Social Research Number:
89/2024
Publication date:
10/12/2024

Resident Survey Pilot: Gwynedd, Pembrokeshire, and Vale of Glamorgan

Mae’r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

 Digital ISBN **978-1-83715-019-9**

Resident Survey Pilot: Gwynedd, Pembrokeshire, and Vale of Glamorgan

Author: Phil Nelson

Full Research Report: Phil Nelson (10/12/2024). *Resident Survey Pilot: Gwynedd, Pembrokeshire, and Vale of Glamorgan.* Cardiff: Welsh Government, GSR report number 89/2024.
Available at: https://www.gov.wales/resident-survey-pilot-gwynedd-pembrokeshire-and-vale-of-glamorgan

For further information please contact:
Name: Research and Insights Team
Division: Visit Wales
Welsh Government
Cathays Park
Cardiff
CF10 3NQ
Tel: N/A
Email: TourismResearch@gov.wales

Contents

Executive Summary 5
Rationale 7
Method 8
Demographic breakdown 8
Sample size 8
Questionnaire 10
Limitations 10
Benefits of this research 10
Summary of Findings 12
Gwynedd 12
Pembrokeshire 21
Vale of Glamorgan 27
Comparisons 36

Table 1. A Table to show the additional questions requested by each pilot area 5
Table 2. A table to show percentage of respondents by Gender for each pilot area 9
Table 3. A table to show percentage of respondents by age for each pilot area 9
Table 4. A table to show percentage of respondents who work in the Tourism industry for each pilot area 9

List of figures

Figure 1. Overall Tourism Sentiment Index for Gwynedd 12
Figure 2. Respondent attitudes toward Tourism in their area 13
Figure 3. A chart to show impact of short term lets 14
Figure 4. A chart to show common themes given by respondents 15
Figure 5. A chart to show the perceived impact of tourism on a number of factors 16
Figure 6. A chart to show the perceived negative consequences of tourism in relation to a number of issues 18
Figure 7. A chart to show different types of visitors respondents want to see more, less, or the same volume. 19
Figure 8. A chart to show the perceived impact of events in Gwynedd 20
Figure 9. Overall Tourism Sentiment Index for Pembrokeshire 21
Figure 10. Respondent attitudes in Pembrokeshire toward Tourism in their area 22
Figure 11. A chart to show common themes given by respondents in Pembrokeshire 23
Figure 12. A chart to show the perceived impact of tourism in Pembrokeshire on a number of factors 24
Figure 13. A chart to show the perceived negative consequences of tourism in relation to a number of issues in Pembrokeshire 25
Figure 14. A chart to show different types of visitors respondents want to see more, less, or the same volume in Pembrokeshire 26
Figure 15. Overall Tourism Sentiment Index for Vale of Glamorgan 27
Figure 16. Respondents from Vale of Glamorgan attitudes toward Tourism in their area 28
Figure 17. A chart to show impact of short term lets in Vale of Glamorgan 29
Figure 18. A chart to show common themes given by respondents in Pembrokeshire 30
Figure 19. A chart to show the perceived impact of tourism in Vale of Glamorgan on several factors 31
Figure 20. A chart to show the perceived impact of Tourism on the Welsh Language in Vale of Glamorgan 32
Figure 21. A chart to show the perceived negative consequences of tourism in relation to a number of issues in Vale of Glamorgan 33
Figure 22. A chart to show different types of visitor respondents want to see more, less, or the same volume in Vale of Glamorgan 34

Figure 23. A chart to show the perceived impact of events in Vale of Glamorgan 35

Executive summary

This report presents a summary of the Wales Resident Survey carried out in the Vale of Glamorgan, Pembrokeshire, and Gwynedd, a pilot to help improve the experience of the visitor economy through the monitoring and analysis of resident attitudes towards Tourism. The project is being conducted as part of the priorities in [Welcome to Wales.]

In order to develop the survey, TCI Research's proprietary TRAVELSAT Resident Sentiment Index Model (RSI) was used which allows for measuring residents' attitudes and support towards Tourism across 30 categories.

Each pilot area was given the opportunity to add up to five custom questions to the existing model, as well as to add items to existing questions. You can see these questions in the table below:

Table 1. A Table to show the additional questions requested by each pilot area

Vale of Glamorgan	Gwynedd	Pembrokeshire
• Whether Tourism had a positive or negative effect on the Welsh language and culture in respondents' respective areas; • Whether respondents would like to see more, the same number of, or less overnight visitors, as well as day visitors in the future; • What the perceived consequences of short-term let accommodation were in respondents' areas; • What the perceived consequences of events were in respondents' areas; • The perceived degree to which the Welsh language had been harmed due to a number of factors	• Whether Tourism had a positive or negative effect on the Welsh language and culture in respondents' respective areas; • Whether respondents would like to see more, the same number of, or less overnight visitors, as well as day visitors in the future; • What the perceived consequences of short-term let accommodation were in respondents' areas; • What the perceived consequences of events were in respondents' areas	• No questions chosen

Key findings

Attitudes to tourism

- Of the three pilot areas respondents from Pembrokeshire were the only ones to score a net positive perception of tourism (56%) compared to Gwynedd (46% and Vale of Glamorgan (45%)
- In terms of negativity towards Tourism, respondents from Gwynedd scored the highest at 14% with Pembrokeshire at 9% and Vale of Glamorgan at 8%.
- All three areas had a net positive score for wanting to see Tourism grow (Vale of Glamorgan, 63%; Gwynedd, 57%; Pembrokeshire 56%). However, it's worth noting that both Gwynedd and Pembrokeshire respondents were more likely to work in Tourism (approximately 40% of respondents from both these areas, compared to just 12% for Vale of Glamorgan)

Respondent attitudes

- There is a strong sense of pride among all three areas (Gwynedd, 88%; Pembrokeshire, 84%; and Vale of Glamorgan, 83%).
- Gwynedd respondents are overall positive about the development of Short Term Let Accommodation (53%) whilst Pembrokeshire (42%) and Vale of Glamorgan (45%) are, on balance, more negative about them.

Short term let accommodation

- Gwynedd respondents were more likely to highlight increases in year-round visitors as a consequence of an increase in Short Term Lets (52%) whereas for Vale of Glamorgan it was the increase in house prices (40%).
- Pembrokeshire chose not to ask any further questions relating to Short Term Lets.

Open suggestions

- Respondents from all three pilot areas suggested more engagement in Tourism policy development (Gwynedd, 37%; Vale of Glamorgan, 35%; Pembrokeshire, 27%).
- Improvements in local infrastructure provision also featured highly across all areas (Gwynedd, 23%; Pembrokeshire, 24%; Vale of Glamorgan, 48%).
- It is important to note that these answers were not prompted, suggesting a high degree of feeling among the respondents.

Tourism impact

- The local economy featured top across all three areas as being positively influenced by Tourism (Gwynedd, 82%; Pembrokeshire, 86%; Vale of Glamorgan, 74%)
- Employment was also featured (Gwynedd, 76%; Pembrokeshire, 77%; Vale of Glamorgan, 62%). Cleanliness of public spaces had a marked negative impact across all three areas (Gwynedd, 38%; Pembrokeshire, 40%; Vale of Glamorgan, 48%)

Welsh language

- Both Gwynedd (70%) and Vale of Glamorgan (56%) respondents believe Tourism is a good vehicle for the promotion of Welsh language.
- Pembrokeshire chose not to ask about the impact on Welsh Language

Tourism consequences

- Parking and Traffic Issues are the highest reported problems encountered by respondents (Gwynedd, 77% and 76% respectively; Pembrokeshire, 84% and 83% respectively; and Vale of Glamorgan, 84% and 84% respectively).

Visitor segments

- Growth of International visitors was prioritised across all three pilot areas (Gwynedd, 75%; Pembrokeshire, 65%; Vale of Glamorgan, 85%).

Events

- Gwynedd (61%) and Vale of Glamorgan (51%) respondents connect Tourism growth to hosting events in the local area.
- Gwynedd (18%) and Vale of Glamorgan (39%) respondents also highlight damage to local infrastructure as a result of these events. Respondents from both areas (Gwynedd, 18%; Vale of Glamorgan, 23%) also believe (at slightly lower levels) that events bring too many people at once.

Rationale

The pilot project discussed in this report is a result of the Welcome To Wales[1] strategy which Visit Wales commits to monitoring the perceptions of residents in Wales:

> *This means that we need to make sure that local people are benefiting from – and comfortable with – a thriving visitor economy. We need to learn more about how people in Wales feel about Tourism. We will listen to the voices of residents, alongside the work we already do with the sector through our business barometer and our regular visitor satisfaction surveys. We want a more rounded view of Tourism growth – it's positive impacts, and areas of future concern.*

Welcome to Wales: Priorities for the Visitor Economy 2020 – 2025, page 38

To meet this aspiration, in 2023 Visit Wales reached out to Local Authorities to see if any areas would be interested in taking part in a pilot project looking to measure resident sentiment towards Tourism. As this was a pilot project Visit Wales limited the scope of the survey to only cover a maximum of three Local Authorities based on the expressions of interest.

[1] Welcome to Wales: priorities for the visitor economy 2020 to 2025

Gwynedd, Pembrokeshire, and Vale of Glamorgan were chosen as being representative of the different Tourism products on offer in Wales and were consulted throughout the process on the format, timing, and analysis of the survey.

Visit Wales consider this a pilot project, and it has been undertaken with an eye to learning and improvement. Therefore. it is important to consider the limitations of this research and to note the caveats when referencing these findings.

Future research

Building on the strategic imperative to monitor and respond to community perceptions of Tourism in Wales, it is important to see this pilot research project as a first step towards this goal. The results give an insight into what data Visit Wales and other key stakeholders, such as Local Authorities, National Parks, and other interested groups, could be gathering in Wales to generate useful and actionable insights. This report is provided for interested parties to learn from, as Gwynedd Council are currently doing with their own survey.

Method

Demographic breakdown

For each area respondents were separated by age and gender, and whether they were a full-time respondent of the area (to exclude second homeowners and tourists). Gwynedd also chose to further delineate between those living in the Gwynedd area and those also living in the Eryri National Park area.

Sample size

The following samples were collected in each area:

- Gwynedd – 740 respondents
- Vale of Glamorgan – 410 respondents
- Pembrokeshire – 459 respondents

The research was conducted between September and October 2023 and were promoted via local channels of recruitment, as such this is a self-selected sample. A relatively even gender distribution was reached, but geographic and demographic factors were not controlled for and may have biased the results. Based on the demographic data collected, weighting was applied in line with available population statics.

A note on base sizes for each question; partial responses were excluded, as such the base size for every question is the same as the total responses gathered for that Local Authority, except for the question relating to negative consequences where only those respondents who indicated perception of negative impact were able to provide answers, for this question the actual base size is noted on the chart.

The following tables show a breakdown for each of the areas by the different demographic elements measured

Table 2. A table to show percentage of respondents by Gender for each pilot area

	Male	Female	Non-Binary / Gender non-conforming	Prefer not to Answer
Gwynedd	42%	51%	2%	5%
Vale of Glamorgan	44%	52%	1%	3%
Pembrokeshire	47%	52%	0%	1%

Table 3. A table to show percentage of respondents by age for each pilot area

	16-24	25-34	35-49	50-64	65-74	75+
Gwynedd	2%	10%	30%	35%	15%	8%
Vale of Glamorgan	3%	12%	22%	32%	20%	11%
Pembrokeshire	6%	12%	27%	32%	15%	8%

Table 4. A table to show percentage of respondents who work in the Tourism industry for each pilot area

	Yes	No
Gwynedd	41%	59%
Vale of Glamorgan	12%	88%
Pembrokeshire	44%	56%

The demographics show a relatively even gender split across all locations and an overall bias towards the 50 – 64 age group with the bulk of responses occurring in the 35 – 74 overall range (Gwynedd, 80%, Vale of Glamorgan, 74%, and Pembrokeshire, 74%). Both Gwynedd and Pembrokeshire report high numbers of respondents working in Tourism (41%

and 44% respectively) well above the national average of 11%. Therefore, the results should be interpreted with caution as it suggests there may be some bias in the findings.

Questionnaire

The questionnaire used for the survey utilised standardised indicators and sociodemographic questions to allow for segmentation of the results, as well as understanding the influence of certain variables on the perception of Tourism (Tourism-related occupation, age, occupation, place of residence, etc.).

For ease of participation, an online questionnaire was used that worked on laptops, tablets, and smartphones with a duration of about 6 minutes to reduce attrition rates.

Limitations

The limitations include potential biases in the sample (discussed below). In addition, the timing of the survey (it ran from September to October 2023) meant it only captured a snapshot of opinions and was also outside the peak summer season and so may under-report on some aspects of the impact of Tourism. There are also geographical limitations insofar as Gwynedd, Pembrokeshire, and Vale of Glamorgan are good representatives of the different Tourism products and attract a significant number of visitors to Wales but not exhaustively so and widening the participating Local Authorities in future surveys may yield different findings.

The Local Authorities taking part in the pilot were also tasked with promoting the survey, including to interested community groups – in the case of Gwynedd this also includes groups linked to work around the preponderance of second homes in the area. Though this was a positive in terms of increasing the number of participants it might also have skewed the result slightly as the survey was presented to groups already predisposed to have strong feelings about the Tourism economy.

Future iterations of this research could utilise a nationally representative consumer panel, or alternatively a longer survey period to enable a wider reach across local populations.

Benefits of this research

This pilot project was intended to assess the viability of measuring resident attitudes towards Tourism across a number of different dimensions. It has filled a key evidence gap to begin monitoring resident sentiment towards Tourism, and in our continuing efforts to improve Tourism for the good of the Wales.

Though all evidence presented here should be viewed from the perspective of a pilot study, and as such should be interpreted with caution, there are interesting findings within this research that could be further expanded on and explored in future iterations. Further, many of the ways to improve the Tourism economy and the resident experience lie with the Local Authorities and, where respondents have suggested possible courses of actions these have been helpful for decision making at a Local Authority level.

We chose a recruitment approach that relied on organic word-of-mouth and social media access as well as targeted sharing to groups willing to further pass it on in their own networks.

An organic recruitment strategy was able to reach a significant number of individuals within a relatively short time period. This type of response speaks to the willingness of populations to respond to these surveys, and also suggests that low-cost methods of gathering insight from respondents is both possible and accessible.

Second, an identified benefit was the ability to collect quantitative data – for example, the importance of different factors relating to Tourism in their area and as a result we were able to determine what factors are most important and between locations. In addition, qualitative data in the form of free response questions highlighted common themes across locations but also identify points of differentiation that suggest Tourism is perceived to have a different impact in different communities.

Finally, the survey was able to yield a series of practical suggestions that could be applied at the local and national level, for example a majority of respondents in all areas wanted to be more involved in Tourism policy decision making. This insight could be further expanded on and tested in future iterations of the research or in separate projects, but it can also be acted upon by the relevant parties to bring representatives of the community together to discuss local Tourism policy to better understand the potential impact of those decisions potentially saving time, effort, and money in the long run.

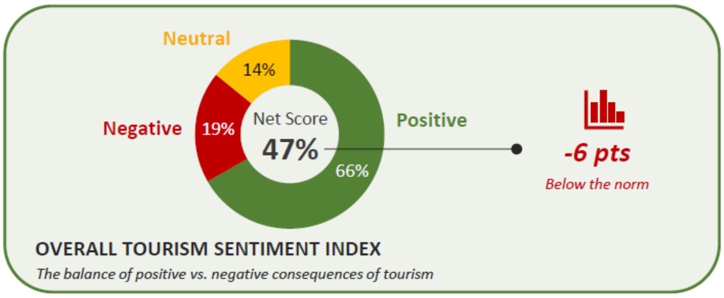
Summary of findings

Gwynedd

Key indicators

Gwynedd respondents had a net score of 47% positive vs. negative sentiment towards Tourism (sum of the positive affectivity [+66%] with the negative affectivity [-19%]).

Figure 1. Overall Tourism Sentiment Index for Gwynedd

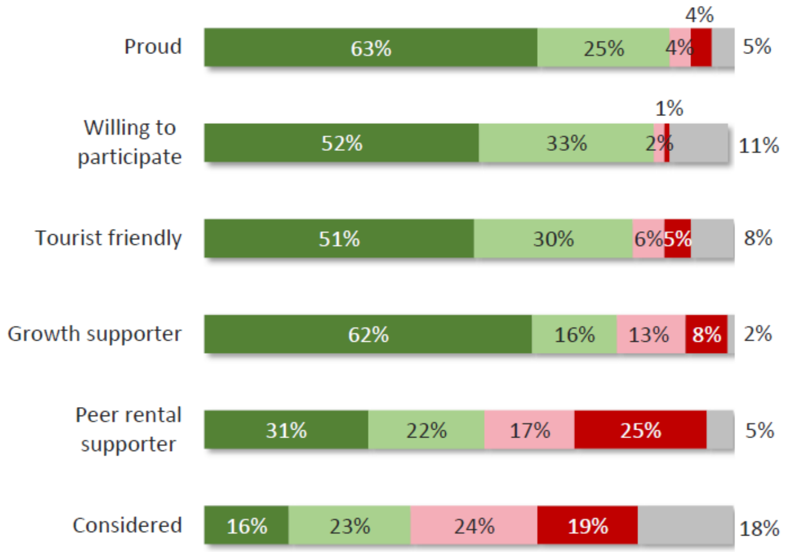


14% of respondents surveyed were opposed to Tourism and its growth, while 57% supported the continued growth of the industry in Gwynedd. On average respondents were more likely to believe Tourism policy did not take into consideration their lives.

Respondent attitudes

Respondents from Gwynedd take great pride in their local area (88%) and are generally enthusiastic about visitors traveling great distances to experience their destination. The community is predominantly receptive to tourists (81%) however fewer (53%) are supportive of Short Term Lets and only 39% agree that Tourism policy considers the effects of Tourism on their lives.

Figure 2. Respondent attitudes toward Tourism in Gwynedd

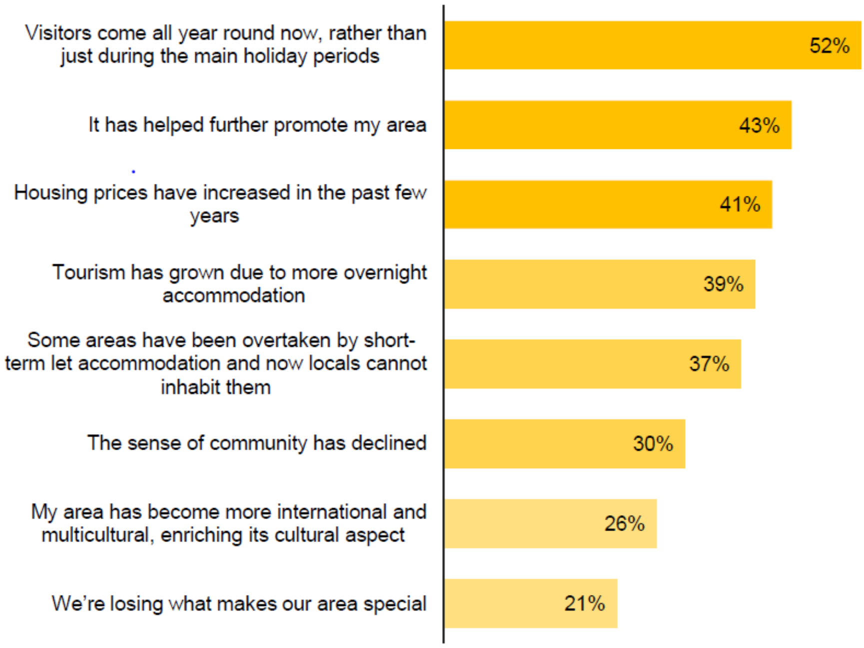


Note: Sorted based on the highest proportion of agreement with each statement (Strongly agree + Tend to agree).

Short term lets

Many respondents from Gwynedd recognise the role of Short Term Let accommodation in drawing visitors year-round (52%) and in promoting their area (43%), somewhat fewer respondents highlight cultural enrichment and interactions with people from around the world (26%). Conversely, there are obvious concerns about the negative repercussions on local access to housing, with some neighbourhoods either out of reach due to housing prices (41%) or simply because of a lack of properties available (37%).

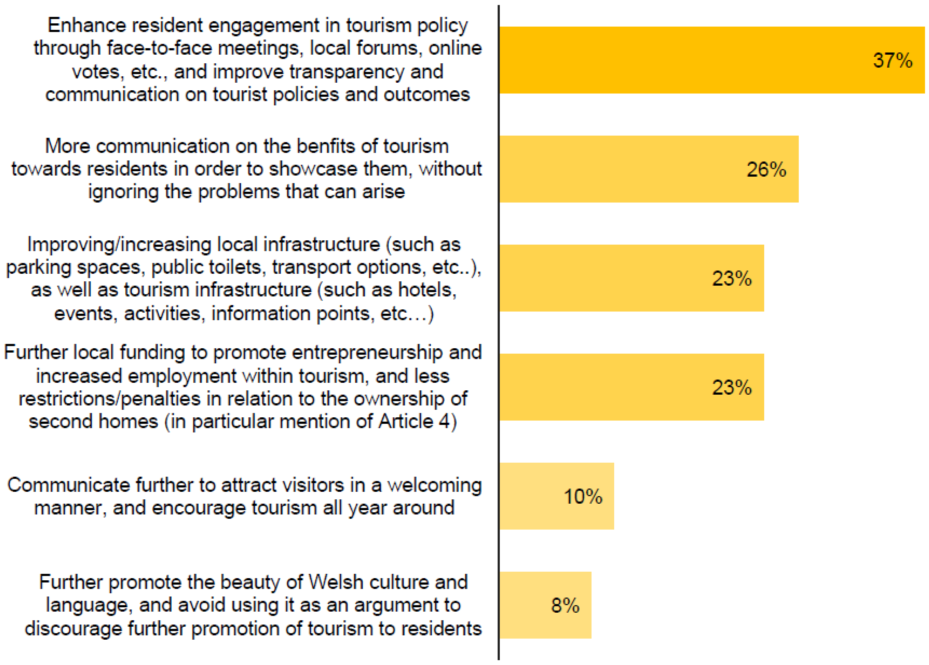
Figure 3. A chart to show perceived impact of short term lets in Gwynedd



Open suggestions

Gwynedd respondents readily voice a strong desire to play a greater role in the advancement of local Tourism initiatives, as well as to have more transparency about the decisions taken (37% of respondents suggested this). Further dialogue on the advantages of Tourism (26%) and a call for increased investment in infrastructure (23%) also featured heavily. 23% also believed that less focus on punishment of second homeowners and more focus on local funding for increasing entrepreneurship and employment would be good.

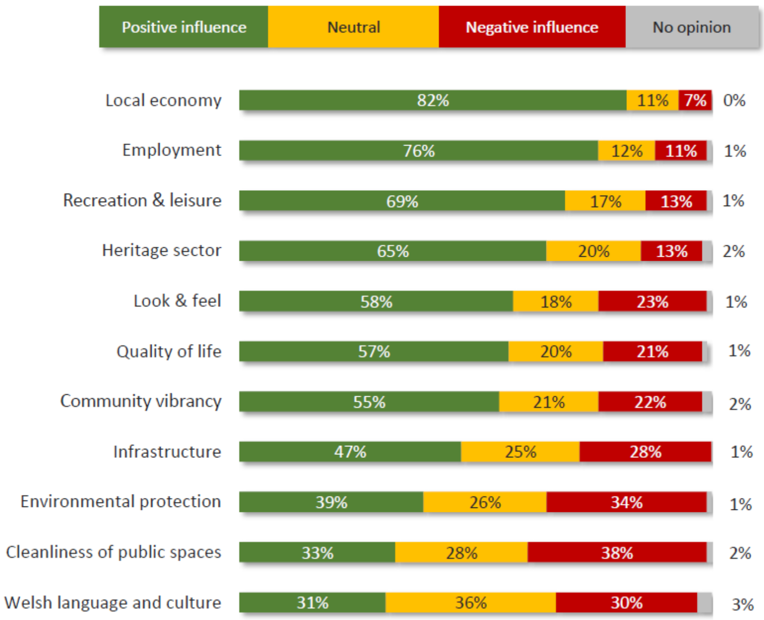
Figure 4. A chart to show common themes given by respondents in Gwynedd



Impact of tourism

There is agreement on Tourism's positive role in the local economy (82% of respondents) and employment (76%), as well as in supporting the Heritage sector (65%) and activities for leisure that both respondents and visitors can appreciate (69%). Whereas 31% believe it has a positive impact on the Welsh Language and 30% believing it has a negative impact.

Figure 5. A chart to show the perceived impact of tourism on a number of factors in Gwynedd

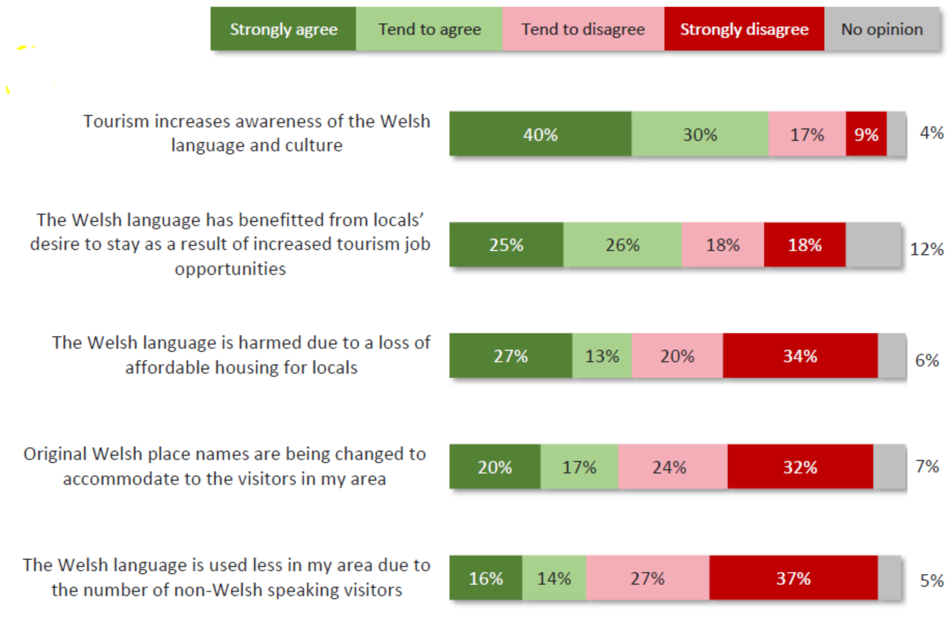


Note: Sorted based on the highest proportion of "Positive" for each statement.

Welsh language

On the impact of Tourism on the Welsh Language, 70% believe Tourism is a good opportunity to promote Welsh distinctiveness and 50% believe the creation of Tourism jobs helps keep local respondents within their communities and thus strengthens the Welsh Language. 40% believe that the loss of affordable housing as a result of Tourism can have a negative impact on the language.

Figure 6. A chart to show the perceived impact of tourism on the Welsh language in Gwynedd

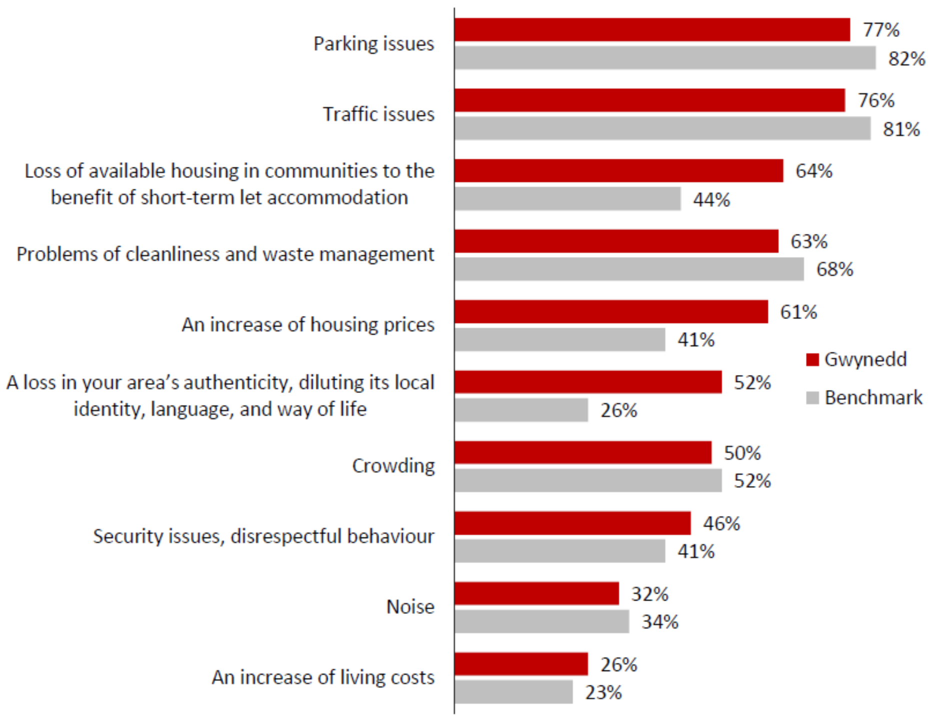


Note: Sorted based on the highest proportion of agreement with each statement (Strongly agree + Tend to agree).

Tourism consequences

Around half of Gwynedd's respondents experience issues with Tourism (49%). The majority of those who state this do so only at certain times of the year (36%). Transportation challenges, such as parking (77%) and traffic (76%), are the most commonly named negative consequences. Negative consequences like noise (32%), crowding (50%), and disrespect from visitors (46%) are brought up to the same degree as in the other pilot areas surveyed. Finally, almost two thirds of respondents mention problems of cleanliness and waste management (63%), although they do so less compared to the average of the other pilot areas.

Figure 7. A chart to show the perceived negative consequences of tourism in relation to a number of issues in Gwynedd

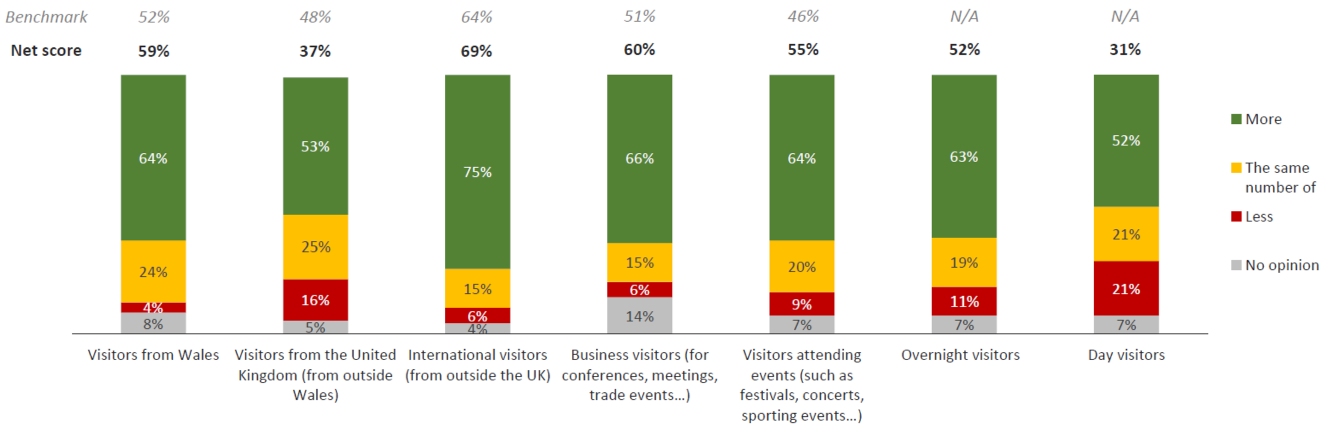


Base: Residents who perceive **negative consequences at least at certain times of the year** (N = 365 respondents)

Visitors

Broadly speaking respondents want to see more of every type of visitor to Wales, International Visitors scoring the highest (75% of respondents) followed by business visitors (66%). Events are perceived as being a positive way to encourage more visitors, with 61% saying it has helped Tourism grow. Although 18% believe they have a negative impact on the infrastructure and environment.

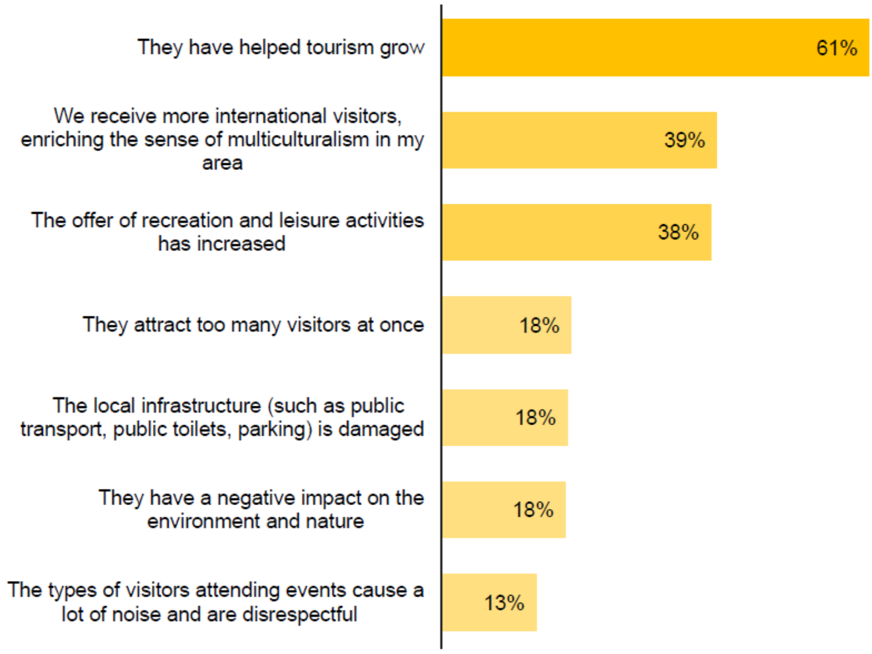
Figure 8. A chart to show different types of visitors respondents in Gwynedd want to see more, less, or the same volume



Events

Gwynedd respondents perceive a variety of impacts from events, 61% say they help tourism grow, and 39% claim they receive more international visitors as a result, and 38% claim the offer of recreation and leisure activities has increased as a result. On the negative side, 18% say they attract too many visitors, they cause damage to local infrastructure, and they have a negative impact on the environment and nature. A further 13% claim the types of visitors attending events cause a lot of noise and are disrespectful.

Figure 9. A chart to show the perceived impact of events in Gwynedd

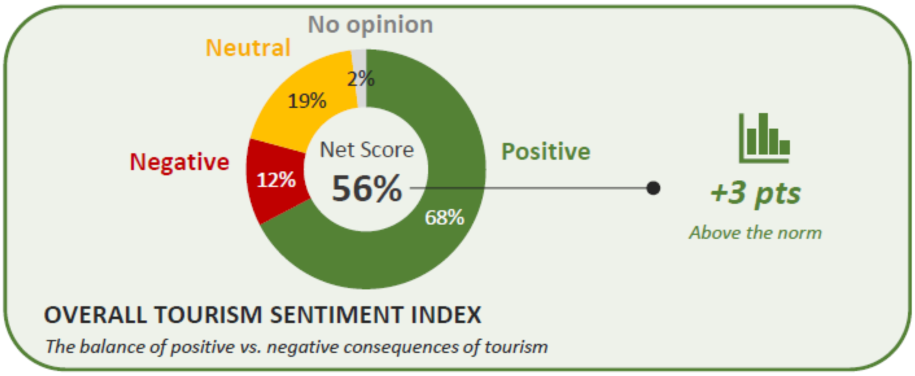


Pembrokeshire

Key indicators

Pembrokeshire respondents had an overall net score of 56% toward Tourism (68% positive summed with -12% negative). 9% of respondents were opposed to Tourism, and 56% support the continued growth. On average respondents were likely to feel that Tourism policy did not take into consideration its effect on their lives.

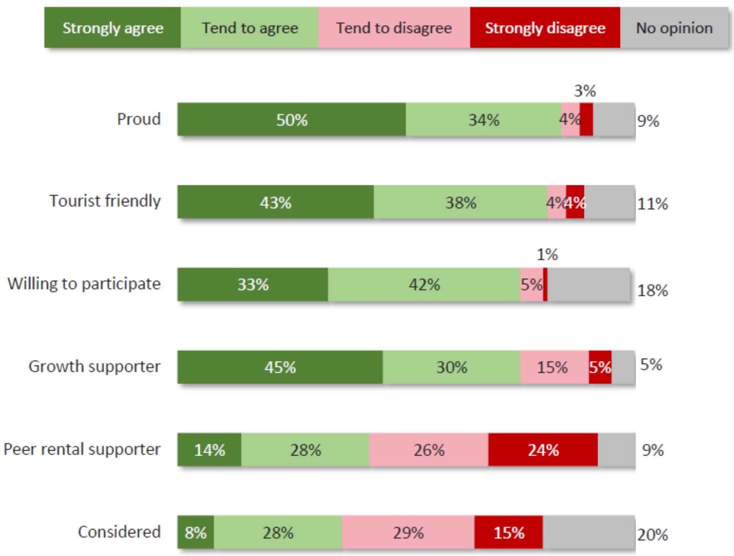
Figure 10. Overall Tourism Sentiment Index for Pembrokeshire



Respondent attitudes

84% of respondents in Pembrokeshire take pride in the fact that tourists choose to visit their area and are largely welcoming to tourists (81%). 75% of respondents also support additional efforts to promote the region for increased visitor attraction. However, only 42% are supportive of short term rentals, and only 36% believe the effect Tourism has on their lives is considered as part of Tourism policy.

Figure 11. Respondent attitudes in Pembrokeshire toward Tourism in their area

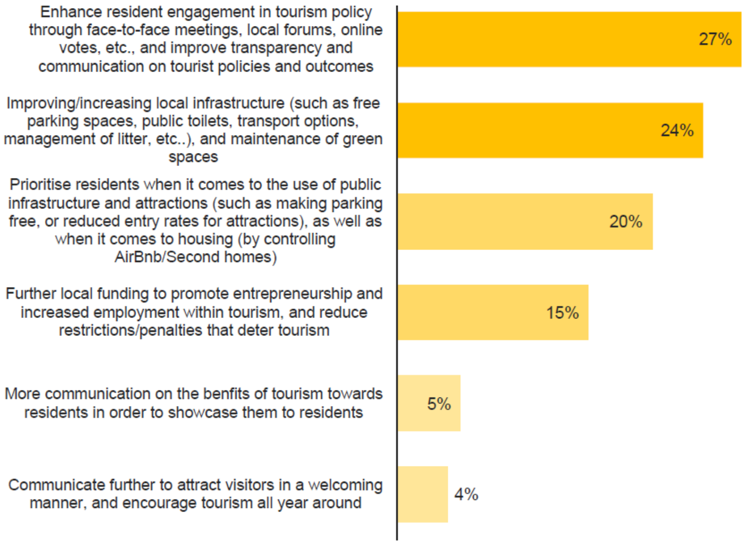


Note: Sorted based on the highest proportion of agreement with each statement (Strongly agree + Tend to agree).

Open suggestions

Respondent engagement in Tourism policy was the most popular suggestion (27%) followed by improving local infrastructure (24%). 20% also believe respondents of Pembrokeshire should be prioritised over visitors for things like parking and housing. In contrast, only 4% support communication to attract further visitors and only 5% believe there should be more communication on the benefits of Tourism.

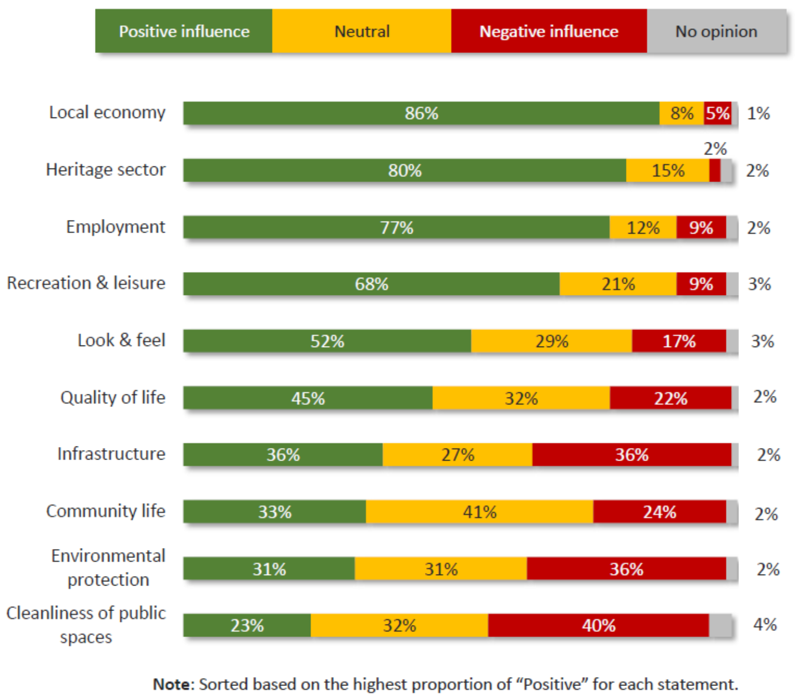
Figure 12. A chart to show common themes given by respondents in Pembrokeshire



Impact of tourism

There is agreement on Tourism's positive role in the local economy (86%), and employment (77%), as well as its benefits for the heritage sector (80%) and recreation and leisure facilities (68%). However, 40% believe it has had a negative effect on the cleanliness of public spaces, 36% believe it has damaged environment protection, and 24% believe it eroded community life. The effect of Tourism on infrastructure is split evenly between positive and negative influence (36%).

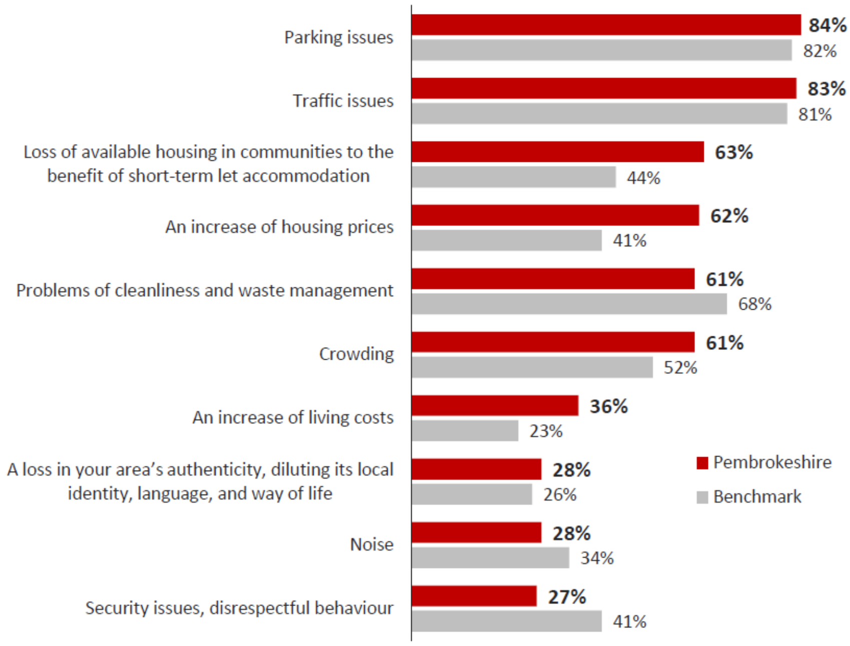
Figure 13. A chart to show the perceived impact of tourism in Pembrokeshire on a number of factors



Tourism consequences

65% of respondents experience negative consequences of Tourism at some point during the year, though only 9% believe this is a year round problem. Parking (84%) and more general traffic issues (83%) are some of the top concerns. Loss of housing follows closely at 63%. Crowding and cleanliness (61%) are also issues, however 27% report concerns about safety and inappropriate behaviour, whilst noise disturbances are highlighted by 28%.

Figure 14. A chart to show the perceived negative consequences of tourism in relation to a number of issues in Pembrokeshire

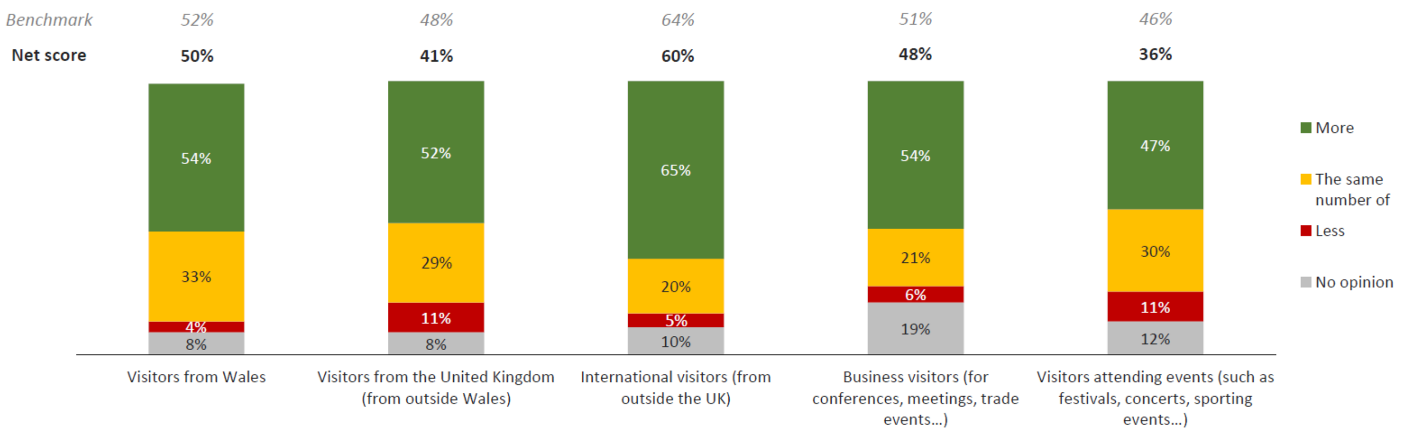


Base: Residents who perceive **negative consequences at least at certain times of the year** (N = 297 respondents)

Visitors

International visitors (65%) are the most wished for increase across all visitor segments, with domestic and business visitors both coming second (54% each). 47% support more event attendees.

Figure 15. A chart to show different types of visitors respondents want to see more, less, or the same volume in Pembrokeshire

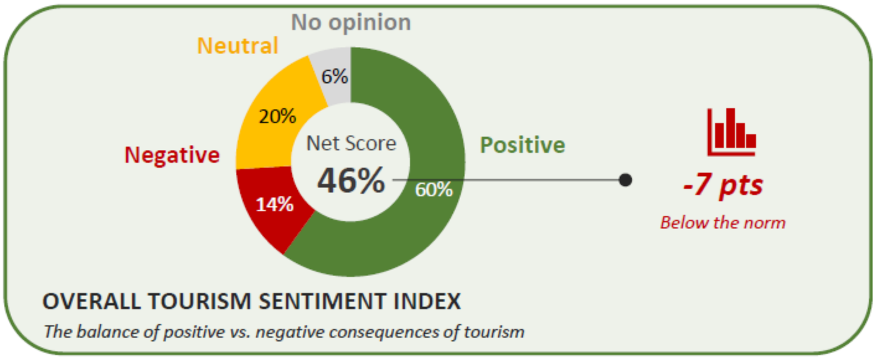


Vale of Glamorgan

Key indicators

Respondents had an overall 46% Tourism sentiment score, (60% positive, 14% negative), with 8% resistant to further Tourism growth in their area. 63% are supportive of Tourism growth, and a majority are interested in being more involved in the decision-making process of Tourism policy.

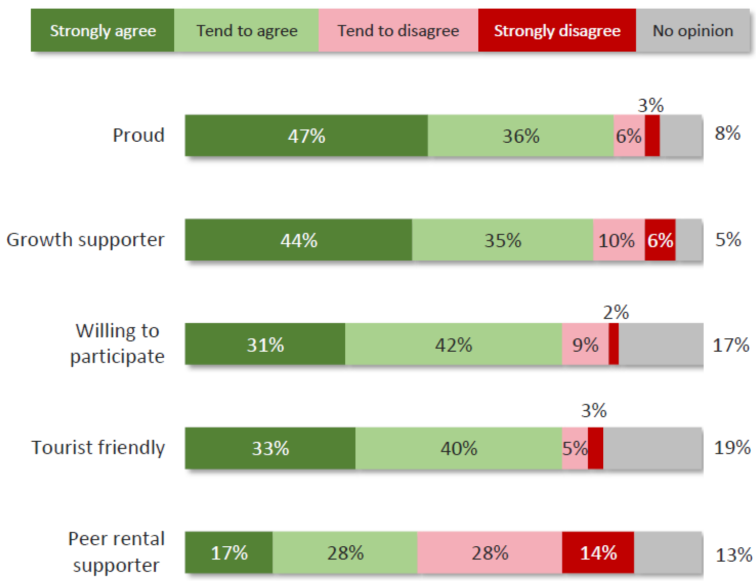
Figure 16. Overall Tourism Sentiment Index for Vale of Glamorgan



Respondent attitudes

83% of respondents are proud of their area, and 79% support further growth of the Tourism offer. 73% are interested in being more involved in the development of the Tourism offer, and the same number are positive and friendly towards tourists. Similar proportions like and dislike Short Term Let accommodation (45% positive, 42% negative).

Figure 17. Respondents from Vale of Glamorgan attitudes toward Tourism in their area

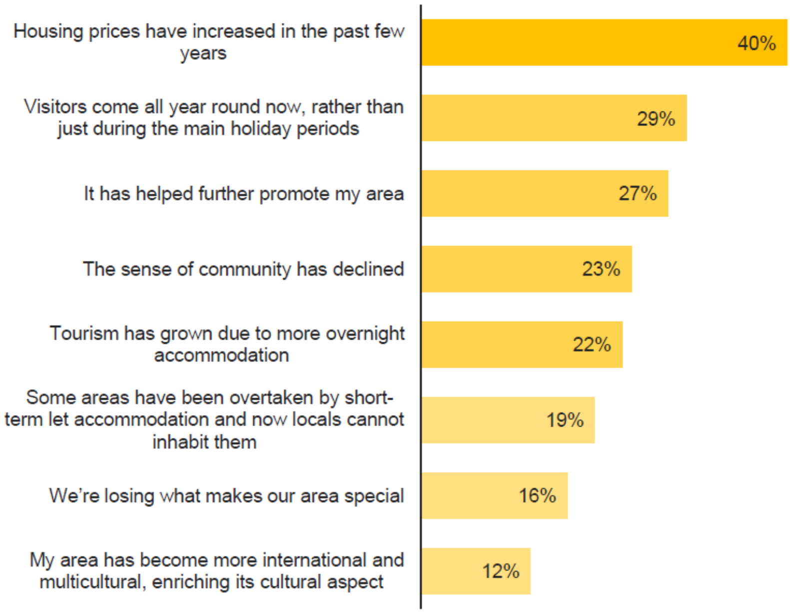


Note: Sorted based on the highest proportion of agreement with each statement (Strongly agree + Tend to agree).

Short term let accommodation

40% of respondents state that housing prices going up has been a consequence of Short Term Let increases, while 29% state it has contributed to spreading Tourism throughout the year, rather than just in the summer months. Importantly 23% believe their sense of community has declined, and 16% believe Short Term Lets are making them lose what makes their area special.

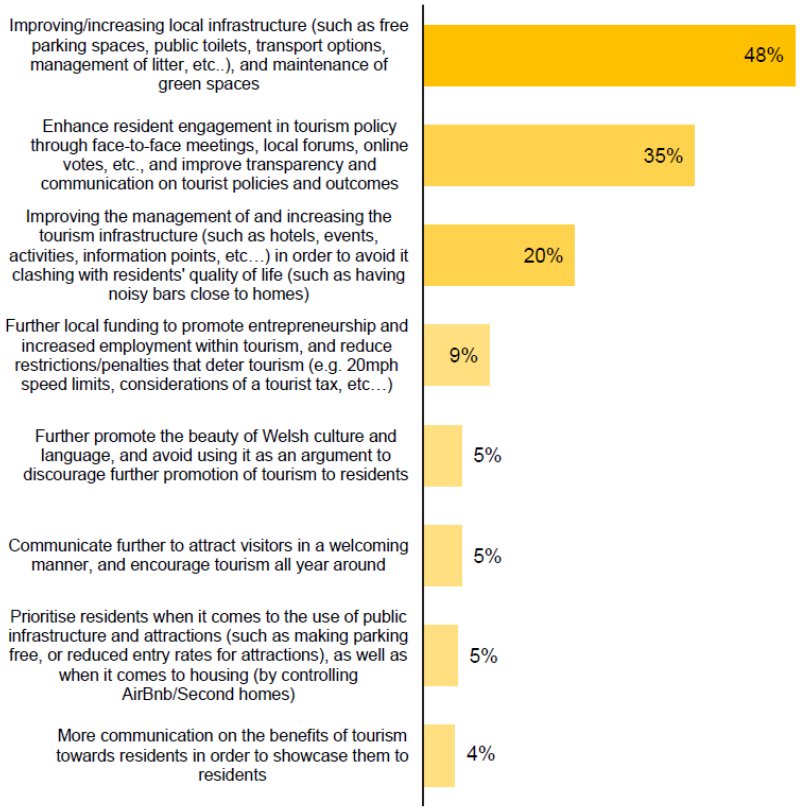
Figure 18. A chart to show impact of short term lets in Vale of Glamorgan



Open suggestions

48% of respondents suggest investing in infrastructure should be a key aim of Tourism policy, with 35% looking to be more engaged in the development of Tourism policy. Very few want the benefits of Tourism to be communicated to them more (4%) and only 5% are interested in being prioritised over visitors for the use of public infrastructure (e.g. parking).

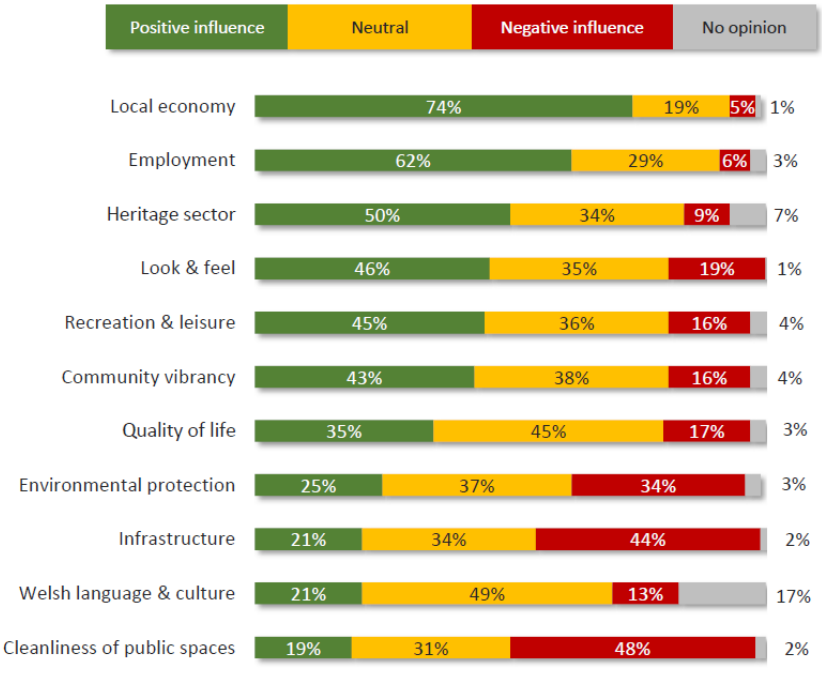
Figure 19. A chart to show common themes given by respondents in Pembrokeshire



Tourism impact

Local Economy and employment (74% and 62% respectively) are considered the main impact of Tourism, similar proportions consider that Tourism has a positive effect on the heritage sector (50%), the area's look and feel (46%), the offer of recreation and leisure activities (45%), and community vibrancy (43%). Conversely 48% state Tourism negatively impacts the cleanliness of public spaces, and 44% state it negatively impacts infrastructure.

Figure 20. A chart to show the perceived impact of tourism in Vale of Glamorgan on several factors

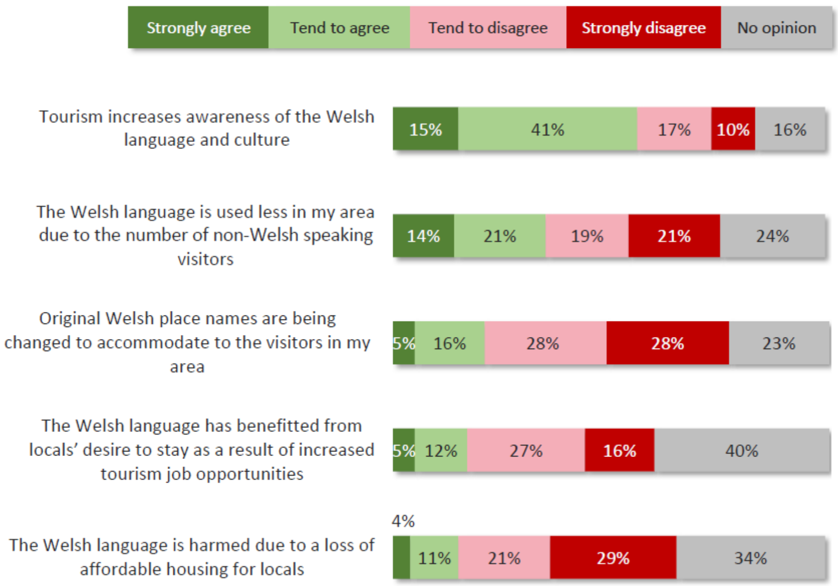


Note: Sorted based on the highest proportion of "Positive" for each statement.

Welsh language

56% of respondents believe Tourism has had a positive impact on the wider awareness of the Welsh Language and Culture. Similar proportions agree (35%) and disagree (40%) that the presence of non-Welsh speakers in their area reduces the use of the language. However, most disagree (56%) that original Welsh place names are being changed to accommodate visitors in the area. Finally, half of the respondents disagree that the Welsh Language is harmed due to a loss of affordable housing for locals, with 34% not holding any opinion.

Figure 21. A chart to show the perceived impact of Tourism on the Welsh Language in Vale of Glamorgan

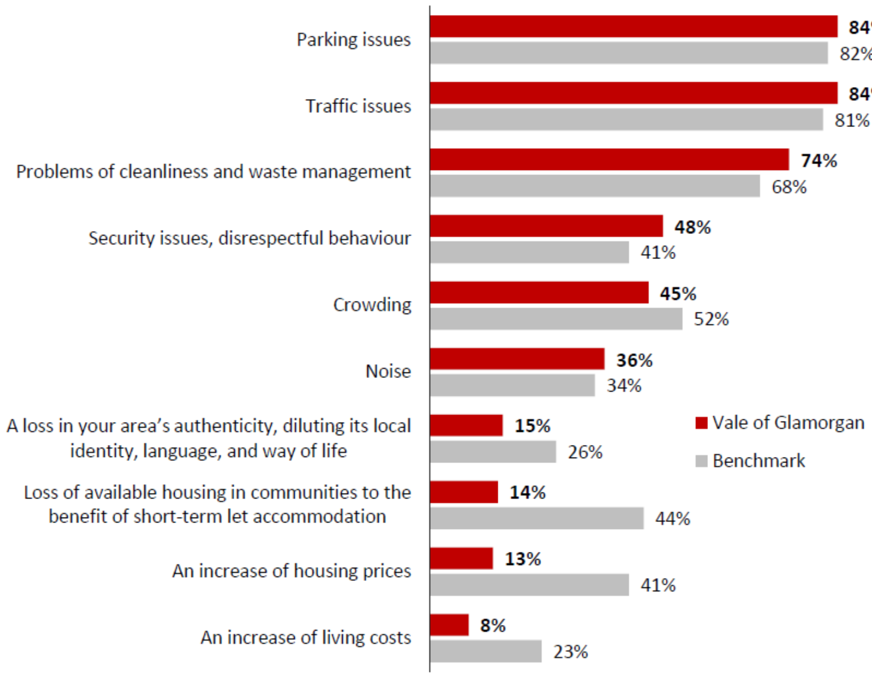


Note: Sorted based on the highest proportion of agreement with each statement (Strongly agree + Tend to agree).

Tourism consequences

57% of respondents feel that Tourism impacts them with 7% impacted throughout the year. Parking and traffic issues (both 84%) are the highest concerns, followed by problems of cleanliness and waste management (74%). Negative consequences, such as security issues or disrespectful behaviour (48%), crowding (45%), and noise (36%) are similarly cited. Interestingly, issues related to the loss of cultural authenticity and identity (15%), available housing (14%), an increase of housing prices (13%), and an increase of living costs (8%) are mentioned much less often.

Figure 22. A chart to show the perceived negative consequences of tourism in relation to a number of issues in Vale of Glamorgan

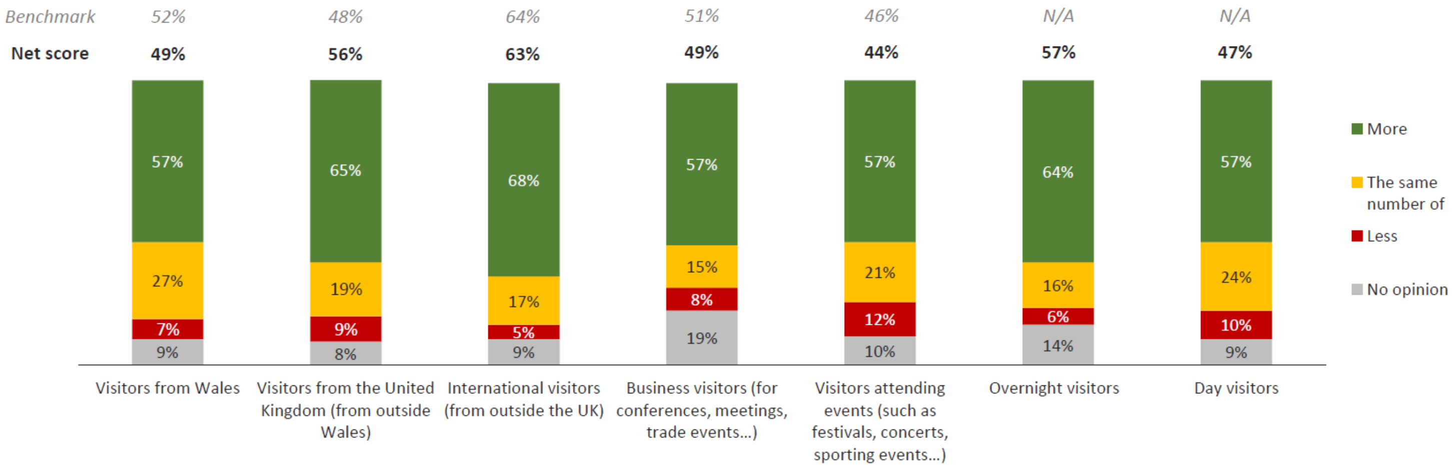


Base: Residents who perceive **negative consequences at least at certain times of the year** (N = 380 respondents)

Visitors

A majority of respondents want to see increases in all visitor types, with international (85%), UK domestic (65%), and overnight (64%) visitors being the most sought after, however the other categories (visitors from Wales, business visitors, and day visitors) all scored 57% suggesting a general increase in Tourism numbers is sought after.

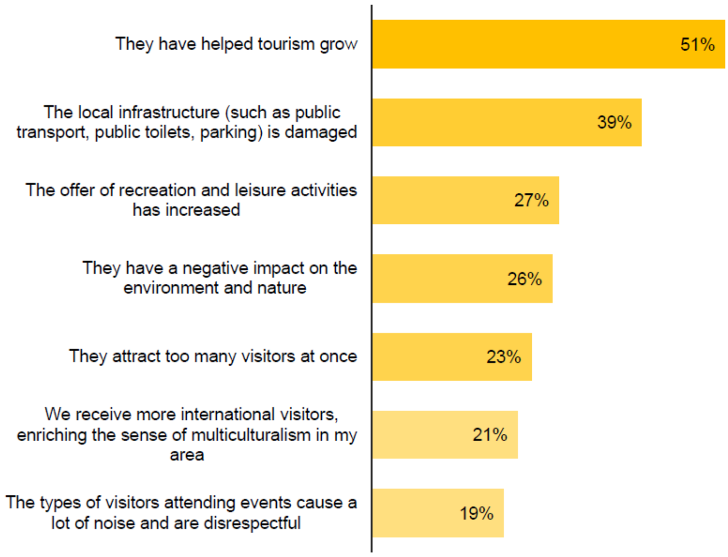
Figure 23. A chart to show different types of visitor respondents want to see more, less, or the same volume in Vale of Glamorgan



Events

51% believe events help grow Tourism, but 39% report that they damage public infrastructure and 26% say they have a negative impact on the environment. 27% agree they increase the leisure activities on offer, but 23% believe they bring in too many visitors at once.

Figure 24. A chart to show the perceived impact of events in Vale of Glamorgan



Comparisons

Key indicators

Pembrokeshire scored the highest net-score for Tourism at 56%, Gwynedd scored 46%, and Vale of Glamorgan scored 45%. Suggesting on-balance the respondents of the two latter Local Authorities believe there are currently more negatives than positives about Tourism in their area.

Gwynedd respondents were the most resistant to Tourism at 14%, followed by Pembrokeshire at 9% and Vale of Glamorgan at 8%. Interestingly, Vale of Glamorgan respondents are the most likely to support further growth of Tourism at 63% and also reported the lowest number of respondents working in Tourism (12%), followed by Gwynedd at 57% (with 41% of respondents working in Tourism), and Pembrokeshire at 56% (with 44% of respondents working in Tourism). This suggest that, despite the somewhat negative perception of Tourism in aggregate in Vale of Glamorgan and Gwynedd, across all three locations there is overall a desire to see Tourism grow.

Respondent attitudes

There is a strong sense of pride among all three areas (Gwynedd, 88%; Pembrokeshire, 84%; and Vale of Glamorgan, 83%). Similarly, all three areas support further growth of Tourism through specifically marketing their local area (Gwynedd, 78%; Pembrokeshire, 75%; and Vale of Glamorgan, 79%). On a point of divergence Gwynedd respondents are overall positive about the development of Short Term Let Accommodation (53%) whilst Pembrokeshire (42%) and Vale of Glamorgan (45%) are, on balance, more negative about them.

Short term let accommodation

Pembrokeshire chose not to ask its respondents about Short Term Lets in more detail, however, between Gwynedd and Vale of Glamorgan some differences of opinion have emerged. For Gwynedd respondents, the increase in year-round visitors is seen as the largest consequence (52%) whereas for Vale of Glamorgan respondents it’s the increase in house prices (40%). Both areas (30% for Gwynedd, 23% for Vale of Glamorgan) believe the sense of community has declined. For Gwynedd the lowest reported concern is the loss of what makes them special at 21%, whereas for Vale of Glamorgan it is the area becoming more international and multicultural (12%).

Open suggestions

There was a high degree of agreement among respondents’ open suggestions, with 37% of Gwynedd respondents, 35% of Vale of Glamorgan, and 27% of Pembrokeshire respondents all requesting more engagement in Tourism policy development. Improvements in local infrastructure provision also featured highly across all areas (Gwynedd, 23%; Pembrokeshire, 24%; Vale of Glamorgan, 48%). It is important to note that these answers were not prompted, suggesting a high degree of feeling among the respondents.

Tourism impact

The local economy featured top across all three areas as being influenced most by Tourism with Gwynedd at 82%, Pembrokeshire at 86%, and Vale of Glamorgan at 74%. Similarly, employment features highly as well (Gwynedd, 76%; Pembrokeshire, 77%, and Vale of Glamorgan, 62%). There is also general agreement among negative impacts with cleanliness of public spaces scoring low across all three areas with 38% in Gwynedd believing Tourism has a negative impact on it, in Pembrokeshire it’s 40%, and in Vale of Glamorgan it’s 48%.

Welsh language

Pembrokeshire chose not to ask about the Welsh Language, but some interesting differences emerged between Gwynedd and Vale of Glamorgan. For Gwynedd 70% of respondents believe Tourism is a good vehicle for the promotion of Welsh language and culture whereas only 56% of respondents agree the same in Vale of Glamorgan. As noted in the reports, a much higher proportion of respondents in Vale of Glamorgan had no opinion on the Welsh language questions (between 16% and 40%), whilst for Gwynedd it was only 4% - 12% depending on the question.

Tourism consequences

49% of Gwynedd respondents say they perceive the negative consequences of Tourism at least at some point during the average year, for Pembrokeshire this figure is 65%, and for Vale of Glamorgan its 64%. Parking and Traffic Issues are the highest reported problems encountered by respondents (Gwynedd, 77% and 76% respectively; Pembrokeshire, 84% and 83% respectively; and Vale of Glamorgan, 84% and 84% respectively). An interesting point of divergence is on the loss of housing to second homes, for Gwynedd and Pembrokeshire this factor rates highly (64% and 63% respectively), and only 14% in Vale of Glamorgan.

Visitor segments

There is some variation in terms of preference strength for which visitor segments the three areas would prefer, however growth in international visitors was preferred across all the areas the most. Similarly business visitors were also seen as a positive growth target across all three areas. Pembrokeshire was the only area to report a less than 50% positive desire for more of any one individual segment (event attendees, 47%).

Events

Pembrokeshire did not ask about the consequences of events, however comparing Gwynedd and Vale of Glamorgan we see some interesting points: both (Gwynedd, 61%; Vale of Glamorgan, 51%) believe events have helped the Tourism economy grow, but whereas only 18% of respondents in Gwynedd believe this has damaged local infrastructure, 39% of respondents in Vale of Glamorgan believe it has. 38% of Gwynedd respondents believe events have increased the recreational offer in the area, whereas 27% in Vale of Glamorgan report the same. Finally, both areas report a similarly low level for events bringing too many people all at once (Gwynedd, 18%; Vale of Glamorgan, 23%).