

Briefing paper 1: for community researchers

Tourism as it is in Gwynedd¹

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This briefing paper is based on desk research which draws together the facts and some basic analysis about tourism as it is in Gwynedd. The aim is to produce an overview so that readers (including community researchers) can take an informed view of public policy and community strategy. It will also serve as a basis for further research because it allows informed questioning in interview based research and frames issues which could be investigated by surveys.

(1) Mass tourism + millions of (diverse) visitors

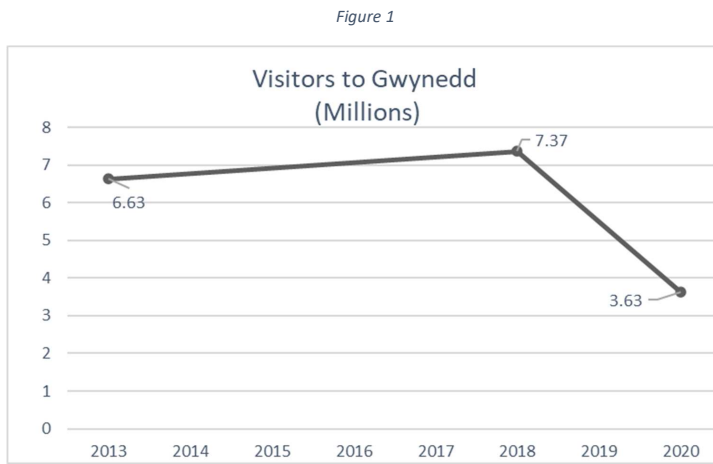
Volume is captured in the STEAM framework which is a widely used activity model² because it counts number of visitors and spend (it is not an impact model about where the spend goes or its social effects). The framework dates from the 1980s and naively treats increases

¹ Draft as of 28 Feb 2023

² Scarborough Tourism Economic Activity Monitor (STEAM) is a tourism economic modelling tool that most Tourism Destination areas in the UK use. It provides a destination with annual tourism data on items such as visitor numbers, spend, overnight stays, numbers employed in tourism sector. It is a measure of activity not socio-economic impact.

in volume and value of spend as a good thing, with no concern for social and ecological aspects. Thus, most non-Welsh visitors who stay overnight in Gwynedd arrive by car and then travel around by car, but this is invisible in the STEAM framework which basically adds up visitor numbers and spend.

The time series below (Figure 1) tracks visitor numbers from 2011 to 2020 showing increase in numbers pre Covid, e.g. 11% increase in visitor numbers from 6.63 million in 2013 to 7.37 million in 2018.



Source: 2012 and 2018 data come from the Destination Management Plan & Partnership Review from Gwynedd Council; 2020 data from the Holiday lets and the Private Rental Sector Report

But is important to focus also on the visitor characteristics beneath the mass. Analysis then brings out the diversity of visitors by residence, age and activity. Day visitors are dominant but 1/3rd stay overnight with an average stay of 6 days. The other main point is that there is a near 50/ 50 split Welsh vs UK. Some key facts on diversity and character are summarised below:

- *Local/national tourism:* approximately 50% split between Welsh and UK, with residual overseas visitors (4%). UK tourism presumably comes from mainly adjacent conurbations like Liverpool, Manchester and Birmingham.
- *Demographics:* all kinds of visitors with the main group being ‘aficionado families’. Couples and families with children are 55% of the sample; while 69% of sample are repeat staying visitors who have visited the area more than once in the last three years. This is in line with Welsh average.

- *Type of trip:* in Gwynedd visitors are mostly day trippers but there is a substantial component of holiday makers staying for a week. Day trips are 72% of a visitor sample but on another count 1/3 of visitors stay overnight and the average stay is 6 days. This is also in line with Welsh average.
- *Tourism attractions:* visitors come to Gwynedd mainly for nature and sport- based tourism with culture/heritage as supplementary attractions in the Gwynedd offer. In the main tourism survey, the two primary reasons to visit Gwynedd re, (a) ‘enjoy landscape, countryside and beaches’ and (b) ‘outdoor and sport activities’; (a) is cited by 63% of sample and outdoor activities have a similar score. Both reasons to visit Gwynedd score substantially higher than the Welsh average, especially in the subcategories related to ‘adventure sports’. ‘Historical/religious places and attractions’ comes third (39%) as reason to visit with similar score to Welsh average. “Historical places” are monuments like castles etc. as visitor attractions with connections to local culture barely figure.

Take away = Gwynedd has mass tourism in the millions but there are many addressable markets/ segments so many different kinds of offer can co-exist and flourish

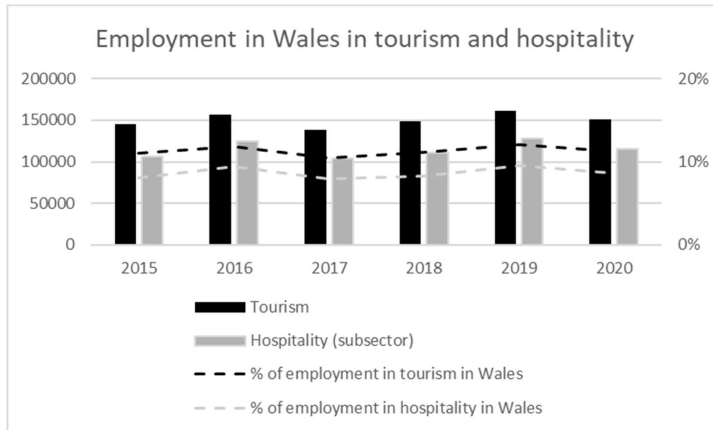
(2) Employment numbers and job quality

On the Office of National Statistics definition, between 2015 and 2020 employment in ‘tourism and hospitality Industries’ in Wales has fluctuated around 15% of total employment. If we look at all of Wales, the dominant element is not tourism but hospitality which is the main component accounting for 10% or more of employment³. It is of course practically very difficult to separate the two in areas like Gwynedd where most hospitality benefits from tourist visitors.

³ Source: <https://www.gov.wales/wales-visitor-economy-profile-2021-html>

Office of National Statistics definition is not the same as the STEAM definition.

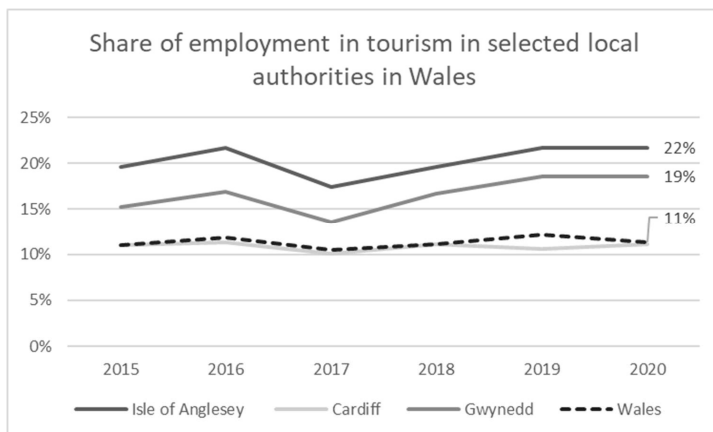
Figure 2



Source: ONS

The overall picture is distinctive in Gwynedd and Anglesey where the share of “tourism and hospitality industries” in total employment is much higher because the local tourism sector is much larger than in major urban centres of Welsh population like Cardiff or Wrexham. On the ONS count in 2020, tourism and hospitality accounts for 11% of employment in Cardiff but 19% in Gwynedd.

Figure 3

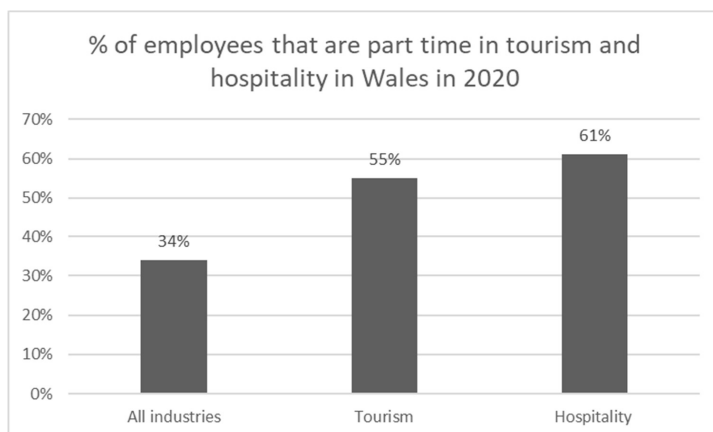


Source: ONS

The benefits to local communities are limited because tourism and hospitality jobs are mainly low quality in terms of wages and conditions. Average wages in tourism and hospitality in Wales have been very gently increasing in the 2010s but in 2021 were still below £10 an hour when the average Welsh wage was £11 an hour. A large number of tourism and hospitality jobs are part time with part

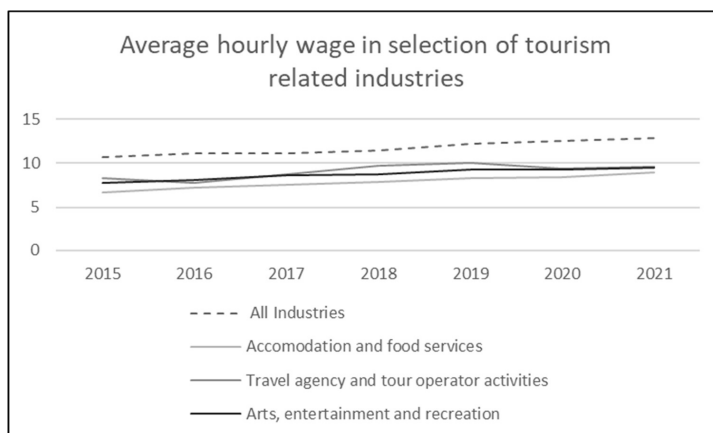
timers accounting for 55% of tourism jobs and 61% in hospitality. Seasonality is an added problem in tourism where seasonal jobs have traditionally attracted migrant labour.

Figure 4



Source: ONS

Figure 5



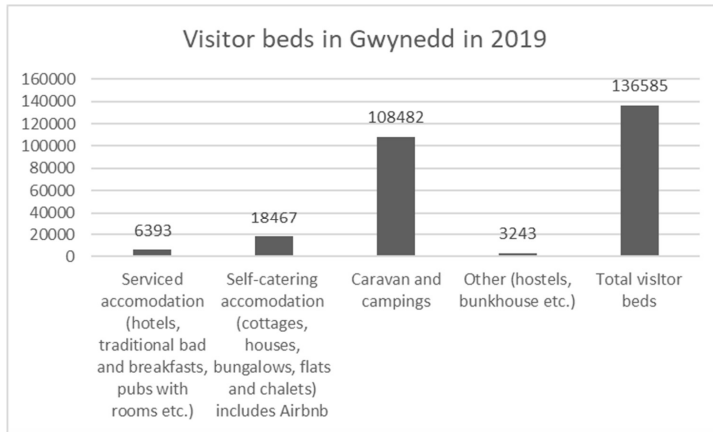
Source: ONS

Take away: As a major tourist destination, Gwynedd has a large tourism and hospitality sector employing nearly 20% of the work force. But on low wages and poor conditions.

(3) Mass investment and the rise of the house capitalist

Caravans and camping have always dominated the bed stock. By implication, amongst those visitors who stay overnight, the volume is in down market/cheap holidays.

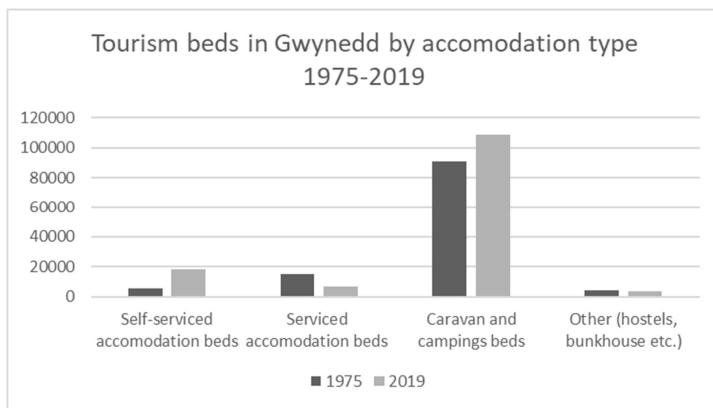
Figure 6



Source: Gwynedd Bedstock Survey 2018/19

But in bricks and mortar accommodation, there is a long run shift to self-catering. The shift runs gently since 1975 and then steadily through the 2010s with only a pause in growth for Covid. This involves a shift from serviced accommodation (hotels and bed and breakfasts) to self-catering with the number of weekly self-catering lets increasing. The long-term driver is socio cultural because sea side B&Bs and cheap hotels don't fit modern life styles with e.g. their fixed, formal meal times. All this is now accelerated by the rise of the Airbnb platform.

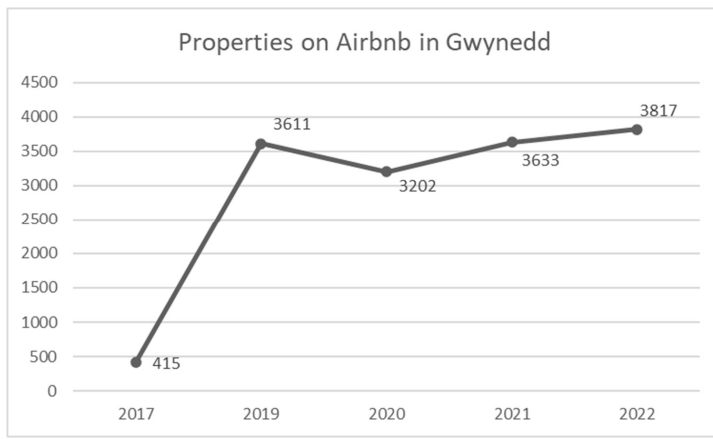
Figure 7



Source: Gwynedd Bedstock Survey 2018/19 + own calculation

The rise of Airbnb listings has turbo charged the switch to self- catering. Measurement of the effect is tricky because the data is fragmented as Table 8 in the appendix demonstrates. But the bottom line is that we have an increase from 415 Gwynedd listings in 2017 to 3,817 listings in 2022. This is partly accounted for (a) by a switching of existing weekly lets onto Airbnb as the dominant platform and (b) by a substantial increases in the stock of short lets. At a guess, the proportions are half and half.

Figure 8



Source: 2017 data is own calculation based on data from Gwynedd Bedstock Survey 2018/19; 2019 to 2021 data from Gwynedd peer-to-peer accommodation: 2021 review; 2022 data from Holiday lets and the private rental sector⁴.

By 2022, on the Bevan Foundation calculations⁵, Airbnb listings now account for 4.6% of Gwynedd's housing stock and 31% of Gwynedd's private rented stock. The pressure on the private rented stock at the bottom end of the market is acute because most Airbnb properties are 2-3 bedroom cottage/ terrace properties.

The expansion is driven by high landlord profits and easy mortgages on buy to let. The Bevan Foundation takes Universal Credit Local Housing Allowance as a bench mark for local rents in Wales. The analysis shows that, on average, an income equal to one year's LHA rent

⁴ The count is of properties. There is a separate market for private rooms on Airbnb, but that is a fraction of full properties with just 216 rooms advertised in in 2021. See Gwynedd peer-to-peer accommodation: 2021 review.

⁵ <https://www.bevanfoundation.org/wp-content/uploads/2022/09/Holiday-lets-and-the-private-rental-sector.pdf>

can be obtained by renting on Airbnb for 10 weeks. If the property is rented for say 15 weeks, the return is 50% greater.

Airbnb lets are a low-risk investment by (we guess) mainly small house capitalists. It represents a search for security when money purchase pensions do not offer security in old age and house property has historically appreciated albeit unsteadily. A holiday let is an easy to understand/manage low risk investment for mortgage lender and borrower because both always have the property as collateral and saleable asset.

With the end of cheap money in 2022, mortgages are more expensive and Bank of England base rate was 4% in February 2023. Dearer mortgages and house price falls may temporarily damp the growth of Airbnb but in the medium-term higher landlord borrowing costs will most likely be passed on in higher Airbnb rents.

Take aways:

- 1. The long-term shift to self-catering implies a limit in local spend per visitor week because hotels are labour intensive and self-catering is a cheaper alternative. This is probably the most important long-term trend in Gwynedd tourism. The shift here is rather like the rise of self-service supermarkets in retail where the customer now scans the goods as well as loading and unloading the trolley.**
- 2. The acceleration of the shift with Airbnb raises new research questions about (a) patterns of spend by Airbnb visitors e.g. arriving with groceries vs. eating out etc. and (b) how many of the Airbnb house capitalists are local and small scale so that communities are internally divided between house capitalists and squeezed out local renters. Basic information on these issues is a priority for community research.**
- 3. There are also public policy and community movement strategy issues. Public policy issues about whether and how to limit short lets through regulation; community issues about whether and how communities should get into low risk, tourist let property investment.**

(4) Big risk projects (providing adventure for the sedentary)

Marketeers present the competitive advantage of North Wales as 'adventure'. In that frame the big projects like Zip World and Surf Snowdonia offer a ticket to adrenaline centred adventure for the urban sedentary who arrive by car. The natural environment and culture figures as 'stunning/ rich back drop'. The big projects ignore a) non adrenaline adventures like walking as well as b) non adventure activities like family picnic and c) nature aligned adventures like surfing or rock climbing because none of these allow the project to sell a large number of expensive tickets in a mass market.

Building scale and 'going large' is central to the risk project because the promoters need a healthy margin on a large turnover to make a lump sum of profit and/or create a business which has resale value. Going large means a big single site and/ or chain expansion by

multiplying the number of sites. The financing model is private equity investment and bank debt sweetened by up to 1/3rd by Welsh Government top up. That's because Welsh Government for its own political reasons also needs scale (see section 4.3). These are risk projects and for the equity investor it is upside/heads you win as in Zip World or tails/ you lose as in Surf Snowdonia.

(4.1) Upside with Zip World

Three amigos (Sean Moriarty, Matthew Taylor and Sean Taylor) each put in £300 of equity in 2011 for joint ownership of a company which they build up through investment in expansion, drawing relatively little out. Expansion is relatively low cost and unproblematic because it takes the form of slinging more zip lines over holes in the ground at deindustrialised sites which are profitable from opening. Then in 2018 there is a management buyout as Sean Moriarty and Matthew Taylor each take £14 million for relinquishing ownership, and Sean Taylor becomes sole owner with a large external debt to be serviced..

The company story here is that, from its 2013 opening of a zip line at Bethesda, Zip World was an expanding, profitable company. With a hiccup for Covid, by 2022 Zip World had 4 sites (Bethesda, Blaenau, Forest, Tower) and possibilities of further expansion. From 2016-21 sales revenue increased from £ 7.1 million to £23.6 million from which they found an operating profit of £9.4 million in 2021. They need the profit because Sean Moriarty and Matthew Taylor could only cash out through an MBO refinancing which loaded the firm with £30 million of debt. So the company has now to be run for cash extraction to service the debt.

The outcome in Zip World is financial extraction after a process of company building. That requires cost containment going forward because the cash surplus services the debt. But interestingly, in the building phase, Zip World employees did not suffer. Historically, labour's share of turnover in Zip World is the same as in the social enterprise Antur Stiniog running a mountain bike trail. This is because labour's share is determined by the physical crewing requirements of the activity and by different employers paying the going rate of low wages. Changes of ownership would not alter these hard facts.

Figure 9: Operating results for Zip World 2016-21

	Revenue £mill	Operating Profit £mill	Net Income £mill	Operating Margin %	Net Income Margin %
2016	7.1	1.5	1.2	21.1	16.9
2017	9.0	1.6	0.7	17.7	7.8
2018	11.5	1.9	2.0	16.5	17.4
2016 to 2018 total/ average	27.6	5.0	3.9	18.1	14.1
2019	12.0	1.8	1.4	15.0	11.7
2020	6.1	-0.7	-0.4	-11.5	-6.6
2021	23.5	9.4	8.1	40.0	34.5
2019 to 2021 total /average	41.6	10.5	9.1	25.2	21.9

Source: Company report and accounts

(4.2) Downside with Surf Snowdonia/ Adventure Park Snowdonia

The project champion, Andrew Ainscough, is son of Martin Ainscough who built up a leading crane hire business with private equity backing and multiple acquisitions. Martin sold the crane hire business for £255 million in 2007 and has afterwards run a portfolio of family businesses. Surf Snowdonia was originally about a wave machine on an industrial lagoon and was subsequently expanded with a 104 bed Hilton Garden hotel. This was complicated and expensive because the Ainscoughs had to make the wave machine technology work reliably and recover the cost of a large capital investment in a tourist destination whose attractiveness was unproven,

The story here is deeper into the mess with the family doubling up on their investment before they quit and recognise liquidation is the only option for a business which has no prospect of revenues which could service its accumulating debts. The family as equity investors have apparently put in more than £17.4 million as paid-up capital which is now completely lost. In 2017 they put in £8.4 million of new equity to reduce debt of £10.9 million but debt subsequently crept back up to £6 million.

This has been a chronically loss-making project with the sole financial benefits being the possibility of tax offsets. From 2017-22 the business never turned an operating profit and accumulated operating losses of nearly £ 5,5 million or nearly £ 1 million a year on turnover which was never more than £ 2.8 million. As of August 2022, the wave machine was not working, and the lagoon had to be drained to allow repairs to the machine; while the hotel was in the interim to be used for housing refugees.

With the Ainscough equity investment wiped out, the assets passed into the hands of the banks or whoever else provided debt secured against assets. The banks will try to recover what they can by selling the assets on to new owners who may be able to run the business profitably if they buy the assets cheaply enough (after it has shed its debt where the banks or bond holders take the hit). If they choose, the Ainscough's could of course buy back the assets.

Figure 10 Operating results for Surf Snowdonia/ Adventure Park Snowdonia, 2017-21

	Revenues	Operating profits	Net Income
	£mill	£mill	£mill
2017	2.8	-0.236	0.264
2018	2.7	-1.3	-1.6
2019	2.6	-0.7	-0.8
2020	2.1	-1.1	-1.9
2021	0.3	-1.2	-1.2
2022	2.8	-0.9	-1.1
Totals	13.3	-5.436	-6.336

Source: Company report and accounts

(4.3) State funding

State funding in the form of grants or soft loans is often obtained for big projects. In the case of Zip World it is a sweetener. It is not clear what public grants Zip World got for its initial opening at the Penrhyn Quarry site in 2013. But, from published sources, Zip World Tower in South Wales has public loans of more than £3 million. For Surf Snowdonia public funds make the project work financially. Surf Snowdonia opened in 2015 with a total investment of 12 million which was 1/3rd funded by Welsh Government. Then Welsh Government contributed £3.9 million towards the second phase Adventure Park Snowdonia with a 106-bed hotel.

Why does the state, in the form of Welsh Government, put money in to big projects? At this point we are in politics not economics. Even if we suppose that politicians want office for public benefit, they need short term, headline grabbing initiatives which create the mood music ahead of the next election. The big tourist project is then an announceable achievement where government can be seen to be promoting something significant which gets positive coverage on the evening news.

Classically, the big project promises the benefit of job creation as with more than 50 new jobs claimed at Surf Snowdonia. The new jobs claims are copied out from one newspaper article to another but are very blurred and often include claims about indirect jobs in the supply chain. Ex ante claims about job creation in proposed projects are never audited or checked ex post when the projects are up and running. It is certain that the jobs in big projects are low wage and often seasonal so that the average pay per employee is just £15. k at Zip World and Adventure Park Snowdonia because these are certainly low wage, often seasonal jobs.

Take aways:

The big projects are high risk/high reward projects It would be very difficult to stop promoters bringing them forward as long as private risk capital is available. The primary driver is that project promoters can easily raise debt from banks and bondholders and

then get rich if it works out or walk away if it does not work out. This is financialised capitalism in action. A

Community enterprise should not try to compete directly by getting involved in projects with this kind of high risk/ high reward profile Because on the downside (a) putting in more capital; into a loss making business is difficult for social investors and (b) with liquidation, any equity investment is wiped out and the assets pass into the hands of banks and bond holders who sell them on.

The development of high risk/high reward projects would be slowed if the state did not put money into these big projects in ways which make it more attractive for private investors. Researchers could and should raise the issue of what the state gets in economic return for millions invested in high-risk big projects. In Surf Snowdonia on the downside, public loans were lost; and in Zip World on the upside, the social return is poor in terms of number and quality of jobs created.

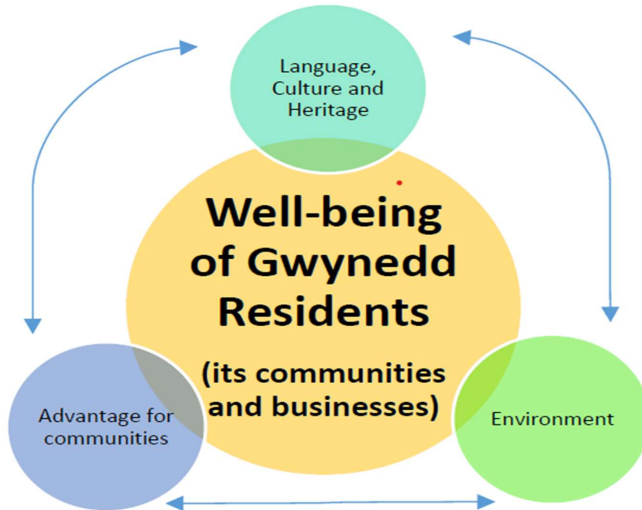
But, as we have argued, politicians and officers in government need announceable achievements and big projects meet that political need. If community enterprise wants to compete for the state millions by way of grants and loans, it has to find its own big projects of a different kind. If the large single site is not wanted, then it would be necessary to put together packages of smaller projects. If low risk is necessary and the demand is for self- catering, are property based projects an important part of the package? .

(5) The vision of a different sustainable tourism

The “Gwynedd Sustainable Visitor Framework 2035” represents a local shift towards embedding social, cultural and environmental objectives which borrows the framework of the UN World Tourism Organisation which promotes ‘Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’.

The new Gwynedd Framework is a big advance on the values and priorities implicit in the STEAM framework which dates from the 1980s. It entails new aspirations for a visitor economy that ‘promotes local ownership and supports local supply chains and produce’ and ‘leads in sustainable and low carbon developments and infrastructure’.

Figure 11: Gwynedd sustainable tourism framework



Source: Gwynedd Sustainable Visitor Economy Framework 2035 - DRAFT

This is important because it is a license to dream about new, responsible and innovative tourism pathways. But the public policy pathway does not lead anywhere very quickly because the Gwynedd framework has a confusing multiplicity of 60 + KPIs, ranging from habitat loss to average salaries in the tourism sector. The new set of KPIs significantly still includes the old KPIs around jobs and financial value.

Furthermore, the new framework lacks any discussion of trade-offs, choices and priorities. Instead, it talks about 'integrating community, industry and environment' and in this way it avoids the hard choices. Another limitation of the framework is that it includes nothing about 'how to get there' which realistically recognises that Airbnb expansion will continue as will proposals for further big high risk projects because the financial incentives are strong in both cases.

Take away = The new Gwynedd Framework is not a reliable "how to do it" support for doing tourism differently. What we have is a vision of a different kind of tourism which recognises economic, social and environmental impact but does not recognise that tourism as it is- house capitalism and big projects- has powerful financial drivers which generate scale.

But the Framework's updating of aspirations must weaken local political resistance to doing things differently. The local authority could and should be held to account against these aspirations. This holding to account would be more powerful if, for example researchers could document the carbon footprint of tourism as it is.

(6) Conclusion: drawing it all together/ raising many questions

The question is how to develop new and alternative forms of tourism provision so as to meet diverse demands which fit with our values and benefit local households and firms in a more sustainable way? Put another way, how to deliver on the new Gwynedd framework while recognising tradeoffs and compromises between different objectives? .

Looking outwards towards tourism demand, there are many opportunities for community enterprise (social and for profit) given the diversity of tourist demands from different demographics for various experiences and activities. There is plenty of room for all kinds of different innovative projects by social enterprises and for-profit family firms. Including projects geared to local and Welsh tourists, projects for those with cultural interests in something other than castles and projects for those adventurers interested in non-adrenaline adventures like walking tours. What would you add to this list? And what would be the costs and difficulties of start up?

At one level we can “let one hundred flowers bloom” but the pace of innovation and the outcomes of alternative provision are complicated by the many variables Gwynedd does not control like transport pricing and by the “race with the devil “ contest with main stream tourism which is highly scalable:

- What about pricing and availability of different forms of transport ?Thus, for environmental reasons, we would want more English tourists to travel to and around Gwynedd by public transport. But by London Treasury decree, England and Wales are countries of high rail fares (unlike Germany where 49 euro buys you a month’s unlimited travel on regional trains). And that’s unlikely to change. What then could be done by capped bus fares and new forms of on demand provision in the slate valleys?
- Is there a “race with the devil”? Unless you envisage radical political brakes on the financial drivers, Airbnb and old-style big projects with easy access to capital will continue to expand at scale. The impact of new offers in reshaping Gwynedd tourism will be limited if the main stream expands faster and through that faster expansion defines community tourism as niche operations on the margins of a dominant, large scale mass tourism system which shapes economy and society. Is it possible/ realistic to put political brakes on the expansion of Airbnb? The question of how this might be done raises questions about regulation by physical limits and/ or taxes. Here it would be interesting to know more about the practice of other European destinations struggling with over tourism.

How then might community enterprise expand at scale? Especially if a large single site development is not what we want? Does social enterprise have to take the lead because it already has a model of federal enterprises as in Cwmni Bro? Can this model be extended so that it mixes and matches social enterprises and for profit local firms offering a cluster of related goods and services?

The social enterprise movement in the three valleys at present lacks large projects which can internally generate a substantial surplus which could be reinvested in developing new and existing social enterprises and supporting community amenities. The Antur Stiniog mountain bike trail is the only major surplus earner for Cwmni Bro federation of social enterprises which is then dependent on external grant funding for major projects like the renovation of the Pengwern community pub.

So there are relevant questions about whether new forms of tourist provision offer the community movement a scale opportunity to generate a substantial internal surplus which can expand community activities in line with the values of the movement. What kinds of larger projects would capture demand and revenue at acceptable risk?

- How does property fit in? Mainstream tourism in Gwynedd has been constructed around volume numbers with a limited local discretionary spend. In caravans and camping and now the growing Airbnb sector, the weekly rental is the major spend in a self-catering holiday. Whoever controls the sites and the house property captures the major spend in a self-catering holiday, Does a big community project in Gwynedd tourism one way or another therefore need a property base?
- How can risk be limited and managed? The rewards of big main stream projects come with downside risk and risk investment is not a game the community should play. Risk is acceptable for a private project promoter who loses his/her investment and walks away like the Ainscough family. But it is not acceptable for a community enterprise which cannot afford to lose equity capital and does not want to see a project pass to the banks and then reopen under new private ownership. If the community is to have large projects, it needs low risk big projects.

These general considerations then open onto where, what and how questions. Where are the projects with robust business models for recovering costs? What are the fixed and working capital requirements? What kind of assets will the business have? How and where might the equity capital come from? Community shares and or government? What is an acceptable role for debt, classically in the form of bank borrowing secured against assets? Low risk is not no risk, so what is the plan for taking losses and / or raising new capital in the event of calamity (like a pandemic which freezes demand) ?

The community big project can be thought of as an offensive operation to capture financial surplus for social purposes and as a defensive operation which prevents mass tourism from shaping the area. It is entirely doable in several forms if government provided first loss capital and there are assets which allow secured bank borrowing. For example, you could have self-catering properties of some kind (whether miners cottages or eco cabins) dispersed around the slate valleys but assembled into an investment package with the target of weekly rents which could generate a substantial surplus for community purposes. Social and for-profit micro and SME businesses could then fill in visitor needs around hard infrastructure connected by a walking trail.

This line of argument fits with the thinking of General Booth, founder of the Salvation Army, on how music could be used to recruit and retain soldiers in his army: "Why should the devil have all the best tunes? " .

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Appendix 1

Table 1: refers to figure 1

Year	Visitors (Millions)	Source			
2013	6.63	Destination Management Plan & Partnership Review			
2018	7.37	Destination Management Plan & Partnership Review			
2020	3.63	STEAM summary 2020			

Table 3: refers to figure 4

Industry	2015	2016	2017	2018	2019	2020
All Industries	1322000	1334000	1324000	1339000	1332000	1331000
Tourism	145000	157000	139000	149000	161000	151000
% of employment in Wales	0.11	0.118	0.105	0.111	0.121	0.113
Hospitality	106000	125000	104000	111000	128000	115000
% of employment in Wales	0.08	0.094	0.079	0.083	0.096	0.086

Table 4: refers to figure 5

Geographical Area	2015	2016	2017	2018	2019	2020
Isle of Anglesey	20%	22%	17%	20%	22%	22%
Cardiff	11%	11%	10%	11%	11%	11%
Gwynedd	15%	17%	14%	17%	19%	19%
Wales	11%	12%	11%	11%	12%	11%

Table 5: refers to figure 6

	% of employees that are part time
All industries	34%
Tourism	55%
Hospitality	61%

Table 6: refers to figure 7

Industry	2015 (£)	2016 (£)	2017 (£)	2018 (£)	2019 (£)	2020 (£)	2021 [note 1]
All Industries	10.64	11.11	11.16	11.42	12.14	12.5	12.82
Accomodation and food services	6.67	7.25	7.5	7.85	8.35	8.37	8.91
Travel agency and tour operator activities	8.29 [Note 3]	7.75 [Note 2]	8.76 [Note 2]	9.70 [Note 3]	10.01 [Note 2]	9.42 [Note 2]	9.65 [Note 2]
Arts, entertainment and recreation	7.76 [Note 2]	8.05	8.66	8.76	9.24	9.25 [Note 2]	9.51 [Note 2]

Note 1,4,5 and 6: data is provisional

Note 2: estimates are considered reasonably precise

Note 3: estimates are considered acceptable

Table 7: refers to figure 8 and 9

Category	1975	2019
Self-serviced accommodation beds	5682	18467
Serviced accommodation beds	15221	6393
Caravan and campings beds	90856	108482
Other (hostels, bunkhouse etc.)	3974	3243
Total Beds	114617	136585

Table 2: refers to figure 10

Year	Properties on Airbnb	Source	Note
2017	415	Gwynedd Bedstock Survey 2018/19 (published 2019?2020?)	Figure is imputed based on the following statement: Between December 2017 and December 2019, there is an increase of 770%
2019	745	Gwynedd Bedstock Survey 2018/19 (published 2019?2020?)	Properties listed for 2 weeks in August 2019 and for 2 weeks in January 2020. Figure refers to full properties called 'establishment' as opposed to 'visitor beds'. The figure includes properties advertised ONLY on Airbnb and excludes properties advertised on Airbnb as well as on other channels, hence the gap with the 2019 figure from peer-to-peer 2021 review might be related to methodology. Figure includes properties not suited for long-term accommodation.
2019	3611	Gwynedd peer-to-peer accommodation: 2021 review (2021)	Entire place listings per month. Figure includes properties not suited for long-term accommodation.
2020	3202	Gwynedd peer-to-peer accommodation: 2021 review (2021)	Entire place listings per month. Figure includes properties not suited for long-term accommodation.
2021	3633	Gwynedd peer-to-peer accommodation: 2021 review (2021)	Entire place listings per month. Figure includes properties not suited for long-term accommodation.
2022	3817	Holiday lets and the private rental sector	Entire properties. Figure includes properties not suited for long-term accommodation. Figure for Airbnb properties suited for long-term accommodation only = 2,885

Main sources used in preparing this briefing

- Destination Management Plan & Partnership Review from Gwynedd Council (2019)
<https://www.visitsnowdonia.info/sites/default/files/2020-11/Destination%20Management%20Plan%20and%20Partnership%20Review%202019.pdf>
- Gwynedd peer-to-peer accommodation: 2021 review (2021)
<https://www.ymweldageryri.info/sites/default/files/2022-08/Gwynedd%202021%20data%20report.pdf>
- Gwynedd Bedstock Survey 2018/19 (published 2019?2020?)
https://www.visitsnowdonia.info/sites/default/files/202006/Gwynedd%20Bedstock%20Survey%202018_19_S_05062020.pdf
- Steam Summary 2020
<https://www.visitsnowdonia.info/sites/default/files/2021-10/GWN%20Basic%20ES%202020.pdf>
- Holiday lets and the private rental sector
<https://www.bevanfoundation.org/wp-content/uploads/2022/09/Holiday-lets-and-the-private-rental-sector.pdf>
- Visitor Survey 2019
<https://www.visitsnowdonia.info/sites/default/files/2020-05/B01919%20Gwynedd%20Report%2016.03.20.pdf>
- ONS
<https://www.ons.gov.uk/>

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