodation. Policies within the Local Development Plan support the conversion of underused buildings. As part of the review other ways for farms to diversify will be explored, this is outlined later in this paper.

9 Developments since the adoption of the Eryri Local Development Plan

Tourist Attractions

9.1 Since the adoption of the local development plan a number of existing attractions within the National Park have improved the service they offer, through the extension of existing buildings or the provision of new attractions. A number of new tourist attractions have also opened within the National Park. Some of the existing sites which have been extended or have improved their facilities include:

- Coed y Brenin which has extended its existing building to provide a bike sales and bike repair shop
- Tree Tops Adventure – Betws y Coed – installation of a zip wire, viewing platforms and connecting walkways.

9.2 New tourist attractions have included

- Mary Jones World, which has opened within an existing Church in Llanycil, Bala, it includes a café and a visitor centre which tells the story of Mary Jones.
- Ysgwrn, Trawsfynydd which is a Grade II* listed building, it has been granted permission to convert the existing farmhouse and curtilage buildings to a heritage attraction to share the story of Hedd Wyn, the bardic tradition, Welsh language and agricultural heritage.
- A dwelling at Plas Brondanw, Llanfrothen has had change of use to a museum to display the works of Sir Clough Williams-Ellis and Lady Williams-Ellis and the drawings of Susan Williams Ellis.
- New cafe and visitor experience at Harlech Castle

9.3 There have also been developments of new and extended tourist attractions outside of the National Park which have been very popular and have increased visitors to the area, these include

- Surf Snowdonia – Dolgarrog
- Bounce Below and Zip wires – Blaenau Ffestiniog
- Zip World – Bethesda
• Mountain bike centre and tracks Blaenau Ffestiniog

10 Visitor Accommodation

Existing static caravan, touring caravan and camping sites

10.1 In addition to the above there have also been applications for the extension of existing caravan and camping sites. Some of these have been to relocate existing static caravans to reduce the density and some have involved the increase of touring or camping pitches but have been in well screen locations and often have been part of an application where there has been improvements to existing facilities.

10.2 There have been a number of applications since the adoption of the Local Development Plan to extend the season, while there is currently no policy which relates directly to this, they have been permitted where the sites have been well screened for the whole season they are operating. No touring or camping sites have been allowed to extend their seasons to become permanent sites.

10.3 Due to their relatively recent development, these new forms of temporary accommodation are not covered by the Caravans and Development Control Act 1960. Given this it is considered that it would be appropriate to develop policies which are more specific to ‘glamping’ and therefore address the issues.

Alternative forms of accommodation

10.4 In recent years since the adoption of the LDP there has been an increase in the types of self catering temporary / mobile accommodation on the market. The types of accommodation that have been seen are pods, yurts, teepes and wooden tents, collectively these are known as ‘glamping’ As is outlined in the Annual Monitoring Reports there has been increasingly more enquiries regarding these alternative types of accommodation, both to be used on new sites and also existing sites within the National Park. The Authority is likely to experience an increase in planning applications for these non traditional types of accommodation.

10.5 Thus far there have been two applications for these non traditional accommodation which have been granted contrary to policy. They are as follows:

10.6 A retrospective application for two shepherds huts was received, it was recommended for refusal at officer level, for the reason that it was contrary to policies within the LDP which does not permit new caravan and camping sites
within the National Park and for reason of visual impact. It was approved following a site visit by the Planning and Access committee for the reason that they did not consider that they had a negative impact on the landscape and were of economic benefit to the area.

10.7 An application was received for three yurts which were related to agricultural diversification scheme on an existing agricultural holding. The application was recommended for refusal at officer level as it was in conflict with the existing LDP policies on new caravan and camping sites within the National Park.

11 St Davids Hotel, Harlech

11.1 St David’s Hotel has not been operating commercially for over 10 years and the site has fallen into severe disrepair and is looking very untidy. There is permission on the site for the demolition of the existing buildings and the erection of a new 130 bedroom hotel. In addition to this part of the planning permission allows for the demolition of the existing Coleg Harlech accommodation tower which is to be replaced with further self catering accommodation. None of these proposals have materialized since the original permission was granted and the hotel has fallen even deeper into disrepair. The Authority has taken formal action to demolish the buildings and improve the appearance of the site.

11.2 In addition to the above there have been significant improvements to the area around Castell Harlech, including a new hotel, cafe, gift shop and improved access to the castle by the provision of a new footbridge. Within the local community there is an appetite to improve the vitality and vibrancy of the town.

12 Agricultural diversification

12.1 As has been outlined earlier in this paper an application for yurts has been permitted contrary to policy with the justification that it would be good for the local economy and that it would support the existing farm holding. There have been a number of enquires for new campsite or caravans sites on existing farm holdings. With these new types of small scale ‘glamping’ accommodation becoming increasingly popular the Authority will need to consider this in the review. Any new developments would need to be in suitable locations and not have a negative impact on the landscape of the National Park.
12.2 In addition to the above, short term holiday accommodation provided through the conversion of redundant rural buildings can also provide extra income for farm holdings and can be considered as agricultural diversification. DP 9 within the ELDP allows for the conversion of redundant rural buildings for the use as short term holiday accommodation. The purpose of this policy was to provide economic benefit, as the short term holiday accommodation was to be run as a business and not permit second homes within the National Park area.

12.3 The Authority prepared a farm diversification SPG jointly with the two other Welsh National Parks. It was adopted in 2012 and the purpose of the SPG is to give some practical guidance on the planning issues which might arise when determining an application and to provide the applicant with a checklist at an early stage of developing a project. It is recognised that farm holdings may need to diversify incomes in order to sustain their farm enterprise. Diversification proposals will generally be supported by the National Park Authority providing they conform will other policies within the Local Development Plan.

13 Landscape Sensitivity SPG

13.1 The Authority has adopted a Landscape Sensitivity SPG which provides guidance on how the Authority will deal with certain kinds of applications which due to their size, design and location would have a harmful effect on the landscape. The SPG looks at landscape character areas within the National Park and whether in some parts of the National Park, certain types of large scale development can be accommodated in a controlled way. The SPG looked at renewable energy developments, mobile phone masts and static caravans and chalet parks. The SPG outlined that within the National Park area that the vast majority of Landscape Character Areas would be highly sensitive or very highly sensitive to new developments of static caravan sites. The information contained within the SPG will need to be taken into consideration when reviewing the tourism policies.

14 Visitor Accommodation SPG

14.1 The Authority adopted a visitor accommodation SPG, the guidance was adopted in October 2012 and the purpose of the SPG is to provide more detailed information on how polices contained within the LDP will be applied in practice. The SPG contains further guidance on several of the policies within the Local Development Plan related to tourism and camping and caravan sites. It also outlines under which policies various new types of visitor accommodations will be considered. In addition this further guidance is
provided on what kinds of environmental improvements are considered appropriate in line with the policies of the LDP. This will need to be revised if any changes are made to tourism policies within the Local Development Plan.

15 Implications for the review of the plan

15.1 The evidence shows that within the National Park the number of caravans is already having a significant effect on the landscape of the National Park and the number of these should not be increased due to the negative effect this would have on the landscape of the National Park. Whilst it is recognised that there are important economic benefits for the National Park, increasing the number of sites or the number of pitches within the National Park would have a far greater detrimental effect on the landscape. The evidence above shows that there are more than sufficient static, tourers and camping pitches within the National Park to cater to the need for this type of accommodation. The visual impacts of the caravans and chalets on the natural beauty of certain parts of the Snowdonia National Park are a clear indicator that saturation levels have been reached and in some parts of the park exceeded. While the evidence suggests that increasing the number of caravans within the National Park would have a negative impact on the landscape, it is recognised that due to the high density of some of the sites particularly along the coast the reduction in the densities would have a positive impact on the landscape. The reduction in densities would improve the visual appearance of the existing sites and ensuring that they sit less obviously in the landscape. Therefore the use of landscaping and the reduction in density of sites will be encouraged in the local development plan. In some cases the removal of a static caravan and its replacement with a chalet may also be appropriate and improve the sites impact on the landscape.

15.2 Consideration will need to be given to the contents of the Landscape sensitivity SPG with regards to new low impact visitor accommodation and whether these may be appropriate at a small scale within certain less sensitive parts of the National Park. They will also need to been in areas which are already well screened from public vantage points.

15.3 As outlined above ‘glamping’ is becoming increasing popular and therefore the Local Development Plan needs to address this. Consideration will need to be given to whether these types of development are considered suitable, the scale of any new developments and the impact on the surrounding landscape.
15.4 Given the decrease in serviced accommodation over the past years consideration will need to be given to whether this is something that should be addressed by the plan and whether the existing tourism policies are appropriate to help address any problems.
### APPENDIX 1 – STEAM 2014 Data

#### Sectoral Distribution of Economic Impact – STEAM 2014 data (2014 Prices)

<table>
<thead>
<tr>
<th>£ Millions</th>
<th>2008</th>
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<th>2011</th>
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#### Revenue by Category of Visitor – STEAM 2014 data

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### Tourist Numbers (Thousands) – STEAM 2014 data

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### Visitor Days (Thousands) – STEAM 2014 data

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<td>7,140.0</td>
<td>7,300.0</td>
<td>6,680.0</td>
<td>6,800.0</td>
<td>6,670.0</td>
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<tr>
<td>Accommodation</td>
<td></td>
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</tr>
<tr>
<td>Staying with friends and relatives</td>
<td>94.50</td>
<td>94.50</td>
<td>94.50</td>
<td>94.50</td>
<td>94.50</td>
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<tr>
<td>Staying Visitor</td>
<td>7,700.0</td>
<td>7,390.0</td>
<td>7,780.0</td>
<td>7,950.0</td>
<td>7,350.0</td>
<td>7,490.0</td>
<td>7,340.0</td>
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<tr>
<td>Day Visitor</td>
<td>2,610.0</td>
<td>2,920.0</td>
<td>2,690.0</td>
<td>2,650.0</td>
<td>2,350.0</td>
<td>2,260.0</td>
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<tr>
<td>TOTAL</td>
<td>10.31</td>
<td>10.31</td>
<td>10.46</td>
<td>10.60</td>
<td>9.70</td>
<td>9.74</td>
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<tr>
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</table>
### Sectoral Distribution of Employment – STEAM 2014 data

<table>
<thead>
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<th>FTE</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<tbody>
<tr>
<td><strong>Accommodation</strong></td>
<td>1,514</td>
<td>1,493</td>
<td>1,512</td>
<td>1,500</td>
<td>1,486</td>
<td>1,501</td>
<td>1,512</td>
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<tr>
<td><strong>Food &amp; Drink</strong></td>
<td>1,435</td>
<td>1,434</td>
<td>1,467</td>
<td>1,463</td>
<td>1,335</td>
<td>1,344</td>
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<tr>
<td><strong>Recreation</strong></td>
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<td>650</td>
<td>685</td>
<td>703</td>
<td>604</td>
<td>618</td>
<td>597</td>
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<tr>
<td><strong>Shopping</strong></td>
<td>1,927</td>
<td>1,948</td>
<td>1,943</td>
<td>1,923</td>
<td>1,741</td>
<td>1,732</td>
<td>1,757</td>
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<tr>
<td><strong>Transport</strong></td>
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<td>320</td>
<td>329</td>
<td>332</td>
<td>295</td>
<td>298</td>
<td>294</td>
</tr>
<tr>
<td><strong>Direct Employment</strong></td>
<td>5,866</td>
<td>5,846</td>
<td>5,936</td>
<td>5,920</td>
<td>5,461</td>
<td>5,494</td>
<td>5,496</td>
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<tr>
<td><strong>Indirect Employment</strong></td>
<td>1,561</td>
<td>1,545</td>
<td>1,577</td>
<td>1,560</td>
<td>1,429</td>
<td>1,426</td>
<td>1,434</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>7,427</td>
<td>7,390</td>
<td>7,513</td>
<td>7,480</td>
<td>6,890</td>
<td>6,920</td>
<td>6,930</td>
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</table>
Serviced Accommodation: 11.36%
Non-Serviced Accommodation: 64.54%
Staying with friends and relatives: 0.66%
Day Visitor: 23.43%
Yearly comparisons

The following graphs show yearly comparisons of key tourism figures taken from the STEAM reports. All the graphs show a marked decrease in all subjects between 2011 and 2012. This decrease can be attributed to a few issues. These include:

The wettest June since records began occurred in 2012, with flooding in Wales. Severe instances included the major flooding of campsites in mid-Wales and in the Aberystwyth area which required RNLI involvement and the evacuation of 600 people from Pennal due to fears of a dam burst. The weather and severe instances like these could have kept visitors away from the area due to safety fears and unwillingness to travel.

Another potential issue for tourism may be the fact that the late May bank holiday was moved to June, which was the wettest since records began so another potentially important weekend for the tourism industry was affected.

2012 was also the year of the London Olympics and whilst the London region, and other regions which held events benefitted, a lot of rural areas dependant on the tourism industry suffered. This meant that many people were drawn to travelling to regions such as London and the mentioned areas instead of coming to places like Snowdonia National Park.

Many attractions and tourism based industries across the UK noted that the summer of 2012 was the worst since 2001, during the Foot and mouth outbreak.
APPENDIX 2 – Number of Static Caravans per Community Council areas
APPENDIX 3 – Number of touring caravans per Community Council

Carafannau Teithiol / Touring Caravans
APPENDIX 4 – Percentage and Number of Static Caravans by Zone of Influence