28 June 2024

Draft for discussion

Version 1

Beddgelert

Demand, economic and social impact assessment

Contents

Executive summary

The planned developments produce positive social and economic impacts:

Social impacts

The proposed developments support ambitions of the local communities to facilitate sustainable tourism and deliver the aims of national and regional policies and specifically the Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035 by:

- Making optimal use of environmental resources that constitute a key element in tourism development
- Respecting the socio-cultural authenticity of host communities
- Ensuring viable, long-term economic operations, providing socio-economic benefits to all.

Economic impacts

The developments provides both one-off and ongoing impacts:

Construction (one-off impact) Gwynedd

Investment:	+£8.4M
Employment:	103 direct, indirect and induced FTE years

Onsite operations (annual impact) Gwynedd – year 1

Gross employment gain:	+13.5 direct, indirect and induced FTE
Net employment:	+13.2 direct, indirect and induced FTE

Off-site activity (annual impact) Gwynedd – year 1

Visitor expenditure:	+£650K
Gross employment gain:	+14.4 direct, indirect and induced FTE
Net employment:	+6.8 direct, indirect and induced FTE

Summary (annual impact) Gwynedd – year 1

Gross employment gain:	+27.9 direct, indirect and induced FTE
Net employment:	+20.0 direct, indirect and induced FTE

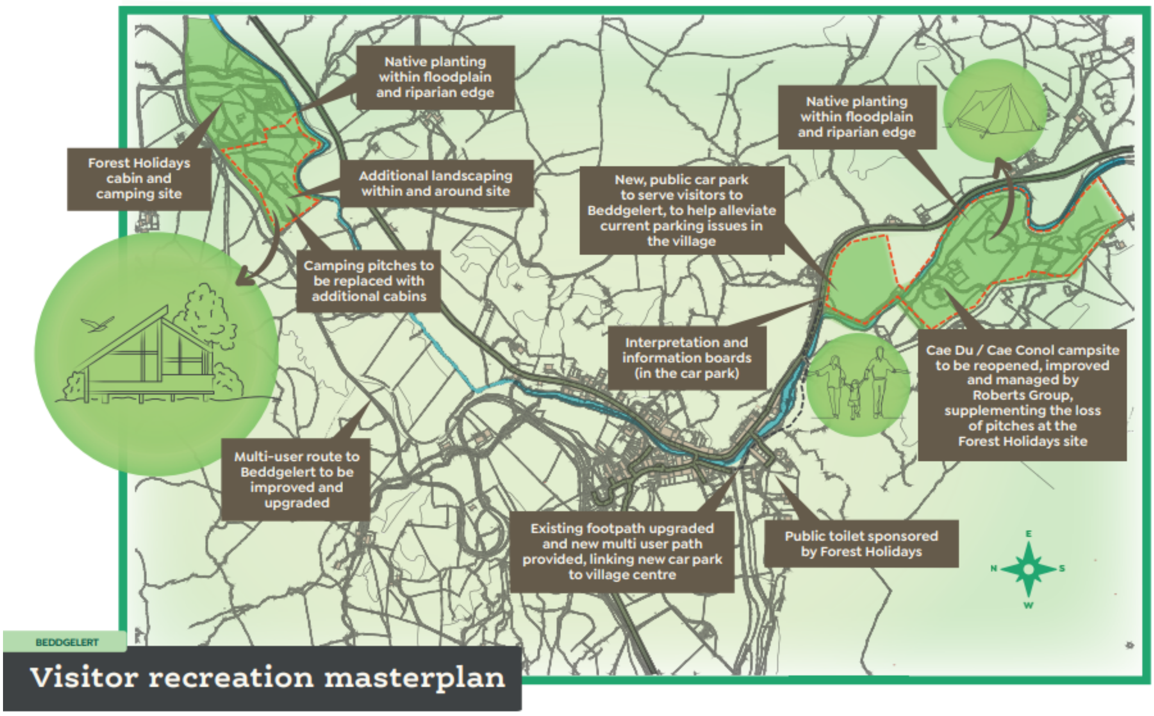
Note: we estimate that if the reception area is expanded and occupancy at Forest Holidays increases to achieved levels of 95%, there could be further net employment gains estimated at c6.0 FTE per annum by year 3.

Introduction

Forest Holidays and the Roberts Group propose to expand their sites adjacent to the village of Beddgelert, Gwynedd, Wales, LL55 4UU. The proposed developments will provide additional visitor accommodation and be considered separately by planning authorities. However, these are complementary developments that provide symbiotic impacts and from a socio-economic perspective can be considered as one entity.

Forest Holidays proposes an £8.1M investment to install 22 new holiday cabins to augment their existing 16 cabin development at Beddgelert. To facilitate this development, Forest Holidays will dispense with 85 camping/caravaning pitches (59 touring caravan pitches; 26 camping pitches) that are currently part of the estate. The proposed development will be wholly within the footprint of the existing site.

To continue to meet demand from the camping and caravaning community, the Roberts Group plans to augment their existing capacity at the nearby Cae Du/Cae Canol campsites (25 touring caravan pitches; 85 camping pitches) with an additional 85 pitches that can accommodate both touring caravans and camping. This additional capacity will wholly replace the losses at Beddgelert. This investment is estimated at c£0.3M. The diagram below shows the proposed site plan.



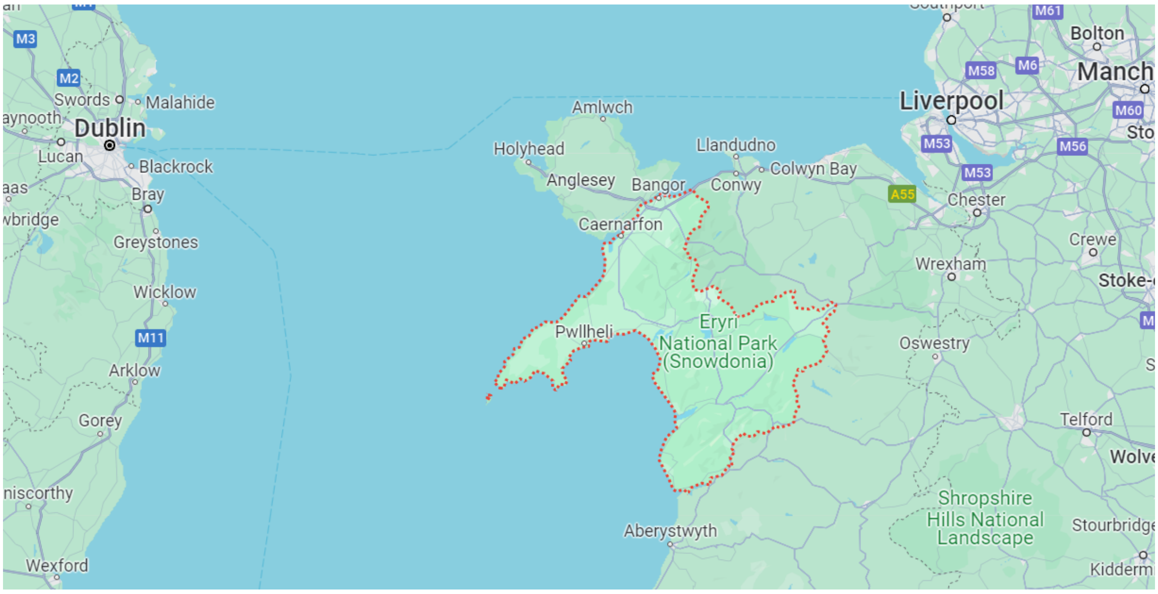
Forest Holidays and the Roberts Group have requested an economic and social impact assessment to evidence the potential benefits that the proposed development can deliver both locally (Beddgelert) and regionally (Gwynedd).

Area, partners and proposals

Gwynedd

Gwynedd is a county in the north-west of Wales. It borders Anglesey across the Menai Strait to the north, Conwy, Denbighshire, and Powys to the east, Ceredigion over the Dyfi estuary to the south, and the Irish Sea to the west. The city of Bangor is the largest settlement, and the administrative centre is Caernarfon.

Gwynedd is the second largest county in Wales but sparsely populated, with an area of 979 square miles (2,540 km^2) and a population of 117,100.[1] After Bangor (18,322), the largest settlements are Caernarfon (9,852), Bethesda (4,735), and Pwllheli (4,076). The county has the highest percentage of Welsh speakers in Wales at 64.4% of the population and is considered a heartland of the language.



The geography of Gwynedd is mountainous, with a long coastline to the west. Much of the county is within the Eryri National Park which contains Wales's highest mountain, Yr Wyddfa (Snowdon) at 3,560 feet. To the west, the Llŷn Peninsula is flatter and has a scenic coastline, part of which is protected by the Llŷn Area of Outstanding Natural Beauty. Gwynedd also contains several of Wales's largest lakes and reservoirs, including the largest, Llyn Tegid.

Parc Cenedlaethol Eryri (Eryri National Park)

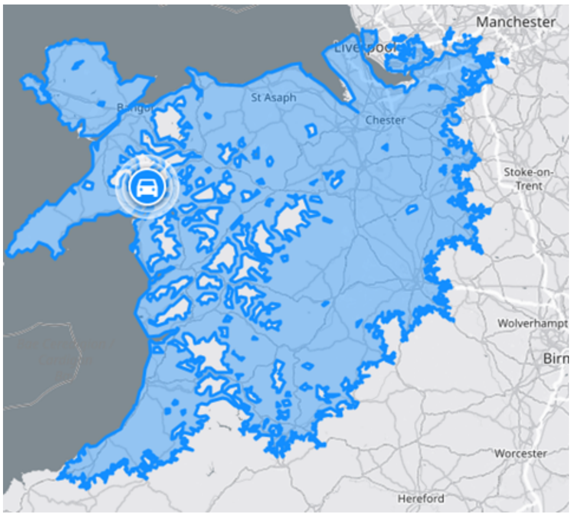
Parc Cenedlaethol Eryri was established in October 1951. It was the third national park in the United Kingdom, following the Peak District and Lake District in April and May of the same year. It covers 827 square miles (2,140 km^2) in the counties of Gwynedd and Conwy and has 37 miles (60 km) of coastline. The park is governed by the Snowdonia

[1] https://www.nomisweb.co.uk/reports/lmp/la/1946157384/report.aspx

National Park Authority which has 18 members to represent national interest: nine appointed by Gwynedd, three by Conwy, and six by the Welsh Government. c5M people are reported to visit the National Park every year. This number surged in 2020, with concerns raised about the pressure put on infrastructure and increases in anti-social behaviour; this incident has led to careful consideration as to how sustainable tourism can operate within the locale.

Beddgelert

The village is accessed via the A498 and A4095 and is located in a valley at the confluence of the River Glaslyn and the River Colwyn. Beddgelert is a key tourist location in North West Wales.[2] It offers a range of tourist accommodation; attractions (including the Welsh Highland Railway, which runs past the village); restaurants, cafes and public houses. The population of the community (2021 census) is c460 residents.



The map opposite shows the territory that can be accessed within a two-hour car journey of Beddgelert. This area includes significant conurbations in the North West of England including Chester, Liverpool and South Manchester. The population within this area is estimated at c3m individuals.

Forest Holidays

Since the mid-1970s, Forest Holidays has sensitively developed holiday destinations under the guiding principles of sustainable woodland use and the preservation of countryside and biodiversity. The business model carefully balances purpose and profit. Conservation remains at the heart of Forest Holidays' approach; they are stewards of c245 hectares of the UK's forests and maintains its forest locations for the benefit of nature and people. To date, Forest Holidays has invested over £100M in Britain's forests, increasing recreational use, improving facilities, and creating and maintaining trails. In June 2023 the organisation reported that it had secured B Corp certification, a designation that a business meets high standards of verified performance, accountability, and transparency on factors including employee benefits, charitable giving, supply chain practices and environmental impacts.

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[2] https://www.beddgelerttourism.com/

The company operates 12 sites within the national forest estate with Forestry England, Forestry and Land Scotland, and Natural Resources Wales as landlords, to whom rental is paid per cabin. Several of these sites are located within National Parks and in Areas of Outstanding Natural Beauty.

The map opposite shows the location of operations. Each site has a range of cabin types that sleep 2-10 people. Prices vary between sites and, in common with other self-catering operators, Forest Holidays' prices vary over the year, with weekend (Friday to Monday) and midweek (Monday to Friday) options available. This flexible length of stay is popular with customers.

In October 2022, the Guardian recognised the quality of experience provided to guests by listing the organisation in the top 10 woodland cabin and lodge stays. In 2024 Forest Holidays reported that they had secured a Feefo Platinum Trusted Service Award for exemplary levels of customer service provided.[3]

The organisation has achieved exceptional levels of occupancy over the past decade, typically over 95% across the whole year. This performance is delivered through a combination of high-quality accommodation in iconic locations coupled with highly effective marketing activities.[4]

Forest Holidays Beddgelert

Beddgelert, Eryri is the smallest Forest Holidays location. It currently includes 16 cabins (72 beds), and 85 caravan/camping pitches; all cabins have hot tubs and it is a pet friendly site. Welcome hampers, including locally sourced provender, are available for guests on arrival. The Forest Retreat at Beddgelert has a small shop and café; the shop provides locally sourced produce and essentials and the Bakehouse offers a limited breakfast, lunch and dinner offering and takeaway service. Local food and beverage organisations are promoted onsite.

In-lodge spa treatments are available along with a range of other bookable activities including bike hire, guided walks and backwoods adventures. In 2023 occupancy onsite was 96%. The site is currently operated by 13 FTE staff based on a 40-hour working week.

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[3] Feefo is a leading global customer reviews platform and its awards are based on guest feedback.
[4] Forest Holidays won the award for Marketing Team of the Year at the 2021 Marketing Week Masters.

The proposed expansion will provide an additional 50 bed spaces, taking the gross capacity to 863 bed spaces. The table below shows the existing and proposed cabin configuration:

Number of beds per cabin	**Existing**		**Proposed**		**Total**	
	Cabins	Beds	Cabins	Beds	Cabins	Beds
1	1	1	4	4	5	5
2	9	18	10	20	19	38
3	5	15	6	18	11	33
4	-	-	2	8	2	8
DDA	1	2	-	-	1	2
Total	**16**	**36**	**22**	**50**	**38**	**86**

The graphic opposite shows the existing and proposed cabin layout:

The Roberts Group

The Roberts Group is a family business based in Gwynedd, with a head office in Pwllheli. It is a diversified group with business interests in property, leisure, and cylinder medical and LPG gases. The organisation is committed to building an economically and socially sustainable future for the communities of Gywedd and increased use of the Welsh language.

The leisure business operates in the holiday park sector of the wider tourism industry. The company has c2,000 pitches over nine parks along with two lodge parks and two static caravan holiday parks. The nine parks can accommodate up to 11,000 people in high season. The company employs c30 full-time staff and up to 40 part-time staff during holiday season (estimated 50 FTE).

Cae Du/Cae Conal

The Roberts Group recently acquired the Cae Du/Cae Conal site; this operation had effectively been closed for five years and previously seen limited investment. The site re-opened in spring 2024.

The importance of the site to the locale is evidenced by recent research. Robinsons Brewery, which operates the three pubs in Beddgelert, confirmed that the sales of food and beverage fell c20% when the sites closed five years ago. Early indications suggest that takings are now starting to increase following the re-opening of the site.

Cae Du includes 85 pitches (70 tents and 15 tourers) with Cae Conal having 25 pitches (15 tents and 10 tourers). The planned expansion (85 multi-use pitches) will take the gross capacity to 195 pitches. From experience, the operators are confident that the site could accommodate up c600 guests at a time; an average of c3 guests per pitch.

Social impact assessment

The proposed developments have been considered against the backdrop of overtourism in the locale, the impact on the quality of life for residents and the subsequent response of public sector agencies.

Impact of overtourism in Gwynedd

"Overtourism – the phenomenon whereby certain places of interest are visited by excessive numbers of tourists, causing undesirable effects for the places and communities visited." [5]

As population movement restrictions were relaxed following the COVID-19 pandemic, the number of visitors to the main tourist destinations in Gwynedd increased significantly, placing pressure on local communities and infrastructure and resulting in tensions between residents and visitors. Issues identified during community consultation included:

- Exceptional pressures on communities and public services, including car parks, waste and recycling facilities, roads, and emergency services
- Tensions between residents and visitors driven by unprecedented visitor numbers
- Concerns around the impact of the visitor economy on language, environment, communities and culture.

Sustainable tourism

United Nations World Tourism Organisation (UNWTO) defines sustainable tourism as:

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities." [6]

UNWTO has three pillars that define sustainable tourism:

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

[5] https://channelpnu.pusan.ac.kr/news/articleView.html?idxno=34193
[6] http://www.unwto.org/sustainable-development#:~:text=%22Tourism%20that%20takes%20full%20account,the%20environment%20and%20host%20communities%22

Response to effects of overtourism

To respond to the concerns of communities and businesses to overtourism, Gwynedd Council has adopted a series of principles to enable the sector to develop sustainably. These are aligned to the three pillars described by UNWTO. Methods for delivering sustainable tourism are described in the Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035 and the associated Action Plan (both adopted in November 2021).[7]

The core principles of the plan are to:

- *Celebrate, Respect and Protect our Communities, Language, Culture and Heritage*
- *Maintain and Respect our Environment*
- *Ensure that the advantages for Gwynedd and Eryri's communities outweigh any disadvantages*

The Gwynedd and Eryri Sustainable Visitor Economy 2035: Strategic Plan requires developments to:

- Be sensitively located and promote outdoor activities
- Be designed to minimise environmental impacts during construction and operations
- Be located on existing tourism sites
- Provide year-round employment
- Support local supply chains through the purchase of local goods and services

Looking forward, the tourism offering will be centred on:

- Outdoor adventure tourism
- History and heritage, including UNESCO World Heritage site
- Culture and language.

Research has found recent evidence as to how this policy is impacting on planning applications. In May 2024, the Eryri National Park Authority's planning and access committee rejected an application from Sunbeach Holiday Park, based at Llwyngwril. to expand their existing park and deliver increased economic benefits. The application was rejected on multiple counts including limited alignment with the principles described in the Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035, a lack of technical documentation, and a lack of support from the local community.

[7] https://www.visitsnowdonia.info/gwynedd-and-eryri-sustainable-visitor-economy-2035

Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035

The table below shows how the proposed developments align with the spirit and specific objectives described in the Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035. The proposed developments will produce economic benefits, but critically do not sacrifice social and environmental wellbeing to achieve fiscal targets.

Celebrate, Respect and Protect our Communities, Language, Culture and Heritage	Forest Holidays	Roberts Group
A visitor economy in the ownership of our communities with an emphasis on pride in one's area.	Forest Holidays has provided year-round employment in the locale for c8 years. The organisation is a respected member of the local community.	The company is headquartered in Gwynedd with operations centred in North Wales. Through diversified operations, employment is provided to over 70 residents annually. The company actively promotes the Welsh language and is committed to ensuring the ongoing viability of communities in North Wales.
A visitor economy that leads in heritage, language, culture and the outdoors.	The company has an ongoing commitment to making outdoor and adventure tourism accessible to the wider population and to educating and enthusing guests to enjoy the outdoors and active tourism.	The company aims to provide cost effective accommodation to visitors looking to enjoy the heritage, language, culture and outdoors of Gwynedd and wider North Wales.

Maintain and Respect our Environment	Forest Holidays	Roberts Group
A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on our environment today and in the future.	This is a limited development that can be accommodated within Gwynedd's wider tourism sector. The company operates sustainably, as recognised through B Corp certification. All developments will comply with latest environmental requirements.	This is a limited development that can be accommodated within Gwynedd's wider tourism sector. All developments will comply with latest environmental requirements.
A visitor economy that leads in sustainable and low carbon developments and infrastructure.	Developments are planned within the footprint of existing sites. Cabin designs minimise energy usage to reduce emissions.	Developments are planned within the footprint of existing sites.

Ensure that the advantages for Gwynedd and Eryri's communities outweigh any disadvantages	Forest Holidays	Roberts Group
A visitor economy ensuring that infrastructure and resources contribute towards the wellbeing of the community all year round.	The development will increase year-round employment in the locale.	The development will increase year-round employment in the locale.
A visitor economy that thrives for the well-being of Gwynedd and Eryri's residents and businesses and that offers quality employment opportunities for local people all year round.	The development will increase year-round employment in the locale.	The development will increase year-round employment in the locale.
A visitor economy that promotes local ownership and supports local supply chains and produce.	The company has an ongoing commitment to using and promoting local food, drink and services across its whole estate.	The re-opening of the sites has already seen increases in trade in the local food and beverage establishments.

Economic impact assessment

Demographics and employment[8]

Note: There is no specific published information for Beddgelert. The following information relates to Gwynedd – we assume that these characteristics can be ascribed to Beddgelert.

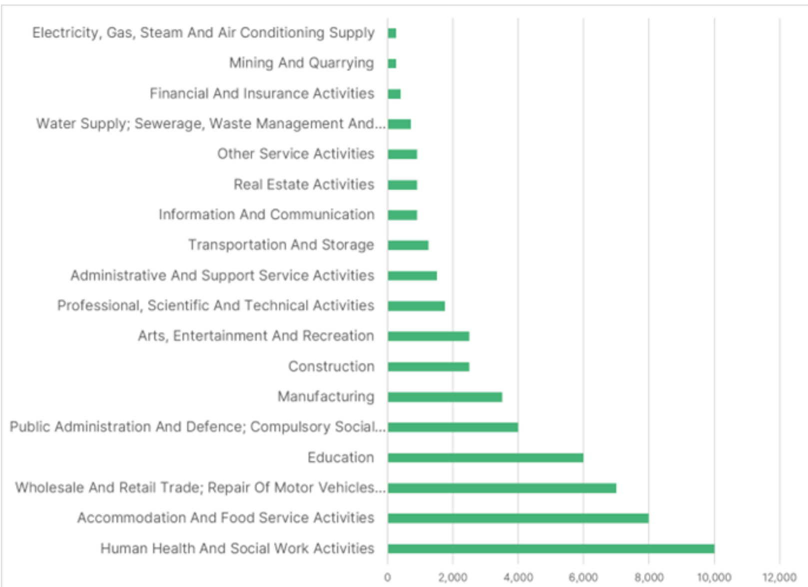
The most recent census data shows that the population size in Gwynedd has decreased by 3.7%, from around 121,900 in 2011 to 117,400 in 2021. The total population of Wales grew by 1.4%, increasing by 44,000 to 3,107,500. The population is aging. There has been an increase of 8.6% in people aged 65 years and over, a decrease of 6.8% in people aged 15 to 64 years, and a decrease of 8.2% in children aged under 15 years.

In summary, the area faces the challenges of many other rural communities with an aging, shrinking population.

Economy and employment

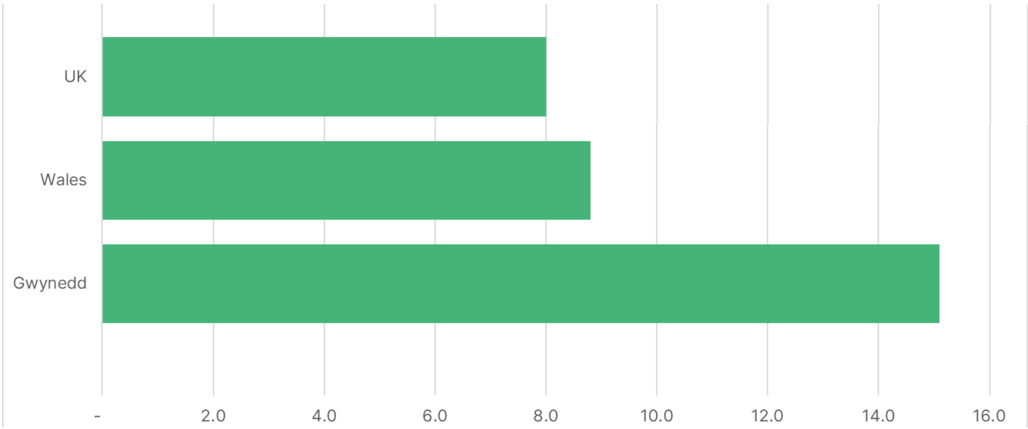
Economy

Gwynedd has a mixed economy; the graph below shows the profile of employment by sector in Gwynedd. This evidences the importance of the Accommodation and Food Service sector as the most significant private sector employer.



The following analysis shows the percentage of jobs in the Accommodation and Food Service sector compared to total jobs at the Gwynedd, Wales and UK levels.[9]

[8] https://www.nomisweb.co.uk/reports/lmp/la/1946157384/report.aspx
[9] https://www.nomisweb.co.uk/reports/lmp/la/1946157384/report.aspx#tabjobs



Agriculture, whilst less important than in the past, remains an important element of the economy. Creative industries have developed more recently (including TV and sound studios). The education sector has emerged in recent decades with the county being home to Bangor University and Further Education colleges: Coleg Meirion-Dwyfor and Coleg Menai, both now part of Grŵp Llandrillo Menai.

Employment

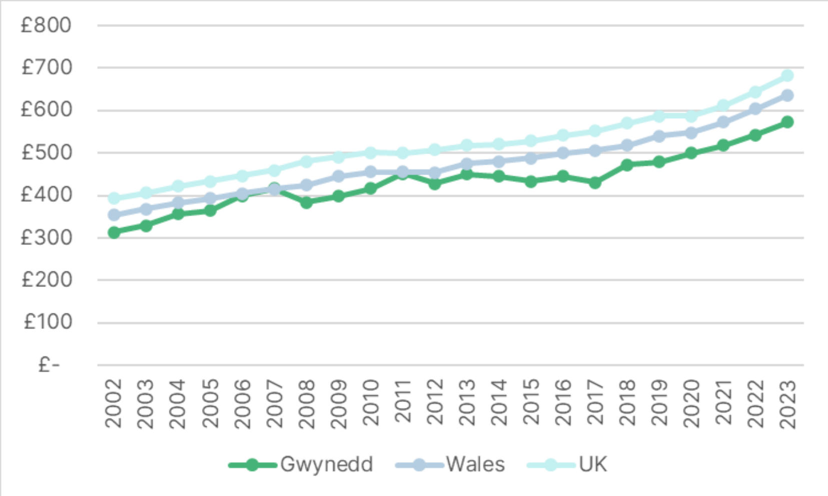
The working age population (16-64) is 70,300 (2021: 60%). As a percentage of the population, this is lower that Welsh (61%) and UK (63%) norms.

Further analysis of the working age population shows:

- 58,600 individuals are in employment (77.4% of working age population). This is broadly comparable to Wales and UK norms
- Of those in employment, 9,900 are self-employed (11.6% of working age population). This is higher than norms for Wales and the UK
- Levels of part-time working are higher in Gwynedd (41.5% of all jobs) than at the Welsh (34.6%) and UK (31.2%) levels
- Rates of unemployment (3.5%) are comparable with Wales and the UK
- The percentage of the working age population in most senior management posts is lower in Gwynedd (40.9%) than norms in Wales (47.2%) and the UK (52.9%)
- The percentage of the working age population in elementary occupations is higher in Gwynedd (23.4%) than norms in Wales (16.8%) and the UK (14.6%)

This profile of employment contributes to the earnings in the territory. The following graph shows weekly earnings over the period 2002 to 2023.[10]

[10] https://www.nomisweb.co.uk/reports/lmp/la/1946157384/subreports/asher_time_series/report.aspx?



Analysis indicates that earnings in the territory have lagged behind norms in Wales by c8% and the UK by 15%.

Tourism sector

National

Tourism is a core industry in Wales. A report published by the Senedd noted:

> " *Tourism is more important to the economy in Wales than to any other part of the UK, accounting for 4.9% of its economic output (the UK average tourism ratio is 3.7%). West Wales and the Valleys exhibit the highest tourism ratio at 5.7%.*
>
> *"Wales has some of the UK's most tourism-dependent local authorities, including Anglesey, Gwynedd, Conwy & Denbighshire, Powys, and South-West Wales.*
>
> *"Tourism's contribution to the wider Welsh economy is £6.9bn Gross Value Added (GVA) and it supports almost a quarter of a million FTE jobs."* [11]

Key findings highlighted in the report include:

- The visitor economy is vital to the growth of the Welsh economy and to the wellbeing of its communities
- Wales is well placed to grow experiential, immersive, authentic, adventurous travel
- More funding is needed to enable Wales to compete effectively and realise its potential on the international stage.

[11] https://business.senedd.wales/documents/s65701/EIS5-20-17%20p2%20Professor%20Annette%20Pritchard.html?CT=2

Gwynedd

Value, employment and visitors

The tourism industry is a key employer in Gwynedd. Prior to the COVID-19 pandemic, the economic value of the sector was estimated at c£1.4B, with c18,200 people working in the field.[12] As with the rest of the UK, the visitor economy was significantly impacted by the pandemic with businesses being closed for substantial periods and events cancelled. The value of the sector in 2020 dropped to £575M and employment fell to 9,570. The latest STEAM data report for 2022[13] evidences that the sector has largely returned to pre-pandemic levels. Gwynedd Council produces a succinct summary of metrics on the sector (all data 2022):[14]

- Value to the economy (income) — £1.5B (+23% on 2021)
- Number of FTE jobs — 17,737 (+21% on 2021)
- Number of visitors — 7.9M (+33% on 2021)
  - Number of day visitors — 3.8M (+24% on 2021)
  - Number of staying visitors — 4.1M (+43% on 2021)
- Number of overnight stays — 20.4M (+32% on 2021)
- Average visit duration — 5.0 nights

The table below shows the profile of employment and value by income type in the tourism sector in Gwynedd (all data 2022).[15]

Activity	Value to the Gwynedd economy (£M)	FTE	Value to the economy per employee (£K)
Accommodation	262.6	5,875	
Food & Drink	216.4	3,400	
Recreation	75.9	1,103	
Shopping	282.3	3,335	
Transport	100.3	572	
Direct	*937.4*		
VAT	*181.6*		
Indirect and induced	*404.4*	*3,453*	
Total	**1,523.4**	**17,737**	**85.9**

[12] This is the second highest concentration of such jobs in England and Wales by resident population (15%).
[13] https://www.visitsnowdonia.info/research
[14] https://www.visitsnowdonia.info/sites/default/files/2024-01/GWN%20Basic%20ES%2022%2C%2021%2C%2019vs%2021%2C%2019%20vs%2022.pdf
[15] STEAM 2022 Excel file: https://www.visitsnowdonia.info/research

Converting the value per employee from 2022 values to 2024 using HMRC deflator information,[16] we estimate the value to the economy per FTE is now **£93.5K**.

Occupancy

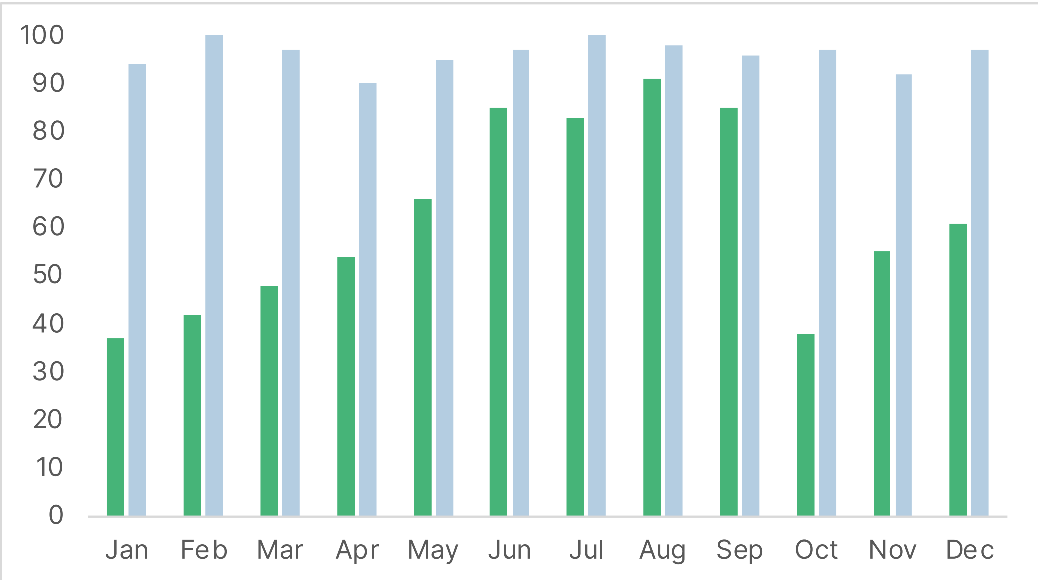
The latest available full year sector data on occupancy is from 2022.[17] Data is only available at the North Wales level; we are using this information as a proxy for Gwynedd and Beddgelert.

Self-catering sector

At a regional level, the achieved self-catering average occupancies reported by the Welsh Government for 2019-2022 are as follows:[18]

Location	2019	2020	2021	2022
North	64	54	68	66
Mid	52	52	46	52
South East	48	57		51
South West	57	52	61	59
Wales	57	52	61	62

The graph below shows the monthly profile of occupancy of self-catering establishments in Wales against achieved performance of Forest Holidays Beddgelert:



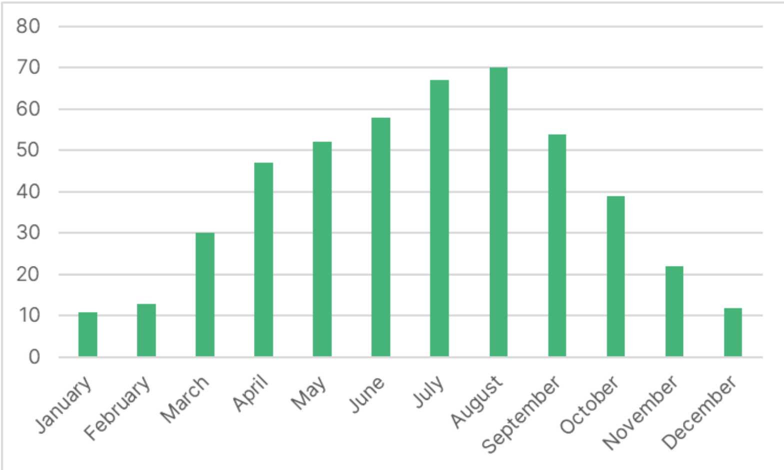
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
North Wales	37	42	48	54	66	85	83	91	85	38	55	61
Beddgelert	94	100	97	90	95	97	100	98	96	97	92	97

16 https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-march-2024-budget-2024
17 https://www.gov.wales/wales-tourism-accommodation-occupancy-surveys-april-june-2023
18 https://www.gov.wales/wales-tourism-accommodation-occupancy-surveys-april-june-2023

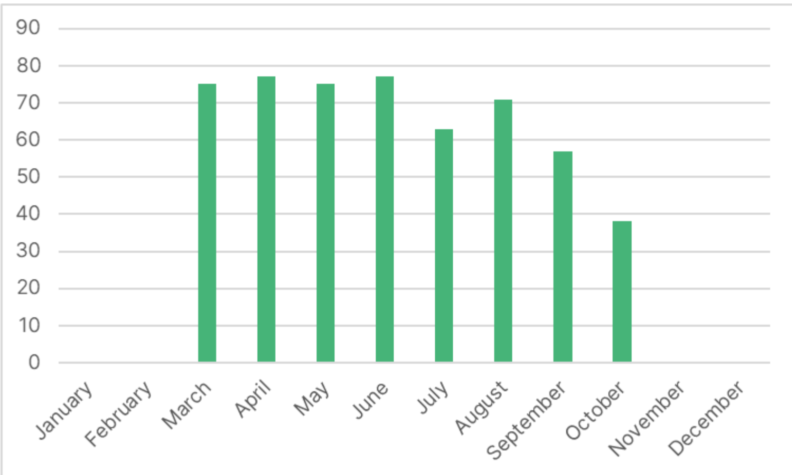
Given that North Wales has outperformed each of the Welsh regions in the recent past, we expect their monthly occupancy performance to be higher than the national norms, however the reported occupancy performance of Beddgelert at 96% in 2022 is significantly ahead of regional norms.

Caravan and camping

A major UK study published in 2019[19] noted that most holiday parks/campsites in the UK (58%) operated seasonally, with 42% open all year round. Most seasonal sites (69%) are open from late March to the end of October. The following graph shows the profile of reported occupancy across the sector by month for the UK.



The Wales Accommodation Occupancy Survey[20] noted that, due to seasonal opening times, there is only partial data available on occupancy performance for the caravan and camping sector. Their published data for 2023 compared favourably with 2022. The graph below summarises reported national performance for 2023.



[19] https://britishdestinations.files.wordpress.com/2019/04/2019-economic-benefits-report-holiday-parks-and-campsites-uk-final-report.pdf
[20] https://northwalestourism.com/research-strategies/wales-tourism-accommodation-occupancy-surveys-july-to-september-2023/

Whist comparison cannot be absolute, the data indicates the Welsh element of the camping and caravanning sector is performing better than other areas of the UK.

Availability of holiday accommodation

The Welsh Government publishes information on the number of tourism accommodation establishments and bed spaces in Wales. We recognise that the accommodation bed stock picture is constantly changing as establishments open or close, expand or contract, upgrade or diversify, however – given the sample size – these values remain statistically valid.

The table below shows the typical number of bed spaces per accommodation type at the national and regional levels.[21]

Type	Serviced	Self-catering	Caravan and camping	Hostel	Alternative
Establishments[22]					
Wales	2,582	12,145	1,434	244	195
Gwynedd	345	3,165	366	52	24
Bed spaces[23]					
Wales	70,585	78,510	434,286	19,413	2,417
Gwynedd	6,387	18,444	108,482	2,737	506
Typical bed spaces per establishment					
Wales	27	6	303	80	12
Gwynedd	19	6	296	53	21

This analysis indicates that self-catering establishments (nationally and in Gwynedd) are predominantly smaller entities and that caravan and camping sites are large entities, potentially providing a range of visitor services and experiences.

Accommodation, self-catering, camping and caravaning

In establishing the direct competition to the Forest Holidays and Roberts Group proposals, we have sampled the market to identify comparable properties within Gwynedd.

[21] https://www.gov.wales/summary-wales-bedstock-data-situation-june-2022-html#:~:text=A%20total%20of%20605%2C211%20visitor,%25)%20were%20in%20serviced%20accommodation
[22] An individual site on which visitor accommodation is provided i.e. hotels, campsites, self-catering complexes or individual self-catering cottages.
[23] The maximum capacity of a unit, pitch or room for adults staying overnight i.e. a double bed is two bedspaces.

Forest Holidays

Analysis indicates that c30% of self-catering properties in Gwynedd could be of interest to potential Forest Holidays clients (950 establishments, 5,500 bedspaces); these properties achieve a minimum 4-star rating and have positive client reviews.

The bulk of the properties identified are standalone cottages in rural locations. These are a different offer to the integrated green tourism product of Forest Holidays which combines high-quality accommodation and visitor services in a woodland setting.

The proposed development will create an additional 50 bedspaces competing against the 5,500 existing operations. At the gross level of 86 bedspaces this is a potential displacement of c1.5% at the Gwynedd level. This is lower than the 3.0% reported in a 2016 demand study,[24] however for prudence we have maintained displacement at 3.0% at the Gwynedd level; there could be higher levels of displacement at the Beddgelert levels, but this again would be minimal at c5% of the available offer. Specific considerations in reaching this conclusion include:

- The popularity of the Beddgelert locale as a visitor destination
- The ongoing interest in self-catering holidays in rural locations
- The limited scale of the proposed Beddgelert development
- The uniqueness of the offer in the locale
- The loyalty of Forest Holiday clients
- The scale of the self-catering market in Gwynedd
- The effectiveness of Forest Holidays' targeted marketing activity.[25]

Displacement at the Welsh level will be nil.

The Roberts Group

The graphic shows the location of campsites across Gwynedd.

[24] Steve Westbrook (2016) Beddgelert development proposal: Demand and economic benefit assessment for Forest Holidays

[25] https://www.marketingweek.com/masters-awards-forest-holidays/

These sites are estimated to provide c108,000 bedspaces for visitors. The planned expansion of the Cae Du/Canol campsite wholly replaces the spaces being disposed of to construct additional cabins on the Forest Holidays site. It is possible that the newer facilities may attract guests from other sites, however displacement is considered zero given:

- The growing attractiveness of camping due to cost-of-living pressures
- The popularity of the National Park and Beddgelert as visitor destinations
- The limited scale of the proposed Beddgelert development.

The market

Travel and tourism contribute significantly to the economy of the UK. In 2022, the total contribution of travel and tourism to the UK's GDP was £237B. While this figure is 4.6% lower than in 2019, it represents an ongoing recovery from the effects of the COVID-19 pandemic on the travel and tourism industries. In terms of distribution of travel and tourism spending in the UK, leisure spending constituted the dominant share, with business spending declining. For 2023, the Office of National Statistics reported that:[26]

- Overseas residents' visits to the UK and UK residents' visits abroad remain lower than pre-COVID-19 pandemic levels from 2019; however, spending was higher in 2023 than in 2019 for both groups
- Overseas residents made 38.0M visits to the UK in 2023; this was higher than in 2022 (31.2M)
- Overseas residents spent £31.1B on their visits to the UK in 2023; this was an increase of £4.6B compared with visits in 2022.

VisitBritain forecasts 39.5M visits and £34.1B spend in 2024, 97% and 120% of the 2019 levels respectively, although spend would be 96% of the 2019 level (when adjusted for inflation). Compared to 2023, this would represent growth of 5% in visits and 7% in nominal spend (4% in real spend).[27]

Domestic tourism – UK

The value of UK domestic tourism peaked in 2019 at c£92B (£25B overnight, £67B day trips). Despite the recovery from a low point of £34B in 2020, the UK Domestic Tourism Market Report 2023 reports that the Domestic Tourism market in the UK faces challenges on two fronts including the cost-of-living crisis affecting consumer finance,

[26] https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2023
[27] https://www.visitbritain.org/visitbritain-publishes-inbound-tourism-forecast-2024

and the strong bounce-back in overseas holidays post-pandemic.[28] The report provides insight into why the overnight sector of the market could be more resilient:

- Concern over climate-related travel disruption
- Two-thirds of domestic holidaymakers with children under 12 preferring destinations less than three hours from home
- Lower travel costs achieved by holidaying nearer to home.

In April 2024 VisitEngland, VisitScotland and Visit Wales published research to understand the UK public's intent to take overnight trips, both within the UK and abroad.[29] In summary:

- Overnight domestic trip intentions were on par with levels anticipated in April 2023. 78% are planning a domestic trip in the next 12 months compared to 77% a year earlier
- For overnight overseas trips, intentions are above 2023 levels; 60% are planning an overseas trip in the next 12 months compared to 57% a year earlier
- The barriers to taking a UK overnight trip in the next six months are the rising cost-of-living, UK weather, and personal finances.

Domestic tourism - Wales

The UK Tourism Consumer Tracker Survey: Wales profile report 2024[30] reports:

- The composition of the Wales trip intender appears different to 2023. In 2024, they are more likely to be families and from outside of Wales – the proportion of Wales residents planning an overnight trip in Wales has declined
- Consistent with 2023 and previous years, Wales overnight intenders have more limited financial means than intenders to other UK destinations – Wales attracting the second highest proportion of visitors 'hit hard' or 'being cautious and careful' as a result of the cost-of-living crisis
- Wales trip intenders in 2024 are most likely to be motivated by a Wales trip 'to get away from it all and have a rest' and 'family time with my partner'. Notably, the motivation 'to connect with nature/be outdoors' amongst Wales trip intenders has increased since 2023 (an increase that has not occurred across the UK)

[28] https://store.mintel.com/report/uk-domestic-tourism-market-report
[29] https://www.visitbritain.org/research-insights/domestic-sentiment-tracker. Based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales. Fieldwork conducted 2-8 April 2024.
[30] https://www.gov.wales/sites/default/files/statistics-and-research/2024-03/uk-tourism-consumer-tracker-survey-wales-profile-report-2024-spring-and-summer-2024-december-to-january-fieldwork.pdf

- The most popular intended activities for Wales trip intenders are 'walking, hiking or rambling', 'trying local food and drink' and 'visiting heritage sites' – the latter two increasing since 2023 (and not increasing across the UK)
- Wales trip intenders are most likely to anticipate their overnight trip being in a 'traditional seaside town' or a 'countryside or village' – both higher than in 2023. 'Rural coastline' and 'mountains or hills' are also popular; the latter is higher than across the UK. Intention to take a trip to a 'city or large town' is lower than in 2023, and much lower than across the UK
- Consistent with previous reporting, Snowdonia is the most intended destination for an overnight trip in Wales
- Consistent with 2023, Wales trip intenders are more likely to be planning a longer trip of 4+ nights than a short break. This is a difference to all UK trips, which are more balanced towards shorter breaks, driven by a higher interest in city breaks. Notably, UK trips are set to be shorter than in 2023 – a shift that has not occurred for trips to Wales. Wales relative resilience in trip length could be driven by perceptions as a good-value destination.

Wider tourism sector trends

Staycations and short-let accommodation

A survey by RSM UK found that c10% of consumers planned to cut back on short stay trips in 2023.[31] When compared to other luxuries – such as eating and drinking out where over a third (36%) plan to cut back – this survey highlights that travel remains a priority. Sykes Cottages, one of the largest providers of short breaks, reports an 8% increase in bookings for 2024 over 2023.[32] Their most popular destinations being Northumberland and Cumbria indicates that rural and coastal destinations continue to have sustained interest and appeal.[33]

The popularity of short break holidays can have negative impacts. A report published by Gwynedd Council highlighted the relationship between the areas of highest short-let accommodation density and second home ownership and the inability of local people to purchase homes in these popular holiday destinations.[34]

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31 https://www.rsmuk.com/insights/consumer-markets-outlook-2023/travel-and-tourism#:~:text=Staying%20in%20the%20UK%20is,go%20on%20holiday%20this%20year
32 https://www.sykescottages.co.uk/letyourcottage/advice/article/holiday-letting-outlook-report-2024
33 https://www.rsmuk.com/news/uk-families-shun-the-staycation-in-2024#:~:text=04%20January%202024&text=A%20survey%20of%201%2C000%20consumers,and%2035%25%20respectively%20last%20year
34 https://democracy.gwynedd.llyw.cymru/documents/s27960/Item%208%20-%20Report%20Holiday%20Homes.pdf

The construction of dedicated infrastructure that specialise on facilitating short breaks, without impacting on housing stocks, can alleviate these pressures.

Health and wellbeing

Long working hours and increased pressures on individuals' time have led to a rising interest in wellness tourism with a global trend towards seeking a balanced, active, and healthier lifestyle to address physical and mental health challenges. The global wellness tourism market was valued at $476B in 2022, and it is predicted to reach around $1T by 2030. Visitors are actively seeking locations that prioritise their health and relaxation. The proposed developments align with these trends by providing a natural setting, relaxation facilities, and access to activity experiences.

Outdoor recreation and adventure tourism

Outdoor and adventure tourism, which includes physical activity, cultural exchange, and activities in nature, has gained popularity. The Active Lives Survey undertaken by Sport England[35] indicates that over half of the population in England engages in regular outdoor activities such as walking and cycling. All of these activities are readily available in the locale.

Camping

The camping sector has historically performed well during economic downturns, with these trips becoming popular alternatives to more expensive trips. The COVID-19 pandemic brought new dynamics to the camping sector, attracting new entrants including families and creating demand for higher-quality experiences.[36]

Sustainability and social responsibility

Consumers are increasingly conscious of the environmental and social impacts of their choices. Sustainability has become a significant factor in decision-making, including travel choices. Travellers are actively seeking sustainable options and eco-friendly accommodation. Forest Holidays has secured B Corp certification to evidence the validity of their socially sustainable operating model.

The low carbon and eco-friendly approach of the developments align well with this growing client requirement.

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[35] https://sportengland-production-files.s3.eu-west-2.amazonaws.com/s3fs-public/2024-04/Active%20Lives%20Adult%20Survey%20November%202022-23%20Report.pdf?VersionId=veYJTP_2n55UdOmX3PAXH7dJr1GA24vs

[36] https://www.mintel.com/press-centre/carry-on-camping-4-5-million-brits-took-their-first-camping-holiday-during-the-pandemic/#:~:text=Our%20research%20shows%20that%20'low,of%20domestic%20camping%20and%20caravanning

Conclusions

- The tourism market has yet to fully recover from the COVID-19 pandemic
- The sector in the UK needs to provide compelling offers to maximise the value of income from UK residents
- The offer proposed by Forest Holidays and the Roberts Group aligns to trends particularly in the short stay, family and activity tourism spaces
- Value for money will be a determinant for a significant proportion of the population on their holiday and short break choices.

We would expect the proposed developments to be attractive to a diverse and significant number of visitors predominantly from the North West of England area.

Calculation of impacts

Scope

Note: All impacts and costs are reported at 2024 values. Figures have been rounded to whole numbers/one decimal place throughout this report. As a result, totalled figures may not be the sum of provided numbers.

The impacts estimated in this report are additional (i.e. net of displacement) within Gwynedd. This means that any trade that might have been transferred from other businesses in the county (that would have benefitted from their spending had visitors not been in Gwynedd during the day or locally overnight) is netted out.

In the wider area (e.g. in and around North Wales) there could be negative impacts where people spend time at Beddgelert rather than in alternate locations, offset by positive impacts where new visitors to Beddgelert subsequently spend time and money in these places during their holiday or en route.

Given that only additional impacts will be considered, the study will be limited to consideration of:

- Construction of 22 lodges (108 bed spaces) by Forest Holidays
- The loss of 85 camping/caravaning pitches by Forest Holidays
- Expansion of the Cae Du/Cae Conal site with the development of 85 camping and caravaning pitches.

Sources of information

All outputs and impacts in this report have been calculated using the latest published data. This includes information provided through:

- The Construction Industry in Wales: Careers Wales LMI Bulletin November 2022
- Official Census and Labour Market Statistics, Nomis
- 2024 Tourism Forecast, VisitBritain
- Data provided from published surveys and via STEAM reports
- Operational data provided by Forest Holidays and the Roberts Group
- UK Government Input/Output tables.

Direct, indirect and induced impacts

The direct effects from the capital spending and subsequent recruitment creates additional activity in the local economy. Indirect effects are the results of business-to-business transactions indirectly related to the direct effects. Businesses initially benefiting from the direct effects will subsequently increase spending on other local business supplies. Induced effects are the results of increased personal income caused by the direct and indirect effects. Businesses experiencing increased revenue from the direct and indirect effects may subsequently increase payroll expenditures (by hiring more employees, increasing payroll hours, raising salaries, etc.). Households will, in turn, increase spending with local businesses. The induced effect is a measure of this increase in household-to-business activity.

Full-time equivalent posts

In this economic impact analysis, an FTE is regarded as a full-time equivalent job year; we have assumed 40 hours per week. Conventionally, an FTE can be assumed to last for an average of at least ten years – although, in this case, new job duration should generally be much longer than this, given the operating models of the organisations involved in the development.

Gross v net impacts

In completing this work, we have adopted an output-based approach, exploring and quantifying the effects and impacts of expenditure. In calculating economic impacts, we have initially calculated the gross effect of the expenditure and then calculated the additional (net) impacts recognising deadweight, displacement and leakage.

Deadweight, displacement and leakage

Deadweight: The concept of deadweight loss can be applied to any deficiency that is caused by the inefficient allocation of resources. Potential causes of deadweight loss include taxation, price ceilings (such as rent controls and price controls) and price floors (such as living wage and minimum wage laws). We have not identified any situation in this study where a deadweight adjustment needs to be made.

Displacement: This is where new activity takes a share of resources (market or labour) from other organisations. The scale of displacement effects vary depending on the nature of activity supported and local markets. For example, if the supported activity has few local competitors then the level of product market displacement will be low. When considering the labour effects, an intervention may result in demand for skilled staff, which could be in short supply and result in delays to a range of initiatives.

In the absence of empirical evidence, guidance on expected levels of displacement is provided by the UK Government:[37]

Level	Description	Impact
None	No other entities impacted	0%
Low	There is expected to be some limited effect in the locale	25%
Medium	There is expected to be a noticeable effect in the locale	50%
High	There will be a substantial (scale/duration) effect in the locale	75%
Total	All activity generated will be displaced	100%

Leakage: This is the proportion of outputs that benefit those outside of the intervention's target area or group. In the absence of empirical evidence, guidance on expected levels of leakage is provided by the UK Government:

Level	Description	Impact
None	All the benefits go to people living in the target area	0%
Low	The majority of benefits go to people living in the target area	10%
Medium	A reasonable proportion of benefits realised in the target area	25%
High	Many of the benefits will be realised outside the target area	50%
Very high	Most benefits will be realised outside the target area	75%
Total	All benefits will be realised outside of the target area	100%

37 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/191511/Additionality_Guide_0.pdf

Construction

Gross impacts: Forest Holidays and Roberts Group

The development cost of construction of an additional 22 cabins and associated camping and caravaning infrastructure is currently estimated at £8.4M (£8.1M Forest Holidays; £0.3M Roberts Group). Using published metrics, we estimate this construction activity could create a gross one-off benefit at the UK level of c120 FTE years of direct, indirect and induced employment.[38] We estimate the direct element of this at 67 FTE with 53 FTE roles realised in the supply chain and in the wider economy.

Displacement

Review of the latest labour market intelligence highlights that despite some easing in the labour market, the construction industry in Wales is facing skills shortages that are impacting its growth. Key areas experiencing these shortages include bricklayers and quantity surveyors. c67% of construction firms surveyed reported a lack of quantity surveyors with 61% needing more bricklayers.[39]

CITB's Construction Skills Network (CSN) 2024-28 report[40] reveals that in Wales, more construction workers left the industry in 2023 than joined. The report shows that in Wales construction output is set to rise by 1.2% annually between now and 2028 with initial demand in repair and maintenance. Future opportunities are expected to arise in new work across public non-housing, public housing and private housing. Large scale projects include:

- The Awel y Môr wind farm project off the coast of Llandudno
- The £590M Dowlais Top to Hirwaun section of the A465 Heads of the Valley Road
- The £360M development on the Embankment site in south Cardiff
- The University of South Wales' new academic building at its Treforest Campus.

A total of 11,000 extra workers, or 2,200 a year, will be needed to meet the continued construction growth expected over the next five years. Efforts are being made to address these shortages, such as the establishment of the AccXel Construction Skills Accelerator Centre. This facility aims to inspire and train new entrants into the industry, providing both practical and technological education to create a skilled workforce ready to meet modern construction demands.

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[38] [£8.4M x estimated employment effect @ 14.240 FTE per £1M expenditure)
[39] https://businessnewswales.com/wales-needs-11000-more-construction-workers-to-meet-future-demand/#:~:text=Wales%20will%20need%20an%20extra,available%20to%20meet%20the%20challenge
[40] https://www.citb.co.uk/about-citb/construction-industry-research-reports/construction-skills-network-csn

Net impacts

In Gwynedd, Nomis reports that there are c2,500 individuals employed in the construction sector. We would expect most work to be delivered by local sub-contractors working in and around the Gwynedd area. Assuming that all construction activity is delivered by the sector in Gwynedd in one year, this is a potential displacement of 2.7% (67 FTE/2,500 FTE). For prudence we have assumed 5.0% at the Gwynedd level to recognise the ongoing challenges that the sector is facing.

We have allowed 10% losses due to leakage as a result of specialist contractors and equipment being required that cannot be sourced locally.

Given these assumptions, we estimate the construction phase could create a one-off benefit of 57 direct FTE roles, with 46 indirect and induced roles. **This is a total one-off net impact of 103 FTE years of direct, indirect and induced employment**.

Onsite

Gross onsite employment impacts – Forest Holidays

Despite the loss of the camping activity, the increase in lodge accommodation will see staffing at Forest Holidays increase by 16 additional part-time staff and one additional full-time staff. This equates to nine new FTE posts, raising the gross complement to 22 FTE posts.

Forest Holidays makes purchases of high-quality local produce both in its catering operations and in welcome packs. For experience of other Forest Holidays operations, we estimate that this activity, coupled with wider economic benefits in the locale, will deliver a further 2.0 indirect and induced posts.[41] In summary, the expanded Forest Holidays development is expected to create 11.0 FTE posts in the first year of operation.

Gross onsite employment impacts – Roberts Group

The Roberts Group plans to expand their site at Cae Du and Cae Conal by 85 pitches. This will facilitate the recruitment of two part-time wardens and one full-time administrator (an estimated 2 FTE). Once fully established, it is estimated that the staffing onsite will be seven FTE posts including:

- Two full-time managers living onsite
- One full-time grounds
- Six part-time wardens
- One office administrator.

[41] Type II employment multiplier direct to direct, indirect and induced calculated at 1.240

The recruitment of an additional two FTE posts will have impacts in the wider economy with 0.5 additional indirect and induced posts created.[42] This is a total of 2.5 direct, indirect and induced posts associated with the expansion.

Gross onsite employment impacts – summary

The total increase in employment associated with the proposed developments is 13.5 direct, indirect and induced FTE posts (11 Forest Holidays, 2.5 Roberts Group).

Net onsite employment impacts – summary

The gross employment gain across both developments is 13.5 FTE. The new roles could be of most interest to those that live closest to Beddgelert sites; on this basis we have assumed employment leakage at the Gwynedd level at zero.

The population of Beddgelert is 460. Utilising data provided by Nomis we estimate that c50 residents in the village could work in the tourism sector; the new roles could be of interest to those working in less secure employment. Given this analysis we estimate the employment displacement at the Beddgelert level could be between 20 and 25% [(9 direct FTE Forest Holidays + 2 direct FTE Roberts Group) / 50 FTE = 22%].

In the wider Gwynedd area, the total number of jobs in the Accommodation and Food sector is estimated at 8,000 jobs. This provides a displacement value of 0.1% and is assumed to be nil. Given this scenario we would expect any displacement at the Beddgelert level to be backfilled by individuals:

- Moving to more attractive employment from within the sector
- Entering the sector from being out of work or from school leavers.

Based on this analysis, the net impact on onsite employment (FTEs) at the Gwynedd level is:

Onsite employment	Forest Holidays	Roberts Group	Summary
Gross direct, indirect and induced employment	11.0	2.5	13.5
Displacement – market	3.0%	Nil	
Displacement – labour	Nil	Nil	
Net direct, indirect and induced employment	*10.7*	*2.5*	*13.2*

[42] Type II eemployment multiplier direct to direct, indirect and induced calculated at 1.240

Offsite

Gross offsite employment impacts – camping

The transfer of the camping pitches from Forest Holidays to the Roberts Group ensures that economic impacts associated with this activity are not lost in the locale. We have adopted a counterfactual methodology that quantifies the negative impact on the local economy if this activity does not proceed.

Operational information provided by the Robert Group shows that recent visitors per pitch per night is calculated at 2.1. Using this ratio, the extended site could welcome an additional c180 guests per night. Using the most recent occupancy data provided by the Welsh Government the expansion could see an additional 29,000 visitors be welcomed to the site across the full year.

Analysis of data by Kantar[43] stated that in 2019 the average spend per camper per night on off-site activities in England and Wales (Food and Beverage, Entertainment and Shopping) was £27.25. Adjusting to 2024 values (using HMRC deflator indices), we estimate this value at £32.57 excluding accommodation and transport costs.

Other research has indicated that visitors to Wales spend at a lower rate than in other parts of the UK. This is evidenced by data provided by Global Tourism Solutions, with analysis that visitors to Gwynedd in 2022 spent £574.6M on Food and Beverage, Entertainment and Shopping. With 28.2M visitor days in 2022 (24.3M overnight stays + 2.9M day visits) this is an average expenditure of £20.35 per day. Converting this to 2024 values using HMRC deflator information, this is a value of £24.33 per visitor per day in the wider economy. Using this value we estimate that the new camping/caravaning facility could generate c£705K per annum of benefits in the locale (29,000 x £24.33). Using the previously calculated value of £93.5K per tourism FTE in Gwynedd this equates to the protection of 7.5 indirect and induced posts within Gwynedd (£705K / £93.5K).

Gross offsite employment impacts – lodges

Analysis of Forest Holidays sites showed high levels of occupancy in the first full year of operation of sites (full year site occupancy varied between 95% to 97% across the estate in 2022/23). Conservatively we expect that expansion of the Forest Holidays Beddgelert site will achieve an initial average annual occupancy of 90% once cabins and built and marketed.

In the first year the site could realise an additional c16,500 visitor nights (50 bedspaces x 365 days x 90%).Based on guest demographics and experience, we

[43] GB Tourist 2019 Annual Report

would expect Forest Holidays guests to spend at rates higher than the average in Gwynedd reported in the STEAM report.[44] From analysis of other Forest Holidays sites including Glentress, Strathyre, Sherwood and Delemere, daily visitor expenditure rates have historically been in the region of £35.00 to £40.00 per visitor per night in these locales. Allowing for cost of living increases and recognising the lower expenditure rates in Wales, we would expect expenditure to be in the region of £39.50 per visitor per day, this provides a potential additional income of £650K per annum in the Gwynedd area (16,500 x £39.50). Using the established value of £93.5K per tourism FTE this activity will lead to the creation of c7.0 FTE indirect and induced posts.

Net offsite employment impacts – summary

Market displacement associated with the lodges has been estimated at 3%; as the camping development is substitutional, displacement on this activity is assumed to be nil. The gross offsite employment associated with the development of the lodges by Forest Holidays is 7.0 FTEs. Applying the displacement and subtracting the loss of camping spaces (the camping counterfactual 7.5 FTE) gives a net of (0.7) FTE.

The 85 camping sites in the development by the Roberts Group will offset the loss of the camping sites at Forest Holidays as a result of the lodge development, giving a nominal impact of 7.5 FTE (as explored in the counterfactual). The table below summarises net impacts across both developments.

Offsite employment	Forest Holidays	Roberts Group	Summary
Gross offsite employment	7.0	7.5	14.5
Displacement - market	3%	Nil	
Leakage – market	Nil	Nil	
Offsite employment lost	*7.5*		
Net offsite employment	*(0.7)*	*7.5*	*6.8*

Looking forward, there could be further positive impacts associated with the potential expansion of the reception area at the Forest Holidays site, requiring a further 5 FTE. The expected increase in occupancy to 95% will increase visitor nights and provide additional offsite opportunities.

Projecting forward to year three when these developments could be in place, the projected direct, indirect and induced employment at the Gwynedd level could see an additional 6.0 FTE posts created.

[44] https://www.visitsnowdonia.info/research

Conclusion

The planned developments produce positive social and economic impacts:

Social impacts

The proposed developments support ambitions of the local communities to facilitate sustainable tourism and deliver the aims of both the UNWTO Sustainable Tourism model and the Gwynedd and Snowdonia Sustainable Visitor Economy Plan 2035 by:

- Making optimal use of environmental resources that constitute a key element in tourism development
- Respecting the socio-cultural authenticity of host communities
- Ensuring viable, long-term economic operations, providing socio-economic benefits to all.

Economic impacts

The developments provides both one-off and ongoing impacts:

Construction (one-off impact) Gwynedd

Investment:	+£8.4M
Employment:	103 direct, indirect and induced FTE years

Onsite operations (annual impact) Gwynedd – year 1

Gross employment gain:	+13.5 direct, indirect and induced FTE
Net employment:	+13.2 direct, indirect and induced FTE

Off-site activity (annual impact) Gwynedd – year 1

Visitor expenditure:	+£650K
Gross employment gain:	+14.4 direct, indirect and induced FTE
Net employment:	+6.8 direct, indirect and induced FTE

Summary (annual impact) Gwynedd – year 1

Gross employment gain:	+27.9 direct, indirect and induced FTE
Net employment:	+20.0 direct, indirect and induced FTE

Note: we estimate that if the reception area is expanded and occupancy at Forest Holidays increases to achieved levels of 95%, there could be further employment gains estimated at 6.0 FTE per annum.

Disclaimer