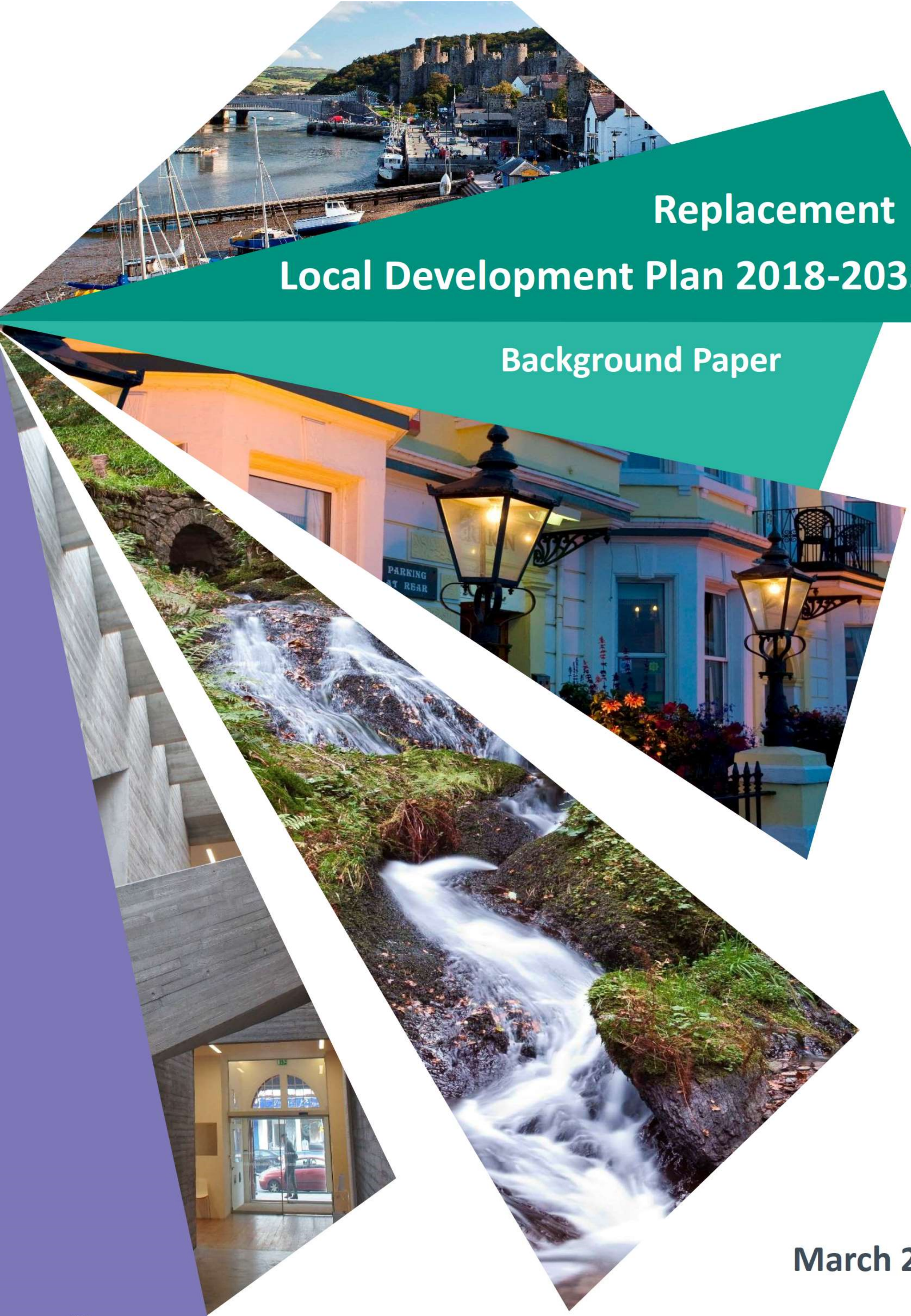

Replacement Local Development Plan 2018-2033

Background Paper

March 2020

BP 22: Conwy County Tourism Assessment

Conwy

Cyngor Bwrdeistref Sirol
County Borough Council

Mae'r ddogfen hon ar gael yn Gymraeg hefyd.

This document is available to view and download on the Council's web-site at: www.conwy.gov.uk/rldp . Copies are also available to view at main libraries and Council offices and can be obtained from the Strategic Planning Policy Service, Coed Pella, Conway Road, Colwyn Bay LL29 7AZ or by telephoning (01492) 575461. If you would like to talk to a planning officer working on the Local Development Plan about any aspect of this document please contact the Strategic Planning Policy Service on (01492) 575181 / 575445 / 575124 / 574232.

This document can be provided on CD, electronically or in large-print and can be translated into other languages. Contact the Planning Policy Service on (01492) 575461.

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Contents

Section 1: Introduction

Why is tourism important?

With the outstanding natural environment and strong built and cultural heritage, it is no wonder that tourism is a significant sector within the local economy of Conwy County Borough. The mountains, coastline, beaches, rivers and lakes provide an unrivalled backdrop to support a wide range of activities including walking, water sports, mountaineering, fishing, horse riding and cycling. The area contains a World Heritage site in Conwy Castle, a rich cultural and industrial heritage which stretches back to the Bronze Age, and benefits from a distinct cultural identity.

Table 1: STEAM data for Conwy County Borough 2018
Source: STEAM 2018

Number of visitors (M)	Economic impact (£M)	Jobs supported
9.39	904.37	11,800

The data provided through STEAM suggests that over 9 Million people visited the county in 2018 with an economic impact of over £900 Million that is supporting almost 12,000 jobs either directly or indirectly. With an estimated 47,000 PAYE jobs[1] in the county in total, the contribution by tourism is significant. The following table produced by the Office for National Statistics (ONS) does not separate out tourism specifically, but demonstrates the importance of tourism related business such as Accommodation, Food and Retail that account for 27% of the labour demand.

Table 2: Labour demand - employment*, 2018 (workplace based)
Source: ONS business register and employment survey, (NOMIS)

	Conwy CB		Wales	Great Britain
	No.	%	%	%
PAYE jobs	50,000			
Total employees	46,000	92.0	93.5	96.6
Working proprietors	4,000	8.5	6.5	3.4
				Employment by industry
Agriculture	2,500	4.9	4.2	1.6
Production	1,800	3.5	12.3	9.2
Construction	3,000	5.9	5.2	4.8
Services	43,500	85.7	78.3	84.3
Wholesale & retail	6,700	13.2	12.0	13.3
Accommodation & food services	7,000	13.8	7.9	7.5
Public admin, education & health	17,500	34.5	31.0	25.5
Other services	12,300	24.2	27.5	38.0

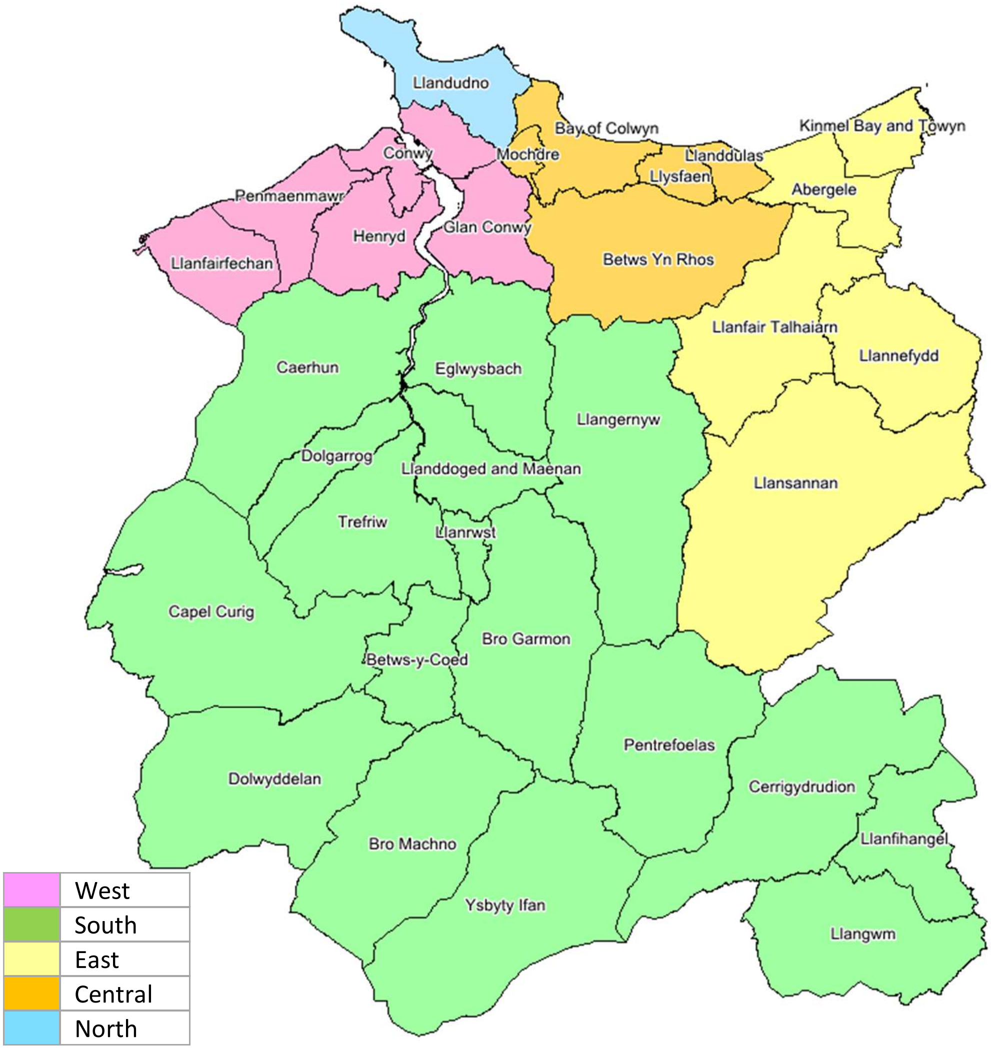
* These figures exclude farm agriculture (SIC subclass 01000)

[1] ONS business register and employment survey, (2017 workplace based)

Data sources and methodology

Wherever possible the data in this report has been split into five strategic sub areas. These have been selected to align with geographies recognised and used for other purposes within Conwy County Borough Council. The map below shows the sub areas and Community Council boundaries.

Map 1: Showing how the county of Conwy has been split up into sub areas



STEAM

The tourism numbers and economic impact data is based on the Scarborough Tourism Economic Activity Monitor (produced as the Scottish Tourism Economic Activity Monitor in Scotland), or 'STEAM' for short. STEAM was designed in Canada in 1981, and since 1989 has been used in England, Scotland, Wales and Northern Ireland to monitor trends in tourism.

STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection.

STEAM quantifies the local economic impact of tourism, from both staying and day visitors, through analysis and use of a variety of inputs including visitor attraction numbers, tourist accommodation bedstock, events attendance, occupancy levels, accommodation tariffs, macroeconomic factors, visitor expenditure levels, transport use levels and tourism-specific economic multipliers.

Conwy holiday accommodation database

Between June 2018 and March 2019, Conwy County Borough Council commissioned Gwynedd Council to produce a database of all holiday accommodation and providers in the county, working with Visit Wales. The database was collated from a variety of sources and cross referenced for accuracy. Data sources include:

- Business rates
- Licencing for caravan and camping sites
- Licencing for food premises
- Information provided by local holiday let agencies
- Surveys sent out to all local operators
- Internet searches of well-known tourism web sites
- Local knowledge by Conwy staff working in the tourism sector / tourist information centres

Visitor Surveys

During the holiday season in 2015, 2016 and 2017, tourism staff with Conwy County Borough Council conducted face to face surveys with visitors at several of the key tourist destinations in the county. The results of these surveys have been collated and used to inform this background paper.

Visit Wales Occupancy Survey

An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to cover all serviced accommodation, including guest houses, bed and breakfast establishments and non-graded serviced accommodation. The data in this report is based on the 2017 survey that was published in June 2018. The next survey is due to be published at the end of November 2019.

Section 2: Tourism trends

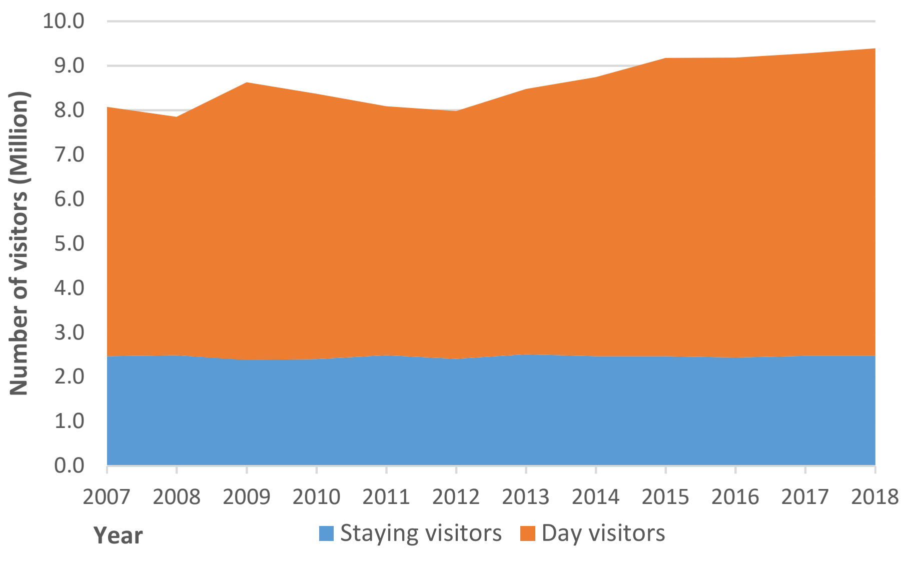
Visitor numbers

The STEAM data estimates that in 2018 there were 9.4 Million visitors to Conwy County of which, 6.9 Million were day visitors and 2.5 million were staying visitors. Over time the number of day visitors is estimated to have been increasing while the number of staying visitors has remained fairly constant.

Table 3: Number of visitors to Conwy County Borough between 2007 and 2018
Source: STEAM 2018

Year	Staying visitors (M)	Day visitors (M)	All (M)
2007	2.5	5.6	8.1
2008	2.5	5.4	7.9
2009	2.4	6.2	8.6
2010	2.4	6.0	8.4
2011	2.5	5.6	8.1
2012	2.4	5.6	8.0
2013	2.5	6.0	8.5
2014	2.5	6.3	8.7
2015	2.5	6.7	9.2
2016	2.4	6.7	9.2
2017	2.5	6.8	9.3
2018	2.5	6.9	9.4

Chart 1: Number of staying and day visitors to Conwy County Borough between 2007 and 2018
Source: STEAM 2018



Accommodation providers

There are 1,300 different accommodation providers identified across the County Borough. Over 60% of the providers offer self-catering accommodation, in particularly holiday lets through established regional holiday let agencies or through online sites such as Air BnB. Over 80% of the bed spaces in the county are on caravan and camping sites, with two thirds of these located in the East Strategic Sub area in the towns of Llanddulas, Towyn and Kinmel Bay.

Table 4: Showing the number of accommodation providers by type and the number of bed spaces
Source: Conwy accommodation database 2019

	Serviced	Self Catering	Caravan & Camping	Bunkhouse	Total
Providers	307	795	191	16	1,309
Bed spaces	8,778	4,148	60,300	470	73,696

Chart 2: Showing the type of accommodation providers in Conwy County Borough
Source: Conwy accommodation database 2019

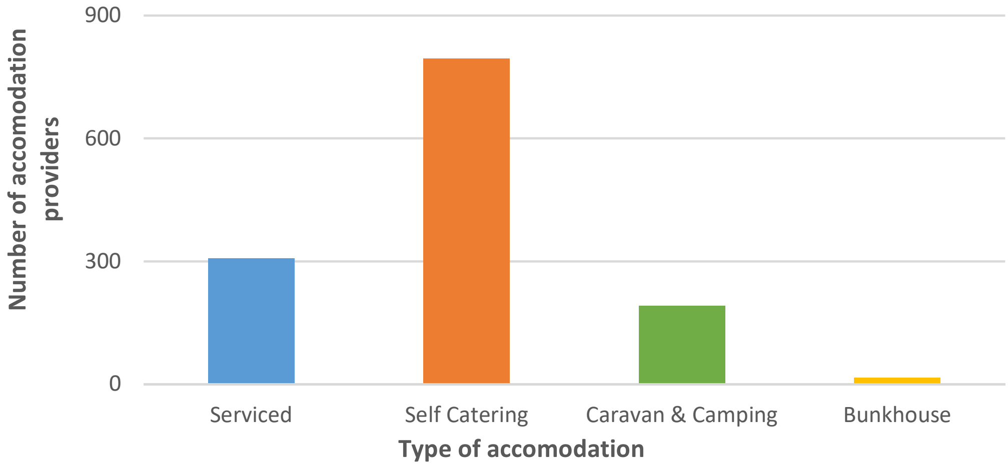
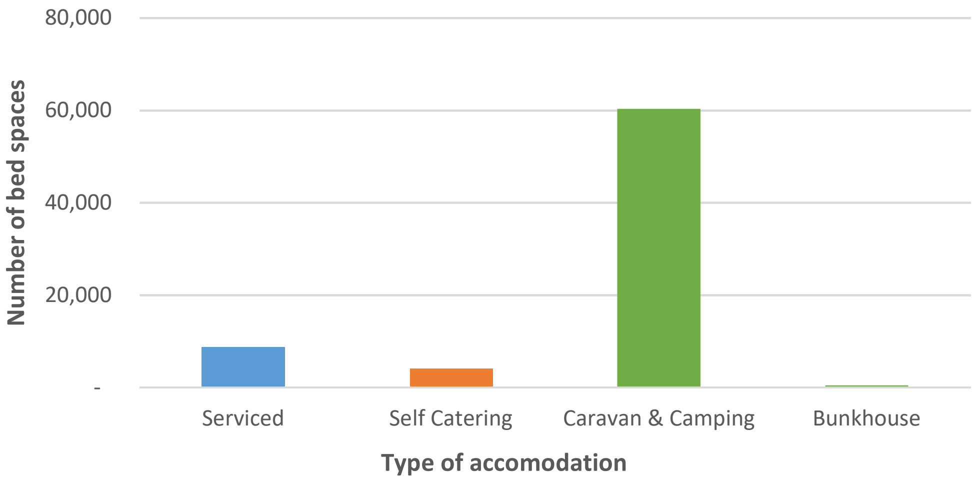


Chart 3: Showing the number of bed spaces available in each type of accommodation
Source: Conwy accommodation database 2019



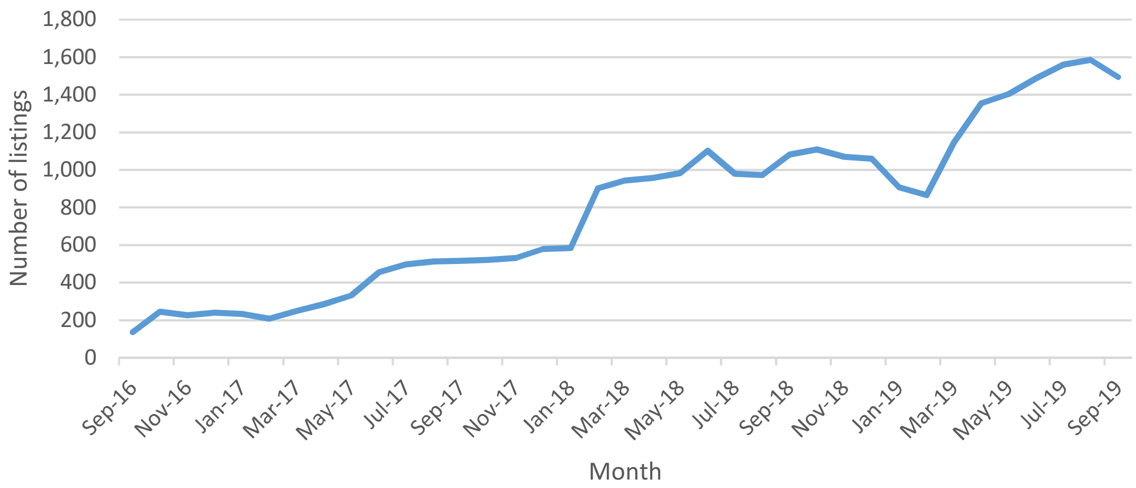
Over the last 10 years the nature of the accommodation supply has changed, with a decrease in serviced accommodation (in particular smaller establishments) and increase in self cratering accommodation providers (in particular holiday cottages). Overall the number of providers has increased, but the number of available bed spaces has decreased as larger serviced accommodation has closed and smaller holiday lets have opened. Some of the static caravan sites have also reduced pitches and bed spaces to improve the quality of their sites (greater room between pitches). As a results of these trends the county has seen growth in day visitor number that hasn't gone hand in hand with a growth in staying visitor numbers. The number of bed spaces available has decreased.

Table 5: Change in holiday accommodation providers over the last 10 years
Source: Conwy accommodation database 2019

	Change in 10 years
Serviced Accommodation Total	**-92**
+50 room hotels	-4
10-50 room hotels	-36
<10 room hotels/others	-52
Non-Serviced Accommodation Total	**262**
Self catering	255
Static caravans/chalets	-1
Touring caravans/camping	8

Online sites such as Air BnB are changing the nature of the accommodation offer in places like Conwy County. The following chart shows how the number of listings on Air BnB has increased over the last 3 years, peaking in August 2019 with almost 1,600 properties listed. Research is ongoing to identify what proportion of these listings are already included in the CCBC accommodation database and accounted for in the STEAM data and how much is not.

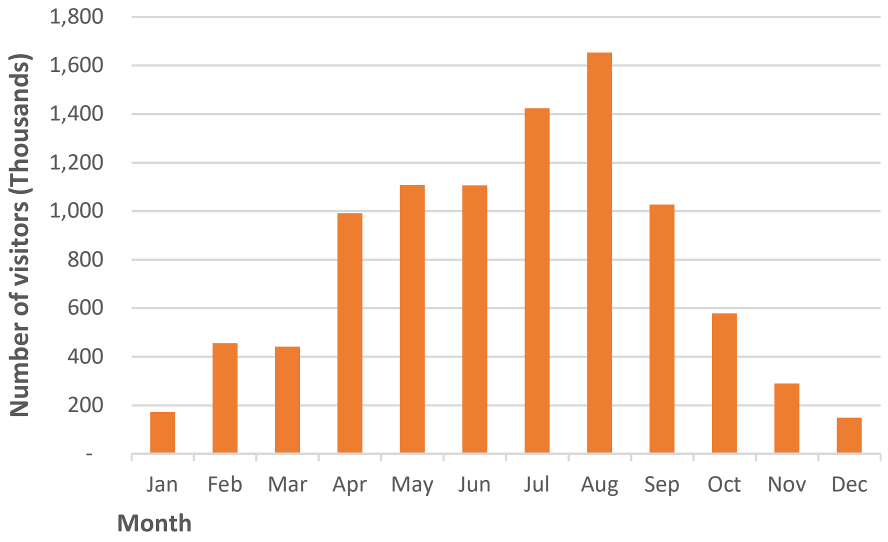
Chart 4: Showing the number of air BnB listings in Conwy County
Source: Air DNA Sept 2019



Seasonal trends

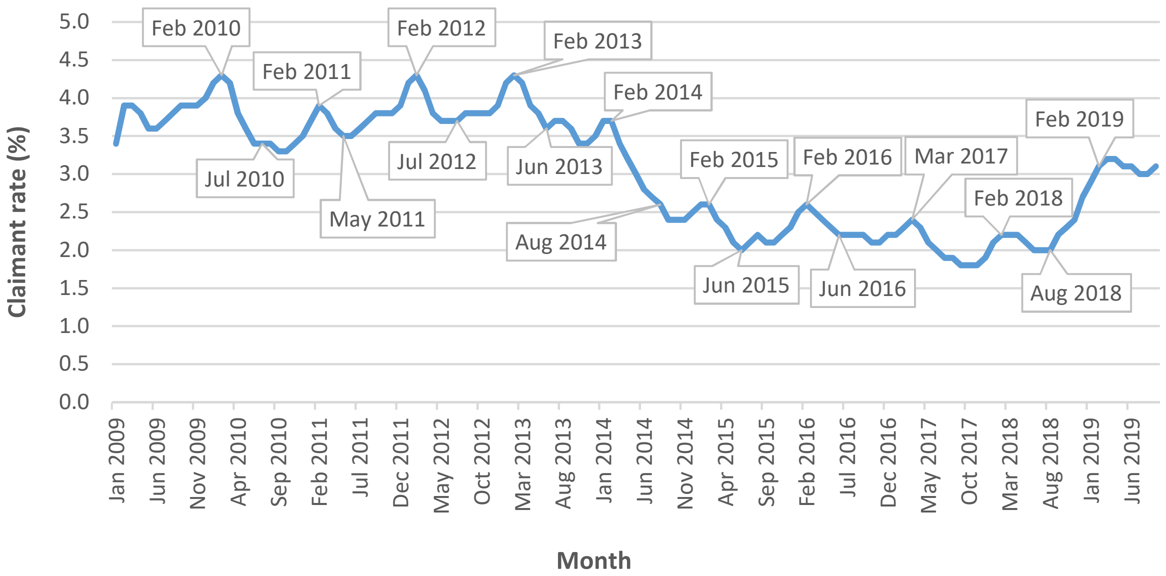
The tourism trade shows distinct seasonal trends that peak significantly in August and are very low in November, December and January during which time many of the accommodation providers and some attractions are closed.

Chart 5: Number of visitors to Conwy County Borough by month (2018)
Source: STEAM 2018



Unemployment claimant rates for Conwy County show a similar seasonal trend with a drop in unemployment claimants over the summer months and an increase in unemployment claimants over the winter. It is likely that this trend reflects the seasonal nature and reliance of the local job market on the tourism trade.

Chart 6: unemployment claimant rate, January 2009 - September 2019
Source: ONS claimant count, (NOMIS)



Occupancy levels

Reliable occupancy rates are not yet available at the local authority level and Conwy County Borough Council are working with local accommodation providers and hospitality associations to improve this in the future. Data is available at the national level for Wales through the Visit Wales occupancy survey, which will be used in this report.

Hotels

The average room occupancy rate for North Wales in 2017 was 67%, which has remained consistent over the last 3 years. In general, the annual average occupancy rates in the hotel sector continue to remain at their highest levels seen in the last 10 years.

Room occupancy levels show a seasonal trend peaking at 79% July and August and falling to 48% in January. Larger hotels show significantly higher occupancy levels than the smaller hotels across Wales, with hotels with 101+ rooms reporting average annual occupancy rates of 79% while smaller hotels with 4-10 rooms report occupancy rates of 50%.

Table 6: Average Hotel Room occupancy by Region in Wales for 2008-2017
Source: Wales tourism accommodation occupancy survey, 2017

Annual Average Room Occupancy										
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
North Wales	57	62	61	61	62	63	66	68	68	67
Mid Wales	50	49	49	54	54	52	52	52	53	54
South East Wales	66	62	62	61	61	66	71	73	72	73
South West Wales	56	53	54	51	50	50	64	64	60	63
TOTAL WALES	***58***	***58***	***59***	***59***	***59***	***61***	***66***	***67***	***67***	***67***

Chart 7: Room and bed occupancy rates for Hotels in Wales by month
Source: Wales tourism accommodation occupancy survey, 2017

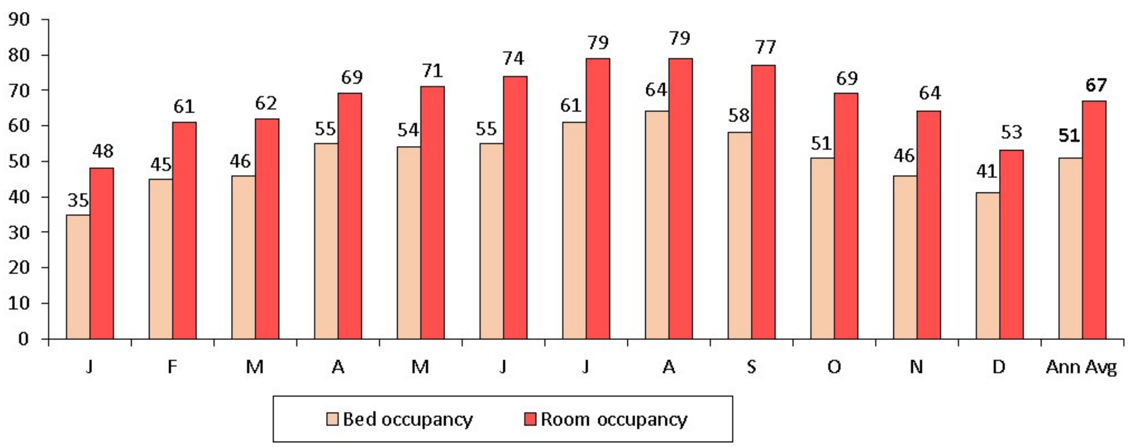
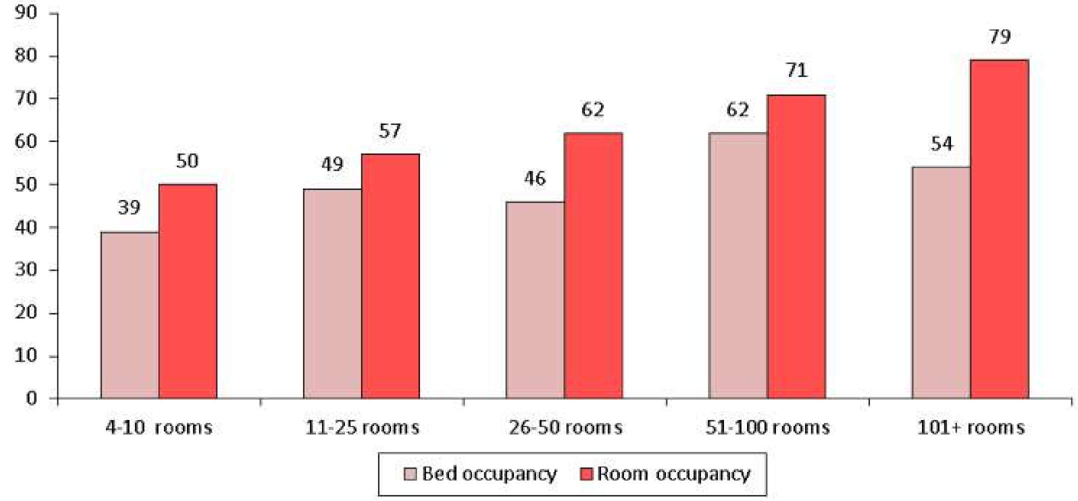


Chart 8: Hotel room and bed occupancy rates in Wales by size of hotel
Source: Wales tourism accommodation occupancy survey, 2017



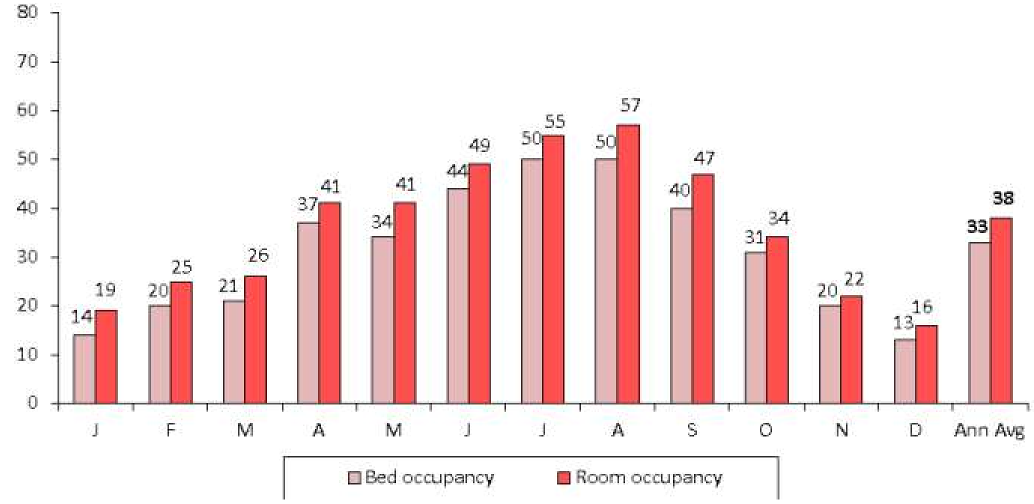
Guesthouses/B&B's

The annual average room occupancy for Guesthouses/B&B's in North wales has remained at 40% for the last two years. Occupancy rates for Guesthouses/B&B's in Wales show a significant seasonal trend peaking at 57% in August and falling to 16% in December. Many providers in this sector close for the winter months.

Table 7: Average Guesthouses/B&B's Room occupancy by Region in Wales for 2008-2017
Source: Wales tourism accommodation occupancy survey, 2017

	Room occupancy									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Wales	35	39	39	35	31	35	35	35	40	40
Mid Wales	29	33	32	34	32	32	27	32	29	26
South East Wales	43	40	38	25	31	28	32	42	40	35
South West Wales	43	39	39	37	40	43	40	43	47	48
All Wales	***37***	***38***	***37***	***34***	***34***	***35***	***33***	***37***	***39***	***38***

Chart 9: Room and bed occupancy rates for Guesthouses/B&B's in Wales by month
Source: Wales tourism accommodation occupancy survey, 2017



The average room occupancy for Guesthouses/B&B’s in Wales increases based on the size of establishment. Smaller Guesthouses/B&B’s with 1-3 rooms showed a room occupancy rate of 28%, while those with 4-10 rooms showed a room occupancy rate of 40%.

Guesthouses/B&B’s also appear to show increased occupancy rates with higher start ratings. The 5 star providers reported occupancy rates of 48% while the three start rates of 38%.

Chart 10: Guesthouses/B&B's room and bed occupancy rates in Wales by size
Source: Wales tourism accommodation occupancy survey, 2017

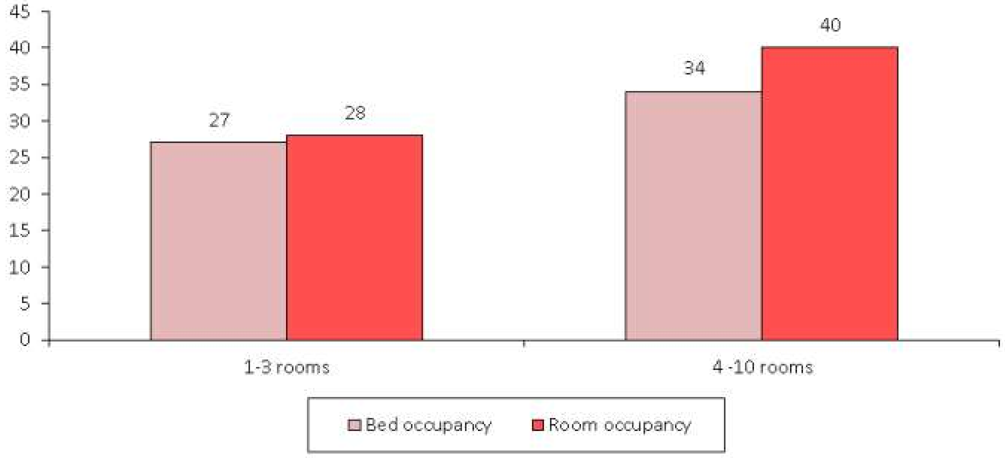
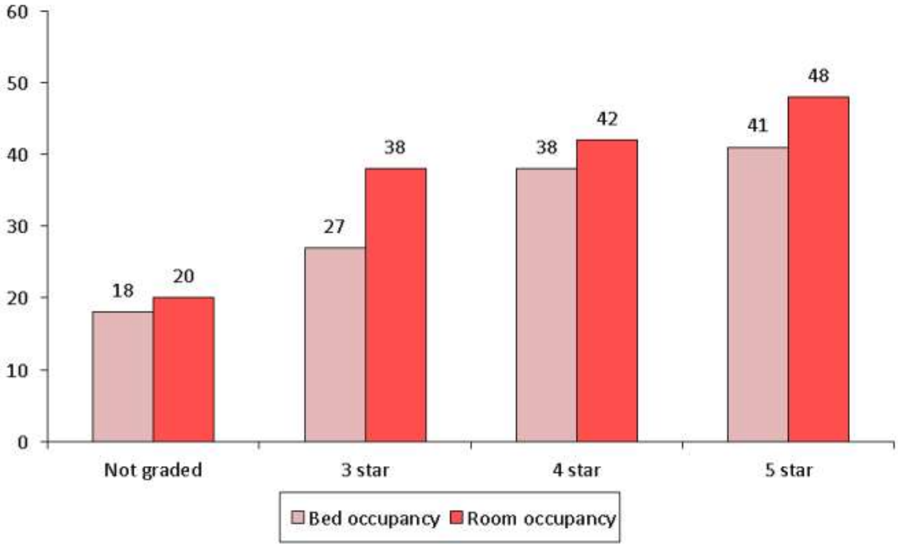


Chart 11: Guesthouses/B&B's room and bed occupancy rates in Wales by star rating
Source: Wales tourism accommodation occupancy survey, 2017



Self-Catering Cottages & Apartments

In 2017 the North Wales annual self-catering average unit occupancy for all cottages and apartments was 61%, the highest rate in the previous nine years. Consistent with previous years, self-catering accommodation continued to demonstrate high levels of occupancy during peak periods. August recorded the highest levels of occupancy at 92%, with December (38%) being the lowest.

Chart 12: Cottages & Apartments unit occupancy rates in Wales by Region
Source: Wales tourism accommodation occupancy survey, 2017

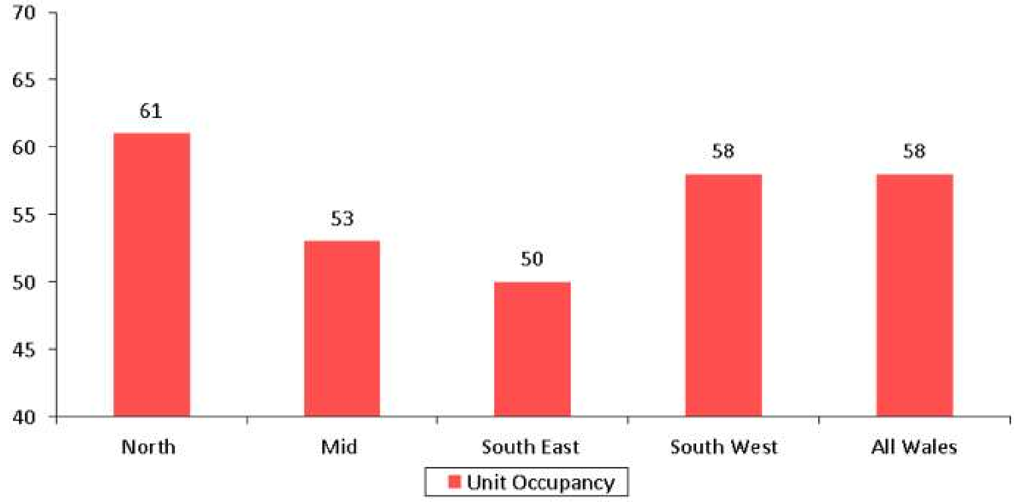


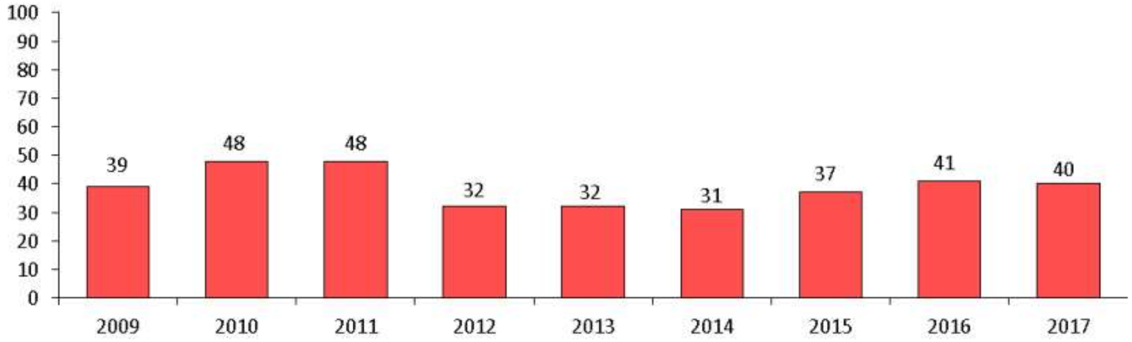
Table 8: Average Cottages & Apartments unit occupancy in North Wales for 2009-2017 by month
Source: Wales tourism accommodation occupancy survey, 2017

Average Unit Occupancy									
	2009	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
January	29	23	33	35	30	28	40	25	41
February	38	44	45	40	37	54	46	36	55
March	38	42	42	45	52	50	42	50	42
April	58	61	63	58	47	62	58	55	67
May	66	67	69	53	67	66	66	62	59
June	70	69	69	69	61	61	59	68	74
July	81	74	73	68	73	78	80	80	80
August	89	85	85	83	88	92	91	91	92
September	77	75	75	68	72	69	73	69	79
October	60	58	60	55	61	60	62	45	66
November	38	36	35	41	38	42	39	42	41
December	44	37	33	47	35	53	27	35	38
May - October ave	***74***	***71***	***72***	***66***	***71***	***71***	***72***	***69***	***75***
Annual average	***57***	***56***	***57***	***56***	***55***	***59***	***57***	***54***	***61***

Touring Caravan & Camping Parks

The sample for touring caravan & camping parks is small and data is only available at the national level for Wales. The reported rate of 40% in 2017, is a fair reflection of the occupancy rates experienced reported in this survey.

Chart 13: Touring Caravan & Camping Parks pitch occupancy rates in Wales 2009-2017
Source: Wales tourism accommodation occupancy survey, 2017



Caravan Holiday Homes

The small sample size in the Wales tourism accommodation occupancy survey for this sector means that it may not properly represent the industry. Data is not published for North Wales because of the small sample size and data at the Wales level shows significant fluctuations form one year to the next.

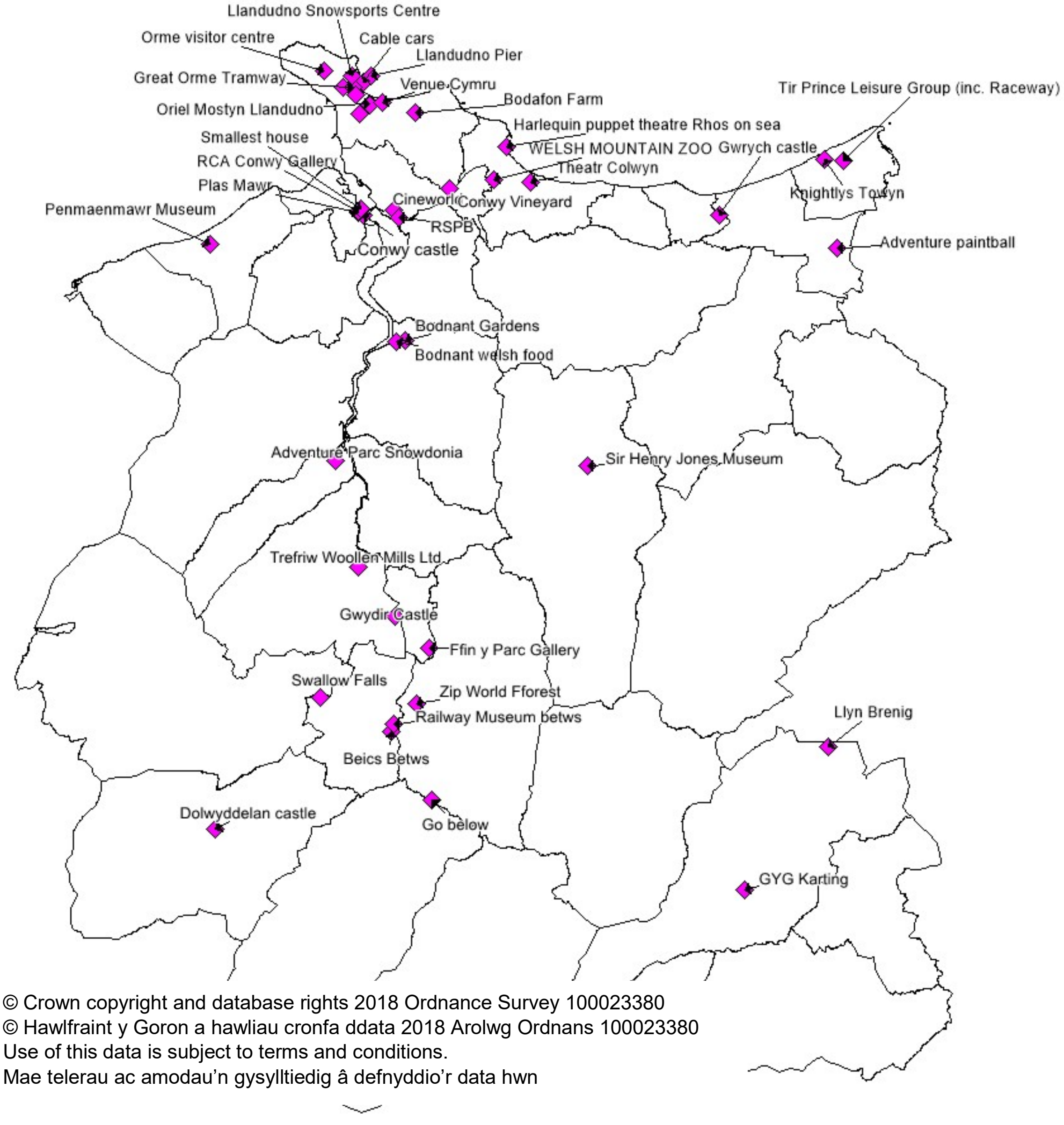
Because of these issues with the data, it is not being used in this report.

Section 3: Key attractions

Key attractions

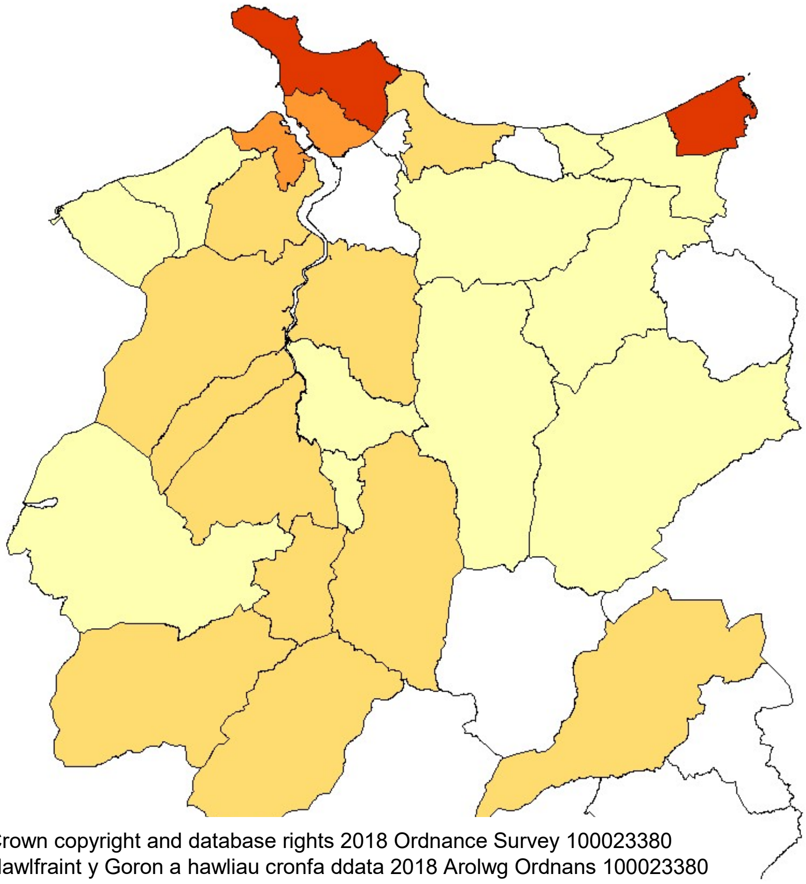
The county is proud to host a large number of visitor attractions. Some of the more well-known attractions have been included on the map below. This list of course does not include the vast amount of open space, coastline, mountains, lakes and rivers that are in themselves key visitor attractions.

Map 2: Showing key attractions



While not a complete picture, the following map shows how the visitor numbers to these attractions are spread geographically across Conwy County Borough. It shows clear hot spots around Llandudno and Kinmel Bay, with a secondary hot spot around Conwy and tertiary following the Conwy Valley to Betws y Coed and one around Llyn Brenig.

Map 3: Hot spot map showing the concentration of attraction visitors
Source: Conwy attractions database 2019



Food establishments

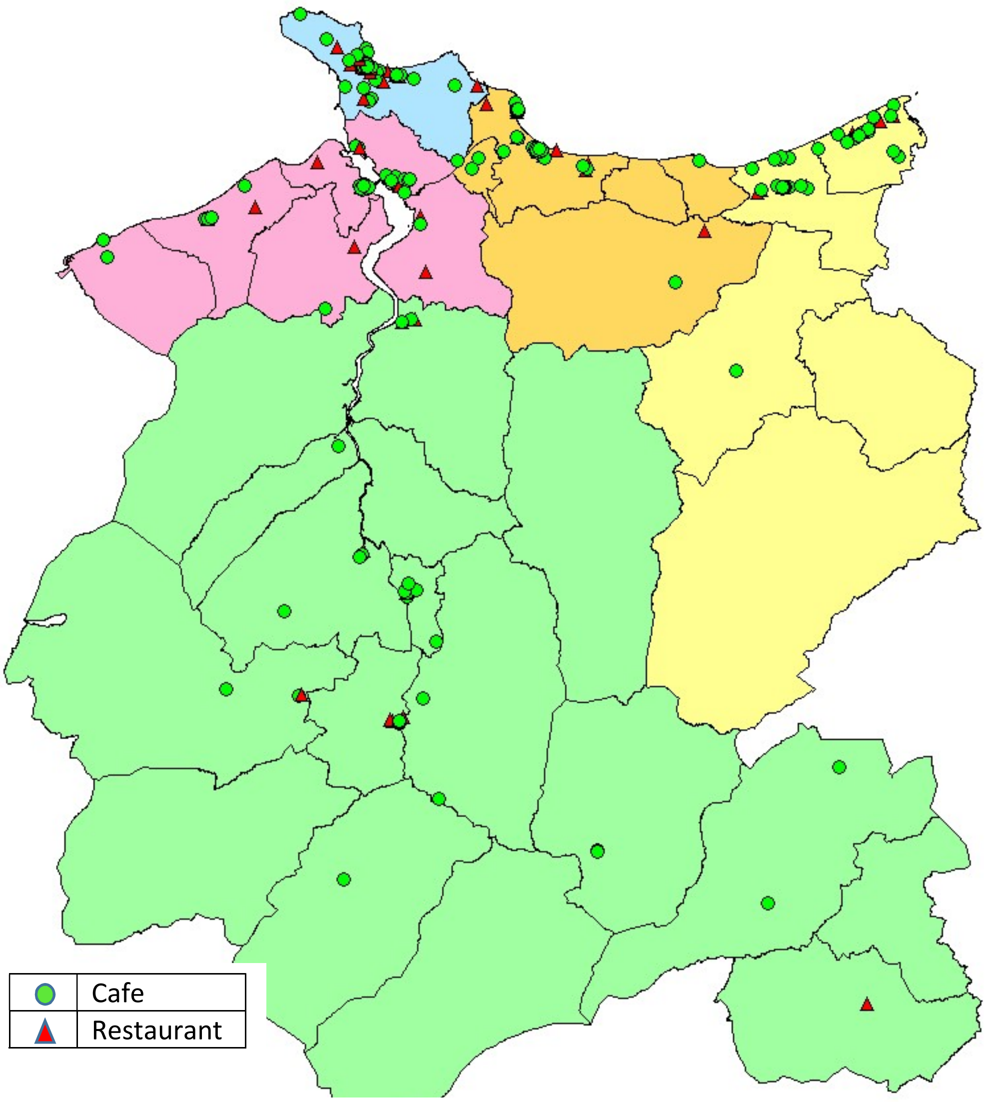
The tourism trade also supports a large number of food establishments, some of which are in themselves visitor attractions and part of the appeal the area has to tourists. Food and accommodation together provide over 7,000 jobs and are the second largest employment sector after public administration and health.

The largest concentration of cafés and restaurants are located in the towns of Llandudno (87), Rhos on Sea (20), Colwyn Bay (27), and Conwy (21). The large number of bed spaces in the East are supported by a relatively small number of food establishments within Conwy County boundaries.

Table 9: The number of food establishments by Strategic Sub Area
Source: CCBC food licencing data 2019

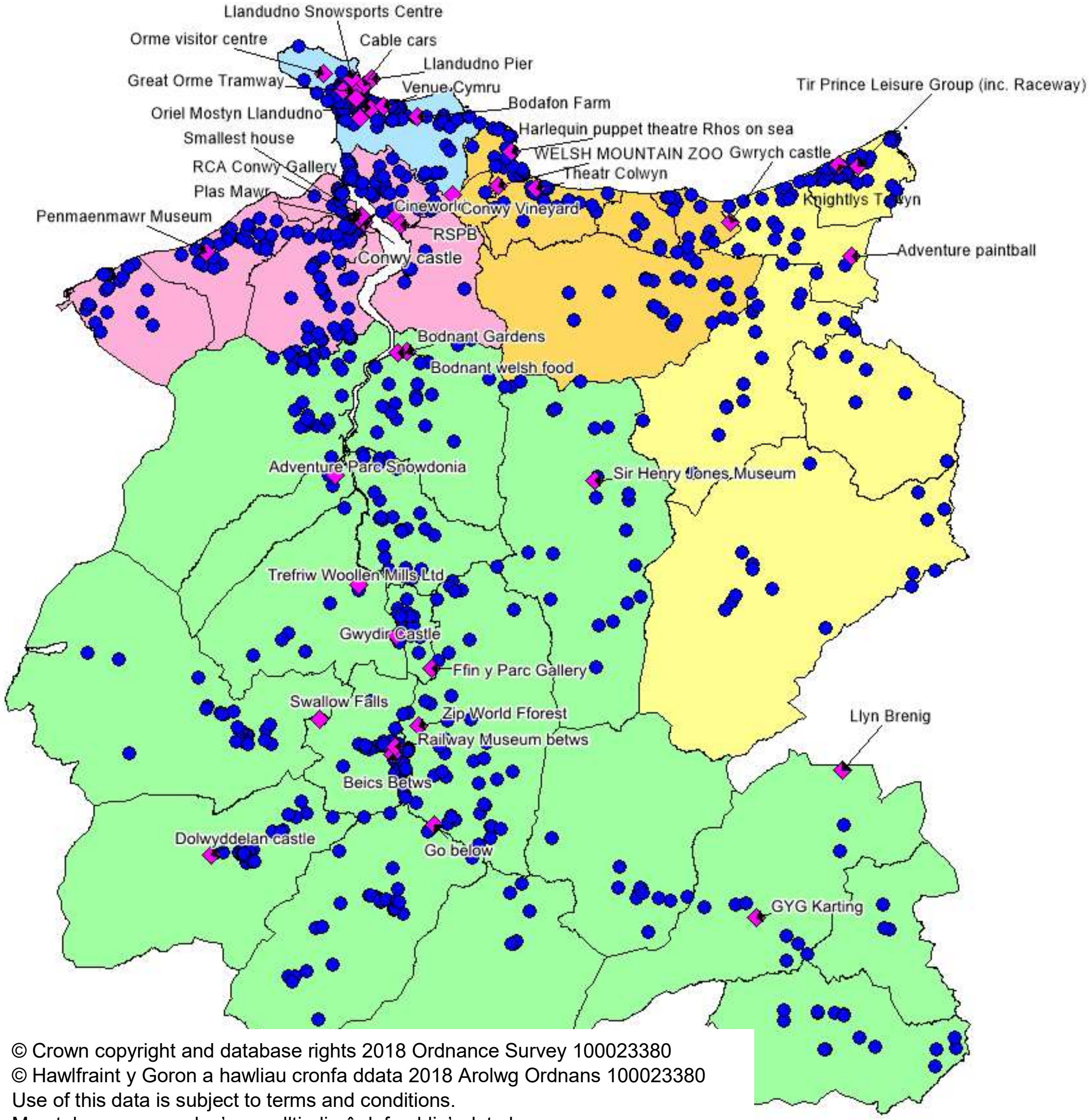
	North	East	Central	West	South	Total
Café	54	36	30	38	27	185
Restaurants	35	5	15	13	9	77
Total	**89**	**41**	**45**	**51**	**36**	**262**

Map 4: showing café and restaurant locations in Conwy County



Section 4: Accommodation

Map 5: showing key attractions and accommodation providers



Accommodation providers by Strategic Sub Area

The five strategic areas are very different in terms of the number and type of accommodation on offer.

- **North** – contains 70% of the serviced accommodation with over 6,000 serviced bed spaces
- **East** – contains two thirds of caravan and camping accommodation with over 40,000 bed spaces provided by a relatively small number of providers. Only a few self-catering holiday lets.
- **South** – 60% of the bed spaces are on caravan and camping sites, however there has been a steady rise in self-catering holiday lets. 40% of all self-catering bed spaces in Conwy County are located in the South.

- **West** – 85% of the bed space can be found on caravan and camping sites, but the West contains over 200 self-catering holiday lets, in particular concentrated around the town of Conwy.
- **Central** – once a busy seaside resort Colwyn Bay now only contains a relatively small number of accommodation providers by comparison.

Table 10: Number of accommodation providers by Strategic sub area
Source: Conwy accommodation database 2019

	Serviced	Self Catering	Caravan & Camping	Bunkhouse	Total
Total	**307**	**795**	**191**	**16**	**1,309**
North	163	159	1	1	324
East	5	65	63		133
Central	13	62	13		88
West	41	204	40		285
South	85	305	74	15	479

Chart 14: Number of accommodation providers by Strategic sub area
Source: Conwy accommodation database 2019

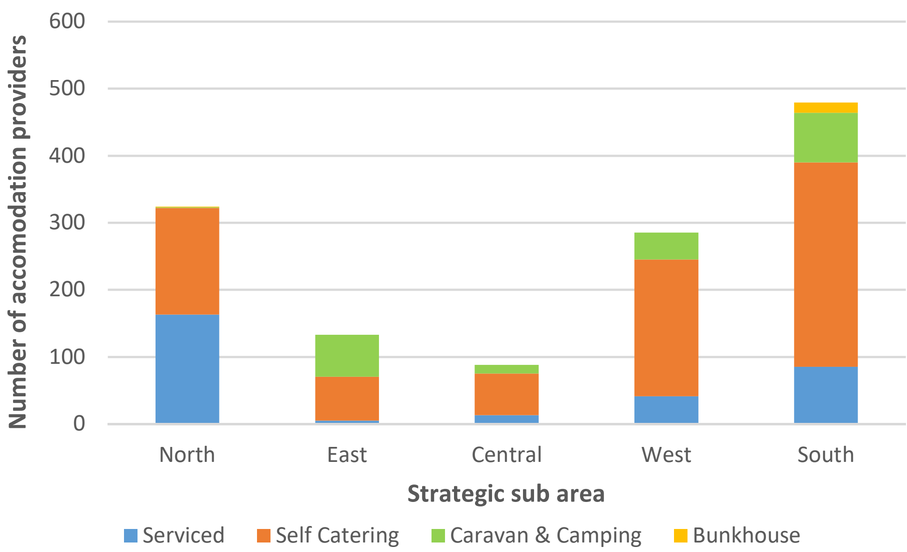
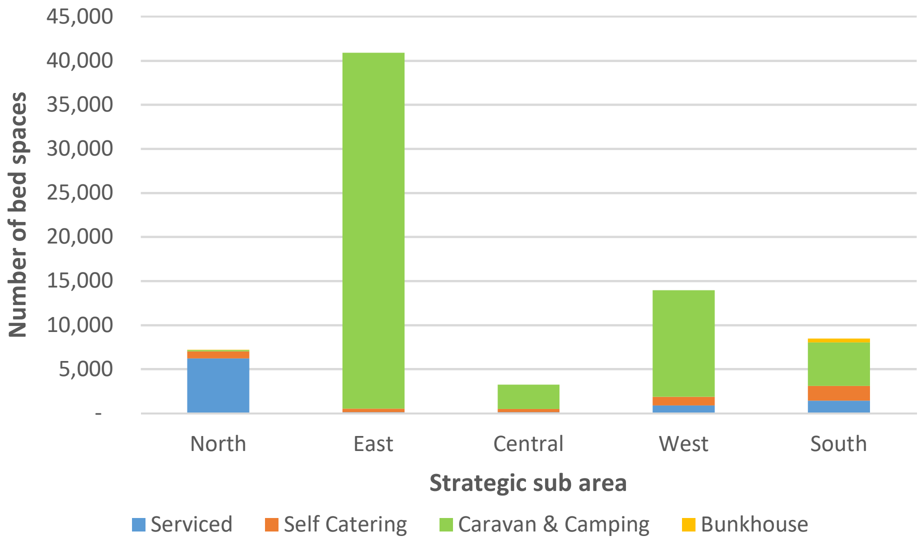


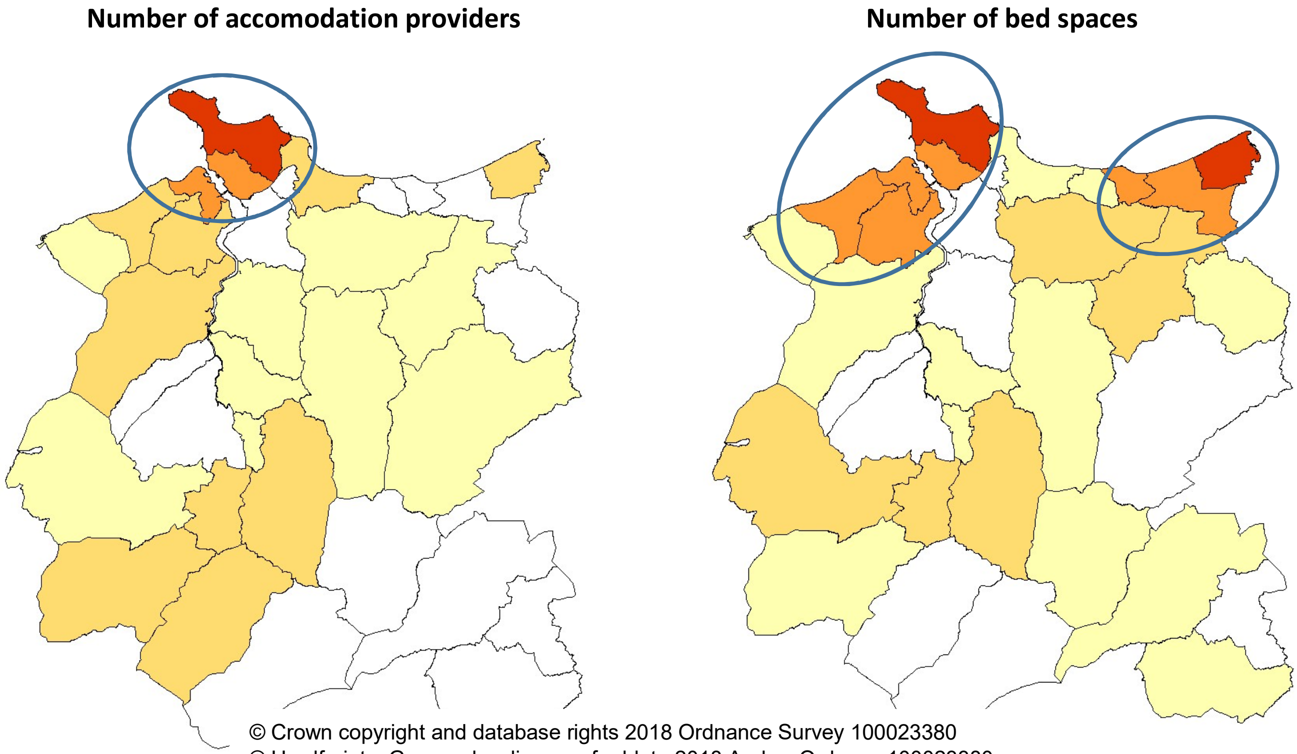
Table 11: Number of bed spaces available in each Strategic sub area
Source: Conwy accommodation database 2019

	Serviced	Self Catering	Caravan & Camping	Bunkhouse	Total
Total	**8,778**	**4,148**	**60,300**	**470**	**73,696**
North	6,218	784	144	44	7,190
East	118	381	40,376		40,875
Central	133	331	2,774		3,238
West	888	981	12,067		13,936
South	1,421	1,671	4,939	426	8,457

Chart 15: Number of bed spaces available in each Strategic sub area
Source: Conwy accommodation database 2019



Map 6: Hot spot map showing the concentration of accommodation providers and bed spaces available in each community area
Source: Conwy accommodation database 2019



There is a clear concentration of accommodation providers in Llandudno and Conwy. The map changes however when you consider the availability of bed spaces, with the hot spot expanding towards Penmaenmawr and a new hot spot emerging to incorporate the caravan parks in the East.

Section 5: Visitor profile

Data source

This section provides an analysis of the results of the Conwy County Borough Council (CCBC) Tourism surveys for 2016. This year was picked because it included a good sample size across the whole of the tourist season.

The data comes from a face to face survey conducted by staff employed by CCBC with visitors to the destinations of Llandudno, Conwy town, Betws y Coed and Colwyn Bay. In total the survey questioned 3,429 people of whom 2,078 were visitors to the area. Only visitors were asked to complete the full survey.

Table 12: Showing where the visitors surveys were conducted
Source: CCBC visitor survey 2016

Destination	Number of visitors surveyed
Betws y Coed	667
Colwyn Bay	546
Conwy	368
Llandudno	497
Total	**2078**

Where are visitors from?

The first question asked visitors where they were from. The survey suggests that Conwy town attracts a high proportion of overseas visitors while most visitors to Colwyn Bay are from Wales and the North West of England.

Table 13: Showing where visitors are coming from for each of the destinations
Source: CCBC visitor survey 2016

Conwy

Home region	Number	Percentage
North West	102	28%
Wales	36	10%
West Midlands	35	10%
Yorkshire	14	4%
South East	11	3%
Other UK	15	4%
International	155	42%

Colwyn Bay

Home region	Number	Percentage
North West	283	52%
Wales	199	36%
West Midlands	37	7%
Yorkshire	6	1%
Scotland	5	1%
Other UK	4	1%
International	12	2%

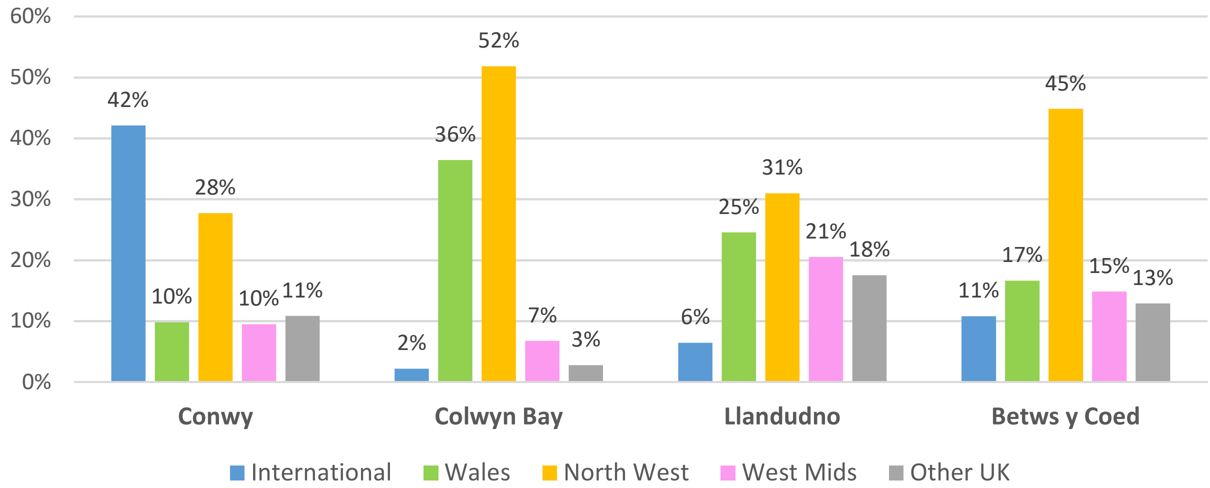
Llandudno

Home region	Number	Percentage
North West	154	31%
Wales	122	25%
West Midlands	102	21%
Scotland	29	6%
South East	21	4%
Other UK	36	7%
International	32	6%

Betws y Coed

Home region	Number	Percentage
North West	299	45%
Wales	111	17%
West Midlands	99	15%
Yorkshire	19	3%
East Midlands	18	3%
Other UK	48	8%
International	72	11%

Chart 16: Showing where visitors are coming from
Source: CCBC visitor survey 2016



Are they day visitors or staying visitors?

All destinations attract a high proportion of day visitors, but Colwyn Bay stands out in particular with only 7% of visitors staying overnight.

Chart 17: Showing what proportion of visitors to each destination are staying overnight
Source: CCBC visitor survey 2016

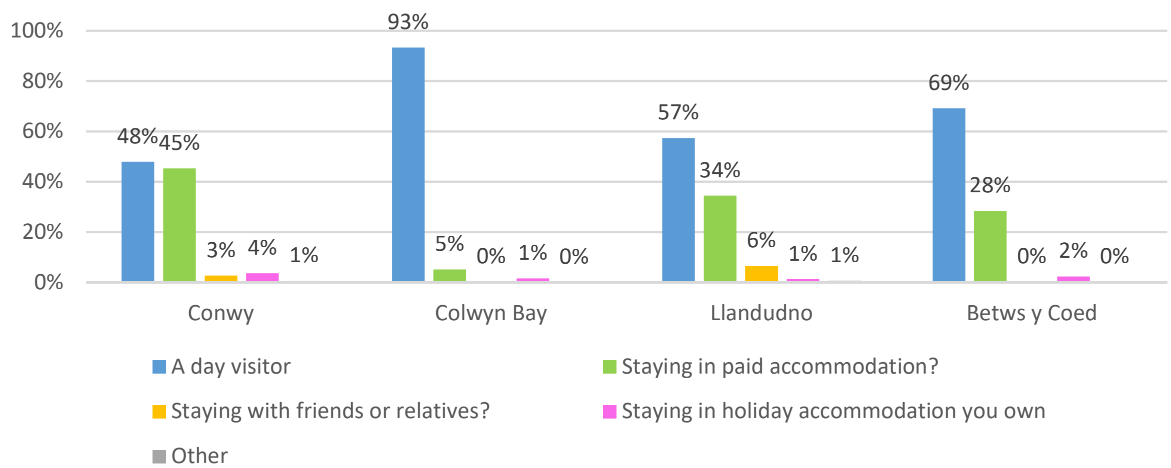


Table 14: Are they day visitors or staying visitors?
Source: CCBC visitor survey 2016

Type of stay	Conwy	Colwyn Bay	Llandudno	Betws y Coed
A day visitor	48%	93%	57%	69%
Staying in paid accommodation	45%	5%	34%	28%
Staying with friends or relatives	3%	0%	6%	0%
Staying in own holiday accommodation	4%	1%	1%	2%
Other	1%	0%	1%	0%
Average length of stay (days)*	3.7	4.9	3.9	4.3

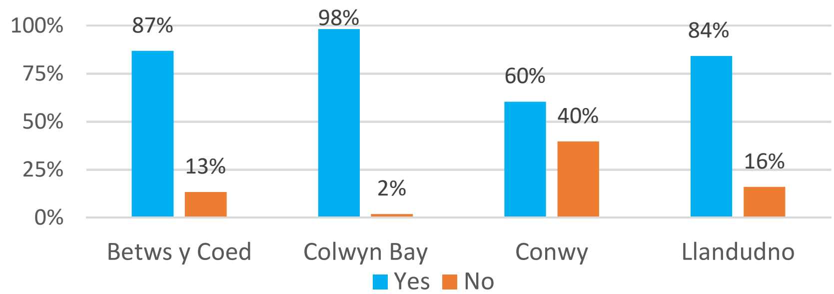
*The average length of stay is only for those who said that they were staying overnight. It excludes day visitors.

Are they repeat visitors?

Betws y Coed, Colwyn Bay and Llandudno all attract a high proportion of repeat visitors while Conwy has a lower proportion in line with the high percentage of international visitors.

Table 15: Are they repeat visitors?
Source: CCBC visitor survey 2016

Location	Yes	No
Betws y Coed	87%	13%
Colwyn Bay	98%	2%
Conwy	60%	40%
Llandudno	84%	16%



What attracts people to the area?

Visitors were asked to name the things that attracted them to come to that destination. They were able to select as many as they wanted from a list and suggest other options that did not feature.

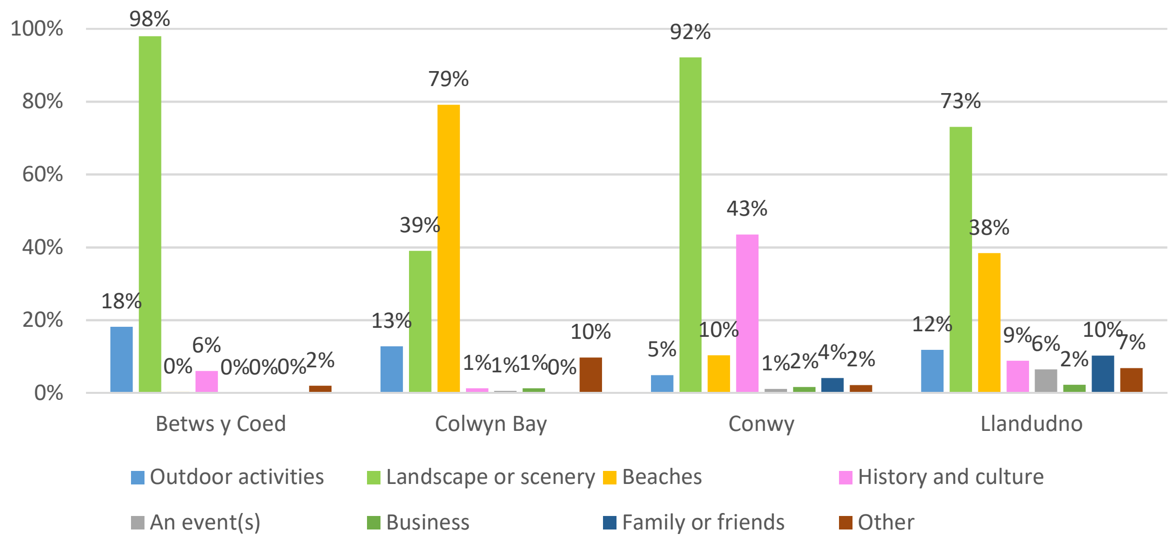
Table 16: What attracts visitors to the area?
Source: CCBC visitor survey 2016

Location	Outdoor activities	Landscape / scenery	Beaches	History / culture	An event	Business	Family / friends	Other
Betws y Coed	18%	98%	0%	6%	0%	0%	0%	2%
Colwyn Bay	13%	39%	79%	1%	1%	1%	0%	10%
Conwy	5%	92%	10%	43%	1%	2%	4%	2%
Llandudno	12%	73%	38%	9%	6%	2%	10%	7%

Landscape, scenery and beaches are the key attractors to all of these destinations. Conwy with the castle, walls and historic buildings stands out with 43% visiting the resort as a result of its history and culture.

The visitors who stated that another reason attracted them mostly mentioned a particular attraction and in Llandudno the shopping was also a key reason mentioned.

Chart 18: Showing what attracts visitors to each of the destinations surveyed
Source: CCBC visitor survey 2016



Simple visitor profile

People completing the survey were asked to provide some basic information about themselves and their group. Colwyn Bay attracted a higher proportion of families with young children with the beach development, but 24% to 26% of visitors to Conwy and Llandudno were also families with young children which is very important to note.

Chart 19: Showing the type of people visiting each destination
Source: CCBC visitor survey 2016

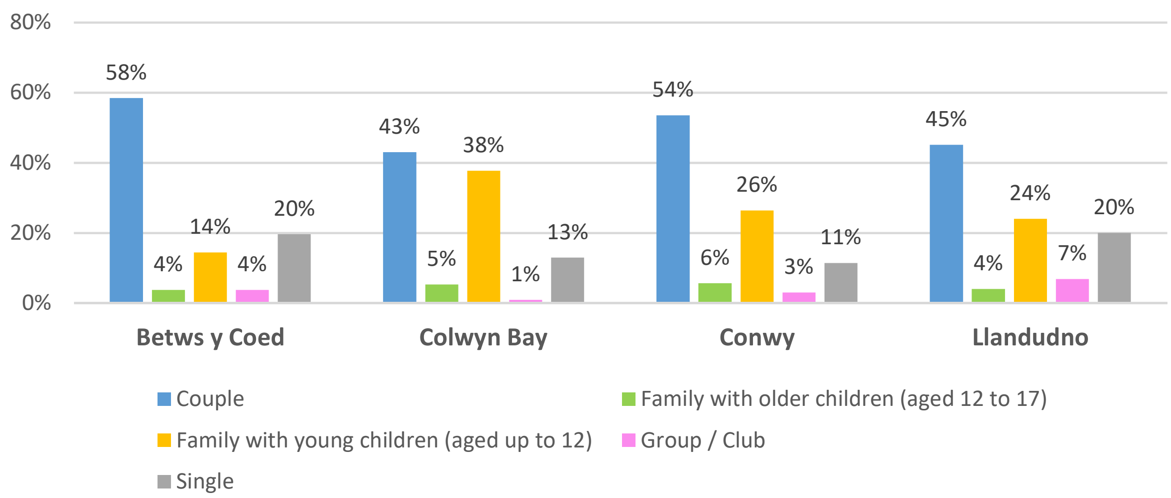


Table 17: Showing the type of people visiting each destination
Source: CCBC visitor survey 2016

Location	Couple	Family with older children (aged 12 to 17)	Family with young children (aged up to 12)	Group / Club	Single
Betws y Coed	58%	4%	14%	4%	20%
Colwyn Bay	43%	5%	38%	1%	13%
Conwy	54%	6%	26%	3%	11%
Llandudno	45%	4%	24%	7%	20%

When you consider the age of those completing the survey it is fair to say that there is a reasonably good spread across all age bands. Llandudno attracts a higher proportion of retired visitors than the other resorts.

Chart 20: Showing the age profile of people surveyed
Source: CCBC visitor survey 2016

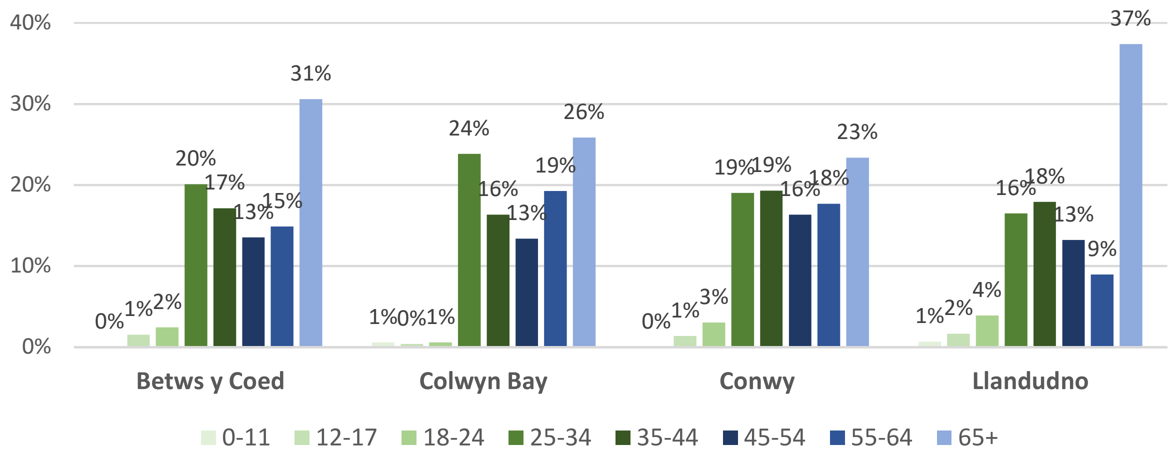


Table 18: Showing the age profile of people surveyed
Source: CCBC visitor survey 2016

Location	Aged 0-11	Aged 12-17	Aged 18-24	Aged 25-34	Aged 35-44	Aged 45-54	Aged 55-64	Aged 65+
Betws y Coed	0%	1%	2%	20%	17%	13%	15%	31%
Colwyn Bay	1%	0%	1%	24%	16%	13%	19%	26%
Conwy	0%	1%	3%	19%	19%	16%	18%	23%
Llandudno	1%	2%	4%	16%	18%	13%	9%	37%

Visitor feedback

The following contains a summary of the main points raised in the visitor surveys for 2016 to 2018.

Conwy

The castle, walls and history were mentioned as the main positive aspect of the destination, with a large number coming for the history and culture of the town. Also popular are the shops, cafes and restaurants. The quayside was mentioned in particular by those with children who said that there was lots to do in the town to keep the children entertained.

By far the overwhelming negative aspect to the destination was the lack of parking with a sizeable number stating that they had found it difficult to park in and around Conwy town.

Llandudno

There were a variety of positive comments about Llandudno as a tourist destination. At the top of the list are the Promenade, Pier, Orme and beaches with their fantastic scenery. Visitors like the fact that the promenade is flat for walking and that the whole area is clean and easily accessible. A large proportion of visitors mentioned the shops as a positive aspect of the town alongside the Cafes and restaurants with staff praised for being friendly. Venue Cymru was mentioned by a smaller number of visitors as a key attraction to the town with the theatre and conference centre.

Too many seagulls was the main negative aspect of the destination alongside parking. There were also a lot of concerns about the lack of activities or attractions when it is raining. A small number of visitors also suggested that signposting around the town needed to be improved and some of the families with older children felt that there needed to be more on offer to keep them entertained, while families with younger children seemed more likely to say that there was plenty for them to do.

Colwyn Bay

The beach development was mentioned by all visitors as the main positive aspect of the destination alongside the long flat promenade. Visitors said that the area was very good for children and liked that it provided a safe environment. Visitors were also very positive about the Bistro and water sports facilities.

At the time the survey was conducted, there were still major works to complete a section of the beach and promenade and this was the main area of complaint for visitors. Some felt that the town centre needed more to offer visitors.

Section 5: The future of tourism?

Ageing population

It is possible that tourism could be an industry that will benefit from an ageing population in the UK with senior citizens opting for shorter UK breaks, rather than travelling overseas. If so, the industry needs to make sure it can cater for the needs of older people, for example those with reduced mobility, as well as the multigenerational travel market owing to the increased cost of childcare.

Experience focussed

The focus of travel is changing for the next generation. A greater emphasis is being placed on experiences and authenticity, with a higher value placed on entertainment and leisure with their families. There has also been a distinct shift in the work-life balance in the last 10-15 years as many people seek changes in work patterns in order to better meet other demands on time. More time is being given over to leisure, both for personal rewards and sharing with family and friends. There is also an increasing emphasis for visitors on a distinct "localised" experience that is linked to the local history and culture.

Achievements

The activities and adventure sector is expected to continue to grow with people placing a greater importance on personal achievements. As well as specific attractions such as Zip World, Adventure Parc Snowdonia and Go Below, there is an increase in the UK of attendance at events such as 10k runs, triathlons and mud runs.

Environmental awareness

Future generations have a higher level of environmental awareness. There is an increased preference towards accommodation and attractions that can offer a sustainable green package, such as low carbon, recycling or zero waste, as well as a sympathy towards the natural environment and bio diversity. There is also an increasing expectation for sustainable transport.

Lower cost accommodation

The spending power of the next generation may be more limited as a result of the UK economy over recent years with many experiencing increased debt and house prices. The demand is shifting towards lower cost accommodation and in particular self-catering accommodation such as Air BnB or smaller cheaper priced rooms.

Technology

Technology is essential for the next generation, with most booking accommodation and activities online and expecting WiFi, usually free WiFi, from accommodation providers as well as local Café's, Libraries and public spaces. Technology plays a fundamental role in how they access, navigate and interact with different tourism products and services.

Leaving the EU

Opportunities

- Attracting more tourists from non-EU countries
- A weaker pound means that it is cheaper for tourists to visit
- Increase in Staycations.

Challenges

- Increasing complexity for tourists traveling across the UK border.
- The UK is sometimes used as a "gateway" to Europe.
- Loss of funding from the EU for tourism.
- Much consumer protection is subject to EU regulations.
- May mean restrictions on flights between the UK and EU.
- The reliance of UK tourism on the employment of people from other EU countries.