

# Environment for Growth Monitoring & Evaluation Project

**Mid-Term Report by:**

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**For:**  
E4G Steering Group

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## EXECUTIVE SUMMARY

### INTRODUCTION

The following summarises the Mid-Term report findings on the economic impact of the Environment for Growth (E4G) project. The economic impact of both visitor spending (to February 2012) and capital spending (to June 2012 and to project end) are detailed for the E4G project as a whole and for each of the 6 strategic projects where data exists. Economic impacts are reported in terms of gross value added and employment.

**Table 1: Economic Impact Indicators**

<i>Economic Measure</i>	<i>Description</i>
Gross Value Added (GVA)	Locally earned incomes and profits. Reported in £s.
Employment	The number of person years of employment (Full-Time Equivalent FTE) supported by spending associated with visits to E4G sites or events.

Also detailed is the progress to date on underlying WEFO indicators for individual projects at June 2012 (e.g. direct jobs created; visitor numbers; enterprises assisted etc.)

### MAIN FINDINGS

#### *Visitor spending economic impact*

- **For each E4G event** an average gross value added of **£19,200** was generated with this supporting around 1 person year of employment in Wales;
- **For each E4G site surveyed** to date an average gross value added of **£1.11m per year** was generated through on-site or directly attributable visitor spending, with this supporting an average of 57 person years of employment in Wales;  
*(Sites surveyed to date have tended to be the relatively large ones in terms of visitor numbers, so the overall average for all initiatives is likely to be less than this)*
- The GVA supported by the whole of trips of which visits to E4G sites were a part levered an average **£4.94m of GVA per year for each site surveyed** and with the underlying tourism consumption supporting 220 person years of employment.

#### *Capital spending economic impact*

- **For the E4G project as a whole** the total estimated construction spend at the mid-term stage (June 2012) was an estimated £28.4m. Taking a central assumption that 80% of construction activity is locally sourced, and following multiplier effects, some **£20.5m of value added** is supported in Wales and around **480 person years of employment**;

- To project completion, estimated construction spend associated with the E4G projects is £72.8m. Again, taking the mid range estimate of 80% local sourcing, it is estimated that, once the multiplier effects of this construction spending are taken into account, around **£53m of value added** is supported in Wales, and over **1,200 person years of employment**.

## BACKGROUND

Table 2 shows 155 individual initiatives within the E4G project that the research team have data for. We estimate the total spend associated with these initiatives is around £80.8m, of which £35.6m represents ERDF support, and with an average intervention rate of 44%. The average expenditure associated with an E4G initiative is £521,000.

**Table 2: E-flyers returned by Strategic Project**

	<i>Number of E4G initiative eflyers</i>
Coastal Tourism	3
Communities and Nature	67
Heritage Tourism Project	20
Sustainable Tourism	4
Valleys Regional Park	48
Wales Coast Path	13
<b>Total</b>	<b>155</b>

The following sections highlight the economic impact of E4G initiatives for:

Section A: Impacts of visitor spending for E4G as a whole;

Section B: Impacts of visitor spending by strategic project;

Section C: Impacts of capital spending;

Section D: Overall project progress by overall targets.

## A. IMPACTS OF VISITOR SPENDING

Table A1 summarises the visitor surveys which had been completed and data submitted to the research team by February 2012. These included 15 site surveys, and 11 at specific events.

**Table A1: E4G Visitor Survey Progress (February 2012)**

	<i>Number of questionnaires</i>	<i>Basic analysis complete?</i>	<i>Economic Impact analysis?</i>	<i>Site or Event survey?</i>
<b>COMMUNITIES AND NATURE</b>				
Ystradlyn Cadair Idris 2011	179	Yes	Yes	Site
Cors Dyfi Ospreys 2011	530	Yes	Partial	Site
Moelyci Natural Heritage Open Day 2011	57	Yes	Yes	Event
Great Orme 2011	163	Yes	Yes	Site
	<b>929</b>			
<b>HERITAGE TOURISM PROJECT</b>				
Blaenavon 2011	183	Yes	Yes	Site
Caernarfon 2011	209	Yes	Yes	Site
Caerphilly 2011	223	Yes	Yes	Site
Conwy 2011	226	Yes	Yes	Site
Harlech 2011	207	Yes	Yes	Site
St Davids 2011	199	Yes	Yes	Site
	<b>1,247</b>			
<b>SUSTAINABLE TOURISM</b>				
Halo British Series 2011	95	Yes	Yes	Event
ETAPE Bicycle event 2011	75	Yes	Yes	Event
One Historic Garden Bryngarw Country Park 2011	50	Yes	Yes	Event
	<b>220</b>			
<b>VALLEYS REGIONAL PARK</b>				
Six Bells 2010	138	Yes	Yes	Event
Cordell Event 2010	102	Yes	Yes	Event
Dare Valley 2010	100	Yes	Yes	Site
Pen Y Fan 2010	100	Yes	Yes	Site
Party in the Past 2010	59	Yes	No	Event
Turner Exhibition 2010	40	Yes	No	Event
Welsh Waterways 2011	121	Yes	Yes	Event
Cwmbran Big Event 2011	107	Yes	Yes	Event
The Big V Festival 2011	46	Yes	No	Event
Parc Taf Bargoed 2011	34	Yes	No	Site
Parc Cwm Darran 2011	107	Yes	No	Site
Pen Y Fan 2011	100	Yes	Yes	Site
	<b>1,054</b>			
<b>WALES COAST PATH</b>				
Convergence area, Winter '11	135	Yes	No	Sites
	<b>135</b>			
<b>TOTAL SURVEYS</b> ALL = 26 (Sites = 15; Events = 11)	<b>Questionnaires</b> <b>3,585</b>			

To develop estimates of visitor spending, information gained from the visitor surveys was grossed up to the overall visitor numbers at each site (over a year or season as appropriate for E4G sites and to the total attendance for events). The accuracy of the estimates relies on the representativeness of the surveys collected, with smaller numbers of surveys having to be considered more carefully.

The information on tourism spending at the sites and events provided inputs to an economic model which then generated an estimate of the gross value added and employment connected to the tourist visits.

Table A2 presents an overview of the economic impact associated with visitation to events. Of the 8 events for which complete data was available and analysed an estimated £154,000 was generated in the Welsh economy and with 8 FTE years of employment supported. The total attendance at these events was 22,029.

**Table A2: Economic impact of surveyed E4G events**

	<i>Number of event surveys</i>	<i>Total GVA (£s) generated</i>	<i>Employment (FTEs) supported by event visitor spending</i>	<i>Average GVA (£s) per event</i>	<i>Average employment (FTEs) supported per event</i>
<b>Communities and Nature(CAN)</b>	1	1,210	0.06	1,210	0.06
<b>Heritage Tourism Project (HTP)</b>	0	-	-	-	-
<b>Coastal Tourism (CT)</b>	0	-	-	-	-
<b>Sustainable Tourism (ST)</b>	3	95,165	5.3	31,722	1.8
<b>Valleys Regional Park (VRP)</b>	4	57,300	2.8	14,325	0.7
<b>Wales Coast Path (WCP)</b>	0	-	-	-	-
<b>All E4G</b>	<b>8</b>	<b>153,675</b>	<b>8</b>	<b>19,209</b>	<b>1.0</b>

Table A3 shows the estimated economic impact of visitor spending directly attributable to E4G sites (so that where visitors were on a long stay holiday, just one night's accommodation spend was included along with any other spend directly linked to their trip to the E4G site). The average value added generated for the Welsh economy over one year for each site surveyed was £1.11m, with the visitor spending being connected with an average of 57 person years of employment.

**Table A3: Economic impact of surveyed E4G sites**

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
<b>Communities and Nature(CAN)</b>	3	2,547,000	110	849,000	37
<b>Heritage Tourism Project (HTP)</b>	6	10,472,000	559	1,745,333	93
<b>Coastal Tourism (CT)</b>	0	-	-	-	-
<b>Sustainable Tourism (ST)</b>	0	-	-	-	-
<b>Valleys Regional Park (VRP)</b>	3	353,300	19	117,767	6
<b>Wales Coast Path (WCP)</b>	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>13,372,300</b>	<b>688</b>	<b>1,114,358</b>	<b>57</b>

Table A4 shows that the GVA supported by the whole of trips of which visits to E4G sites were a **part** levered an average of £4.9m of GVA per site. The underlying tourism consumption supported 221 person years of employment.

Clearly there is some possibility of double counting in the total trip figures as visitors to one E4G site may have visited another E4G site. Double counting and displacement issues such as this will be resolved during the monitoring and evaluation of the project as data on visitors' travel patterns in Wales become more robust.

**Table A4: Economic impact of whole trip in Wales of visitors to E4G sites** (includes impact of visitor spending elsewhere on their trip i.e. includes all nights in accommodation)

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
<b>Communities and Nature(CAN)</b>	3	12,271,000	549	4,090,333	183
<b>Heritage Tourism Project (HTP)</b>	6	41,712,000	1,867	6,952,000	311
<b>Coastal Tourism (CT)</b>	0	-	-	-	-
<b>Sustainable Tourism (ST)</b>	0	-	-	-	-
<b>Valleys Regional Park (VRP)</b>	3	5,316,900	231	1,772,300	77
<b>Wales Coast Path (WCP)</b>	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>59,299,900</b>	<b>2,647</b>	<b>4,941,658</b>	<b>221</b>

## B. IMPACTS OF VISITOR SPENDING BY STRATEGIC PROJECT

A summary follows of the economic impact resulting from visitor spending by E4G strategic project where data was available.

### Communities and Nature

Table B1 summarises the economic impact information for Communities and Nature sites. For Ystradllyn Cadair Idris there were an estimated 35,000 visitors in 2010/2011. The survey base was just under 2% of the total number of visitors with 179 surveys covering 603 people. Two-thirds of those surveyed were staying away from home. The GVA associated with the trips of which Ystradllyn was a part was £1.88m (around £54 per visitor), and with this amount of tourism consumption in Wales estimated to support 84 FTE jobs.

The on-site impacts are much smaller reflecting the nature of the site. The GVA attributable to on-site spending was around £0.28m and with this supporting an estimated 15 FTE jobs in Wales directly and indirectly. Table B1 reveals not surprisingly that the Great Orme site levers larger numbers of visitors (over 145,000), but also with a higher proportion of economic impact associated with on site spending. Visitor consumption associated with trips of which Great Orme was a part were associated with an estimated £8.2m of GVA and 370 supported FTE jobs. On site visitor spend contributed £2.3m of GVA and 95 FTEs.

Cors Dyfi Ospreys shares some of the site characteristics of Ystradllyn. Here total trip impacts were estimated at £2.15m of GVA supported and 95 FTE jobs. No on site spending information was available for Cors Dyfi.

The CAN project included one surveyed event to date, the Moelyci Open Day. In the case of events we seek to only estimate the economic impacts associated with the event i.e. this would only include overnights associated with the event itself such that the 'event' is the 'trip'. The impact numbers are much smaller here. The event attracted some 800 visitors. However, there was a GVA impact of £1,210 and with even with the visitor consumption associated with the event directly and indirect supporting 0.06 of an FTE job in Wales.

**Table B1 Communities and Nature Visitor Surveys: Economic Impact**

	Ystradlyn Cadair Idris 2011	Great Orme 2011	Cors Dyfi Ospreys 2011	Moelyci Open Day 2011
Type	Site	Site	Site	Event
Visitor Numbers	35,000	145,183	40,000	800
Date Visitor Numbers relate to	Oct'10-Sep'11	Jan'11-Dec'11	2011 Season	3rd July 2011
Questionnaires completed	179	163	530	57
Number in respondents' parties	603	599	1,513	130
Staying away from home in Wales	65.5%	82.6%	62.2%	7.3%
<b>Economic Impact</b>				
<u>Total Trip</u>				
Gross Value Added	£1,876,000	£8,245,000	£2,150,000	N/A
Supported employment – person-years	84	370	97	N/A
GVA to create each job	£22,333	£22,284	£22,165	N/A
Trips to create job	417	392	412	N/A
Total trip GVA per visitor	£53.60	£56.79	£53.75	N/A
<u>Directly attributable to site/event</u>				
Gross Value Added	£276,000	£2,271,000		£1,210
Employment FTEs	15	95		0.06
GVA to create each job	£18,400	£23,905		£20,167
Visits to create job	2,333	1,528		13,333
On-site GVA per visitor	£7.89	£15.64		£1.51
GVA per visitor: total trip: on-site	6.80	3.63		N/A
GVA to create job: total trip: on-site	1.21	0.93		N/A

*N.B. Visitors to Cors Dyfi Ospreys were not asked for spend data*

In sum CAN initiatives surveyed to date can be connected with tourism trips supporting around £12.4m of GVA in total and supporting over 550 FTE jobs.



## Heritage Tourism Project

Table B2 provides a summary of the economic impact results for Heritage Tourism Project initiatives. These are particularly interesting results because they evidence very different economic effects across similar sites but in different areas of Wales. The castles at Caernarfon and Conwy are among the most visited attractions in Wales. Caernarfon attracted nearly 192,000 visitors in 2009-10. The GVA supported by the whole of trips of which visits to Caernarfon Castle were a part levered a little over £14m of GVA and with the underlying tourism consumption supporting 630 FTE jobs. Around one quarter of the GVA impact was attributable to the site itself in the Caernarfon case i.e. £3.62m and 197 FTE jobs supported directly and indirectly by on-site visitor consumption.

Taken together the HTP sites could be connected to tourism visits in Wales that contributed £41.7m of GVA and that supported 1,867 FTE jobs direct and indirectly. Clearly there is some possibility of double counting in the total trip figures as visitors to one historic site may have visited another HTP site. Double counting and displacement issues such as this will be resolved as data on visitors' travel patterns in Wales become more robust.

**Table B2 Heritage Tourism Project Visitor Surveys : Economic Impact**

	Blaenafon	Caernarfon	Caerphilly	Conwy	Harlech	St Davids	Site Average
Type	Site	Site	Site	Site	Site	Site	Site
Visitors Oct 2009- Sept 2009	28,085	191,871	84,631	177,411	93,624	26,165	100,298
Questionnaires completed	183	209	223	226	207	199	208
Number in respondents' parties	598	829	735	803	835	686	748
Staying away from home in Wales	53.0%	88.0%	57.8%	82.7%	91.8%	92.5%	77.6%
<b>Economic Impact</b>							
<u>Total Trip</u>							
Gross Value Added	£1,643,000	£14,029,000	£4,433,000	£12,622,000	£6,799,000	£2,186,000	£6,952,000
Supported employment – p/y	73	630	199	565	305	95	311
GVA to create each job	£22,507	£22,268	£22,276	£22,340	£22,292	£23,011	£22,449
Trips to create job	385	305	425	314	307	275	335
Total trip GVA per visitor	£58.50	£73.12	£52.38	£71.15	£72.62	£83.55	£69.31
<u>Directly attributable to site</u>							
Gross Value Added	£263,000	£3,618,000	£1,230,000	£3,317,000	£1,347,000	£697,000	£1,745,333
Employment FTEs	14	197	63	180	70	35	93
GVA to create each job	18,786	18,365	19,524	18,428	19,243	19,914	£19,043
Visits to create job	2,006	974	1,343	986	1,337	748	1,232
On-site GVA per visitor	£9.36	£18.86	£14.53	£18.70	£14.39	£26.64	£17.40
GVA per visitor: total trip: on-site	6.25	3.88	3.60	3.81	5.05	3.14	3.98
GVA to create job: total trip: on-site	1.20	1.21	1.14	1.21	1.16	1.16	1.18

The GVA attributable to on-site spending across the six HTP projects was £10.5m and with the underlying tourism spending at the sites supporting an estimated 559 FTE jobs.

Table B2 reveals marked differences in the on-site GVA supported per visitor. This varied from £9.36 in the case of Blaenavon to £26.64 in the case of St Davids. These figures testify to the different spending opportunities available at sites and subtle differences in the visitor mix at each site. Finally here the information in Table B2 shows that care is required in generalising economic impact based on visitor numbers alone with GVA and employment effects per visitor showing marked variation.

### Sustainable Tourism

Table B3 reveals economic impacts associated with Sustainable Tourism events. Here the focus is on economic activity supported by the event.

**Table B3 Sustainable Tourism Visitor Surveys : Economic Impact**

	ETAPE Cycling event 2011	HALO British Series Cycling event 2011	One Historic Garden, Bryngarw Country Park "Shakespeare, Songs & Silliness" 2011
Type	Event	Event	Event
Visitor Numbers	1,000	2,310	175
Date Visitor Numbers relate to	8/9th Oct'11	25/26th Jun'11	26-28th Jul'11
Questionnaires completed	75	95	50
Number in respondents' parties	236	288	154
Staying away from home in Wales	36.1%	91.1%	0.0%
<b>Economic Impact</b>			
<u>Total Trip</u>			
Gross Value Added	N/A	N/A	N/A
Supported employment - FTE	N/A	N/A	N/A
GVA to create each job	N/A	N/A	N/A
Trips to create job	N/A	N/A	N/A
Total trip GVA per visitor	N/A	N/A	N/A
<u>Directly attributable to event</u>			
Gross Value Added	£23,040	£71,800	£325
Employment FTEs	1.24	4	0.02
GVA to create each job	£18,581	£17,950	£16,250
Visits to create job	806	578	8,750
On-site GVA per visitor	£23.04	£31.08	£1.86
GVA per visitor: total trip: on-site	N/A	N/A	N/A
GVA to create job- total trip: on-site	N/A	N/A	N/A

In each case here the number of survey returns represented a relatively large proportion of total visits. For example the ETAPE cycling event surveys completed covered 23.6% of the event visitor numbers. Compared to strategic sites economic impact numbers are smaller but with the figures typically representing just a few days of activity as opposed to a season or year.

The ETAPE event for 8/9<sup>th</sup> October 2011 attracted around 1,000 visitors. Tourism spending levered by the event supported just over £23,000 of GVA and with the underlying spending supporting just over 1 FTE job. The Halo Cycling event attracted an estimated 2,310 visitors and featured a relatively high amount of staying visitation. Visitor spending associated with the event is estimated to have supported £71,800 of GVA and supported 4 FTE jobs directly and indirectly. The event at the One Historic Garden initiative in Bryngarw was smaller scale but with some GVA and employment supported by spending at the event by 175 visitors.

### **Valleys Regional Park**

Table B4 summarises economic effects associated with Valleys Regional Park sites and events. Dare Valley was estimated to have received 142,000 visitors between October 2009 and September 2010. The GVA supported by trips of which Dare Valley was a part was around £4.4m and with linked tourism spending supporting an estimated 190 FTE jobs. In the case of Dare Valley, on-site effects were a small proportion of total trip effects. Just £0.28m of GVA was supported by the on-site spending and 15 FTE jobs. The remaining site is Pen y Fan where survey results were available for 2010 and 2011. For the two years there are similarities in the GVA and employment supported by trips of which visit to Pen y Fan were a part. In 2011 an estimated £0.51m of GVA was supported and 22 FTE jobs. However, economic activity supported by on site spending differed markedly between 2010 and 2011. It is noted that in the case of Pen y Fan survey returns represent a small element of the visitor population and with results here possibly sensitive to just a few returns.

Finally Table B4 summarises economic effects associated with four Valley Regional Park events. Taken together the four events supported £57,000 of GVA and with underlying spending directly and indirectly supporting just under 3 FTE jobs.

**Table B4 Valleys Regional Park Visitor Surveys : Economic Impact**

	Dare Valley 2010	Pen Y Fan 2010	Pen Y Fan 2011	Six Bells Event 2010	Cordell Event 2010	Welsh Waterways 2011	Cwmbran Big Event 2011	Event Average
Type	Site	Site	Site	Event	Event	Event	Event	Event
Visitor Numbers	142,000	80,000	81,000	7,500	1,568	1,676	7,000	4,436
Date	Oct'09- Sep'10	Jan'10- Dec'10	Nov'10- Oct'11	28th Jun'10	18/19th Sep'10	28-30th May'11	16th Jul'11	
Questionnaires completed	100	100	100	138	102	121	107	117
Number in respondents' parties	332	261	244	424	502	355	405	422
Staying away from home in Wales	33.0%	1.0%	1.0%	13.5%	4.9%	14.0%	1.9%	8.6%
<b>Economic Impact</b>								
<u>Total Trip</u>								
Gross Value Added	£4,367,000	£435,900	£514,000	N/A	N/A	N/A	N/A	N/A
Supported employment - FTE	190	19	22	N/A	N/A	N/A	N/A	N/A
GVA to create each job	£22,984	£22,942	£23,364	N/A	N/A	N/A	N/A	N/A
Trips to create job	747	4,211	3,682	N/A	N/A	N/A	N/A	N/A
Total trip GVA per visitor	£30.75	£5.45	£6.35	N/A	N/A	N/A	N/A	N/A
<u>Directly attributable to event</u>								
Gross Value Added	£280,000	£54,500	£18,800	£32,000	£3,350	£5,950	£16,000	£14,325
Employment FTEs	15	3	1	1.5	0.16	0.27	0.9	0.7
GVA to create each job	£18,667	£18,167	£18,800	£21,333	£20,938	£22,037	£17,778	£20,521
Visits to create job	9,467	26,667	81,000	5,000	9,800	6,207	7,778	7,196
On-site GVA per visitor	£1.97	£0.68	£0.23	£4.27	£2.14	£3.55	£2.29	£3.06
GVA per visitor: total trip: on-site	15.60	8.00	27.34	N/A	N/A	N/A	N/A	N/A
GVA to create job: total trip: on-site	1.23	1.26	1.24	N/A	N/A	N/A	N/A	N/A

### C. IMPACTS OF CAPITAL SPENDING

As well as impacts in terms of leveraging tourism spending it is important to recognise that the Environment for Growth programme has also involved considerable amounts of capital spending, in large measure, on construction type activity. Within the Welsh European Funding Office guidelines the direct and indirect economic activity supported through capital spending cannot be included within any gross or new jobs created target. However, estimates of output and employment supported during E4G developmental activity should be included in a more general evaluation of the programmes impact. In particular, it is noted that selected project activity has taken place in more needy parts of the regional economy, such that employment and incomes supported in construction could have important local effects.

Moreover, we would argue that on the basis of prior projects evaluated by the Cardiff University team involving environmental assets, the nature of construction contracts issued commonly supports local firms and jobs as opposed to situations where contracts are awarded outside of the regional and West Wales and the Valleys economy. It is stressed that what follows is an estimate of the employment and value added associated with the capital spending of the E4G project from inception to June 2012. The estimates in Table C1 are reported as a range based on different regional sourcing assumptions. There is also here no attempt to differentiate different types of construction activity i.e. the spend is assumed to be connected to an average construction type activity in Wales. We use the framework of the Welsh Input-Output tables to estimate the indirect effects associated with the spending.

Table C1 reveals that the total estimated construction spend associated with the E4G projects at the mid-term stage (June 2012) was an estimated £28.4m. Taking the mid range estimate of 80% local sourcing, we estimate that once the multiplier effects of this construction spending are taken into account that some £20.5m of value added is supported in Wales and around 480 person years of employment.

Put another way if the construction activity bridged a period of three years, the E4G spending would have supported around 165 construction jobs and jobs in the construction supply chain over this three year period, and around £7m of value added per annum. However, the table also reveals that if the local sourcing of the construction industry inputs averaged just 60% then a total of around £15m of value would have been supported and around 350 person years of employment.

The table also subdivides estimated value added and job years supported between the strategic strands of the E4G project. Capital spend associated with the Valleys Regional Park project accounts for around one third of the direct and indirect effects at the mid-term stage.

**Table C1 Estimated Value Added and Employment Supported by E4G Capital Spending to June 2012, and to Project Completion**

Project and Local sourcing assumption	Mid Term Stage		At Project Completion	
	Value Added (£m)	Approx Employment (FTE person years)*	Value Added (£m)	Approx Employment (FTE person years)*
<b>Sustainable Tourism</b>	<i>To June 2012 (£2.743m)</i>		<i>Whole project (£14.232m)</i>	
100%	2.5	60	12.9	300
80%	2.0	45	10.3	240
60%	1.5	35	7.7	180
<b>Coastal Tourism</b>	<i>To June 2012 (£4.600m)</i>		<i>Whole project (£13.949m)</i>	
100%	4.1	100	12.5	300
80%	3.3	80	10.0	240
60%	2.5	60	7.6	180
<b>Heritage Tourism Project</b>	<i>To June 2012 (£4.889m)</i>		<i>Whole project (£15.227m)</i>	
100%	4.4	105	13.7	320
80%	3.5	85	11.0	260
60%	2.6	60	8.2	190
<b>Communities and Nature</b>	<i>To June 2012 (£2.944m)</i>		<i>Whole project (£8.997m)</i>	
100%	2.7	60	8.2	185
80%	2.1	50	6.5	150
60%	1.6	35	4.9	110
<b>Wales Coast Path</b>	<i>To June 2012 (£4.009m)</i>		<i>Whole project (£6.216m)</i>	
100%	3.6	85	5.6	130
80%	2.9	65	4.5	100
60%	2.2	50	3.4	80
<b>Valleys Regional Park</b>	<i>To June 2012 (£9.218m)</i>		<i>Whole project (£14.200m)</i>	
100%	8.3	195	12.8	300
80%	6.7	155	10.3	240
60%	5.0	110	7.7	175
<b>Total</b>	<i>To June 2012 (£28.403m)</i>		<i>Whole project (£72.821m)</i>	
100%	<b>25.6</b>	<b>605</b>	<b>65.7</b>	<b>1535</b>
80%	<b>20.5</b>	<b>480</b>	<b>52.6</b>	<b>1230</b>
60%	<b>15.4</b>	<b>350</b>	<b>39.5</b>	<b>915</b>

\*Note. The employment estimate numbers have been rounded to the nearest 5.

Table C1 also indicates that, to project completion, estimated construction spend associated with the E4G projects is £72.8m. Again, taking the mid range estimate of 80% local sourcing, it is estimated that, once the multiplier effects of this construction spending are taken into account, around £53m of value added is supported in Wales, and over 1,200 person years of employment. We stress these are estimated numbers, but they do reveal that as well as leveraging tourist spending, the development activity connected to E4G may also have important employment effects.

#### **D. OVERALL PROJECT TARGET PROGRESS**

For completeness, Table D1 provides information on the overall progress of the E4G strands of activity against the targets that were agreed with WEFO on project inception. Progress on some of the key targets has been disappointing but it has to be accepted that projects are at different stages, although the overall E4G project is at mid-term stage.

In general progress on job created has been poor at the mid-term stage across all strands i.e. less than 25 jobs reported as created against a target of close to 350. Notwithstanding this direct jobs created target does not include employment supported by visitor spend and during the development phases of construction. In this respect progress on levered visitation has been much stronger across all of the six strands with two strands already well exceeding their visitor targets, and a further two expected to do so by the end of the E4G project.

Progress has also been poor in terms of enterprises assisted and created, although an evidence base is being developed to provide better evidence on this measure.

Progress on managed access in terms of kilometres developed has also been variable. Valleys Regional Park seems well on schedule to exceed its managed access target. It is unclear why with respect to the Welsh Coastal Path that the delivery of the path is reported as completed but that no total is reported against km of managed access. Coastal Tourism and Sustainable Tourism are at earlier stages but with some way to go to meet targets on amounts of managed access achieved.

Our conclusion from table D1 would be selected strands of the E4G programme are unlikely to meet all of their targets, and with some questions on whether the original targets developed are suitable given the difficulty of collating appropriate evidence.

**Table D1 Overall Project Target Progress**

<b>Sustainable Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	53	4.66	48
Visitor Numbers	917,187	396,255	520,932
Enterprises Assisted	55	7	48
Initiatives developing, urban, natural or historic environment	13	1	12
Managed access to the Coast or Countryside (km)	428.00	81.9	346
<b>Coastal Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	44	8.5	35.5
Visitor Numbers	406,380	243,534	162,846
Enterprises Assisted	21	0	21
Initiatives developing, urban, natural or historic environment	33	6	27
Managed access to the Coast or Countryside (km)	25.775	1.5	24.275
<b>Heritage Tourism Project *</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	18	0.7	17.3
Visitor Numbers	210,000	160,928	49,072
Enterprises Assisted	0	0	0
Initiatives developing, urban, natural or historic environment	18	4	14
Managed access to the Coast or Countryside (km)	0	0	0
<b>Communities and Nature</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	20	2	18
Visitor Numbers	100,000	694,743	exceeded
Enterprises Assisted/ <u>Created</u>	3	1	2
Initiatives developing, urban, natural or historic environment	20	67	exceeded
Managed access to the Coast or Countryside (km)	10	133	exceeded
<b>Wales Coast Path</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	8		
Visitor Numbers	100,000		
Enterprises Assisted	2		
Initiatives developing, urban, natural or historic environment	Delivery of the all Wales Coast Path	completed	
Managed access to the Coast or Countryside (km)	15		



<b>Valleys Regional Park</b>			
<i><b>OUTPUT</b></i>	<i><b>TARGET</b></i>	<i><b>ACTUAL</b></i>	<i><b>REMAINING</b></i>
Jobs Created- Direct	200	7	193
Visitor Numbers	100,000	580,000	exceeded
Enterprises Assisted	NA	NA	NA
Initiatives developing, urban, natural or historic environment	6	8	exceeded
Managed access to the Coast or Countryside (km)	80	72	8
Participants in training	200	263	exceeded
Qualifications	150	169	exceeded

\* Note: HTP figures reflect OE September 2012 claim (Strata Florida, Conwy Castle, Denbigh Castle and Copper Kingdom Heritage Centre, Amlwch (Mona Antiqua)).

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**Appendix 1:** Visitor Survey Findings by Strategic Project

**Appendix 2:** E4G Visitor Surveys- Summary information by question

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## **1. Introduction**

### **1.1 The objectives of Mid-Term report**

The Mid-Term report on the Environment for Growth (E4G) project covers the progress of the monitoring and evaluation undertaken between November 2009 and February 2012. The overall objective is to better understand the economic effects levered by both improvements to E4G sites, and visitation to E4G sponsored events. It is important to note that this Mid-Term report follows two interim reports covering the periods November 2009 to April 2010, and then in the period to March 2011. The findings in this Mid-Term report should be read in conjunction with the material in the interim reports, although we attempt to distil some key elements from prior reporting. There is a strong focus in the Mid-Term report on the economic assessment of visitation to sampled sites.

### **1.2 E4G Monitoring and evaluation**

The objectives of the monitoring and evaluation project commissioned by the E4G project partners required that Cardiff University would:

- Work with Strategic E4G Project managers to implement the E4G monitoring and evaluation framework majoring on the economic effects of levered visitation.
- Develop the E4G monitoring and evaluation framework using feedback from partners and site managers.
- Deliver workshops on monitoring and evaluation measurement techniques around the Convergence Fund area.
- Develop and assist in the application of a system to collect the appropriate monitoring and evaluation information from E4G sites/projects and/or bid partners as appropriate, including developing a process for the electronic submission of visitor survey data.
- Develop a meta-analysis of sites, in order to focus survey resources on a sample of representative sites.
- Mentor project managers at sampled sites as appropriate.
- Analyse the collated monitoring data, and report information in short reports and datasheets to project sponsors and stakeholders at site and aggregate level.
- Create and maintain a website for E4G partners to provide access to information on M&E tools, approaches and 'best practice', and include a stakeholder discussion forum.

### **1.3 Structure of the Mid-Term report**

In this report we describe progress against these objectives. Section 2 outlines overall progress of the monitoring and evaluation project covering development of tools, training and guidance, data collection processes and website development, and examination of the other ways through which Cardiff University has been able to engage with partner institutions and other stakeholders through the project to date. Section 3 examines the process of data collection for the project. This offers the opportunity to explore elements of the data collection process that went well and where improvements might be made in future. The section examines the numbers of survey returns that the team have received from sampled sites and events, and the amount of data received by means of the e-flyers to collate basic site information. The conclusions to section 3 show the further information that will be required between the Mid-Term report and the end of the project, and highlights where there are opportunities to gain additional data.

Section 4 is the core of the Mid-Term report. Here we aggregate the visitor survey information that has been received to date and attempt to examine key trends in the data. Section 4 begins by examining the likely determinants of the economic impact linked to E4G visitation. The first part of the section then focuses on reasons for visitation, visitor satisfaction, visitor demographics at different sites/events, staying visitor information, information on visitor travel patterns and then ties this together with an analysis of the economic impact of visitation at different sites/events.

Section 5 of the report looks forward to research required between the Mid-Term report and the final evaluation, and considers the analytical issues that need to be considered in the final analysis including grossing up visitor returns, capital spending effects and linking the economic impact work with the wider Convergence programme. Section 5 concludes and provides some recommendations going forward.

## 2. Review of overall progress November 2009 to February 2012

### 2.1 Development of the M&E framework and website resource

A major part of the early part of the monitoring and evaluation project was concerned with the development of the overall framework. Much of the commentary on this was addressed in the first interim report covering the period to March 2011. The early part of the project focused on the development of survey tools, the methodology to be employed in visitor survey analysis, the practical means through which data from visitor sites/events would be collated centrally and the ways through which this would be reported. The web site [e4g.org.uk](http://e4g.org.uk) has been developed as a store for the M&E materials developed. Currently the website includes:

- Project guidance materials for individual and strategic project managers including details of what the process is seeking to achieve, and practical steps in undertaking surveys.
- A set of template questionnaires; and volume and energy monitoring forms in Microsoft Word which managers and other stakeholders can use as a basis for visitor and other surveys at sites and events.
- Details of the workshops held to date including a full suite of the presentations made.
- A submission portal through which managers can submit survey information to the Cardiff University team.

The website is also expected to become the gateway for the release of the findings from the M&E process. The interim reports from Cardiff University on the progress of the project have also been placed on the website. The website ([www.e4g.org.uk](http://www.e4g.org.uk)) went on-line in March 2010.

At the Mid-Term stage the following conclusions can be made regarding the website. The information page of the website seems to have worked well; the Cardiff team have received few concerns regarding participant access to web materials, with initiative managers reporting no serious problems with downloading data and template forms.

However, the Forum pages have still *not* been well used at Mid-Term stage. This is possibly due to a combination of a lack of need and lack of time for project/initiative managers. The conclusions with respect to available materials are:

- that surveys have been straightforward to implement, with the questions relatively easy to go through with visitors
- expenditure data derived from interviews has generally been of good standard and complete
- there were early concerns on the use of a Microsoft Access database to return data i.e. not everyone has the software and the process of zipping/sending files was not ideal. In response Cardiff have produced a Microsoft Excel version of the input form which is now available on the website. Feedback on the improved process has been very positive
- inputting of surveys has been achieved without difficulty by initiative staff and with very little extra guidance needed from the Cardiff team.

## 2.2. Workshops and surgeries

An important part of the overall project was for Cardiff University staff to work closely with a wide range of E4G participants including strategic project managers and staff involved with managing sites and events. Here it was critical to get some consistency in the survey approach adopted across E4G projects and to ensure that participants understood what types of information needed to be collected and why. To this end the period November 2009 to February 2012 saw a series of workshops and more targeted surgery days.

An important corollary of the general workshop sessions was the need for more targeted surgery days for individual E4G project streams and we briefly report on these also in this section.

Table 2.1 shows the main meetings held involving the Cardiff University team. This is in addition to advice offered by Cardiff University staff on a one to one basis over the first half of the project to a number of E4G stakeholders.

The first E4G Workshop was held on March 22nd 2010 at Merthyr Tydfil. In the first workshop an overview was given of the E4G M&E project, and some background was given on the size and scope of the general visitor economy in Wales. Presentations examined the problems of accounting for the economic impact of tourism, and cases were presented on the economic impact of tourism at the Blaenavon world heritage site and at the Anglesey Fens. The latter part of the first workshop day focused on how the team would evaluate the economic benefits levered by the E4G project, and how the website was being developed. Participants also received an outline of the different survey forms that would be available.

The Cardiff University team believed at this early stage that some project managers were wary of the additional work associated with the survey demands of the E4G Toolkit (compared with basic WEFO monitoring) such that an important part of the further work programme was

managing these concerns and making the process as efficient as possible for project managers.

There were two further general workshops held at the Aberystwyth offices of the Welsh Government. The second Workshop in September 2010 included sessions on:

- The connections between the E4G project and the progress of the Welsh economy
- The significance of the Welsh tourism economy
- The E4G Toolkit
- What E4G initiatives were expected to do; types of information that needed to be collected and impacts initiatives might have
- Case Studies: "Local Authority Response to the E4G M&E challenge with reference to Valleys Regional Park"; and "Analysis of Six Bells Project"
- The practicalities of undertaking visitor surveys, and issues surrounding sampling and sites
- Heritage Tourism Project – key issues as envisaged by Cadw's Howard James

The second workshop saw positive feedback from attendees, but with some stress on the value in guidance on sampling strategies for visitor surveys; more of a focus on going through the monitoring and evaluation of a hypothetical project; and making the workshops more interactive by asking all attendees to come prepared with questions arising from their projects that could be addressed in the sessions. The Cardiff University team were able to deal with these issues through more dedicated sessions targeted on individual project streams, but also through a redesign of material in preparation for the third workshop.

The third Workshop was held on 8th March 2011. Following from feedback from Workshop 2 the initial sessions were tailored to suit the delegate's projects, with an emphasis on Centres of Excellence and CAN projects which have a high level of interpretative content, and the presentation approach was more practical than in earlier workshops. In particular the Cardiff team went more carefully through the web materials and practical advice on organising surveys. The second part of the workshop provided the opportunity for attendees to describe their projects and explain the gains expected from them, and raise any concerns regarding the application of E4G monitoring and evaluation. There was a general sense of confidence and engagement during this session. The open session permitted each delegate to discuss their own initiatives, the challenges they were facing, and then with inputs from the Cardiff monitoring and evaluation team on how these challenges could be overcome.

**Table 2.1: Main E4G Meetings**

Date	Description
22 <sup>nd</sup> March 2010	Workshop 1 in Merthyr Tydfil
16 <sup>th</sup> June 2010	E4G Steering Group Meeting - at which the Annual Summary Report (year to end March 2010) was approved
18 <sup>th</sup> June 2010	Valleys Regional Park (and Heads of the Valleys Tourism) individual initiative meeting day with Cardiff University (Nantgarw)
21 <sup>st</sup> September 2010	Workshop 2 in Aberystwyth
13 <sup>th</sup> October 2010	E4G Steering Group Meeting
26 <sup>th</sup> January 2011	E4G Steering Group Meeting
27 <sup>th</sup> January 2011	Coastal Tourism and Sustainable Tourism individual initiative meeting day with Cardiff University (Aberystwyth)
8 <sup>th</sup> March 2011	Workshop 3 in Aberystwyth
9 <sup>th</sup> May 2011	E4G steering meeting at Brunel House, Cardiff
21 <sup>st</sup> June 2011	Coastal Tourism meeting at Welsh Government offices at Aberystwyth
12 <sup>th</sup> August 2011	Wales Coast Path Meeting (Cardiff with Beaufort Research).
22 <sup>nd</sup> September 2011	E4G steering meeting at Cwmbran
30 <sup>th</sup> November 2011	CAN meeting –discuss progress and plan for future
31 <sup>st</sup> January 2012	E4G steering meeting at Cilgerran

An analysis of the three workshops and the questions that were asked and discussed suggested that initiative managers faced common problems. These included:

- Uncertainty in establishing benchmarks for projects and baselines .
- Gaining the correct sample size for any given survey.
- The process of selecting interviewees in a random manner.
- Best methods of counting visitors and uncertainty on the mechanical aids to people counting.
- Misunderstanding of the conceptual aspects of direct and indirect visitor spends.
- Estimating fuel consumption (buildings and vehicles) when only part of the building/vehicle is used only part of the time.
- Avoiding double counting if one part of an initiative involves a footpath and another part involves an improvement to a visitor centre.



The concern of the Cardiff University team was that while many of these issues were being covered at workshops, and dedicated surgery days, project managers were perhaps not making enough use of the guidance material on the website.

Further opportunities for dealing with project specific enquiries came through more dedicated surgery days for strategic project streams. For example, during 2010-11 there were dedicated surgery days for Valleys Regional Park projects, and a second for representatives from the Centres of Excellence (Sustainable Tourism and Coastal Tourism strategic projects). These more focused sessions were an opportunity for teams to discuss issues that have occurred on their projects, and afforded the project team an opportunity to ensure that we would receive sufficient information for analysis.

Further surgery days were committed during the 2011 year. In June 2011 a day was held covering Coastal Tourism projects (including the Green Seas beach Improvement programme where the main themes of the initiatives are the new or improved facilities and interpretation and with a key benchmark relating to visitor satisfaction). Then the surgery day focused on how visitor perceptions of the environment could be built into the M&E process. As a result of the surgery it was decided to create a new element in the Visitor Survey Questionnaire, getting visitors to rate aspects of the project from 'bad' to 'good' (e.g. cleanliness, car parking, toilets etc.) The new version of the questionnaire for Green Seas initiatives was agreed by the end of August '11.

A further meeting was held in August 2011 covering the Wales Coastal Path. This was linked to the main E4G evaluation but with the Cardiff University team using E4G tools to inform this evaluation. In this meeting a timetable for undertaking visitor surveys and sample sizes were discussed. It was agreed that the questionnaire sampling should reflect the dimensions of urban/rural; new section/ existing section of path; and industrial/natural areas. A bespoke questionnaire for the Wales Coast Path was discussed and designed. Importantly the evidence gained from the non-Convergence side of this project will further improve the evidence base for E4G although being a separate project involving the Cardiff team.

Finally a meeting was held in November 2011 with CCW staff involved in managing the Communities and Nature project. This meeting was held to check overall project e-flyer returns for completeness and with economic impact estimations completed for CAN initiatives

also discussed, together with future requirements. The submission of visitor number data from the initiative leaders was one of the areas highlighted as being of particular importance.

Clearly the issues raised in the individual surgery session mirrored some of those in the general workshop sessions. However, with smaller numbers of people speaking to specific families of projects we believe that important progress was made in surgery days toward pushing the monitoring and evaluation project forward. One conclusion is that this type of more dedicated surgery day may be a useful way ahead in the second half of the programme, particularly as project managers become more accustomed to the survey tools and have more specific needs. In general the feedback from those at Surgery days was very positive. For example: attendees welcomed the opportunity to go through their initiatives in detail (and in 'private') finding out what exactly was required in terms of monitoring and evaluation. Following the surgery days the perception coming from delegates was that the underlying M&E requirements were actually relatively straightforward to achieve. For example, in terms of the processes, the surgeries showed that what was being requested by the team was actually similar to what many Local Authorities required and with many of the staff involved in initiatives actually having had experience of collecting visitor data and/or running surveys before, the requirements for E4G monitoring and evaluation were not seen as onerous.

### **2.3 Steering meetings & management**

By the mid-term stage of the project the Cardiff University team have attended a total of six steering group meetings. The earlier steering meetings focused more on specific problems being encountered by project managers and resolving these, and then on tightening the developed M&E framework. Steering meetings also provided the opportunity to chase up on projects that had not supplied basic data (i.e. relating to the e-flyers –see next section). Within steering the workshop format material was also planned and discussed.

The later steering meetings provided the opportunity to also report on the economic impacts levered by E4G projects coming through. We return to this in section 4 of this report.

### **2.4 Other outputs**

Although not formally part of the M&E process it is noted that the Cardiff University team have been seeking to bring the E4G research to a wider practitioner and academic audience. For example, in October 2011 Calvin Jones discussed the approach and challenges involved in

the E4G project at the EU sponsored *1<sup>st</sup> Nature & Sports Euro'Meet* in Annecy, following a competitive process that saw only a handful of 150 experience submissions presented to the conference. In February 2012 Max Munday used the E4G case specifically to discuss the challenges associated with the valuation of cultural heritage at the EVoCH ("Economic Value of Cultural Heritage") consortium meeting in Vienna. This meeting included members from a range of EU states who were interested in valuing cultural heritage and with the group exchanging knowledge on best practices among the different European stakeholders involved in cultural heritage (see [www.jcyl.es/evoch](http://www.jcyl.es/evoch)). The seminar in Vienna aimed to identify a potential cost-benefit assessment model for cultural tourism, which could serve as an evaluation and steering tool for political and administrative decision-makers in town and regional planning.

It is hoped that the opportunities to share the knowledge gained from the E4G project with interested people in Wales and further afield might continue, particularly as the underlying evidence base grows in size and allows more complex analysis of levered visitation to be undertaken.

### 3. Data collection and progress

#### 3.1 Introduction

In this section of the report we provide a summary of progress in terms of the process of data collection and an appreciation of outstanding issues which need to be considered in taking the project forward. Also included in this section is a summary of the data that has been collected up to and including February 2012.

#### 3.2 E-Flyers

At the start of the monitoring and evaluation process for E4G, the WERU research team instituted the “e-flyer” as a means of picking-up basic information from initiatives. This was intended to provide an insight into the breadth of activity being undertaken, the time-scales associated with projects and their spending (with subdivisions for matched funding and ERDF elements) and details of the expected outputs from the projects. The overarching project data also provides the evaluators with information that can be used to develop typologies of projects, and to inform the numbers of initiatives which will require more detailed surveys on top of simple volume counts.

Despite a somewhat slow initial flow in the number of contributions sent through (noted in the first report of April 2010), some prompting by the strategic project managers on behalf of the research team resulted in a substantial improvement. The second interim report (April 2011) was consequently able to recount that the project database was almost fully populated a year later. Since this date, numbers of new e-flyers being sent to the research team have, understandably, slowed.

**Table 3.1 Summary of Environment for Growth Projects from E-Flyer Returns at March 2012**

Start Date of Initiative	Number of E4G Initiatives	Total Value of Initiative Spend (£s)	Value of ERDF grant aid £s
2009 <sup>1</sup>	24	11,412,836	4,060,825
2010 <sup>2</sup>	73	44,302,117	19,973,374
2011	50	19,498,463	9,044,059
2012	2	760,000	342,000
2013	2	4,031,000	1,813,950
Unknown	4	776,739	319,814
<b>Total</b>	<b>155</b>	<b>80,781,155</b>	<b>35,554,022</b>

<sup>1</sup> total project spend and ERDF grant figures not available for 3 initiatives, so figures are for 21 initiatives

<sup>2</sup> total project spend not available for 1 initiative and ERDF grant figures not available for 7 initiatives

Table 3.1 reveals 155 individual initiatives of which the research team have data for, the majority having a start date in 2010. We estimate the total spend associated with these projects is around £80.8m, of which £35.6m represents ERDF support, and with an average intervention rate of 44%. The average expenditure associated with an E4G initiative is £521,000. There are currently details of 211 people involved in these E4G initiatives held on the database. The quality of information initiative by initiative does vary somewhat especially in regard to the expected outputs from the initiatives.

**Table 3.2 E-flyers returned by Strategic Project**

	<b>Number of E4G initiative eflyers</b>
Coastal Tourism	3
Communities and Nature	67
Heritage Tourism Project	20
Sustainable Tourism	4
Valleys Regional Park	48
Wales Coast Path	13
<b>Total</b>	<b>155</b>

Table 3.2 provides a summary of the e-flyer returns by strategic project. These figures reflect both the different lengths of time strategic projects have been fully active (Valleys Regional Park and Communities and Nature have progressed relatively rapidly) and the different divisions of funding within strategic projects (the Coastal Tourism and Sustainable Tourism initiatives being largely focussed on substantially sized Centres of Excellence).

### **3.3 Visitor Surveys Completed**

The second interim report (April 2011) summarised the findings from the 6 visitor surveys that had been completed at that time. All these visitor surveys were undertaken by Valleys Regional Park initiatives. A substantially larger number of visitor surveys were carried out, and with data submitted to the WERU, between April 2011 and March 2012. Importantly they have come from across the spectrum of strategic projects.

**Table 3.3 E4G Visitor Survey Progress (March 2012)**

	Number of questionnaires	Basic analysis complete?	Economic Impact analysis?	Site or Event survey?
<b>COMMUNITIES AND NATURE</b>				
Ystradlyn Cadair Idris 2011	179	Yes	Yes	Site
Cors Dyfi Ospreys 2011	530	Yes	Partial	Site
Moelyci Natural Heritage Open Day 2011	57	Yes	Yes	Event
Great Orme 2011	163	Yes	Yes	Site
	<b>929</b>			
<b>HERITAGE TOURISM PROJECT</b>				
Blaenavon 2011	183	Yes	Yes	Site
Caernarfon 2011	209	Yes	Yes	Site
Caerphilly 2011	223	Yes	Yes	Site
Conwy 2011	226	Yes	Yes	Site
Harlech 2011	207	Yes	Yes	Site
St Davids 2011	199	Yes	Yes	Site
	<b>1,247</b>			
<b>SUSTAINABLE TOURISM</b>				
Halo British Series 2011	95	Yes	Yes	Event
ETAPE Bicycle event 2011	75	Yes	Yes	Event
One Historic Garden Bryngarw Country Park 2011	50	Yes	Yes	Event
	<b>220</b>			
<b>VALLEYS REGIONAL PARK</b>				
Six Bells 2010	138	Yes	Yes	Event
Cordell Event 2010	102	Yes	Yes	Event
Dare Valley 2010	100	Yes	Yes	Site
Pen Y Fan 2010	100	Yes	Yes	Site
Party in the Past 2010	59	Yes	No	Event
Turner Exhibition 2010	40	Yes	No	Event
Welsh Waterways 2011	121	Yes	Yes	Event
Cwmbran Big Event 2011	107	Yes	Yes	Event
The Big V Festival 2011	46	Yes	No	Event
Parc Taf Bargoed 2011	34	Yes	No	Site
Parc Cwm Darran 2011	107	Yes	No	Site
Pen Y Fan 2011	100	Yes	Yes	Site
	<b>1,054</b>			
<b>WALES COAST PATH</b>				
Convergence area, various sites, Winter 2011	135	Yes	No	Sites
	<b>135</b>			
<b>TOTAL SURVEYS</b> ALL = 26 (Sites = 15; Events = 11)	<b>Questionnaires</b> <b>3,585</b>			

Where an economic impact analysis has not thus far been completed, this is due to a paucity of spending data collected during the relevant survey, or a lack of visitor numbers to allow a grossing of survey returns to total attendance.

The Wales Coast Path strategic project has a target sample size of 1,500 in total, these being spread across two years of fieldwork from October 2011 to September 2013.

The aspiration at the start of the E4G monitoring and evaluation process for the other five strategic projects was that they would aim to gain around 1,000 completed questionnaires in each of two separate calendar years. Table 3.3 shows that these data ambitions have therefore been met for one year by three of the strategic projects: Communities and Nature; Heritage Tourism Project; and Valleys Regional Park.

The two exceptions are strategic projects that have been developed more recently. Sustainable Tourism initiatives have nevertheless contributed three visitor surveys from events in 2011, including the high profile HALO cycling event (where data collected further enabled the environmental impact of the event to be estimated). Coastal Tourism initiatives have submitted a small number of baseline visitor surveys (Aberafan and Newgale) with the expectation being that full surveying will be set in motion during 2012.

### **3.4 Visitor Numbers**

In order to assess the economic impact of visitation to a destination an estimate must be made of the volume of visitors to a site over a given period (this then being combined with an estimate for the impact per visitor). The WERU research team requested that each initiative supply, as a minimum, a year's visitor data post-completion (a full operational year). Additionally, baseline data (visitor numbers prior to initiative works commencing) was requested, where available, as it is useful for analysis purposes.

Table 3.4 shows the data for visitor numbers collected, for each strategic project, by March 2012. With many initiatives not having reached the stage of one year post-completion there are understandably many gaps. However, the research team would reiterate the importance of ensuring that appropriate systems are in place to record visitor numbers, and where possible baseline statistics are also submitted.

**Table 3.4 Visitor Number data returned by E4G Initiatives (March 2012)**

<b>Coastal Tourism (CT)</b>		
<b>E-flyer ID</b>	<b>Data for:</b>	<b>Description</b>
	<b>GREEN SEAS</b> Newgale Beach Poppit Sands	Monthly car park ticket sales April '11 to Sept '11 Car visitor numbers: Individual day sample counts May '11 & June '11 (charges at car park instituted on 25th May '11). Also, Last week of May '11 to first week Sept '11 (baseline)
	Cefn Sidan, Pembrey Country Park	Vehicle entries 2002-2010. Income at Pembrey broken down by activity (eg. Golf, mini railway)
	Aberafan Seafront	April'11 to Sept'11 vehicle number & grossreceipts for 2 car parks
	Pendine	Car park income collected on individual days (23 in total) between 29/07/11 and 14/11/11
	<b>SWANSEA BAY WATERSPORTS Centre of Excellence</b>	
73	Swansea Bay Watersports CoE	Extensive pedestrian counts/car park receipts/ Pontoon numbers 2011
73	Knab Rock	Pedestrian counts covering 31/07/11 to 9/11/11, and 3/12/11. Car park ticket sales covering 1/8/11 to 25/9/11, and 14/11/11 to 19/12/11.
73	Swansea Bay	Pontoon count monthly Sep'11 to Jan'12
	<b>PEMBROKESHIRE COASTAL TOURISM</b>	
3	Coppet Hall	(baseline stats) 2 single day car park vehicle counts 1/6/11 and 26/6/11
3	Tenby Low Water landing stage & Tenby Pontoon (TP)	[all baseline] For both sites single day count of visitors 26/5/11 & 31/5/11
3	Solva	(baseline) car park vehicle numbers, one day counts 28/5/11, 10/6/11, 25/6/11, 27/6/11
3	Porthgain	(baseline) car park vehicle numbers, one day counts 16/6/11, 19/6/11, 23/6/11, 25/6/11
<b>Communities and Nature (CAN)</b>		
<b>E-flyer ID</b>	<b>Data for</b>	<b>Description</b>
7, 8, 9, 10, 11, 12	Wild Fishing Wales	August Bank Holiday 2010 weekend figures
7, 8, 9, 10, 11, 12	Wild Fishing Wales	Angling Club visitor counts Apr'11 to Jun'11
18	Branching Out/ Tir Coed	Sites including: Castle Woods; Coed Penglanowen; Teifi Marshes; Cors Goch; Poor Man's wood. Various methods: car park ticket sales/ pedestrian counts/ footfall sensors. Data from April'10 to June'11.
149	Ty Hyll Welsh Honey Bee Initiative	Visitor numbers 2003 to 2011
29	Pembrey & Burry Canal Walk	Sample day counts for 2010 and 2011
<b>Heritage Tourism Project (HTP)</b>		
<b>E-flyer ID</b>	<b>Data for</b>	<b>Description</b>
34-50	Cadw site visitor numbers for Jan'08 to Dec'08 and Jan'09 to Sep'09.	Comprehensive monthly baseline data for Cadw sites (including: Blaenafon; Caernarfon; Caerphilly; Conwy; Denbigh; Harlech; Strata Florida; and St Davids)
34	Anglesey - Cadw [Caernarfon & Beaumaris]	visitor numbers Jan 2008 - Sep 2009
35	Blaenafon Ironworks	visitor numbers Jan 2008 - Sep 2009
36	Strata Florida Abbey	visitor numbers Jan 2008 - Sep 2009
37	St Davids Bishops Palace	visitor numbers Jan 2008 - Sep 2009



39	Conwy Castle	visitor numbers Jan 2008 - Sep 2009
40	Denbigh Castle	visitor numbers Jan 2008 - Sep 2009
41	Harlech Castle	visitor numbers Jan 2008 - Sep 2009
43	Caerphilly Castle	visitor numbers Jan 2008 - Sep 2009
44	Caernarfon Castle	visitor numbers Jan 2008 - Sep 2009
46	Castles & Princes (Caernarfon/Conwy/Denbigh/Harlech & Caerphilly)	visitor numbers Jan 2008 - Sep 2009
48	Spiritual & Inspirational Landscapes (St Davids/Strata Florida)	visitor numbers Jan 2008 - Sep 2009
50	Industrial Heritage (Blaenavon Ironworks/Dyfi Furnace)	visitor numbers Jan 2008 - Sep 2009
<b>Sustainable Tourism (ST)</b>		
<b>E-flyer ID</b>	<b>Data for</b>	<b>Description</b>
<b>One Historic Gardens</b>		
1	Aberglasney Gardens	Visitor numbers for Aberglasney Gdns one day counts 25/8/10 and 19/9/10
1	Colby Woodland Gardens	Visitor numbers for Colby Woodland Gdns one day counts 15/6/10 and 17/8/10. Also spend data for these tickets
1	Penllergare Valley Woods	Visitor numbers for Jan to Dec 2011. Conservative estimate as other minor entry points not covered by counters.
<b>Off Road Cycling</b>		
75	Off Road Cycling - Forestry Commission report 2011Q4	Visitor numbers (+results from own visitor survey, nearly two thirds of visitors were from outside Wales)
<b>Valleys Regional Park (VRP)</b>		
<b>E-flyer ID</b>	<b>Data for</b>	<b>Description</b>
30	Green Meadow Farm	Baseline Data 2007/8 to 2009/10. Torfaen CBC
28	Blaenavon	Visitor numbers, data from 1995-2008. Torfaen CBC
27	Cwmbran Riverside Park	1st Oct'10 to 30th Sep'11, Torfaen CBC
53	Cwmcarn	Visitor numbers 2004-2009. Caerphilly CBC
31	Pontymoel Basin	VCN Monitoring Report, SUSTRANS Route user survey. Estimates annual users 98,694. Field work Aug & Sep 2009 (report published April 2010). Gives mode breakdown (and demographics). Also, visitor numbers 20th Sep'10 to 31st Oct'10; and 1st Oct'10 to 30th Sep'11 Torfaen CBC
127	Cyd Terrace & Ynysbwlllog	Visitor counts Ynysbwlllog May 2010-Feb 2011. NPT CBC
26	Blaen Bran Community Woodland	Visitor count Sep'10 to Oct'11; plus Finish report. Torfaen CBC
<b>Wales Coast Path (WCP)</b>		
<b>E-flyer ID</b>	<b>Data for</b>	<b>Description</b>
91	Coastal Path Visitor Numbers	All Local Authorities where data available included, data to March'10, from counter installation date for LA (varies).
91	Coastal Path Visitor Numbers	All Local Authorities where data available. April '07 to March'11

### 3.5 Energy Usage Information

Initiatives were further requested to submit energy usage information providing evidence that the strategic projects are thinking about measuring and minimising carbon emissions. It is hoped that this data will help initiative sites become 'future proofed', aiding them to address the Welsh Government target of a 3% cut per annum of carbon emissions.

Table 3.5 shows energy usage returns by strategic project and initiatives by March 2012. The Heritage Tourism Project has submitted electricity usage data (kWh) for a calendar year for each of nine sites, and additional gas usage data for Caerphilly Castle.

**Table 3.5 Energy Usage Data Received by the WERU Research Team (March 2012)**

<b>STRATEGIC PROJECT</b>	<b>ENERGY USAGE FOR:</b>
<b>Coastal Tourism</b>	
Pembrokeshire CoE	Jun'11
<b>Communities and Nature</b>	
Greenlink -Upton woodland Scheme	Apr'10-Mar'11
Branching Out/Egin Tir Coed	May'10-Jun'11
Ty Hyll Honey Bee Initiative	Nov'10-Apr'11
<b>Heritage Tourism Project</b>	
Blaenafon Ironworks	Apr'10-Mar'11
Caernarfon Castle and Town Walls;	Apr'10-Mar'11
Caerphilly Castle	Apr'10-Mar'11
Conwy Castle and Town Walls	Apr'10-Mar'11
Denbigh Castle and Town Walls	Apr'10-Mar'11
Dyfi Furnace	Apr'10-Mar'11
Harlech Castle	Apr'10-Mar'11
Saint Davids Bishop's Palace	Apr'10-Mar'11
Strata Florida	Apr'10-Mar'11
<b>Sustainable Tourism</b>	
One Historic Gardens - Colby Woodland Gardens	Jan'10-Dec'10
<b>Valleys Regional Park</b>	
Green Meadow Farm	Jan'10-May'10

The majority of initiatives have not however submitted any energy usage data so far. One year's worth of energy use statistics are required- quarterly data covering a period that is most suitable for collection. It should be noted that even if there are particular problems why a site can't record the energy usage, the reasons why not should be recorded and sent to the research team. This information (still lacking) is in itself is useful.

### 3.6 Progress

With the E4G project reaching its halfway stage it is timely to summarise the problems and opportunities that have arisen so far in the data collection process. It has been noted that issues with the speed of return of basic initiative information (actioned through the use of e-flyer forms) were overcome with the help of strategic project managers chasing-up initiative managers and/or completing the forms themselves.

The E4G visitor survey process has been simplified by the use of a standard Microsoft Excel spreadsheet input template sent out for populating, before being returned to the research team. This spreadsheet replaced the initial Microsoft Access database that was somewhat more unwieldy for users. Furthermore, the opportunity to customise the standard E4G Visitor survey forms ("F5" and "F6") has been utilised by a number of initiatives. The Welsh Waterways Festival 2011 (VRP) added further questions on visitor satisfaction to help better gauge the potential of future re-visits, and also asked which sources of information visitors had used to find out about the event beforehand. At the Ystradlyn Cadair Idris (CAN) visitor survey respondents were additionally asked where else they had been/ intended to go on the day of their visit.

The second part of the standard E4G visitor survey form has been re-designed for Green Seas Coastal Tourism visitor surveys in order to focus on the new facilities that are to be constructed at the beaches and better examine how environmental quality drives visitation. For the Wales Coastal Path a bespoke visitor survey form has been jointly developed by the Countryside Council for Wales, Beaufort Research and the WERU research team to both fit in with the overall E4G research objectives and also provide useful strategic project specific data (such as length of respondent's journey along the path).

As noted above three strategic projects have met the aspiration of completing one of their two years worth of around 1,000 questionnaires- and are thus half-way along in their visitor survey data gathering. The Coastal Tourism and Sustainable Tourism project initiatives are projected to expand their survey work in 2012, and the Wales Coast Path will continue the surveying work started at the end of 2011. Overall progress is therefore largely on target, and the research team are beginning to assemble a useful body of survey data.

There is more work to be done on collecting both visitor numbers and energy returns.

## 4. Analysis of visitor returns to February 2012

### 4.1 Introduction

This section of the report provides an analysis of the visitor returns by site/event up to and including those received by the end of February 2012. In what follows we provide a synthesis of the main findings. A more complete set of visitor return results is found in Appendices 1 and 2. The approach here is to first deal with a series of factors from the visitor returns which potentially have an effect on the economic impact of the visitation at site and an all Wales level. These factors include visitor demographics; reason for visit; type of accommodation used; and travel modes. Finally the section considers economic impact at site and at an all Wales level for four strategic themes on which we currently have adequate returns on which to comment.

### 4.2 Analysis

Table 4.1 shows the main reason for visits to sites/events by strategic project. Note here that some of the data cover 2010 and some 2011. The different types of leisure/non-leisure trips are expected to have some impacts on the magnitude of spending effects at site/event and at an all Wales level.

Table 4.1 reveals that the proportion of visits to E4G sites that were accounted as leisure trips from home varies from 7.5% of site visitors in the case of St Davids, to 94.0% in the case of the Pen y Fan site survey for 2011 (note that the Pen y Fan site survey for 2010 reports a slightly lower figure). Analysis of Table 4.1 in conjunction with the staying visitor analysis later in this section suggests that there is some mis-reporting/mis-understanding here with it likely that some of the survey respondents saying that they were on leisure trips from home actually involved staying away from home in Wales. For these reasons we would be careful coming to the conclusion that all leisure trips from home in the individual site cases actually represent daytrips with no overnight.

The above noted there seems to be strong variation in the proportion of visitors reporting that their visit was a leisure trip from home even across sites with similar characteristics. For example in the case of heritage tourism (HTP) sites, this proportion varies from around 7.5% in the cases of St Davids and Harlech to over 40% in the cases of Blaenavon and Caerphilly. This possibly reveals the fact that HTP sites in South Wales are much closer to larger centres of population and with a higher number of day visitors. Indeed this pattern is repeated in other South Wales E4G sites with a series of Valley Regional Park sites also reporting larger proportions of leisure trips from home in overall visitation (Dare Valley excepted).

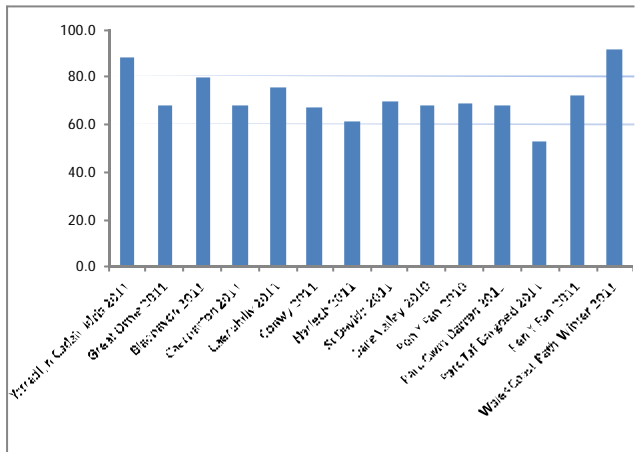
E4G-supported events across the strategic projects tend to have a higher level of daytrips associated. For example, the un-weighted average across the 11 events reported in Table 4.1 is 76.3% of visitors reporting that their visit was a leisure trip from home. The 'outliers' among the events are the Halo British Series event, and the Six Bells memorial. In the former case there were a high proportion of visitors classified to the 'other' category, possibly competitors and support. The Six Bells case reported a relatively high percentage of total visitation in the 'non-routine work', and 'volunteering' categories.

In summary here some caution needs to be exercised in assuming that each of the surveys is picking up accurately on levels of staying visitation associated with sites/events, and with a potential problem that respondents may not have understood a leisure trip from home to represent a day trip.

**Table 4.1 Why were Visitors at the site/event?**

Strategic Project	Survey	Type	Leisure trip from home	Leisure trip as part of longer break	Non-routine work purposes	Volunteering	Other	All
CAN	Ystradlyn Cadair Idris 2011	Site	46.1	47.7	0.6	0.0	5.6	100.0
CAN	Great Orme 2011	Site	31.5	66.7	1.2	0.0	0.6	100.0
CAN	Cors Dyfi Ospreys 2011	Site	37.8	62.2	0.0	0.0	0.0	100.0
CAN	<i>Moelyci Open Day 2011</i>	<i>Event</i>	<i>80.0</i>	<i>3.6</i>	<i>3.6</i>	<i>7.3</i>	<i>5.5</i>	<i>100.0</i>
HTP	Blaenavon 2011	Site	43.2	56.3	0.0	0.0	0.5	100.0
HTP	Caernarfon 2011	Site	10.0	89.5	0.0	0.0	0.5	100.0
HTP	Caerphilly 2011	Site	40.8	58.3	0.0	0.0	0.9	100.0
HTP	Conwy 2011	Site	14.2	84.5	0.0	0.0	1.3	100.0
HTP	Harlech 2011	Site	7.7	92.3	0.0	0.0	0.0	100.0
HTP	St Davids 2011	Site	7.5	92.5	0.0	0.0	0.0	100.0
ST	<i>ETAPE bicycle event 2011</i>	<i>Event</i>	<i>81.6</i>	<i>1.5</i>	<i>3.1</i>	<i>0.0</i>	<i>13.8</i>	<i>100.0</i>
ST	<i>Halo British Series 2011</i>	<i>Event</i>	<i>42.2</i>	<i>5.6</i>	<i>1.1</i>	<i>0.0</i>	<i>51.1</i>	<i>100.0</i>
ST	<i>One Historic Garden Brynagarw 2011</i>	<i>Event</i>	<i>85.4</i>	<i>4.2</i>	<i>0.0</i>	<i>2.1</i>	<i>8.3</i>	<i>100.0</i>
VRP	Dare Valley 2010	Site	34.0	55.3	0.0	0.0	10.7	100.0
VRP	Pen Y Fan 2010	Site	83.7	1.0	5.1	0.0	10.2	100.0
VRP	Parc Cwm Darran 2011	Site	85.2	10.2	0.0	0.0	4.6	100.0
VRP	Parc Taf Bargoed 2011	Site	71.0	3.2	3.2	6.5	16.1	100.0
VRP	Pen Y Fan 2011	Site	94.0	2.0	1.0	0.0	3.0	100.0
VRP	<i>Cordell Event 2010</i>	<i>Event</i>	<i>81.4</i>	<i>0.0</i>	<i>3.9</i>	<i>1.0</i>	<i>13.7</i>	<i>100.0</i>
VRP	<i>Party in the Past 2010</i>	<i>Event</i>	<i>94.9</i>	<i>3.4</i>	<i>0.0</i>	<i>0.0</i>	<i>1.7</i>	<i>100.0</i>
VRP	<i>Six Bells Event 2010</i>	<i>Event</i>	<i>51.6</i>	<i>0.8</i>	<i>15.9</i>	<i>18.3</i>	<i>13.4</i>	<i>100.0</i>
VRP	<i>Turner Exhibition 2010</i>	<i>Event</i>	<i>71.8</i>	<i>2.6</i>	<i>0.0</i>	<i>2.6</i>	<i>23.0</i>	<i>100.0</i>
VRP	<i>Cwmbran Big Event 2011</i>	<i>Event</i>	<i>82.5</i>	<i>0.0</i>	<i>6.8</i>	<i>5.8</i>	<i>4.9</i>	<i>100.0</i>
VRP	<i>The Big V Festival 2011</i>	<i>Event</i>	<i>78.6</i>	<i>7.1</i>	<i>7.1</i>	<i>2.4</i>	<i>4.8</i>	<i>100.0</i>
VRP	<i>Welsh Waterways 2011</i>	<i>Event</i>	<i>95.1</i>	<i>4.1</i>	<i>0.0</i>	<i>0.0</i>	<i>0.8</i>	<i>100.0</i>
WCP	Wales Coast Path (Winter) 2011	Sites	59.4	38.5	0.7	0.0	1.4	100.0

**Figure 4.1a**  
Percentage of Visitors to E4G sites who were adults



**Figure 4.1b**  
Percentage of Visitors E4G events who were adults

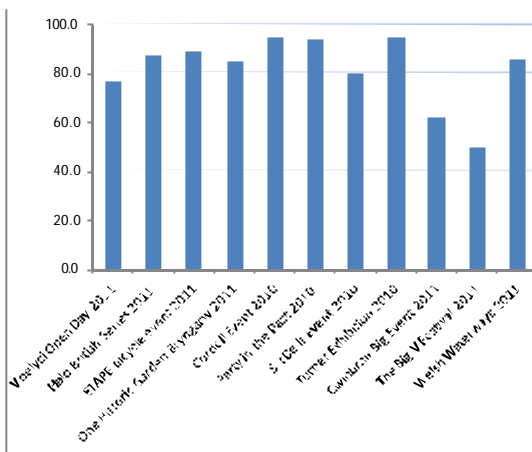
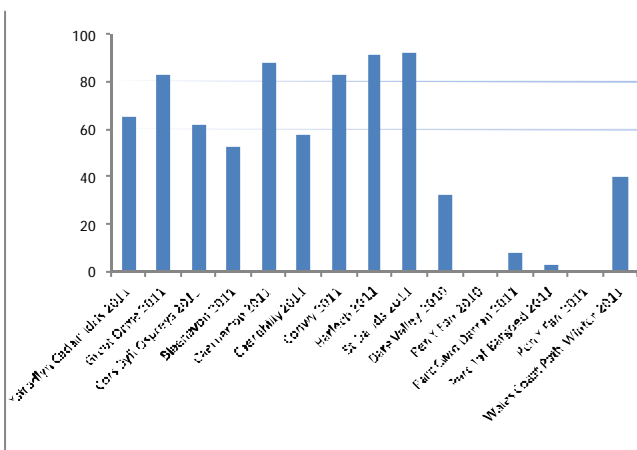


Figure 4.1a/b shows the proportion of visitors at E4G sites and then events that were adults. There is some expectation that a higher proportion of adult visitation might be connected to visitor impact although this is not straightforward. It is more difficult to identify any firm patterns here. Taking the E4G sites in Figure 4.1a the percentage of adults in total surveyed visitation varies from 52.5% in the case of Parc Taf Bargoed to 91.5% in the case of Wales Coast Path (although the latter was a winter survey which might explain the high proportion of adults). The unweighted average here, across 14 sites which reported, was 71.3% adults over total visitors.

Figure 4.1b demonstrates that events typically feature a higher a number of adults among surveyed visitors. For example, in seven out of the 11 events reporting the percentage of adults was in excess of 80%, with figures approaching 95% in the case of the Turner Exhibition (2010) and the Cordell Event (2010). Once again the proportion of adult visitors may link to the precise timing of events, content, and whether attendance is free or not.

**Figure 4.2a**  
Percentage of Visitors to sites staying overnight in Wales



**Figure 4.2b**  
Percentage of Visitors to events staying overnight in Wales

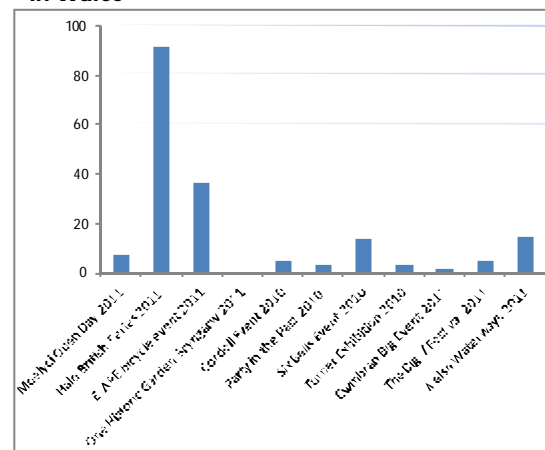
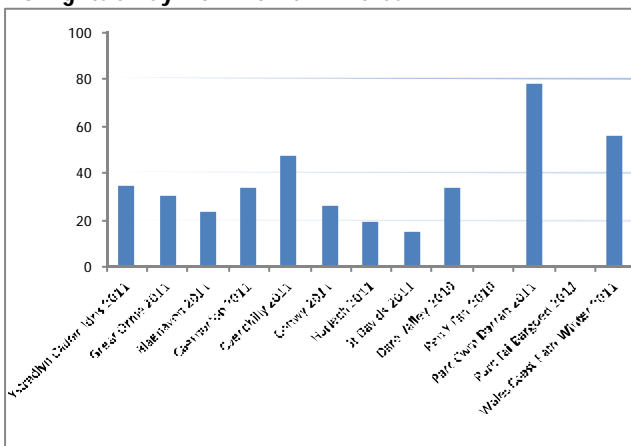


Figure 4.2a/b shows the percentage of visitors at sites and then events that reported that they were staying overnight in Wales as part of their visit. These data show that the earlier information in Table 4.1 may under-estimate the proportions of visitors that were overnights. It is important to recognise here that the overnight stay might not be totally attributable to the E4G sponsored site or event with visits perhaps part of multi-day breaks. Moreover spending on accommodation will often be distant from the E4G site itself. However, where staying visitation can be in part associated with E4G this can have marked economic effects with staying visitors having very different spending patterns and impact when compared to day visitors.

Figure 4.2a focuses on E4G sites. Figures here vary from just 1.0% in the case of the Pen y Fan visitor survey for 2011 to a high of 92.5% of visitors staying overnight in the case of the St Davids visitor survey in 2011 (a Heritage Tourism project). Among the 6 HTP sites Blaenavon and Caerphilly Castle feature lower levels of staying visitation. In general it is sites in South Wales where visitor surveys suggest rather less staying visitation particularly in the case of VRP projects.

In the case of E4G sponsored events there tends to be a much lower level of staying visitation. The two sporting events (Halo Event and ETAPE) reported the highest amounts of staying visitation at 91.1% and 36.1% of visitors respectively staying overnight. For the remaining 9 events reported in Table 4.2a the percentage of staying visitors varied from zero to 14%, although we note some small sample sizes in selected event visitor surveys.

**Figure 4.3a**  
Percentage of overnight Visitors to sites who were staying 1-3 nights away from home in Wales



**Figure 4.3b**  
Percentage of overnight Visitors to events were staying 1-3 nights away from home in Wales

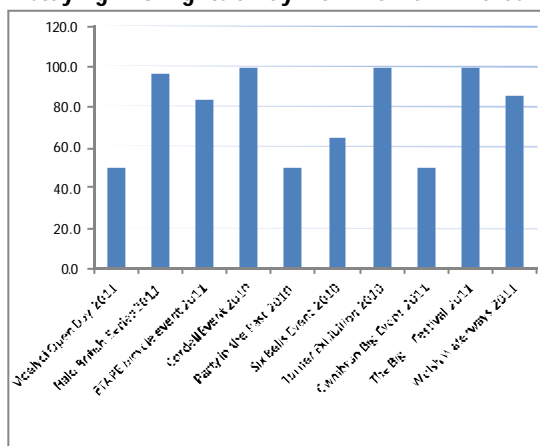


Figure 4.3a/b shows the proportion of staying visitors at E4G sites and events who were involved in short stays; clearly the balance here would represent cases where visits were part

of longer stays of more than 3 nights. Once again there are subtle differences in the spending patterns of short stay and longer stay visitors which could feed through into impacts that can be attributed to E4G. In the case of the two Communities and Nature (CAN) sites 34.5% of staying visitors were short stay in the Cadair Idris survey, and with 30.2% in the Great Orme case. Then the corollary is that on the CAN sites overall here around two thirds of staying visitation is long stay. In the case of HTP sites short stay as a percentage of all staying visitation varied from 15.2% in the case of St Davids to 47.3% in the case of Caerphilly. A pattern with HTP sites would again be that sites more distant from population centres seem to feature more visitation connected to longer stays. The Valleys Regional Park sites featured lower levels of staying visitation in the round. However, the surveys for Pen y Fan (2010) and Parc Taf Bargoed (2011) reveal that the small amount of staying visitation reported was long stay rather than short stay. For Parc Cwm Darran 77.8% of staying visitation was short stay, while at Dare Valley 33.3% was short stay.

Figure 4.3b reports the percentage of short stay visitors in total overnight visitors for E4G events. In four cases here 100% of staying visitation was short stay. Higher levels of long stay visitation were associated with the Moelyci Open Day (CAN), Party in the Past (VRP) and Cwmbran Big Event (VRP). However, in each case, and as highlighted earlier, staying visitation at these events was a relatively small proportion of overall visitation.

Where visitors do stay in connection with visits to E4G sites the type of accommodation is one of the largest drivers of economic effects. To some extent the distribution of accommodation by visitor reflects the very different tourism supply side around each site and event. Table 4.2 shows for each project within the strategic themes the distribution of overnights. Once again this information is not weighted but summarises the responses to the site/event surveys. Furthermore it is difficult to highlight any patterns by type of site and nature of event. Finally this information is self reported and it is accepted that some respondents may conflate accommodation categories i.e. classifying a guesthouse as an hotel for example.

The highest proportion of staying visitors using hotels/motels is found in three E4G events. For example in the case of Six Bells some 77% of staying visitors used hotels, 44% in the case of the Etape bicycle event and 40.0% in the case of the Cordell Event (2010). It is noted here that with some events staying visitation made up a small amount of total visitation. However, across both sites and events the most common accommodation types used tend to be self catering, camping, caravan or hostel, with staying with friends and family another important category. For example in the case of Heritage Tourism projects an average (unweighted) of 48% of visitors were self catering etc, with an average 19% staying with friends or family.



**Table 4.2 Type of accommodation used by Visitors staying overnight**

Strategic Project	Survey	Type	Hotel/ motel	Guesthouse, B&B or pub	Self- catering/ camping/ caravan or hostel	With friends or family	Other	All
CAN	Ystradlyn Cadair Idris 2011	Site	15.5	15.5	55.2	2.6	11.2	100.0
CAN	Great Orme 2011	Site	33.9	16.1	34.7	8.5	6.8	100.0
CAN	Cors Dyfi Ospreys 2011	Site	7.9	11.9	72.0	6.7	1.5	100.0
CAN	<i>Moelyci Open Day 2011</i>	<i>Event</i>	<i>0.0</i>	<i>0.0</i>	<i>25.0</i>	<i>50.0</i>	<i>25.0</i>	100.0
HTP	Blaenavon 2011	Site	27.8	3.1	39.2	28.9	1.0	100.0
HTP	Caernarfon 2011	Site	18.5	12.0	54.9	13.6	1.0	100.0
HTP	Caerphilly 2011	Site	35.6	8.5	20.2	34.1	1.6	100.0
HTP	Conwy 2011	Site	20.9	16.6	49.7	11.8	1.0	100.0
HTP	Harlech 2011	Site	6.3	10.5	66.3	15.3	1.6	100.0
HTP	St Davids 2011	Site	12.5	10.3	60.3	12.0	4.9	100.0
ST	<i>ETAPE bicycle event 2011</i>	<i>Event</i>	<i>44.0</i>	<i>12.0</i>	<i>12.0</i>	<i>32.0</i>	<i>0.0</i>	100.0
ST	<i>Halo British Series 2011</i>	<i>Event</i>	<i>11.4</i>	<i>11.4</i>	<i>55.7</i>	<i>8.8</i>	<i>12.7</i>	100.0
ST	<i>One Historic Garden Bryngarw 2011</i>	<i>Event</i>	<i>Not applicable (no-one in sample stayed overnight)</i>					
VRP	Dare Valley 2010	Site	6.7	6.7	70.0	10.0	6.6	100.0
VRP	Pen Y Fan 2010	Site	0.0	0.0	0.0	100.0	0.0	100.0
VRP	Parc Cwm Darran 2011	Site	22.2	0.0	33.3	44.5	0.0	100.0
VRP	Parc Taf Bargoed 2011	Site	0.0	0.0	100.0	0.0	0.0	100.0
VRP	Pen Y Fan 2011	Site	<i>No data available</i>					
VRP	<i>Cordell Event 2010</i>	<i>Event</i>	<i>40.0</i>	<i>0.0</i>	<i>0.0</i>	<i>60.0</i>	<i>0.0</i>	100.0
VRP	<i>Party in the Past 2010</i>	<i>Event</i>	<i>0.0</i>	<i>0.0</i>	<i>50.0</i>	<i>50.0</i>	<i>0.0</i>	100.0
VRP	<i>Six Bells Event 2010</i>	<i>Event</i>	<i>76.5</i>	<i>0.0</i>	<i>0.0</i>	<i>23.5</i>	<i>0.0</i>	100.0
VRP	<i>Turner Exhibition 2010</i>	<i>Event</i>	<i>No data available</i>					
VRP	<i>Cwmbran Big Event 2011</i>	<i>Event</i>	<i>0.0</i>	<i>100.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	100.0
VRP	<i>The Big V Festival 2011</i>	<i>Event</i>	<i>No data available</i>					
VRP	<i>Welsh Waterways 2011</i>	<i>Event</i>	<i>11.8</i>	<i>0.0</i>	<i>41.2</i>	<i>35.2</i>	<i>11.8</i>	100.0
WCP	Wales Coast Path (Winter) 2011	Sites	14.8	7.4	68.5	3.7	5.6	100.0

**Table 4.3 Main mode of travel to the site or event by Visitors**

Strategic Project	Survey	Type	Private car/van/ or taxi	Scheduled bus/ coach	Organised coach trip	Train	Bicycle/ walk	Other	All
CAN	Ystradlyn Cadair Idris 2011	Site	93.2	2.8	2.3	0.0	1.1	0.6	100.0
CAN	Great Orme 2011	Site	54.6	0.7	2.7	3.3	16.0	22.7	100.0
CAN	Cors Dyfi Ospreys 2011	Site	<i>mode of travel data not collected</i>						
CAN	Moelyci Open Day 2011	Event	75.5	1.9	0.0	0.0	17.0	5.6	100.0
HTP	Blaenavon 2011	Site	89.6	3.3	3.3	1.1	0.5	2.2	100.0
HTP	Caernarfon 2011	Site	77.5	4.3	2.9	6.2	7.7	1.4	100.0
HTP	Caerphilly 2011	Site	81.2	4.9	3.6	7.2	2.2	0.9	100.0
HTP	Conwy 2011	Site	79.6	4.0	3.6	4.0	7.5	1.3	100.0
HTP	Harlech 2011	Site	89.4	0.0	0.0	4.3	4.3	2.0	100.0
HTP	St Davids 2011	Site	87.9	1.6	1.0	0.0	9.5	0.0	100.0
ST	Halo British Series 2011	Event	89.2	0.0	0.0	0.0	6.0	4.8	100.0
ST	ETAPE bicycle event 2011	Event	83.3	1.9	0.0	0.0	12.9	1.9	100.0
ST	One Historic Garden Bryngarw	Event	93.5	2.2	0.0	0.0	4.3	0.0	100.0
VRP	Dare Valley 2010	Site	84.9	0.0	0.0	0.0	10.8	4.3	100.0
VRP	Pen Y Fan 2010	Site	83.7	0.0	0.0	1.0	13.3	2.0	100.0
VRP	Parc Cwm Darran 2011	Site	86.1	1.9	0.0	0.0	10.2	1.8	100.0
VRP	Parc Taf Bargoed 2011	Site	13.4	3.3	0.0	0.0	83.3	0.0	100.0
VRP	Pen Y Fan 2011	Site	88.9	0.0	0.0	0.0	11.1	0.0	100.0
VRP	Cordell Event 2010	Event	93.8	3.7	0.0	0.0	2.5	0.0	100.0
VRP	Party in the Past 2010	Event	96.6	0.0	0.0	0.0	3.4	0.0	100.0
VRP	Six Bells Event 2010	Event	60.7	4.3	2.6	0.0	30.8	1.6	100.0
VRP	Turner Exhibition 2010	Event	34.2	0.0	0.0	0.0	65.8	0.0	100.0
VRP	Cwmbran Big Event 2011	Event	76.7	1.9	0.0	0.0	21.4	0.0	100.0
VRP	The Big V Festival 2011	Event	53.7	4.9	7.3	0.0	34.1	0.0	100.0
VRP	Welsh Waterways 2011	Event	85.9	1.7	0.0	0.0	12.4	0.0	100.0
WCP	Wales Coast Path (Winter) 2011	Site	<i>mode of travel "on path" rather than "to site" was collected - see Appendix 1</i>						

Table 4.3 reports travel mode to site or event by visitors. An underlying principle of many of the sites and events is the promotion of environmental sustainability. A potential issue here is how far selected E4G sites can work to diversify visitor travel away from less sustainable modes. Furthermore, within the E4G monitoring and evaluation there is the opportunity to estimate the carbon emissions associated with travel to sites. Finally, different patterns of visitor spending are levered locally by different travel modes. Not surprisingly Table 4.3 reveals that the main mode of travel to both sites and events is private car. In 19 out of 24 cases reporting mode in Table 4.3, the percentage of visitors arriving by private car etc. exceeds 75%, and in 4 cases exceeds 90%. To a number of the sites in particular the predominance of private car simply reflects the unavailability of public transport modes.

There are some exceptions. Just over half of visitors to the Great Orme came by private car with 16% walking or using bicycle, and 23% using other means (cable railway). In the case of Parc Taf Bargoed over 80% of visitors reported that they had walked or cycled to the site. There were also relatively higher proportions of walking and cycling at events including Molelyci Open Day (17.0% of visitors), Six Bells (30.8%), Turner Exhibition (65.8%), Cwmbran Big Event (21.4%) and the Big V Festival (34.1%). In each of these cases the greater number of visitors walking or cycling relates to the higher proportion of local day visits.

Those using scheduled buses or coaches does not exceed 5.0% of visitors at any location. Organised coach trips and train travel tend to feature more strongly in visits to the Heritage Tourism sites, but with 17 out of 24 sites reporting in surveys no visitors coming by train to the site/event.

Finally, before considering economic impact specifically, Table 4.4. summarises information relating to visitor satisfaction at sites and events. Clearly this links (where applicable) with the potential for repeat visits, and with satisfaction with facilities etc. a potential driver of on-site spending magnitudes. Columns 1-3 of Table 4.4 evidence a high degree of visitor enjoyment at sites/events, and with staff at sites. There is a little more variation of visitor satisfaction with facilities but there still a strong agreement that facilities at sites and events were appropriate.

**Table 4.4 Visitor satisfaction: Percentage who "agreed" or "agreed strongly" with statement**

Strategic Project	Survey	Type	"Overall, have enjoyed visit"	"Staff are friendly and helpful"	Staff are knowledgeable & informative"	"Facilities are appropriate"	"Location was easy to find"
CAN	Ystradlyn Cadair Idris 2011	Site	95.4	100.0	100.0	83.8	74.0
CAN	Great Orme 2011	Site	84.1	87.2	80.6	83.3	82.7
CAN	Cors Dyfi Ospreys 2011	Site	<i>see below</i>				
CAN	Moelyci Open Day 2011	Event	94.1	93.6	95.7	89.4	93.9
HTP	Blaenavon 2011	Site	96.7	99.2	92.4	64.8	84.4
HTP	Caernarfon 2011	Site	98.1	99.4	100.0	88.7	94.2
HTP	Caerphilly 2011	Site	96.4	93.4	93.2	66.1	89.4
HTP	Conwy 2011	Site	98.2	98.1	96.2	87.9	94.2
HTP	Harlech 2011	Site	97.6	98.0	100.0	80.7	92.2
HTP	St Davids 2011	Site	98.0	99.5	100.0	83.6	98.0
ST	Halo British Series 2011	Event	76.1	66.3	60.5	68.6	77.0
ST	ETAPE bicycle event 2011	Event	92.3	82.4	64.7	35.3	73.3
ST	One Historic Garden Brynagarw	Event	94.6	91.3	86.0	88.9	91.3
VRP	Dare Valley 2010	Site	96.9	99.0	97.4	92.6	93.7
VRP	Pen Y Fan 2010	Site	85.3	81.5	71.8	59.4	85.3
VRP	Parc Cwm Darran 2011	Site	89.8	88.0	76.0	75.7	80.4
VRP	Parc Taf Bargoed 2011	Site	96.8	90.3	83.9	80.6	90.3
VRP	Pen Y Fan 2011	Site	96.0	78.2	66.7	64.6	95.9
VRP	Cordell Event 2010	Event	96.9	97.9	94.6	94.6	94.7
VRP	Party in the Past 2010	Event	100.0	100.0	100.0	75.0	100.0
VRP	Six Bells Event 2010	Event	96.1	97.0	91.0	87.0	91.0
VRP	Turner Exhibition 2010	Event	90.6	90.0	90.0	63.6	69.7
VRP	Cwmbran Big Event 2011	Event	95.0	96.8	91.1	84.3	91.2
VRP	The Big V Festival 2011	Event	85.0	84.6	84.6	76.9	79.5
VRP	Welsh Waterways 2011	Event	71.4	95.6	97.2	92.5	82.5
WCP	Wales Coast Path (Winter) 2011	Sites	<i>Alternative data relating to use of path was collected</i>				

NB. Visitors to Cors Dyfi Ospreys were asked different "site satisfaction" questions:

(100% of visitors to Cors Dyfi Ospreys replied "Yes" when asked "Would you recommend a friend to visit?"

Additionally, 25% of visitors stated that they liked "everything" at the site and "nothing needed changing").

Tables 4.5 to 4.8 provide an overview of economic impact associated with visitation to sites. In developing the estimates in these tables it was necessary to gross up the information in the visitor surveys to the overall visitor numbers at each site over a year or season as appropriate. Clearly the accuracy of the estimates relies heavily on the representativeness of the surveys collected, with smaller numbers of surveys having to be considered more carefully. The information on tourism spending at the sites becomes an input into the framework of the Tourism Impact Planning Model for Wales developed for Visit Wales by Cardiff University. This economic model generates an estimate of the gross value added and employment connected to the tourist visits. The economic impact information in Tables 4.5 to 4.8 is presented in two

panels. First, the tables provide an estimate of the E4G site/event visitor total trip impact. Here for example the visit to an E4G site might only take up one day of a three day visit. However, we account for the economic impact associated with the whole trip. The E4G site clearly represents just part of the visit but it is important to consider the type and impact of tourism in Wales that E4G is helping to lever. The second panel provides an estimate of the economic effects associated with the visit to the E4G site/event itself and is classified as an on-site impact. These are the effects associated with visitor spending at the site.

The economic impact is reported in terms of gross value added and supported employment. It is important to note that the employment estimates in the second panel do not link directly to full time equivalent employment at the respective sites. Rather the economic impact tables reveal the direct and indirect employment impacts associated with the tourism spending as a whole. For example this reflects the amount of annual full-time equivalent (FTE) employment supported per £ of different types of tourism spending in Wales for a given year.

There are a number of determinants of the scale of economic impacts at site and trip level. Fundamentally this reflects differences in spending patterns from day trip as opposed to staying visitation, and then precisely what tourists spend money on. In the case of on-site economic effects this is inevitably bounded by the supply side around sites and events. Some E4G sites feature few opportunities to purchase goods and services often with good reason to preserve the services deriving from the environmental assets at sites. For these reasons care needs to be exercised in comparing sites on the economic impact numbers. Smaller on-site impacts may not be a bad news story.

In Tables 4.5 to 4.8 the economic impacts are presented by strategic project area. Then the opportunity is taken to present these tables in terms of all sites and then all events in Tables 4.9 to 4.11. The full suite of economic impact data is also reported in the Appendices.

Table 4.5 summarises the economic impact information for Communities and Nature sites. For Ystradllyn Cadair Idris there were an estimated 35,000 visitors in 2010/2011. The survey base was just under 2% of the total number of visitors with 179 surveys covering 603 people. Two-thirds of those surveyed were staying away from home. The GVA associated with the trips of which Ystradllyn was a part was £1.88m (around £54 per visitor), and with this amount of tourism consumption in Wales estimated to support 84 FTE jobs. The on-site impacts are much smaller reflecting the nature of the site. The GVA attributable to on-site spending was around £0.28m and with this supporting an estimated 15 FTE jobs in Wales directly and indirectly. Table 4.5 reveals not surprisingly that the Great Orme site levers larger numbers of visitors (over 145,000), but also with a higher proportion of economic impact associated with

on site spending. Visitor consumption associated with trips of which Great Orme was a part were associated with an estimated £8.2m of GVA and 370 supported FTE jobs. On site visitor spend contributed £2.3m of GVA and 95 FTEs. Cors Dyfi Ospreys shares some of the site characteristics of Ystradllyn. Here total trip impacts were estimated at £2.15m of GVA supported and 95 FTE jobs. No on site spending information was available for Cors Dyfi.

**Table 4.5 Communities and Nature Visitor Surveys: Economic Impact**

	Ystradllyn Cadair Idris 2011	Great Orme 2011	Cors Dyfi Ospreys 2011	Moelyci Open Day 2011
Type	Site	Site	Site	Event
Visitor Numbers	35,000	145,183	40,000	800
Date Visitor Numbers relate to	Oct'10-Sep'11	Jan'11-Dec'11	2011 Season	3rd July 2011
Questionnaires completed	179	163	530	57
Number in respondents' parties	603	599	1,513	130
Staying away from home in Wales	65.5%	82.6%	62.2%	7.3%
<b>Economic Impact</b>				
<u>Total Trip</u>				
Gross Value Added	£1,876,000	£8,245,000	£2,150,000	N/A
Supported employment – person-years	84	370	97	N/A
GVA to create each job	£22,333	£22,284	£22,165	N/A
Trips to create job	417	392	412	N/A
Total trip GVA per visitor	£53.60	£56.79	£53.75	N/A
<u>Directly attributable to site/event</u>				
Gross Value Added	£276,000	£2,271,000		£1,210
Employment FTEs	15	95		0.06
GVA to create each job	£18,400	£23,905		£20,167
Visits to create job	2,333	1,528		13,333
On-site GVA per visitor	£7.89	£15.64		£1.51
GVA per visitor: total trip: on-site	6.80	3.63		N/A
GVA to create job: total trip: on-site	1.21	0.93		N/A

*N.B. Visitors to Cors Dyfi Ospreys were not asked for spend data*

The CAN project included one surveyed event to date, the Moelyci Open Day. In the case of events we seek to only estimate the economic impacts associated with the event i.e. this would only include overnights associated with the event itself such that the 'event' is the 'trip'. The impact numbers are much smaller here. The event attracted some 800 visitors.

However, there was a GVA impact of £1,210 and with even with the visitor consumption associated with the event directly and indirect supporting 0.06 of an FTE job in Wales.

In sum CAN initiatives surveyed to date can be connected with tourism trips supporting around £12.4m of GVA in total and supporting over 550 FTE jobs.

Table 4.6 provides a summary of the economic impact results for Heritage Tourism Project initiatives. These are particularly interesting results because they evidence very different economic effects across similar sites but in different areas of Wales. The castles at Caernarfon and Conwy are among the most visited attractions in Wales. Caernarfon attracted nearly 192,000 visitors in 2009-10. The GVA supported by the whole of trips of which visits to Caernarfon Castle were a part levered a little over £14m of GVA and with the underlying tourism consumption supporting 630 FTE jobs. Around one quarter of the GVA impact was attributable to the site itself in the Caernarfon case i.e. £3.62m and 197 FTE jobs supported directly and indirectly by on-site visitor consumption.

Taken together the HTP sites could be connected to tourism visits in Wales that contributed £41.7m of GVA and that supported 1,867 FTE jobs direct and indirectly. Clearly there is some possibility of double counting in the total trip figures as visitors to one historic site may have visited another HTP site. Double counting and displacement issues such as this will be resolved as data on visitors' travel patterns in Wales become more robust. The GVA attributable to on-site spending across the six HTP projects was £10.5m and with the underlying tourism spending at the sites supporting an estimated 559 FTE jobs.

Table 4.6 reveals marked differences in the on-site GVA supported per visitor. This varied from £9.36 in the case of Blaenafon to £26.64 in the case of St Davids. These figures testify to the different spending opportunities available at sites and subtle differences in the visitor mix at each site. Finally here the information in Table 4.6 shows that care is required in generalising economic impact based on visitor numbers alone with GVA and employment effects per visitor showing marked variation.

**Table 4.6 Heritage Tourism Project Visitor Surveys : Economic Impact**

	Blaenafon	Caernarfon	Caerphilly	Conwy	Harlech	St Davids	Site Average
Type	Site	Site	Site	Site	Site	Site	Site
Visitors Oct 2009- Sept 2009	28,085	191,871	84,631	177,411	93,624	26,165	100,298
Questionnaires completed	183	209	223	226	207	199	208
Number in respondents' parties	598	829	735	803	835	686	748
Staying away from home in Wales	53.0%	88.0%	57.8%	82.7%	91.8%	92.5%	77.6%
<b>Economic Impact</b>							
<u>Total Trip</u>							
Gross Value Added	£1,643,000	£14,029,000	£4,433,000	£12,622,000	£6,799,000	£2,186,000	£6,952,000
Supported employment – p/y	73	630	199	565	305	95	311
GVA to create each job	£22,507	£22,268	£22,276	£22,340	£22,292	£23,011	£22,449
Trips to create job	385	305	425	314	307	275	335
Total trip GVA per visitor	£58.50	£73.12	£52.38	£71.15	£72.62	£83.55	£69.31
<u>Directly attributable to site</u>							
Gross Value Added	£263,000	£3,618,000	£1,230,000	£3,317,000	£1,347,000	£697,000	£1,745,333
Employment FTEs	14	197	63	180	70	35	93
GVA to create each job	18,786	18,365	19,524	18,428	19,243	19,914	£19,043
Visits to create job	2,006	974	1,343	986	1,337	748	1,232
On-site GVA per visitor	£9.36	£18.86	£14.53	£18.70	£14.39	£26.64	£17.40
GVA per visitor: total trip: on-site	6.25	3.88	3.60	3.81	5.05	3.14	3.98
GVA to create job: total trip: on-site	1.20	1.21	1.14	1.21	1.16	1.16	1.18



Table 4.7 reveals economic impacts associated with Sustainable Tourism events. Here the focus is on economic activity supported by the event. In each case here the number of survey returns represented a relatively large proportion of total visits. For example the ETAPE cycling event surveys completed covered 23.6% of the event visitor numbers. Compared to strategic sites economic impact numbers are smaller but with the figures typically representing just a few days of activity as opposed to a season or year.

The ETAPE event for 8/9<sup>th</sup> October 2011 attracted around 1,000 visitors. Tourism spending levered by the event supported just over £23,000 of GVA and with the underlying spending supporting just over 1 FTE job. The Halo Cycling event attracted an estimated 2,310 visitors and featured a high amount of staying visitation. Visitor spending associated with the event is estimated to have supported £71,800 of GVA and supported 4 FTE jobs directly and indirectly. The event at the One Historic Garden initiative in Bryngarw was smaller scale but with some GVA and employment supported by spending at the event by 175 visitors.

Finally Table 4.8 summarises economic effects associated with Valleys Regional Park events. Dare Valley was estimated to have received 142,000 visitors between October 2009 and September 2010. The GVA supported by trips of which Dare Valley was a part was around £4.4m and with linked tourism spending supporting an estimated 190 FTE jobs. In the case of Dare Valley, on-site effects were a small proportion of total trip effects. Just £0.28m of GVA was supported by the on-site spending and 15 FTE jobs. The remaining site is Pen y Fan where survey results were available for 2010 and 2011. For the two years there are similarities in the GVA and employment supported by trips of which visit to Pen y Fan were a part. In 2011 an estimated £0.51m of GVA was supported and 22 FTE jobs. However, economic activity supported by on site spending differed markedly between 2010 and 2011. It is noted that in the case of Pen y Fan survey returns represent a small element of the visitor population and with results here possibly sensitive to just a few returns.

Table 4.8 also summarises economic effects associated with four Valley Regional Park events. Taken together the four events supported £57,000 of GVA and with underlying spending directly and indirectly supporting just under 3 FTE jobs.

**Table 4.7 Sustainable Tourism Visitor Surveys : Economic Impact**

	ETAPE Cycling event 2011	HALO British Series Cycling event 2011	One Historic Garden, Bryngarw Country Park "Shakespeare, Songs & Silliness" 2011
Type	Event	Event	Event
Visitor Numbers	1,000	2,310	175
Date Visitor Numbers relate to	8/9th Oct'11	25/26th Jun'11	26-28th Jul'11
Questionnaires completed	75	95	50
Number in respondents' parties	236	288	154
Staying away from home in Wales	36.1%	91.1%	0.0%
<b>Economic Impact</b>			
<u>Total Trip</u>			
Gross Value Added	N/A	N/A	N/A
Supported employment - FTE	N/A	N/A	N/A
GVA to create each job	N/A	N/A	N/A
Trips to create job	N/A	N/A	N/A
Total trip GVA per visitor	N/A	N/A	N/A
<u>Directly attributable to event</u>			
Gross Value Added	£23,040	£71,800	£325
Employment FTEs	1.24	4	0.02
GVA to create each job	£18,581	£17,950	£16,250
Visits to create job	806	578	8,750
On-site GVA per visitor	£23.04	£31.08	£1.86
GVA per visitor: total trip: on-site	N/A	N/A	N/A
GVA to create job- total trip: on-site	N/A	N/A	N/A

**Table 4.8 Valleys Regional Park Visitor Surveys : Economic Impact**

	Dare Valley 2010	Pen Y Fan 2010	Pen Y Fan 2011	Six Bells Event 2010	Cordell Event 2010	Welsh Waterways 2011	Cwmbran Big Event 2011	Event Average
Type	Site	Site	Site	Event	Event	Event	Event	Event
Visitor Numbers	142,000	80,000	81,000	7,500	1,568	1,676	7,000	4,436
Date	Oct'09- Sep'10	Jan'10- Dec'10	Nov'10- Oct'11	28th Jun'10	18/19th Sep'10	28-30th May'11	16th Jul'11	
Questionnaires completed	100	100	100	138	102	121	107	117
Number in respondents' parties	332	261	244	424	502	355	405	422
Staying away from home in Wales	33.0%	1.0%	1.0%	13.5%	4.9%	14.0%	1.9%	8.6%
<b>Economic Impact</b>								
<u>Total Trip</u>								
Gross Value Added	£4,367,000	£435,900	£514,000	N/A	N/A	N/A	N/A	N/A
Supported employment - FTE	190	19	22	N/A	N/A	N/A	N/A	N/A
GVA to create each job	£22,984	£22,942	£23,364	N/A	N/A	N/A	N/A	N/A
Trips to create job	747	4,211	3,682	N/A	N/A	N/A	N/A	N/A
Total trip GVA per visitor	£30.75	£5.45	£6.35	N/A	N/A	N/A	N/A	N/A
<u>Directly attributable to event</u>								
Gross Value Added	£280,000	£54,500	£18,800	£32,000	£3,350	£5,950	£16,000	£14,325
Employment FTEs	15	3	1	1.5	0.16	0.27	0.9	0.7
GVA to create each job	£18,667	£18,167	£18,800	£21,333	£20,938	£22,037	£17,778	£20,521
Visits to create job	9,467	26,667	81,000	5,000	9,800	6,207	7,778	7,196
On-site GVA per visitor	£1.97	£0.68	£0.23	£4.27	£2.14	£3.55	£2.29	£3.06
GVA per visitor: total trip: on-site	15.60	8.00	27.34	N/A	N/A	N/A	N/A	N/A
GVA to create job: total trip: on-site	1.23	1.26	1.24	N/A	N/A	N/A	N/A	N/A

Table 4.9 presents an overview of the economic impact associated with visitation to events. Of the 8 events for which complete data was available and analysed an estimated £154,000 was generated in the Welsh economy and with 8 FTE years of employment supported. The total attendance at these events was 22,029.

**Table 4.9 Economic impact of surveyed E4G events**

	<i>Number of event surveys</i>	<i>Total GVA (£s) generated</i>	<i>Employment (FTEs) supported by event visitor spending</i>	<i>Average GVA (£s) per event</i>	<i>Average employment (FTEs) supported per event</i>
Communities and Nature(CAN)	1	1,210	0.06	1,210	0.06
Heritage Tourism Project (HTP)	0	-	-	-	-
Coastal Tourism (CT)	0	-	-	-	-
Sustainable Tourism (ST)	3	95,165	5.3	31,722	1.8
Valleys Regional Park (VRP)	4	57,300	2.8	14,325	0.7
Wales Coast Path (WCP)	0	-	-	-	-
<b>All E4G</b>	<b>8</b>	<b>153,675</b>	<b>8</b>	<b>19,209</b>	<b>1.0</b>

Table 4.10 shows the estimated economic impact of visitor spending directly attributable to E4G sites (so that where visitors were on a long stay holiday, just one night's accommodation spend was included along with any other spend directly linked to their trip to the E4G site). The average value added generated for the Welsh economy over one year for each site surveyed was £1.11m, with the visitor spending being connected with an average of 57 person years of employment.

**Table 4.10 Economic impact of surveyed E4G sites**

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
Communities and Nature(CAN)	3	2,547,000	110	849,000	37
Heritage Tourism Project (HTP)	6	10,472,000	559	1,745,333	93
Coastal Tourism (CT)	0	-	-	-	-
Sustainable Tourism (ST)	0	-	-	-	-
Valleys Regional Park (VRP)	3	353,300	19	117,767	6
Wales Coast Path (WCP)	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>13,372,300</b>	<b>688</b>	<b>1,114,358</b>	<b>57</b>

Table 4.11 shows that the GVA supported by the whole of trips of which visits to E4G sites were a **part** levered an average of £4.9m of GVA per site. The underlying tourism consumption supported 221 person years of employment.

Clearly there is some possibility of double counting in the total trip figures as visitors to one E4G site may have visited another E4G site. Double counting and displacement issues such as this will be resolved during the monitoring and evaluation of the project as data on visitors' travel patterns in Wales become more robust.

**Table 4.11 Economic impact of whole trip in Wales of visitors to E4G sites** (includes impact of visitor spending elsewhere on their trip i.e. includes all nights in accommodation)

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
<b>Communities and Nature(CAN)</b>	3	12,271,000	549	4,090,333	183
<b>Heritage Tourism Project (HTP)</b>	6	41,712,000	1,867	6,952,000	311
<b>Coastal Tourism (CT)</b>	0	-	-	-	-
<b>Sustainable Tourism (ST)</b>	0	-	-	-	-
<b>Valleys Regional Park (VRP)</b>	3	5,316,900	231	1,772,300	77
<b>Wales Coast Path (WCP)</b>	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>59,299,900</b>	<b>2,647</b>	<b>4,941,658</b>	<b>221</b>

### 4.3 Conclusions

This section has summarised the economic impacts of visitation to selected E4G sites and revealed some of the expected determinants of the scale of impacts. This marks the beginning of a process to build an evidence base of economic impact per visitor on site and off site at E4G sponsored projects. With a larger number of survey returns collected through the project then the suite of economic impact data becomes a means of estimating economic impacts at non-surveyed sites. We return to the practicalities of moving the project forward and remaining data needs in section 5 of the report.

## 5. Monitoring and Evaluation Going Forward

### 5.1 Introduction

In this section of the report we look ahead to some of the issues that need to be considered in the second half of any E4G M&E project. By way of introduction Table 5.1 outlines the progress towards the main objectives of the research commission.

**Table 5.1: Progress against objectives in summary**

Objectives	Progress
Work with Strategic E4G Project managers to implement the E4G monitoring and evaluation framework.	Framework in place and being used across the E4G strategic projects.
Develop the E4G monitoring and evaluation framework using feedback from partners and site managers.	M&E framework was further improved in 2010-11 to include new survey materials for 'links and loops' projects
Deliver workshops on monitoring and evaluation measurement techniques around the Convergence Fund area.	Three general workshops completed during 2010-12, and a series of dedicated survey sessions with discrete project sets. Good feedback on value particularly with respect to surgery days
Develop and assist in the application of a system to collect the appropriate monitoring and evaluation information from E4G sites/projects and/or bid partners as appropriate, including developing a process for the electronic submission of data.	System collection in place and has now been tested with a series of VRP, CAN, HRP, and Sustainable Tourism projects; system for electronic submission of project data in place ; a series of 'one to one' consultations completed to assist project managers with providing appropriate data .
Mentor initiative managers at sampled sites as appropriate.	Ongoing throughout 2010-12 and expected to continue through second half of the E4G project as new sites and events enter the process.
Analyse the collated monitoring data, and report information in short reports and datasheets to project sponsors and stakeholders at site and aggregate level.	Mid-Term report provides description and analysis of survey data received as at end February 2012, which on approval can be posted onto the website, Furthermore standard reporting format developed for individual sites/events to bring out key messages.
Create and maintain a website for E4G partners to provide access to information on M&E tools, approaches and 'best practice', and include a stakeholder discussion forum.	Website is fully operational and with evidence that projects have used the main resources; however, forum seeing less use.

Table 5.1 reveals that there has been significant progress towards meeting project objectives. However, there are some parts of the project that will require attention going forward.

## 5.2 Economic Impact

Estimating the economic impact of visitor sites and events is not straightforward. Many of the important impacts of visitation will not occur 'onsite' or directly because of the activity, but more widely throughout the regional economy as visitors spend money on accommodation and other services away from the destination in question (typically in main towns and cities); meanwhile, sites will have impacts off site through their purchases of goods and labour. Many E4G-related jobs will be created 'indirectly', as E4G visitors spend their money in the wider Convergence region away from E4G sites. In order to justify the substantial regional match-funding being allocated under this EU priority, these impacts must be evaluated, requiring an overall understanding of visitors' characteristics and behaviour. Section 4 of the report reveals the start of this process. The visitor surveys requested by the research team have the aim of supplying this understanding as their goal.

Progress on the E4G visitor surveys was approaching the half-way stage by March 2012, with over 3,500 completed questionnaires. During the next twelve months the strategic projects of the Wales Coast Path, Coastal Tourism and Sustainable Tourism have major increases in their visitor survey activity planned. It is obviously important that the momentum in gathering this visitor data is maintained so as to ensure as large a sample as possible. With higher numbers of returns it will be possible to come to conclusions on the types of initiatives expected to have the greatest visitor economy effects.

Visitor surveys will not be undertaken at every site/event. It is possible, and in some cases necessary, to assume that impact per visitor is comparable between similar sites or visitors within an area (in this case the Convergence area). For small or unmanned projects, undertaking visitor surveys in order to reveal visitor characteristics or behaviour is impractical. For example, for very small sites, the effort involved in interviewing a sufficient sample of visitors to provide statistically robust estimates of (say) expenditure would be wholly disproportionate to the usefulness of the data collected. Here, it is more sensible to measure visitor volumes, and then to assume characteristics and behaviour are in line with those reported at other similar or proximate projects. To assist this, a typology of sites has been produced.

This does mean that it is imperative for site and event visitor numbers to be collected and sent through to the research team as has been requested (section 3 of this report details the responses gained so far for visitor numbers). If baseline visitor numbers are available, showing the volume of visitors before any capital works are undertaken (or E4G related marketing or developmental activities initiated), then an appreciation of the additionality of E4G works can also be investigated. Three recommendations follow directly and indirectly from the above.

### **Recommendation 1: Visitor baseline data**

The Mid Term E4G report reveals that there has been strong progress in terms of the surveys being collected at different sites and events. However, the framework requires that inference is drawn from visitor survey information at a sample of sites to the whole population, whether by strategic project or for the whole E4G project. To make this process work it is critical that the Cardiff University team have visitor numbers associated with E4G sites and events that are not covered by surveys. There has been some progress here but this is an ongoing task. We recommend that strategic project managers in the second half of the E4G programme work to get these visitor numbers and quickly identify where there may be problems in gaining accurate data such that appropriate steps can be taken in terms of counts etc.

### **Recommendation 2: Economic analysis**

Clearly the economic impact assessment covered in the Mid-Term report is necessarily partial. As more survey information is derived and analysed the opportunity will arise for more complex analysis of the information. For example, during the second half it is recommended that analyses examine the on-site economic effects in the context of the socio-economic needs of the areas surrounding the sites. Furthermore analyses will be able to consider more carefully the determinants of economic effects both off and on E4G sites, and relate the effects of levered visitation to the capital expended in making site improvements or in developing events. Finally it is recommended that further analysis will also have to address more subtle issues of displacement and double counting, and weighting of the survey information.

### **Recommendation 3: Gaps in the data**

Moving through to the second half of the project it will be necessary for the M&E team to work closely with strategic project managers to identify gaps in the survey coverage for different types of sites. In the first half of the project there has been an emphasis on the volume of quality returns but with a need going forward to ensure that no major gaps in coverage are occurring both within and between strategic projects. To this end it is recommended that the M&E team will need to work closely with strategic project managers and the steering group in identifying and closing gaps in the survey coverage.

## **5.3 Impacts of capital spending**

As well as impacts in terms of leveraging tourism spending it is important to recognise that the Environment for Growth programme has also involved considerable amounts of capital spending, in large measure, on construction type activity. Within the Welsh European Funding Office guidelines the direct and indirect economic activity supported through capital spending



cannot be included within any gross or new jobs created target. However, estimates of output and employment supported during E4G developmental activity should be included in a more general evaluation of the programmes impact. In particular, it is noted that selected project activity has taken place in more needy parts of the regional economy, such that employment and incomes supported in construction could have important local effects.

Moreover, we would argue that on the basis of prior projects evaluated by the Cardiff University team involving environmental assets, the nature of construction contracts issued commonly supports local firms and jobs as opposed to situations where contracts are awarded outside of the regional and West Wales and the Valleys economy. It is stressed that what follows is an estimate of the employment and value added associated with the capital spending of the E4G project from inception to June 2012. The estimates in the Table below are reported as a range based on different regional sourcing assumptions. There is also here no attempt to differentiate different types of construction activity i.e. the spend is assumed to be connected to an average construction type activity in Wales. We use the framework of the Welsh Input-Output tables to estimate the indirect effects associated with the spending.

Table 5.2 reveals that the total estimated construction spend associated with the E4G projects at the mid-term stage (June 2012) was an estimated £28.4m. Taking the mid range estimate of 80% local sourcing, we estimate that once the multiplier effects of this construction spending are taken into account that some £20.5m of value added is supported in Wales and around 480 person years of employment.

Put another way if the construction activity bridged a period of three years, the E4G spending would have supported around 165 construction jobs and jobs in the construction supply chain over this three year period, and around £7m of value added per annum. However, the table also reveals that if the local sourcing of the construction industry inputs averaged just 60% then a total of around £15m of value would have been supported and around 350 person years of employment.

The table also subdivides estimated value added and job years supported between the strategic strands of the E4G project. Capital spend associated with the Valleys Regional Park project accounts for around one third of the direct and indirect effects at the mid-term stage. Table 5.2 also indicates that, to project completion, estimated construction spend associated with the E4G projects is £72.8m. Again, taking the mid range estimate of 80% local sourcing, it is estimated that, once the multiplier effects of this construction spending are taken into account, around £53m of value added is supported in Wales, and over 1,200 person years of employment. We stress these are estimated numbers, but they do reveal that as well as

leveraging tourist spending, the development activity connected to E4G may also have important employment effects.

**Table 5.2 Estimated Value Added and Employment Supported by E4G Capital Spending to June 2012, and to Project Completion**

Project and Local sourcing assumption	Mid Term Stage		At Project Completion	
	Value Added (£m)	Approx Employment (FTE person years)*	Value Added (£m)	Approx Employment (FTE person years)*
<b>Sustainable Tourism</b>	<i>To June 2012 (£2.743m)</i>		<i>Whole project (£14.232m)</i>	
100%	2.5	60	12.9	300
80%	2.0	45	10.3	240
60%	1.5	35	7.7	180
<b>Coastal Tourism</b>	<i>To June 2012 (£4.600m)</i>		<i>Whole project (£13.949m)</i>	
100%	4.1	100	12.5	300
80%	3.3	80	10.0	240
60%	2.5	60	7.6	180
<b>Heritage Tourism Project</b>	<i>To June 2012 (£4.889m)</i>		<i>Whole project (£15.227m)</i>	
100%	4.4	105	13.7	320
80%	3.5	85	11.0	260
60%	2.6	60	8.2	190
<b>Communities and Nature</b>	<i>To June 2012 (£2.944m)</i>		<i>Whole project (£8.997m)</i>	
100%	2.7	60	8.2	185
80%	2.1	50	6.5	150
60%	1.6	35	4.9	110
<b>Welsh Coastal Path</b>	<i>To June 2012 (£4.009m)</i>		<i>Whole project (£6.216m)</i>	
100%	3.6	85	5.6	130
80%	2.9	65	4.5	100
60%	2.2	50	3.4	80
<b>Valleys Regional Park</b>	<i>To June 2012 (£9.218m)</i>		<i>Whole project (£14.200m)</i>	
100%	8.3	195	12.8	300
80%	6.7	155	10.3	240
60%	5.0	110	7.7	175
<b>Total</b>	<i>To June 2012 (£28.403m)</i>		<i>Whole project (£72.821m)</i>	
100%	<b>25.6</b>	<b>605</b>	<b>65.7</b>	<b>1535</b>
80%	<b>20.5</b>	<b>480</b>	<b>52.6</b>	<b>1230</b>
60%	<b>15.4</b>	<b>350</b>	<b>39.5</b>	<b>915</b>

\*Note. The employment estimate numbers have been rounded to the nearest 5.

## 5.4 Overall Project Target Progress

In going forward the project stakeholders should continue to collect spending on capital information as this will form part of the analysis of the overall impact of the programme. For completeness, Table 5.3 provides information on the overall progress of the E4G strands of activity against the targets that were agreed with WEFO on project inception. Progress on some of the key targets has been disappointing but it has to be accepted that projects are at different stages, although the overall E4G project is at mid-term stage.

In general progress on job created has been poor at the mid-term stage across all strands i.e. less than 25 jobs reported as created against a target of close to 350. Notwithstanding this direct jobs created target does not include employment supported by visitor spend and during the development phases of construction. In this respect progress on levered visitation has been much stronger across all of the six strands with two strands already well exceeding their visitor targets, and a further two expected to do so by the end of the E4G project.

Progress has also been poor in terms of enterprises assisted and created, although an evidence base is being developed to provide better evidence on this measure.

Progress on managed access in terms of kilometres developed has also been variable. Valleys Regional Park seems well on schedule to exceed its managed access target. It is unclear why with respect to the Welsh Coastal Path that the delivery of the path is reported as completed but that no total is reported against km of managed access. Coastal Tourism and Sustainable Tourism are at earlier stages but with some way to go to meet targets on amounts of managed access achieved.

Our conclusion from table 5.3 would be selected strands of the E4G programme are unlikely to meet all of their targets, and with some questions on whether the original targets developed are suitable given the difficulty of collating appropriate evidence.

**Table 5.3 Overall Project Target Progress**

<b>Sustainable Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	53	4.66	48
Visitor Numbers	917,187	396,255	520,932
Enterprises Assisted	55	7	48
Initiatives developing, urban, natural or historic environment	13	1	12
Managed access to the Coast or Countryside (km)	428.00	81.9	346

<b>Coastal Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	44	8.5	35.5
Visitor Numbers	406,380	243,534	162,846
Enterprises Assisted	21	0	21
Initiatives developing, urban, natural or historic environment	33	6	27
Managed access to the Coast or Countryside (km)	25.775	1.5	24.275
<b>Heritage Tourism Project *</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	18	0.7	17.3
Visitor Numbers	210,000	160,928	49,072
Enterprises Assisted	0	0	0
Initiatives developing, urban, natural or historic environment	18	4	14
Managed access to the Coast or Countryside (km)	0	0	0
<b>Communities and Nature</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	20	2	18
Visitor Numbers	100,000	694,743	exceeded
Enterprises Assisted/ <u>Created</u>	3	1	2
Initiatives developing, urban, natural or historic environment	20	67	exceeded
Managed access to the Coast or Countryside (km)	10	133	exceeded
<b>Wales Coast Path</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	8		
Visitor Numbers	100,000		
Enterprises Assisted	2		
Initiatives developing, urban, natural or historic environment	Delivery of the all Wales Coast Path	completed	
Managed access to the Coast or Countryside (km)	15		
<b>Valleys Regional Park</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	200	7	193
Visitor Numbers	100,000	580,000	exceeded
Enterprises Assisted	NA	NA	NA
Initiatives developing, urban, natural or historic environment	6	8	exceeded
Managed access to the Coast or Countryside (km)	80	72	8
Participants in training	200	263	exceeded

Qualifications	150	169	exceeded
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\* Note: HTP figures reflect QE September 2012 claim (Strata Florida, Conwy Castle, Denbigh Castle and Copper Kingdom Heritage Centre, Amlwch (Mona Antiqua)).

## 5.5 Energy use monitoring

There are a number of cross cutting themes that address the way that E4G initiatives should be run, particularly concerning environmental sustainability and equal opportunities. The first of these is also closely related to a requirement that Funded schemes are mindful of (and seek to minimise) carbon emissions consequent on their operation.

A key requirement of E4G is that negative environmental impacts are understood and managed, whilst positive impacts are maximised. The use of a bespoke tourism model which links economic behaviour to environmental outcomes will enable projects and bids to measure the carbon, waste and other environmental impacts associated with their visitors and make tangible, grounded steps to reduce these impacts. Meanwhile, the measurement of energy use will enable the derivation of an overall 'carbon footprint', and point to what actions can minimise this footprint in the most resource effective ways. Again, the ability to make these estimates is reliant on gathering sufficient data from initiatives. Section 3 of this report noted the relatively few returns of energy usage data so far received by the research team.

There are also other potential uses of E4G data that would build a base of environmental information. The research team utilised visitor survey data from the Halo British Series Cycling Event 2011 to estimate the potential environmental costs of the event. This analysis quantitatively estimated the visitor related carbon-equivalent emissions resulting from the activity associated with the event in Wales. The environmental performance of events has in the past been largely evaluated in terms of changes to internal processes, and with organisational activities being monitored rather than outcomes (in terms of measurable externalities). As such, the Halo event analysis is a further step towards understanding the environmental consequences of events and, importantly, starts to illustrate how event hosting can be integrated into wider Government commitments to sustainable development.

### **Recommendation 4: Energy returns**

To date the Cardiff University team have received fewer energy survey returns from sites. In terms of carbon generation much of this is likely to be associated with visitor travel and here the visitor survey returns from sites are invaluable. However, to provide a complete picture the team require information on energy being used at sites to support visitation. It is recommended that strategic project managers emphasise the importance of completing these

returns to individual site managers. Cardiff University will assist in this process if commissioned going forward.

## **5.6 Other recommendations deriving from the Mid-Term report**

A series of further recommendations are made following this Mid-Term report.

### **Recommendation 5: Web based forum**

While the website resource has worked well as a portal for incoming returns and as a means of distributing project information and survey tools it has worked less well in generating a forum for exchanging information between projects. It is recommended that the E4G steering group together with the M&E team consider whether there are other means to promote knowledge exchange between project managers. There may be scope here for future seminars and workshops to share knowledge. In this respect Workshop 3 worked well because it encouraged project participants to share experiences such that further days following this pattern might be used in the second half of the project.

### **Recommendation 6: Surgery days**

Associated with the above is the fact that the more formally designed Workshops (1 and 2) tended to work less well unless they were being used to share experience (Workshop 3). Coming out of the Mid Term report is that there was real value in the more tightly focused surgery days for individual projects or covering specific issues. Then it is recommended that further use is made of the surgery days during the second half of the project.

## **5.7 Conclusion**

In conclusion the framework developed is not expected to require major changes during the second half of the project. A greater emphasis in the period to the end of the project will need to be on analysis and the dissemination of outputs to project participants and other stakeholders.

## Appendix 1 Visitor Survey Findings by Strategic Project

### COMMUNITIES & NATURE

YSTRADLYN CADAIR IDRIS 2011			CAN	
<b>ATTENDANCE:</b>			<b>SITE SATISFACTION</b>	
		%		% agree
	Leisure trip as part of a longer break	47.7	a.	"Overall, I have enjoyed my visit" 95.4
	Leisure trip from home	46.1	b.	"The staff here are friendly & helpful" 100.0
	Non-routine work business	0.6	c.	"The staff here are knowledgeable" 100.0
	Other	5.6	d.	"The site facilities are appropriate" 83.8
	<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find" 74.0
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	
	Yes	65.5		Yes 93.7
	No	34.5		No 6.3
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Number of nights stayed?</b>			<b>Age breakdown</b>	
				%
	one to three	34.5		16-24 6.8
	four to six	29.3		25-34 18.1
	seven	19.8		35-44 23.2
	eight or more	16.4		45-54 25.4
	<b>Total</b>	<b>100.0</b>		55-64 17.5
<b>Travel to accommodation:</b>			65+ 9.0	
		%		<b>Total 100.0</b>
	Private car/van/taxi	93.9	<b>Long term limiting health problem?</b>	
	Aeroplane	1.7		%
	Organised coach	1.7		Yes 7.5
	Scheduled bus	1.7		No 92.5
	Other	1.0		<b>Total 100.0</b>
	<b>Total</b>	<b>100.0</b>	<b>Full Time employment?</b>	
<b>Where did respondents stay?</b>				
		%		%
	Self catering/camping	55.2		Yes 78.2
	Guesthouse/B&B	15.5		No 21.8
	Hotel/Motel	15.5		<b>Total 100.0</b>
	With friends/family	2.6	<b>Ethnic Grouping</b>	
	Other	11.2		%
	<b>Total</b>	<b>100.0</b>		1. White British/ Northern Irish 93.8
<b>Average length of stay at park: hours</b>			18. Other ethnic background NEC 4.1	
		4.8	4. Any other white 1.4	
	<i>Over four and three-quarter hours</i>		2. Irish 0.7	
				<b>Total 100.0</b>
<b>Had respondents visited before?</b>			<b>ECONOMIC IMPACT</b>	
		%	<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £1,876,000</b>	
	First time visitor	41.0	Supported employment (FTE) 84	
	Once or twice before	24.7	<i>Of which expenditure attributable to site(a subset of gross impact shown above, not additional):</i>	
	Not for a while	18.0	<b>GVA £276,000</b> Employment 15 FTEs	
	Am a regular visitor	16.3		
	<b>Total</b>	<b>100.0</b>		
<b>How did respondents travel to the site?</b>				
		%		
	Private car/van/taxi	93.2		
	Scheduled bus/coach	2.8		
	Organised coach trip	2.3		
	Bicycle/walk	1.1		
	Other	0.6		
	<b>Total</b>	<b>100.0</b>		
<b>Did respondents spend money on site?</b>				
		%		
	Yes	77.1		
	No	22.9		
	<b>Total</b>	<b>100.0</b>		

## YSTRADLYN CADAIR IDRIS 2011

### SITE BACKGROUND

Interviews were carried out between April and September 2011

The total number of visitors between October 2010 and September 2011 was an estimated 35,000 (source: Business Plan)

179 face-to-face interviews were carried out by the Countryside Council for Wales. The total number of people in respondents' parties was 603.

#### **The Ystradlyn Initiative:** (Source: *returned eflyer*)

The project will extend and refurbish Ystradlyn cottage to create an exhibition room and a tea room. Ystradlyn lies at the foot of Cadair Idris, by a main access for walking and close to camp sites and caravan parks in the Talyllyn Valley.

The project will enhance the recreational experience for walkers, attract new visitors, create jobs in the tea room and engage with nearby communities to create social and economic benefits.

### OTHER RESULTS

#### **Q14. Comments given by respondents regarding their visit (mentions):**

"signage needs improving especially for car park" (26)

"good to have a café/ tea room" (9)

"car park was expensive" (8)

"Toilets could be improved" (6)

"Change machine needed (to get coins for parking)" (5)

"Need bins" (5)

### GLOSSARY

**Economic Impact:** Economic activity such as household income (measured by Gross Value Added, GVA) and employment (measured in Full Time Equivalents, FTEs) resulting from the combined effects of all the direct, indirect and induced impacts associated with visitor expenditure.

**Gross Spending:** measures the total expenditure by attendees on Welsh goods and services. Only monies related to the event are included in the analysis. This is the direct impact of visitor expenditure.

**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

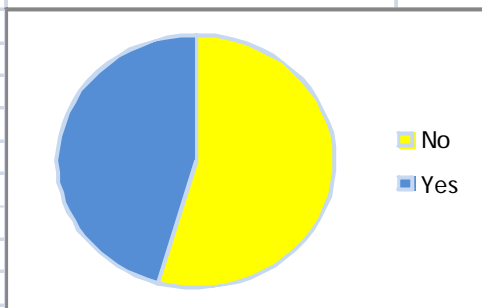
**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

**Induced effects:** A proportion of the increase in regional household income created by the direct and indirect effects is spent within the region, giving rise to further increases in economic activity. This is the induced effect.



## YSTRADLYN CADAIR IDRIS 2011 - SUPPLEMENTARY QUESTIONS

### Did respondents visit anywhere else on the day they visited Ystradlyn?



Percentage %	
No	54.4
Yes	45.6
<b>Total</b>	<b>100.0</b>

### If "Yes" -where else did they visit?

	Percentage %
Machynlleth *	14.6
Aberdyfi	9.8
Tywyn	9.8
Dolgellau	7.3
Local Pub (nr Ystradlyn)	7.3
Aberystwyth	4.9
Betws-Y-Coed	4.9
Wrexham - (Cross Foxes Hotel)	4.9
Shell Island	4.9
Tal-y-Llyn	4.9
Beddgelert	2.4
Bermo	2.4
BrynCerrig	2.4
Coed y Brenin	2.4
Golgellau cycle trail	2.4
Harlech Castle	2.4
Llandudno	2.4
Mathach trail	2.4
Nant Gwynant Youth Hostel	2.4
St Asaph	2.4
Tan-y Carmel pub	2.4
<b>Total</b>	<b>100.0</b>

\* Machynlleth included visits to RSPB reserve/CAT, & Steam railway centre

### OTHER COMMENTS (number of mentions by respondents)

#### KEY

+	Positive comment
N	Neutral comment/ suggestion
-	Negative comment

#### Café related

	mentions
+	"café is a good idea" 52
-	"don't change site/ no cafe" 6
N	"don't make area too touristy" 5
+	"exhibition space would be useful" 3

#### Other concerns

	mentions
-	"poor toilet facilities/no hand dryer" 4
-	"no bins/ not enough bins" 4
N	"picnic tables would be nice" 1
-	"dog bins needed" 1
+	"lovely area" 1
N	"could supply weather forecast info" 1
N	"could supply info on mounntn lodges" 1
-	"not happy with loss of Camilla trees" 1

#### Parking

	mentions
-	"poor signage/hard to find" 13
-	"expensive parking" 6
-	"need coin change machine" 3
-	"small car park" 2
N	"pensioners shouldn't have to pay" 2
N	"hotels could sell car park tickets" 1
-	"payment methods need sorting" 1

<b>CORS DYFI OSPREYS 2011</b>			<b>CAN</b>
<b>ATTENDANCE:</b>		<b>%</b>	<b>How became aware of Cors Dyfi Ospreys?</b>
Leisure trip as part of a longer break	62.2		Banner 24.0
Leisure trip from home	37.8		Word of Mouth 22.8
<b>Total</b>	<b>100.0</b>		DOP website 10.6
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	Been before 10.0
Yes	62.2		BBC Springwatch 8.5
No	37.8		Leaflet 8.1
<b>Total</b>	<b>100.0</b>		Live/stay locally 6.0
<b>Where did respondents stay?</b>		<b>%</b>	AA signs 5.5
Caravan	25.3		by chance 2.3
S/C cottage	20.7		local paper 1.7
B+B	11.6		other 0.6
Camping	8.2		<b>Total 100.0</b>
Hotel	7.9		
VFR Visit Friends Relatives	6.7		
Campervan	6.4		
Holiday home	4.9		
Time share	3.4		
Youth hostel	1.2		
Hostel	0.9		
S/C apartment	0.9		
Chalet	0.6		
Guest house	0.3		
Holiday park	0.3		
Lodge	0.3		
University campus	0.3		
	<b>100.0</b>		
<b>Had respondents visited before?</b>		<b>%</b>	
First time visitor	64.0		
Once or twice before	20.9		
Three to six times	10.0		
Seven or more	5.1		
<b>Total</b>	<b>100.0</b>		
<b>DEMOGRAPHICS</b>			
<b>Respondents resident in the UK?</b>		<b>%</b>	
			Yes 98.5
			No 1.5
			<b>Total 100.0</b>
<b>First language</b>		<b>%</b>	
			English 92.6
			Welsh 6.4
			Dutch 0.6
			French 0.2
			German 0.2
			<b>Total 100.0</b>
<b>ECONOMIC IMPACT</b>			
<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £2,150,000</b>			
Supported employment (FTE) 95			
(Site only net income from donations and sales £40,000. A site-only economic impact estimate has not yet been finalised)			

## CORS DYFI OSPREYS 2011

### SITE BACKGROUND

Interviews were carried out in 2011 . Visitor numbers exceeded 40,000 over the 6 -month season (source: Dyfi Osprey Project Visitor Survey 2011)

530 people completed visitor surveys. The total number of people in respondents' parties was 1,513.

Visitor satisfaction levels were very high (100% of respondents noting that they would recommend the site to friends (source: Dyfi Osprey Project Visitor Survey 2011, *Overview* statement).

One thing liked?	mentions	%	One thing to improve?	
seeing ospreys easily	174	32.8	nothing needed!	17.4
information from staff	103	19.4	café facilities	2.5
everything!	44	8.3	more/bigger hides	2.5
webcam images	40	7.5	more interpretation on site	2.3
friendly welcome	34	6.4	more telescopes/cameras	2.3
using telescopes	28	5.3	more seats/picnic tables	1.5
views across Reserve	21	4.0	extend boardwalk	1.1
bird hide	14	2.6	more clarity on payment	0.9
birdwatching on Reserve	13	2.5	more/better toilets, litter bins	0.8
well-organised project	11	2.1	other	4.4
other wildlife	7	1.3	nothing suggested	64.5
osprey eggs/nest	6	1.1	<b>Total</b>	<b>100.0</b>
going for a walk	3	0.6		
satellite tagging	3	0.6		
other	4	0.8		
nothing mentioned	25	4.7		
<b>Total</b>	<b>530</b>	<b>100.0</b>		

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MOELYCI - OPEN DAY EVENT 2011			CAN	
<b>ATTENDANCE:</b>		<b>%</b>	<b>SITE SATISFACTION</b>	
Leisure trip from home	80.0			<b>% agree</b>
Volunteer	7.3	a.	"Overall, I have enjoyed my visit"	94.1
Other	5.5	b.	"The staff here are friendly & helpful"	93.6
Leisure trip as part of a longer break	3.6	c.	"The staff here are knowledgeable"	95.7
Non-routine work business	3.6	d.	"The site facilities are appropriate"	89.4
<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find"	93.9
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	<b>DEMOGRAPHICS</b>	
Yes	7.3	<b>Respondents resident in the UK?</b>		
No	92.7			<b>%</b>
<b>Total</b>	<b>100.0</b>		Yes	100.0
<b>Number of nights stayed?</b>			No	0.0
one to three	50.0		<b>Total</b>	<b>100.0</b>
four to six	50.0	<b>Age breakdown</b>		
<b>Total</b>	<b>100.0</b>			<b>%</b>
<b>Travel to accommodation:</b>		<b>%</b>	16-24	3.6
Private car/van/taxi	66.7		25-34	9.1
Train	33.3		35-44	21.8
Organised coach	0.0		45-54	27.3
Scheduled bus	0.0		55-64	25.5
Other	0.0		65+	12.7
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>Where did respondents stay?</b>		<b>%</b>	<b>Long term limiting health problem?</b>	
With friends/family	50.0		Yes	7.3
Self catering/camping	25.0		No	92.7
Other	25.0		<b>Total</b>	<b>100.0</b>
Hotel/Motel	0.0	<b>Full Time employment?</b>		
Guesthouse/B&B	0.0		Yes	60.0
<b>Total</b>	<b>100.0</b>		No	40.0
<b>Average length of stay at park: hours</b>		<b>3</b>	<b>Total</b>	
	<i>Three hours</i>			<b>100.0</b>
<b>Had respondents visited before?</b>		<b>%</b>	<b>Ethnic Grouping</b>	
First time visitor	25.5			<b>%</b>
Once or twice before	27.3		1. White British/ Northern Irish	90.2
Not for a while	14.5		7. White and Asian	4.9
Am a regular visitor	32.7		18. Other ethnic background NEC	4.9
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>How did respondents travel to the site?</b>		<b>%</b>	<b>ECONOMIC IMPACT</b>	
Private car/van/taxi	75.5		a. Gross spending by event attendees	<b>£1,706</b>
Bicycle/walk	17.0		b. Total economic impact	<b>£2,650</b>
Other	3.7		c. Gross value Added	<b>£1,210</b>
Ferry or boat	1.9		d. Employment supported by visitor spend	<b>0.06 FTEs</b>
Scheduled bus/coach	1.9			
Organised coach trip	0.0		a. Gross spending by event attendees (Welsh goods & services only; net of VAT)	
<b>Total</b>	<b>100.0</b>		b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)	
<b>Did respondents spend money on site?</b>		<b>%</b>	c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes & profits)	
Yes	74.5		d. Employment supported by visitor spending (Person-years equivalent)	
No	25.5			
<b>Total</b>	<b>100.0</b>			

## MOELYCI 2011

### SITE BACKGROUND

Interviews were carried out in the summer of 2011 on the site open day (3rd July)

The total number of visitors for the Open Day was an estimated 800(source: Moelyci )

57 face-to-face interviews were carried out by the Moelyci Natural Heritage initiative. The total number of people in respondents' parties was 130.

### Moelyci Natural Heritage initiative

Main plans include:

- 1) The refurbishment of Moelyci's barn outbuildings complex to provide an all weather visitor centre/community resource focussing on the exceptional natural and social heritage of Moelyci.
- 2) The creation of the Moelyci Natural Heritage Trail which will be linked directly to the refurbished barn buildings, having its start and finish at the main barn where a live wildlife webcam and natural heritage display will be housed.

### OTHER RESULTS

#### What prompted visit? (mentions)

"Open day" (19)

"Look at garden/ Interested in growing veg/ Helping out on allotment/ like outdoors" (10)

"Friends/family" (4)

"Involved regularly/ a member" (2)

#### Other comments given by respondents regarding their visit:

"Very dog friendly which is very important"

#### UK home postcodes of respondents

	percentage of all %
LL	90.4
SY	5.8
DE	1.9
EH	1.9

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GREAT ORME 2011			CAN		
<b>ATTENDANCE:</b>		<b>%</b>	<b>SITE SATISFACTION</b>		
Leisure trip as part of a longer break	66.7			<b>% agree</b>	
Leisure trip from home	31.5	a.	"Overall, I have enjoyed my visit"	84.1	
Non-routine work business	1.2	b.	"The staff here are friendly & helpful"	87.2	
Other	0.6	c.	"The staff here are knowledgeable"	80.6	
<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate"	83.3	
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	e.	"The site is easy to find"	82.7
Yes	82.6				
No	17.4				
<b>Total</b>	<b>100.0</b>				
<b>Number of nights stayed?</b>			<b>DEMOGRAPHICS</b>		
one to three	30.2	<b>Respondents resident in the UK?</b>			
four to six	33.6		Yes	95.9	
seven	22.4		No	4.1	
eight or more	13.8		<b>Total</b>	<b>100.0</b>	
<b>Total</b>	<b>100.0</b>	<b>Age breakdown</b>			
<b>Travel to accommodation:</b>		<b>%</b>		16-24	16.2
Private car/van/taxi	74.4			25-34	5.1
Organised coach	14.5			35-44	18.4
Train	7.7			45-54	19.9
Scheduled bus	1.7			55-64	22.0
Other	1.7			65+	18.4
<b>Total</b>	<b>100.0</b>			<b>Total</b>	<b>100.0</b>
<b>Where did respondents stay?</b>		<b>%</b>	<b>Long term limiting health problem?</b>		
Self catering/camping	34.7			Yes	16.4
Hotel/Motel	33.9			No	83.6
Guesthouse/B&B	16.1			<b>Total</b>	<b>100.0</b>
With friends/family	8.5		<b>Full Time employment?</b>		
Other	6.8			Yes	55.6
<b>Total</b>	<b>100.0</b>			No	44.4
<b>Average length of stay at park: hours</b>		<b>2.8</b>	<b>Ethnic Grouping</b>		
<i>Over two and three-quarter hours</i>				1. White British/ Northern Irish	95.8
<b>Had respondents visited before?</b>		<b>%</b>		2. Irish	0.7
First time visitor	42.7			4. Any other white	1.4
Once or twice before	32.1			5. White and Black Caribbean	1.4
Not for a while	19.5			18. Other ethnic background NEC	0.7
Am a regular visitor	5.7			<b>Total</b>	<b>100.0</b>
<b>Total</b>	<b>100.0</b>		<b>ECONOMIC IMPACT</b>		
<b>How did respondents travel to the site?</b>		<b>%</b>	<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £8,245,000</b>		
Private car/van/taxi	54.6		Supported employment (FTE) 370		
Other	22.7		<i>Of which expenditure attributable to site (a subset of gross impact shown above, not additional):</i>		
Bicycle/walk	16.0		<b>GVA £2,271,000</b> Employment 95 FTEs		
Train	3.3				
Organised coach trip	2.7				
Scheduled bus/coach	0.7				
<b>Total</b>	<b>100.0</b>				
<b>Did respondents spend money on site?</b>		<b>%</b>			
Yes	70.2				
No	29.8				
<b>Total</b>	<b>100.0</b>				

**GREAT ORME 2011**

**SITE BACKGROUND**

163 questionnaires were completed. 25 face-to-face interviews were carried out by staff and volunteers at the Visitor Centre, and the remainder by self-completion (these 'self-completed' questionnaires were analysed by Cardiff University to check for genuine returns). Interviews were carried out in the summer/autumn 2011.

The total number of people in respondents' parties was 599.

The total number of visitors to the Great Orme Visitor Centre for the year 2011 was an estimated 145,183 (source: Conwy CBC). The Visitor Centre was open between the dates of 26/03/11 and 30/10/11.

**Local Nature Reserve Improvement programme**

The initiative looks aims at improvement and enhancement of the infrastructure of the Great Orme and Loggerheads Country Parks and Nature Reserves in Conwy and Denbighshire respectively. This will be achieved through conservation management, access and interpretation initiatives.

The initiative at Great Orme includes: Touch screen information point; and interpretation regarding management and heathland interests.

**OTHER RESULTS**

**What prompted visit? (mentions)**

"The view/scenery" (24)	"Taking children out" (11)
"Good place to visit/fun/nostalgia" (24)	"Recommended by someone else" (11)
"Cable cars/trams" (18)	"With friends/family" (11)

**Comments given by respondents regarding their visit (all SINGLE mentions):**

"car park ticket machine not working"	<b>Positive:</b>
"could be better / more interactive activities"	"good access & parking"
"Could be more great orme souvenirs"	"It is very comfortable here"
"more shelter on trams, windows"	"well run and set out"
"more toilets"	"it was so nice to look at all the information and colourful visitor centre"
"need a fire watch" / "need bird lookouts"	"child friendly visitor centre"
"no signage to café from tram"	
"reduce prices for OAPs" / "staff in café unhelpful"	
"too many tourist could spoil the place e.g.Lands End"	
"you need signs at the pier by hotel" / "Wheel chair access?"	

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## HERITAGE TOURISM PROJECT

<b>BLAENAVON 2011</b>					<b>HTP</b>
<b>ATTENDANCE:</b>			<b>%</b>		
Leisure trip from home		43.2			
Leisure trip as part of a longer break		56.3			
Other		0.5			
<b>Total</b>		<b>100.0</b>			
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>%</b>		
Yes		53.0			
No		47.0			
<b>Total</b>		<b>100.0</b>			
<b>Travel to accommodation:</b>			<b>%</b>		
Private Car/Van/Taxi		79.4			
Scheduled bus/ coach		11.3			
Organised coach trip		5.2			
Other		3.1			
Train		1.0			
<b>Total</b>		<b>100.0</b>			
<b>Where did respondents stay?</b>			<b>%</b>		
Self-catering/camping/caravan		39.2			
Friends Family		28.9			
Hotel		27.8			
Guesthouse/B&B/Pub		3.1			
Other		1.0			
<b>Total</b>		<b>100.0</b>			
<b>Nights away from home in Wales</b>			<b>%</b>		
1-3 nights: short break		23.7			
4+ nights: long holiday		76.3			
<b>Total</b>		<b>100.0</b>			
<b>Average length of stay:</b>			<b>hours</b>	<b>1.5</b>	
<b>Had respondents visited before?</b>			<b>%</b>		
Am a regular visitor		2.2			
First time visitor		81.4			
Have been a number of times		4.9			
Once or twice before		11.5			
<b>Total</b>		<b>100.0</b>			
<b>How did respondents travel to the site?</b>			<b>%</b>		
Private car/van/taxi		89.6			
Bicycle/walk		0.5			
Organised coach trip		3.3			
Scheduled bus/ coach trip		3.3			
Train		1.1			
Other		2.2			
<b>Total</b>		<b>100.0</b>			
<b>Did respondents spend money at site?</b>			<b>%</b>		
Yes		59.0			
No		41.0			
<b>Total</b>		<b>100.0</b>			
			<b>SITE SATISFACTION</b>		
				<b>% agree</b>	
a.	"Overall, I have enjoyed my visit"			96.7	
b.	"The staff here are friendly & helpful"			99.2	
c.	"The staff here are knowledgeable"			92.4	
d.	"The site facilities are appropriate"			64.8	
e.	"The site is easy to find"			84.4	
			<b>DEMOGRAPHICS</b>		
<b>Respondents resident in the UK?</b>			<b>%</b>		
			Yes	80.9	
			No	19.1	
<b>Total</b>			<b>Total</b>	<b>100.0</b>	
<b>Age breakdown</b>			<b>%</b>		
			16-24	6.0	
			25-34	12.0	
			35-44	14.8	
			45-54	23.0	
			55-64	25.6	
			65+	18.6	
<b>Total</b>			<b>Total</b>	<b>100.0</b>	
<b>Long term limiting health problem?</b>			<b>%</b>		
			Yes	16.4	
			No	83.6	
<b>Total</b>			<b>Total</b>	<b>100.0</b>	
<b>Full Time employment?</b>			<b>%</b>		
			Yes	66.7	
			No	33.3	
<b>Total</b>			<b>Total</b>	<b>100.0</b>	
<b>Ethnic Grouping</b>			<b>%</b>		
			1. Welsh/English/Scottish/N Irish	87.4	
			4. Any other white background	11.5	
			8. Any other mixed ethnic background	0.5	
			14. African	0.5	
<b>Total</b>			<b>Total</b>	<b>100.0</b>	
			<b>ECONOMIC IMPACT</b>		
			<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £1,643,000</b>		
			Supported employment (FTE) 73		
			<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>		
			<b>GVA £263,000</b>	<b>Employment FTEs 14</b>	



## BLAENAVON 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 28,085 (source: Cadw).

183 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 598.

### OTHER RESULTS

#### Most enjoyable part of visit *[number of responses]*

- "Everything, all of it" [72]
- "The buildings/ structure/ looking around" [45]
- "Imaging life in the past/ feeling of history" [22]
- "Good/clear information, signage" [8]

#### Least enjoyable part of visit

- "Nothing" [147]
- "The weather/rain/mud" [6]
- "Lack of shops/refreshments" [4]

#### What prompted visit?

- "Choice of someone else in party" [48]
- "Leaflet/brochure/internet" [28]
- "Recommended/word of mouth/to show friends or family" [22]
- "Spontaneous/just passing" [10]
- "Interested in history" [9]

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CAERNARFON 2011			HTP	
<b>ATTENDANCE:</b>			<b>SITE SATISFACTION</b>	
		%		<b>% agree</b>
	Leisure trip from home	10.0	a.	"Overall, I have enjoyed my visit" 98.1
	Leisure trip as part of a longer break	89.5	b.	"The staff here are friendly & helpful" 99.4
	Other	0.5	c.	"The staff here are knowledgeable" 100.0
	<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate" 88.7
			e.	"The site is easy to find" 94.2
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	
	Yes	88.0		Yes 88.5
	No	12.0		No 11.5
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Travel to accommodation:</b>			<b>Age breakdown</b>	
		%		%
	Private Car/Van/Taxi	85.9		16-24 3.9
	Scheduled bus/ coach	1.1		25-34 11.2
	Organised coach trip	1.6		35-44 32.0
	Other	2.2		45-54 25.3
	Train	6.5		55-64 15.5
	Ferry or boat	2.2		65+ 12.1
	Bicycle or walk	0.5		<b>Total 100.0</b>
	<b>Total</b>	<b>100.0</b>		
<b>Where did respondents stay?</b>			<b>Long term limiting health problem?</b>	
		%		%
	Self-catering/camping/caravan	54.9		Yes 9.1
	Hotel	18.5		No 90.9
	Friends Family	13.6		<b>Total 100.0</b>
	Guesthouse/B&B/Pub	12.0		
	Other	1.0		
	<b>Total</b>	<b>100.0</b>		
<b>Nights away from home in Wales</b>			<b>Full Time employment?</b>	
		%		%
	1-3 nights: short break	33.7		Yes 80.9
	4+ nights: long holiday	66.3		No 19.1
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Average length of stay: hours</b>			<b>Ethnic Grouping</b>	
		2.5		%
<b>Had respondents visited before?</b>			1. Welsh/English/Scottish/N Irish 86.1	
		%	4. Any other white background 12.0	
	First time visitor	62.2	9. Indian 1.9	
	Once or twice before	18.2		<b>Total 100.0</b>
	Been a number times not recently	15.3		
	Am a regular visitor	4.3		
	<b>Total</b>	<b>100.0</b>		
<b>How did respondents travel to the site?</b>			<b>ECONOMIC IMPACT</b>	
		%		
	Private car/van/taxi	77.5	<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £14,029,000</b>	
	Bicycle/walk	7.7	Supported employment (FTE) 630	
	Train	6.2	<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>	
	Scheduled bus/ coach trip	4.3	<b>GVA £3,618,000</b>	
	Organised coach trip	2.9	Employment FTEs 197	
	Other	1.4		
	<b>Total</b>	<b>100.0</b>		
<b>Did respondents spend money at site?</b>				
		%		
	Yes	54.1		
	No	45.9		
	<b>Total</b>	<b>100.0</b>		

## CAERNARFON 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 191,871 (source: Cadw).

209 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 829.

### OTHER RESULTS

#### Most enjoyable part of visit [number of responses]

"Climbing the towers/ruins/walking the walls" [35]

"Looking around the castle/ Interested in history" [30]

"The great views/ scenery/ countryside" [21]

"Audio Guide/Audio show/Event/Exhibition/Entertainment" [19]

#### Least enjoyable part of visit

"Nothing" [134]

"The climb down/ spiral stairs" [28]

"Need better historical information" [8]

#### What prompted visit?

"To see the castle/activities/ re-enactments" [29]

"Interested in history/historic buildings" [24]

"For the children" [22]

"Recommended/word of mouth/to show friends or family" [18]

### GLOSSARY

**Economic Impact:** Economic activity such as household income (measured by Gross Value Added, GVA) and employment (measured in Full Time Equivalents, FTEs) resulting from the combined effects of all the direct, indirect and induced impacts associated with visitor expenditure.

**Gross Spending:** measures the total expenditure by attendees on Welsh goods and services. Only monies related to the event are included in the analysis. This is the direct impact of visitor expenditure.

**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

**Induced effects:** A proportion of the increase in regional household income created by the direct and indirect effects is spent within the region, giving rise to further increases in economic activity. This is the induced effect.

CAERPHILLY 2011			HTP	
<b>ATTENDANCE:</b>		%	<b>SITE SATISFACTION</b>	
Leisure trip from home	40.8			<b>% agree</b>
Leisure trip as part of a longer break	58.3		a. "Overall, I have enjoyed my visit"	96.4
Other	0.9		b. "The staff here are friendly & helpful"	93.4
<b>Total</b>	<b>100.0</b>		c. "The staff here are knowledgeable"	93.2
			d. "The site facilities are appropriate"	66.1
			e. "The site is easy to find"	89.4
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	<b>DEMOGRAPHICS</b>	
Yes	57.8		<b>Respondents resident in the UK?</b>	
No	42.2			%
<b>Total</b>	<b>100.0</b>		Yes	71.3
			No	28.7
			<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>		%	<b>Age breakdown</b>	
Private Car/Van/Taxi	77.4			%
Train	10.9		16-24	6.3
Scheduled bus/ coach	5.4		25-34	16.7
Aeroplane	2.3		35-44	25.2
Organised coach trip	1.6		45-54	24.8
Other	1.6		55-64	14.4
Ferry or boat	0.8		65+	12.6
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>Where did respondents stay?</b>		%	<b>Long term limiting health problem?</b>	
Self-catering/camping/caravan	20.2			%
Hotel	35.6		Yes	7.9
Friends Family	34.1		No	92.1
Guesthouse/B&B/Pub	8.5		<b>Total</b>	<b>100.0</b>
Other	1.6		<b>Full Time employment?</b>	
<b>Total</b>	<b>100.0</b>			%
			Yes	76.7
			No	23.3
			<b>Total</b>	<b>100.0</b>
<b>Nights away from home in Wales</b>		%	<b>Ethnic Grouping</b>	
1-3 nights: short break	47.3			%
4+ nights: long holiday	52.7		1. Welsh/English/Scottish/N Irish	68.2
<b>Total</b>	<b>100.0</b>		4. Any other white background	28.3
			5. White and Black Caribbean	0.4
			7. White and Asian	0.4
			9. Indian	0.9
			13. Any other Asian background	1.8
			<b>Total</b>	<b>100.0</b>
<b>Average length of stay:</b>		<b>hours</b>	<b>ECONOMIC IMPACT</b>	
		<b>2</b>	<b>Supported Gross Value Added of visitors total trip (site+elsewhere)</b>	
<b>Had respondents visited before?</b>		%	<b>£4,433,000</b>	
First time visitor	68.7		Supported employment (FTE) 199	
Once or twice before	17.0		<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>	
Been a number times not recently	9.4		<b>GVA £1,230,000</b>	
Am a regular visitor	4.9		Employment FTEs 63	
<b>Total</b>	<b>100.0</b>			
<b>How did respondents travel to the site?</b>		%		
Private car/van/taxi	81.2			
Train	7.2			
Scheduled bus/ coach trip	4.9			
Organised coach trip	3.6			
Bicycle/walk	2.2			
Other	0.9			
<b>Total</b>	<b>100.0</b>			
<b>Did respondents spend money at site?</b>		%		
Yes	43.0			
No	57.0			
<b>Total</b>	<b>100.0</b>			

## CAERPHILLY 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 84,631 (source: Cadw).

223 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 735.

### OTHER RESULTS

#### Most enjoyable part of visit [number of responses]

"Everything/all of it" [98]

"Good access/ allowed to roam/ no restrictions" [19]

"Audio Guide/Audio show/Event/Exhibition/Entertainment" [19]

"The building/ castle/ towers" [15]

"Climbing the towers/ruins/walking the walls" [14]

#### Least enjoyable part of visit

"Nothing" [176]

"Lack of shops/ refreshments/cafes/seating area" [7]

"Need better historical information" [7]

#### What prompted visit?

"Someone else's choice or decision" [40]

"Saw it in brochure/leaflet/internet/tv/book" [39]

"To see the castle/activities/ re-enactments" [19]

"Recommended/word of mouth/to show friends or family" [19]

"Interested in history/historic buildings" [17]

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CONWY			HTP	
<b>ATTENDANCE:</b>			<b>SITE SATISFACTION</b>	
		%		<b>% agree</b>
	Leisure trip from home	14.2	a.	"Overall, I have enjoyed my visit" 98.2
	Leisure trip as part of a longer break	84.5	b.	"The staff here are friendly & helpful" 98.1
	Other	1.3	c.	"The staff here are knowledgeable" 96.2
	<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate" 87.9
			e.	"The site is easy to find" 94.2
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	
	Yes	82.7		Yes 77.9
	No	17.3		No 22.1
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Travel to accommodation:</b>			<b>Age breakdown</b>	
		%		%
	Private Car/ Van/Taxi	84.0		16-24 10.2
	Train	9.1		25-34 22.7
	Organised coach trip	3.2		35-44 31.0
	Scheduled bus/ coach	2.1		45-54 17.8
	Other	1.1		55-64 11.6
	Ferry or boat	0.5		65+ 6.7
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Where did respondents stay?</b>			<b>Long term limiting health problem?</b>	
		%		%
	Self-catering/camping/caravan	49.7		Yes 5.3
	Hotel	20.9		No 94.7
	Guesthouse/B&B/Pub	16.6		<b>Total 100.0</b>
	Friends Family	11.8	<b>Full Time employment?</b>	
	Other	1.0		%
	<b>Total</b>	<b>100.0</b>		Yes 88.1
				No 11.9
				<b>Total 100.0</b>
<b>Nights away from home in Wales</b>			<b>Ethnic Grouping</b>	
		%		%
	1-3 nights: short break	26.2		1. Welsh/English/Scottish/N Irish 74.8
	4+ nights: long holiday	73.8		4. Any other white background 21.8
	<b>Total</b>	<b>100.0</b>		5. White and Black Caribbean 0.4
				9. Indian 0.4
				10. Pakistani 0.4
				11. Bangladeshi 0.4
				13. Any other Asian background 1.4
				15. Caribbean 0.4
				<b>Total 100.0</b>
<b>Average length of stay: hours</b>			<b>ECONOMIC IMPACT</b>	
		1.5	<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £12,622,000</b>	
<b>Had respondents visited before?</b>			Supported employment (FTE) 565	
		%	<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>	
	First time visitor	70.3	<b>GVA £3,317,000</b> Employment FTEs 180	
	Once or twice before	16.4		
	Been a number times not recently	11.1		
	Am a regular visitor	2.2		
	<b>Total</b>	<b>100.0</b>		
<b>How did respondents travel to the site?</b>				
		%		
	Private car/van/taxi	79.6		
	Bicycle/walk	7.5		
	Train	4.0		
	Scheduled bus/coach trip	4.0		
	Organised coach trip	3.6		
	Other	1.3		
	<b>Total</b>	<b>100.0</b>		
<b>Did respondents spend money at site?</b>				
		%		
	Yes	42.9		
	No	57.1		
	<b>Total</b>	<b>100.0</b>		

## CONWY 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 177,411 (source: Cadw).

226 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 803.

### OTHER RESULTS

#### Most enjoyable part of visit [number of responses]

- "The views/scenery/countryside/setting" [61]
- "Climbing the towers/ruins/walking the walls" [47]
- "Good access/ allowed to roam/ no restrictions" [22]
- "Great for children/grandchildren" [20]
- "Interesting/Imagining life in the past/feeling of history" [17]

#### Least enjoyable part of visit

- "Nothing" [148]
- "The climb down/spiral stairs" [28]
- "The height/I have a fear of heights" [11]
- "Safety/hand rails needed/Not safe/ safety barriers" [6]

#### What prompted visit?

- "To see the castle/activities/ re-enactments" [37]
- "Interested in history/historic buildings" [36]
- "Saw it in brochure/leaflet/internet/tv/book" [30]
- "Recommended/word of mouth/to show friends or family" [28]
- "Passing by/ spontaneous/saw signs" [16]

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HARLECH 2011			HTP	
<b>ATTENDANCE:</b>		%	<b>SITE SATISFACTION</b>	
Leisure trip from home	7.7			<b>% agree</b>
Leisure trip as part of a longer break	92.3		a. "Overall, I have enjoyed my visit"	97.6
<b>Total</b>	<b>100.0</b>		b. "The staff here are friendly & helpful"	98.0
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	c. "The staff here are knowledgeable"	100.0
Yes	91.8		d. "The site facilities are appropriate"	80.7
No	8.2		e. "The site is easy to find"	92.2
<b>Total</b>	<b>100.0</b>		<b>DEMOGRAPHICS</b>	
<b>Travel to accommodation:</b>		%	<b>Respondents resident in the UK?</b>	
Private Car/Van/Taxi	95.8		Yes	93.2
Train	1.6		No	6.8
Other	1.6		<b>Total</b>	<b>100.0</b>
Bicycle/ walk	0.5		<b>Age breakdown</b>	
Aeroplane	0.5		16-24	2.5
<b>Total</b>	<b>100.0</b>		25-34	18.6
<b>Where did respondents stay?</b>		%	35-44	41.2
Self-catering/camping/caravan	66.3		45-54	19.1
Hotel	6.3		55-64	13.7
Guesthouse/B&B/Pub	10.5		65+	4.9
Friends Family	15.3		<b>Total</b>	<b>100.0</b>
Other	1.6		<b>Long term limiting health problem?</b>	
<b>Total</b>	<b>100.0</b>		Yes	10.6
<b>Nights away from home in Wales</b>		%	No	89.4
1-3 nights: short break	19.5		<b>Total</b>	<b>100.0</b>
4+ nights: long holiday	80.5		<b>Full Time employment?</b>	
<b>Total</b>	<b>100.0</b>		Yes	89.9
<b>Average length of stay: hours</b>		2	No	10.1
<b>Had respondents visited before?</b>		%	<b>Total</b>	<b>100.0</b>
First time visitor	62.8		<b>Ethnic Grouping</b>	
Once or twice before	17.9		1. Welsh/English/Scottish/N Irish	89.4
Am a regular visitor	11.1		4. Any other white background	9.6
Been a number times not recently	8.2		9. Indian	1.0
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>How did respondents travel to the site?</b>		%	<b>ECONOMIC IMPACT</b>	
Private car/van/taxi	89.4		<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £6,799,000</b>	
Bicycle/walk	4.3		Supported employment (FTE) 305	
Train	4.3		<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>	
Other	2.0		<b>GVA £1,347,000    Employment FTEs 70</b>	
<b>Total</b>	<b>100.0</b>			
<b>Did respondents spend money at site?</b>		%		
Yes	55.6			
No	44.4			
<b>Total</b>	<b>100.0</b>			



## HARLECH 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 93,624 (source: Cadw).

207 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 835.

### OTHER RESULTS

#### Most enjoyable part of visit [number of responses]

- "The views/scenery/countryside/setting" [55]
- "Climbing the towers/ruins/walking the walls" [28]
- "Audio guide/Audio show/Event/Exhibition/Entertainment" [20]
- "Great for children/grandchildren" [18]
- "Interesting/Imagining life in the past/feeling of history" [17]

#### Least enjoyable part of visit

- "Nothing" [153]
- "Safety/hand rails needed/Not safe/ safety barriers" [10]
- "Car parking problems/ car park expensive/traffic" [8]
- "Need better historical information/ lack of specific information" [7]
- "The climb down/spiral stairs/steps/ slippery steps" [6]

#### What prompted visit?

- "Staying nearby/Live nearby" [23]
- "For the children" [19]
- "Interested in history/historic buildings" [18]
- "Been before/Wanted to return" [16]
- "Recommended/word of mouth/to show friends or family" [15]
- "Passing by/ spontaneous/saw signs" [15]
- "Never been before/always wanted to come" [15]
- "To see the castle/activities/ re-enactments" [14]
- "Saw it in brochure/leaflet/internet/tv/book" [13]

### GLOSSARY

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ST DAVIDS 2011			HTP	
<b>ATTENDANCE:</b>			<b>SITE SATISFACTION</b>	
		%		% agree
	Leisure trip from home	7.5	a.	"Overall, I have enjoyed my visit" 98.0
	Leisure trip as part of a longer break	92.5	b.	"The staff here are friendly & helpful" 99.5
	<b>Total</b>	<b>100.0</b>	c.	"The staff here are knowledgeable" 100.0
<b>STAYING AWAY FROM HOME IN WALES?</b>			d.	"The site facilities are appropriate" 83.6
		%	e.	"The site is easy to find" 98.0
	Yes	92.5	<b>DEMOGRAPHICS</b>	
	No	7.5	<b>Respondents resident in the UK?</b>	
	<b>Total</b>	<b>100.0</b>		%
<b>Travel to accommodation:</b>				Yes 80.4
	Private Car/Van/Taxi	90.2		No 19.6
	Scheduled bus or coach	3.3		<b>Total 100.0</b>
	Aeroplane	3.3	<b>Age breakdown</b>	
	Train	1.7		%
	Other	0.5		16-24 2.0
	Ferry or boat	0.5		25-34 12.1
	Organised coach trip	0.5		35-44 31.1
	<b>Total</b>	<b>100.0</b>		45-54 26.1
<b>Where did respondents stay?</b>				55-64 17.1
	Self-catering/camping/caravan	60.3		65+ 11.6
	Hotel	12.5		<b>Total 100.0</b>
	Guesthouse/B&B/Pub	10.3	<b>Long term limiting health problem?</b>	
	Friends Family	12.0		%
	Other	4.9		Yes 4.5
	<b>Total</b>	<b>100.0</b>		No 95.5
<b>Nights away from home in Wales</b>				<b>Total 100.0</b>
	1-3 nights: short break	15.2	<b>Full Time employment?</b>	
	4+ nights: long holiday	84.8		%
	<b>Total</b>	<b>100.0</b>		Yes 86.9
<b>Average length of stay: hours</b>				No 13.1
		1.75		<b>Total 100.0</b>
<b>Had respondents visited before?</b>			<b>Ethnic Grouping</b>	
	First time visitor	67.3		%
	Been a number times not recently	16.1		1. Welsh/English/Scottish/N Irish 79.3
	Once or twice before	14.6		4. Any other white background 19.2
	Am a regular visitor	2.0		5. White and Black Caribbean 0.5
	<b>Total</b>	<b>100.0</b>		13. Any other Asian background 1.0
<b>How did respondents travel to the site?</b>				<b>Total 100.0</b>
	Private car/van/taxi	87.9	<b>ECONOMIC IMPACT</b>	
	Bicycle/walk	9.5	<b>Supported Gross Value Added of visitors total trip (site+elsewhere) £2,186,000</b>	
	Scheduled bus or coach	1.6	Supported employment (FTE) 95	
	Organised coach trip	1.0	Of which expenditure on-site or closely attributable (a <b>subset</b> of gross impact shown above, not additional):	
	<b>Total</b>	<b>100.0</b>	<b>GVA £697,000</b> Employment FTEs 35	
<b>Did respondents spend money at site?</b>				
	Yes	41.2		
	No	58.8		
	<b>Total</b>	<b>100.0</b>		

## ST DAVIDS 2011

### SITE BACKGROUND

Interviews were carried out between the end of July and the start of September 2011.

The total number of visitors between October 2008 and September 2009 was 26,165 (source: Cadw).

199 questionnaires were completed, with the collection of information being overseen by Cadw. The total number of people in respondents' parties was 686.

### OTHER RESULTS

#### Most enjoyable part of visit [number of responses]

"Peaceful/Quiet environment/Atmosphere/Relaxing/Lovely/Leisurely walk around site" [33]

"Interesting/Imagining life in the past/feeling of history" [27]

"Good information/Clear explanation/Good signage" [19]

"The building/the castle/the cathedral/towers/tunnels" [18]

"Access/Allowed to roam/No restrictions/Exploring/Openness" [17]

#### Least enjoyable part of visit

"Nothing" [159]

"The weather/Rain/Muddy" [5]

"Expensive/Costs too high/Price" [4]

"Need better historical information/Lack of specific information" [4]

#### What prompted visit?

"Interested in history/historic buildings" [24]

"To see the castle/activities/ re-enactments" [21]

"Passing by/ spontaneous/saw signs" [19]

"Saw it in brochure/leaflet/internet/tv/book" [18]

"Been before/Wanted to return" [16]

"Recommended/word of mouth/to show friends or family" [16]

### GLOSSARY

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## SUSTAINABLE TOURISM

<b>HALO BRITISH SERIES EVENT, JUNE 2011</b>				
<b>Cycling Centre of Excellence- Sustainable Tourism</b>				
<b>ATTENDANCE Purpose of visit:</b>		<b>%</b>	<b>EVENT SATISFACTION</b>	
Leisure trip from home		42.2		<b>% agree</b>
Leisure trip as part of a longer break		5.6	a. "Overall, I have enjoyed my visit"	76.1
Non-routine work business		1.1	b. "The staff here are friendly & helpful"	66.3
Other (bike race)		51.1	c. "The staff here are knowledgeable"	60.5
<b>Total</b>		<b>100.0</b>	d. "The site facilities are appropriate"	68.6
			e. "The site is easy to find"	77.0
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	<b>DEMOGRAPHICS</b>	
Yes		91.1	<b>Respondents resident in the UK?</b>	
No		8.9	Yes	96.6
<b>Total</b>		<b>100.0</b>	No	3.4
			<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>		<b>%</b>	<b>Age breakdown</b>	
Private car/van/taxi		89.7		<b>%</b>
Bicycle/walk		6.4		16-24
Aeroplane		1.3		25-34
Ferry/boat		1.3		35-44
Organised coach trip		1.3		45-54
<b>Total</b>		<b>100.0</b>		<b>Total</b>
				<b>100.0</b>
<b>Where did respondents stay?</b>		<b>%</b>	<b>Long term limiting health problem?</b>	
Self catering/hostel		55.7	Yes	6.7
Guesthouse/B&B		11.4	No	93.3
Hotel		11.4	<b>Total</b>	<b>100.0</b>
Friends/family		8.8	<b>Full Time employment?</b>	
Other (own camper van)		12.7	Yes	95.6
<b>Total</b>		<b>100.0</b>	No	4.4
			<b>Total</b>	<b>100.0</b>
<b>Number of nights stayed?</b>		<b>%</b>	<b>Ethnic Grouping</b>	
one		11.6		<b>%</b>
two		75.6	British	94.0
three or more		12.8	Other Asian	2.4
<b>Total</b>		<b>100.0</b>	Gypsy or Irish Traveller	2.4
			Other White	1.2
			<b>Total</b>	<b>100.0</b>
<b>Where stayed?</b>		<b>%</b>	<b>ECONOMIC IMPACT</b>	
Llangollen		76.3	a. Gross spending by event attendees	<b>£104,000</b>
Oswestry		6.6	b. Total economic impact	<b>£154,000</b>
On-site/ Near site		5.3	c. Gross value Added	<b>£71,800</b>
Other		11.8	d. Employment supported by visitor spend	<b>4 FTEs</b>
<b>Total</b>		<b>100.0</b>		
<b>Average length of stay:</b>		<b>hours</b>		
		<b>23</b>		
<b>Had respondents visited before?</b>		<b>%</b>	a. Gross spending by event attendees (Welsh goods & services only; net of VAT)  b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)  c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes & profits)  d. Employment supported by visitor spending (Person-years equivalent)	
Am a regular visitor		11.1		
First time visitor		20.0		
Have been a number of times		23.3		
Once or twice before		45.6		
<b>Total</b>		<b>100.0</b>		
<b>How did respondents travel to the site?</b>		<b>%</b>		
Private car/van/taxi		89.2		
Bicycle/walk		6.0		
Ferry/boat		2.4		
Aeroplane		2.4		
<b>Total</b>		<b>100.0</b>		

## HALO BRITISH SERIES EVENT, JUNE 2011

### EVENT BACKGROUND

The Halo British Series event took place on the 25th and 26th June 2011 at Llangollen.

Total attendance was an estimated 2,000 spectators and 310 competitors (source: Denbighshire CBC).

95 face-to-face interviews were carried out by Denbighshire CBC on the first day of the competition.

The total number of people in respondents' parties was 288.

### Other results:

Did respondents spend money on site on the day questioned?	%
Yes	67.0
No	33.0
<b>Total</b>	<b>100.0</b>

### "Any other comments" by respondents section: comments (mentions)

- Uplift service could be improved (8)
- More ladies toilets required (2)
- Good organisation/ good sign-posts (2)
- Poor race organisation- needs roads closed (2)

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<b>ETAPE, October 2011</b>							
				<b>Cycling Centre of Excellence- Sustainable Tourism</b>			
<b>ATTENDANCE Purpose of visit:</b>		<b>%</b>		<b>EVENT SATISFACTION</b>			
Leisure trip from home	81.6					<b>% agree</b>	
Non-routine work business	3.1	a.	"Overall, I have enjoyed my visit"			92.3	
Leisure trip as part of a longer break	1.5	b.	"The staff here are friendly & helpful"			82.4	
Other (bike race)	13.8	c.	"The staff here are knowledgeable"			64.7	
<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate"			35.3	
		e.	"The site is easy to find"			73.3	
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>		<b>DEMOGRAPHICS</b>			
Yes	36.1	<b>Respondents resident in the UK?</b>				<b>%</b>	
No	63.9			Yes		98.5	
<b>Total</b>	<b>100.0</b>			No		1.5	
<b>Travel to accommodation:</b>		<b>%</b>		<b>Total</b>		<b>100.0</b>	
Private car/van/taxi	95.8	<b>Age breakdown</b>				<b>%</b>	
Train	4.2			16-24		4.2	
<b>Total</b>	<b>100.0</b>			25-34		21.1	
<b>Where did respondents stay?</b>		<b>%</b>		35-44		39.5	
Self catering/hostel	12.0			45-54		18.3	
Guesthouse/B&B	12.0			55-64		16.9	
Hotel	44.0			<b>Total</b>		<b>100.0</b>	
Friends/family	32.0	<b>Long term limiting health problem?</b>				<b>%</b>	
<b>Total</b>	<b>100.0</b>			Yes		1.6	
<b>Number of nights stayed?</b>		<b>%</b>		No		98.4	
one	57.9			<b>Total</b>		<b>100.0</b>	
two	10.5	<b>Full Time employment?</b>				<b>%</b>	
three or more	31.6			Yes		80.7	
<b>Total</b>	<b>100.0</b>			No		19.3	
<b>Where stayed?</b>		<b>%</b>		<b>Total</b>		<b>100.0</b>	
Wrexham	32.0	<b>Ethnic Grouping</b>				<b>%</b>	
Rhyl	8.0			1. British		90.4	
Other	60.0			4. Any Other White background		5.4	
<i>(single mentions: inc. Rhyl; Cefn Mawr; Ruthin; Holt Village; Dinas Bran; Mold)</i>				6. White & Black African		1.4	
<b>Total</b>	<b>100.0</b>			8. Any other Mixed/Multiple ethnic		1.4	
				18. any other ethnic group		1.4	
				<b>Total</b>		<b>100.0</b>	
<b>Average length of stay: hours</b>		<b>6</b>		<b>ECONOMIC IMPACT</b>			
<b>Had respondents visited before?</b>		<b>%</b>		<b>a. Gross spending by event attendees</b>		<b>£29,036</b>	
Am a regular visitor	47.5			<b>b. Total economic impact</b>		<b>£47,540</b>	
First time visitor	25.4			<b>c. Gross value Added</b>		<b>£23,040</b>	
Been number of times but not recentl	20.3			<b>d. Employment supported by visitor spend</b>		<b>1.24 FTEs</b>	
Once or twice before	6.8			a. Gross spending by event attendees <i>(Welsh goods &amp; services only; net of VAT)</i>			
<b>Total</b>	<b>100.0</b>			b. Total economic impact (output/turnover) <i>(a. minus sales taxes plus multiplier effects)</i>			
<b>How did respondents travel to the site?</b>		<b>%</b>		c. Of which Gross Value Added <i>(proportion of b. which comprises Welsh incomes &amp; profits)</i>			
Private car/van/taxi	83.3			d. Employment supported by visitor spending <i>(Person-years equivalent)</i>			
Bicycle/walk	12.9						
Scheduled bus	1.9						
Other	1.9						
<b>Total</b>	<b>100.0</b>						

## ETAPE CYMRU, OCTOBER 2011

### EVENT BACKGROUND

The Etape Cymru cycling event took place in Wrexham on the weekend of the 8th/9th October.

The 100-mile route, which includes over 6000ft of climbing, started and finish in Wrexham, North Wales and passed through the Clwydian Range, which is an area of outstanding beauty. The route took in several well-known climbs such as: Horseshoe Pass, The Shelf, The Garth and Worlds End. (Source: <http://www.etape-cymru.co.uk/>)

On the day 1,000 riders took part, although 1,500 had registered to ride (source: Denbighshire CBC).

75 face-to-face interviews were carried out at the competition.

The total number of adults (those aged 16 years or above) in respondents' parties was 211.

The economic impact calculations only take into account visitor expenditure relating to the event. Furthermore, they do not include entrance fees for the competition itself (the majority of this spend is known to go out of Wales).

### Other results:

Did respondents spend money on site on the day questioned?	%
Yes	63.6
No	36.4
<b>Total</b>	<b>100.0</b>

### "Any other comments" by respondents: comments (mentions)

A bit of fresh air	<i>A map and address prior to event (would be helpful)</i>
<i>Absolutley Annoying</i>	Been alright/ quite good (2)
Would do again next year.	<i>Cars on road - distracting. More marshalls needed.</i>
<i>Encourage road race</i>	Enjoyed it but hard work
Event a bit disorganised	<i>Interested in close road race</i>
<i>Good- very tiring</i>	Marshalling very poor (no one at Bryneg nor Panderosa car park)
Lovely Atmosphere	<i>Ok so far. Foodstation not safe</i>
<i>Nice Venue</i>	Windy and beautiful
Seems Good (5)	<i>Sure it will be ok</i>
<i>Been on better organised, a little chaotic. Feeding stations running out of water. Earlier year better.</i>	
Organising not good at start. No maps on website, bit more info on roads needed. Not enough marshalls	
<i>No food at station. Clear markings - Food station 500yards. Shame roads not closed properly</i>	
<i>Sleeveless top not available.</i>	

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One Historic Garden, Bryngarw Country Park-2011			Sustainable Tourism	
<b>"Shakespeare, Songs &amp; Silliness" event</b>				
<b>ATTENDANCE Purpose of visit:</b>			<b>EVENT SATISFACTION</b>	
		<b>%</b>	<b>% that agree</b>	
	Leisure trip from home	85.4	a.	"Overall, I have enjoyed my visit" 94.6
	Leisure trip as part of a longer break	4.2	b.	"The staff here are friendly & helpful" 91.3
	Other	8.3	c.	"The staff here are knowledgeable" 86.0
	Volunteering	2.1	d.	"The site facilities are appropriate" 88.9
	<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find" 91.3
<b>What attracted visitors to site?</b>			f.	"One Historic Garden is appealing" 91.1
	Live Music/Band playing	30.0	g.	"I will visit the OHG again" 93.3
	Family Friendly	26.0		
	Theatre Play/ Enjoy Shakespeare	24.0		
	Location	8.0		
	Come most years	4.0		
	Historic	4.0		
	Educational	2.0		
	First aid	2.0		
	<b>Total</b>	<b>100.0</b>		
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		<b>%</b>	<b>Respondents resident in the UK?</b>	
	Yes	0.0		Yes 100.0
	No	100.0		No 0.0
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>Where did visitors travel from?</b>			<b>Age breakdown</b>	
		<b>%</b>		<b>%</b>
	CF31	30.0		16-24 10.4
	CF32	18.0		25-34 14.6
	CF35	10.0		35-44 12.5
	CF15	8.0		45-54 20.8
	CF34	8.0		55-64 22.9
	SA13	8.0		65+ 18.8
	CF1	4.0		<b>Total 100.0</b>
	CF33	4.0	<b>Long term limiting health problem?</b>	
	CF36	4.0		Yes 13.3
	CF64	2.0		No 86.7
	CF72	2.0		<b>Total 100.0</b>
	EX2	2.0	<b>Full Time employment?</b>	
	<b>Total</b>	<b>100.0</b>		Yes 64.4
<b>Average length of stay:</b>			<b>Ethnic Grouping</b>	
	<b>hours</b>	<b>2.65</b>		<b>%</b>
	Two hours forty minutes			1. Welsh / English / Scottish / N.Irish 100.0
<b>Had respondents visited before?</b>				<b>Total 100.0</b>
		<b>%</b>	<b>ECONOMIC IMPACT</b>	
	Am a regular visitor	51.1	a.	Gross spending by event attendees £631
	Number of times but not for while	26.7	b.	Total economic impact £955
	Once or twice before	13.3	c.	Gross value Added £325
	First time visitor	8.9	d.	Employment supported by visitor spend 0.02 FTEs
	<b>Total</b>	<b>100.0</b>	a. Gross spending by event attendees (Welsh goods & services only; net of VAT)  b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)  c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes & profits)  d. Employment supported by visitor spending (Person-years equivalent)	
<b>How did respondents travel to the site?</b>				
		<b>%</b>		
	Private car/van/taxi	93.5		
	Bicycle/walk	4.3		
	Scheduled bus/coach	2.2		
	<b>Total</b>	<b>100.0</b>		



## One Historic Garden Bryngarw Country Park- Sustainable Tourism

### EVENT BACKGROUND

The "Shakespeare, Songs and Silliness" event took place on the 26th, 27th and 28th July 2011 at Bryngarw Country Park.

Total attendance was an estimated 175 people (source: Bridgend CBC).

50 face-to-face interviews were carried out under the guidance of Bridgend CBC over the three days of the event.

### Other results:

#### Did respondents spend money on site/ or related to visit to site on the day questioned?

Yes - on site	43.2	%
Yes - on the way	50.0	%
No	6.8	%
<b>Total</b>	<b>100.0</b>	<b>%</b>

#### Sources of information consulted before visit to Bryngarw Country Park (mentions)

Guidebook	0	Advice from friends/relatives/word of mouth/tv	14
Poster/Leaflet/ Mailing List	18	Visit to tourist information centre/hotels/attractions	1
Adverts in newspaper/magazines	3	School leaflet	0
Articles in newspapers/magazines	2	Received information/post/email	12
Internet	6	Other	5

#### Social media used by visitors (mentions)

Twitter	4	Linkedin	0	Skype	1
Facebook	23	Blog	1	Hotmail	20

#### "Any other comments" by respondents (each were single mentions)

- "Because of lack of advertising it was very poorly supported considering quality of the entertainment"
- "Company are fantastic"
- "Enjoyed refreshments"
- "Increase in advertising (needed) re events at Bryngarw"
- "Leaflet did not state that event was in Bryn Garw, just historic garden"
- "More Bins around Park"
- "More plays and music events"
- "Prefer an open stage"

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## VALLEYS REGIONAL PARK

<b>SIX BELLS EVENT 2010</b>			<b>VRP</b>		
<b>ATTENDANCE :</b>		<b>%</b>	<b>EVENT SATISFACTION</b>		
Leisure trip from home	51.6			<b>% agree</b>	
Volunteering	18.3	a.	"Overall, I have enjoyed my visit"	96.1	
Non-routine work business	15.9	b.	"The staff here are friendly & helpful"	97.0	
Leisure trip as part of a longer break	0.8	c.	"The staff here are knowledgeable"	91.0	
Other	13.4	d.	"The site facilities are appropriate"	87.0	
<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find"	91.0	
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	<b>DEMOGRAPHICS</b>		
Yes	13.5	<b>Respondents resident in the UK?</b>		<b>%</b>	
No	86.5		Yes	86.5	
<b>Total</b>	<b>100.0</b>		No	13.5	
<b>Travel to accommodation:</b>		<b>%</b>	<b>Age breakdown</b>		
Private car/van/taxi	47.1		16-24	16.8	
Aeroplane	29.4		25-34	11.8	
Ferry/boat	17.6		35-44	22.7	
Train	5.9		45-54	16.0	
<b>Total</b>	<b>100.0</b>		55-64	15.1	
<b>Where did respondents stay?</b>		<b>%</b>		65+	17.6
Hotel	76.5		<b>Total</b>	<b>100.0</b>	
Friends/family	23.5		<b>Long term limiting health problem?</b>		
<b>Total</b>	<b>100.0</b>		Yes	17.5	
<b>Average length of stay:</b>		<b>hours</b>		No	82.5
		<b>5</b>	<b>Total</b>	<b>100.0</b>	
<b>Had respondents visited before?</b>		<b>%</b>	<b>Full Time employment?</b>		
Am a regular visitor	29.5		Yes	57.1	
First time visitor	35.2		No	42.9	
Have been a number of times	19.7		<b>Total</b>	<b>100.0</b>	
Once or twice before	15.6		<b>Ethnic Grouping</b>		
<b>Total</b>	<b>100.0</b>			<b>%</b>	
<b>What prompted visit?</b>		<b>%</b>		Welsh	64.5
Memorial service/event	86.5			Other British	27.3
Volunteering	7.6			Other European	7.4
Other (work related non-routine)	5.9			American	0.8
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>	
<b>How did respondents travel to the site?</b>		<b>%</b>	<b>ECONOMIC IMPACT</b>		
Private car/van/taxi	60.7		a. Gross spending by event attendees	<b>£45,900</b>	
Bicycle/walk	30.8		b. Total economic impact	<b>£56,500</b>	
Scheduled bus/coach	4.3		c. Gross value Added	<b>£32,000</b>	
Organised coach	2.6		d. Employment supported by visitor spend	<b>1.5 FTEs</b>	
Aeroplane	0.9		a. Gross spending by event attendees <i>(Welsh goods &amp; services only; net of VAT)</i>  b. Total economic impact (output/turnover) <i>(a. minus sales taxes plus multiplier effects)</i>  c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes & profits)  d. Employment supported by visitor spending		
Other	0.7				
<b>Total</b>	<b>100.0</b>				
<b>Did respondents spend money on site?</b>		<b>%</b>			
Yes	71.4				
No	28.6				
<b>Total</b>	<b>100.0</b>				

## SIX BELLS EVENT 2010

### EVENT BACKGROUND

The event took place on the 28th June 2010, to commemorate the 60th anniversary of the Six Bells mining disaster.

Total attendance was estimated at over 7,500 people (source: Blaenau Gwent CBC).

138 face-to-face interviews were carried out by Community First staff, the Blaenau Gwent Tourism Team and the Six Bells Regeneration team. The total number of people in respondents' parties was 424.

A service was led by the Archbishop of Canterbury, after which an unveiling of a miners statue took place. There were over 30 stalls set up at the event which promoted participation as people could have a go at making things and then take them away afterwards; and access information regarding heritage. Also there were tours (of site and local area).

All stalls and food providers were local and supported promotion of Welsh produce, arts and craft. Three venues were utilised: x1 for showing of digital story telling (17 stories made by families of those who died and mines rescue etc) ; x2 art exhibition (Valerie Ganz and Chopper Davies); x3 local history and tracing of family tree. Four areas had memorial books for signing.

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**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

**Induced effects:** A proportion of the increase in regional household income created by the direct and indirect effects is spent within the region, giving rise to further increases in economic activity. This is the induced effect.

CORDELL FESTIVAL 2010			VRP	
<b>ATTENDANCE- Purpose of visit:</b>			<b>EVENT SATISFACTION</b>	
		%		% agree
	Leisure trip from home	81.4	a. "Overall, I have enjoyed my visit"	96.9
	Non-routine business purposes	3.9	b. "The staff here are friendly & helpful"	97.9
	Volunteer	1.0	c. "The staff here are knowledgeable"	94.6
	Other (with choir/band)	13.7	d. "The site facilities are appropriate"	94.6
	<b>Total</b>	<b>100.0</b>	e. "The site is easy to find"	94.7
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	%
	Yes	4.9	Yes	96.7
	No	95.1	No	3.3
	<b>Total</b>	<b>100.0</b>	<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>			<b>Age breakdown</b>	
		%		%
	Private Car/Van/Taxi	100.0	16-24	2.1
	<b>Total</b>	<b>100.0</b>	25-34	6.3
<b>Where did respondents stay?</b>				35-44
		%		11.6
	Hotel	40.0	45-54	17.9
	Friends Family	60.0	55-64	36.8
	<b>Total</b>	<b>100.0</b>	65+	25.3
			<b>Total</b>	<b>100.0</b>
<b>Average length of stay: hours</b>			<b>Long term limiting health problem?</b>	
		3.5		%
<b>Had respondents visited before?</b>				Yes
		%		14.7
	Am a regular visitor	30.3	No	85.3
	First time visitor	27.0	<b>Total</b>	<b>100.0</b>
	Have been a number of times	21.3	<b>Full Time employment?</b>	
	Once or twice before	21.3		%
	<b>Total</b>	<b>100.0</b>		Yes
<b>What prompted visit?</b>				51.0
		%		No
	Cordell Event	67.6		49.0
	Choir/ Bands (to watch or partake)	11.8		<b>Total</b>
	Coal mine tour	4.9		<b>100.0</b>
	Other	8.8	<b>Ethnic Grouping</b>	
	<b>Total</b>	<b>100.0</b>		%
<b>How did respondents travel to event?</b>				British/Welsh
		%		75.8
	Private car/van/taxi	93.8		White (Mixed/Welsh/British)
	Bus/Coach	3.7		23.2
	Bicycle/walk	2.5		Chinese
	<b>Total</b>	<b>100.0</b>		1.1
<b>Did respondent spend money at event?</b>				<b>Total</b>
		%		<b>100.0</b>
	Yes	63.7	<b>ECONOMIC IMPACT</b>	
	No	36.3	<b>a. Gross spending by event attendees</b>	<b>£4,850</b>
	<b>Total</b>	<b>100.0</b>	<b>b. Total economic impact</b>	<b>£6,860</b>
			<b>c. Gross value Added</b>	<b>£3,350</b>
			<b>d. Employment supported by visitor spend</b>	<b>0.16 FTEs</b>
			a. Gross spending by event attendees (Welsh goods & services only; net of VAT)	
			b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)	
			c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes & profits)	
			d. Employment supported by visitor spending (Person-years equivalent)	

## CORDELL FESTIVAL 2010

### EVENT BACKGROUND

The Cordell Festival took place on the 18th and 19th September 2010.

Total attendance for the event was 1,568 (source: BGCBC).

102 face-to-face interviews were carried out under the guidance of Blaenau Gwent County Borough Council. The total number of people in respondents' parties was 502.

### GLOSSARY

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**Gross Spending:** measures the total expenditure by attendees on Welsh goods and services. Only monies related to the event are included in the analysis. This is the direct impact of visitor expenditure.

**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

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DARE VALLEY COUNTRY PARK 2010			VRP	
<b>ATTENDANCE:</b>		%	<b>SITE SATISFACTION</b>	
Leisure trip from home	34.0			<b>% agree</b>
Leisure trip as part of a longer break	55.3	a.	"Overall, I have enjoyed my visit"	96.9
Other	10.7	b.	"The staff here are friendly & helpful"	99.0
<b>Total</b>	<b>100.0</b>	c.	"The staff here are knowledgeable"	97.4
		d.	"The site facilities are appropriate"	92.6
		e.	"The site is easy to find"	93.7
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	<b>DEMOGRAPHICS</b>	
Yes	33.0	<b>Respondents resident in the UK?</b>		
No	67.0		Yes	93.0
<b>Total</b>	<b>100.0</b>		No	7.0
			<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>		%	<b>Age breakdown</b>	
Private Car/Van/Taxi	84.9		16-24	4.1
Motorhome	9.1		25-34	17.5
Bicycle/walk	3.0		35-44	26.8
Train	3.0		45-54	12.4
<b>Total</b>	<b>100.0</b>		55-64	19.6
			65+	19.6
			<b>Total</b>	<b>100.0</b>
<b>Where did respondents stay?</b>		%	<b>Long term limiting health problem?</b>	
Self-catering/camping/caravan	70.0		Yes	10.0
Friends Family	10.0		No	90.0
Hotel	6.7		<b>Total</b>	<b>100.0</b>
Guesthouse/B&B/Pub	6.7		<b>Full Time employment?</b>	
Other	6.6		Yes	71.0
<b>Total</b>	<b>100.0</b>		No	29.0
			<b>Total</b>	<b>100.0</b>
<b>Average length of stay:</b>		hours	<b>Ethnic Grouping</b>	
	11			%
<b>Had respondents visited before?</b>		%	British/Welsh	90.8
Am a regular visitor	47.5		Other European	9.2
First time visitor	19.2		<b>Total</b>	<b>100.0</b>
Have been a number of times	9.1		<b>ECONOMIC IMPACT</b>	
Once or twice before	24.2		<b>Supported Gross Value Added of visitors total trip (site+elsewhere)</b>	
<b>Total</b>	<b>100.0</b>		<b>£4,367,000</b>	
			Supported employment (FTE) 190	
<b>What prompted visit?</b>		%	<i>Of which expenditure on-site (a subset of gross impact shown above, not additional):</i>	
Countryside/walking/dog walking in	24.2		<b>GVA £280,000</b>	
Café	20.9		Employment 15 FTEs	
Friends/family	17.6			
Holiday/campsite/	15.4			
Children's playarea	15.4			
Other	6.6			
<b>Total</b>	<b>100.0</b>			
<b>How did respondents travel to the site?</b>		%		
Private car/van/taxi	84.9			
Bicycle/walk	10.8			
Other	4.3			
<b>Total</b>	<b>100.0</b>			
<b>Did respondents spend money at site?</b>		%		
Yes	75.0			
No	25.0			
<b>Total</b>	<b>100.0</b>			

## DARE VALLEY COUNTRY PARK 2010

### SITE BACKGROUND

Interviews were carried out in August 2010.

The total number of visitors between October 2009 and September 2010 was 142,000 (source: data from RCT CBC for STEAM).

100 questionnaires were completed, with the information being collected by Rhondda Cynon Taff County Borough Council. The total number of people in respondents' parties was 332.

83% of respondents were resident in Wales.

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**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

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PEN Y FAN POND 2010			VRP	
<b>ATTENDANCE:</b>		%	<b>SITE SATISFACTION</b>	
Leisure trip from home	83.7			<b>% agree</b>
Non-routine work business	5.1	a.	"Overall, I have enjoyed my visit"	85.3
Leisure trip as part of a longer break	1.0	b.	"The staff here are friendly & helpful"	81.5
Other	10.2	c.	"The staff here are knowledgeable"	71.8
<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate"	59.4
		e.	"The site is easy to find"	85.3
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	<b>DEMOGRAPHICS</b>	
Yes	1.0	<b>Respondents resident in the UK?</b>		
No	99.0			%
<b>Total</b>	<b>100.0</b>		Yes	100.0
			No	0.0
			<b>Total</b>	<b>100.0</b>
<b>Nights away from home in Wales</b>		%	<b>Age breakdown</b>	
1-3 nights short break	0.0			%
4+ nights long holiday	100.0		16-24	7.1
<b>Total</b>	<b>100.0</b>		25-34	6.1
			35-44	23.5
			45-54	15.3
			55-64	21.4
			65+	26.5
			<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>		%	<b>Long term limiting health problem?</b>	
Aeroplane	100.0			%
<b>Total</b>	<b>100.0</b>		Yes	31.6
			No	68.4
			<b>Total</b>	<b>100.0</b>
<b>Where did respondents stay?</b>		%	<b>Full Time employment?</b>	
Friends/ Family	100.0			%
<b>Total</b>	<b>100.0</b>		Yes	54.1
			No	45.9
			<b>Total</b>	<b>100.0</b>
<b>Average length of stay:</b>		hours	<b>Ethnic Grouping</b>	
		2		%
			White British	98.0
			Black/Black British	1.0
			Mixed/Mixed British	1.0
			<b>Total</b>	<b>100.0</b>
<b>Had respondents visited before?</b>		%	<b>ECONOMIC IMPACT</b>	
Am a regular visitor	74.5		<b>Supported Gross Value Added of visitors total trip (site+elsewhere)</b>	
First time visitor	4.1		<b>£435,900</b>	
Have been a number of times	12.2		Supported employment (FTE) 19	
Once or twice before	9.2		<i>Of which expenditure on-site or closely attributable (a subset of gross impact shown above, not additional):</i>	
<b>Total</b>	<b>100.0</b>		<b>GVA £54,500</b>	
			Employment FTEs 2.9	
<b>What prompted visit?</b>		%		
Walk	30.6			
Taking children out	20.4			
Dog walking	16.3			
Visit café	15.3			
Cycling	4.1			
Other (exercise/fishing)	13.3			
<b>Total</b>	<b>100.0</b>			
<b>How did respondents travel to the site?</b>		%		
Private car/van/taxi	83.7			
Bicycle/walk	13.3			
Train	1.0			
Other	2.0			
<b>Total</b>	<b>100.0</b>			
<b>Did respondents spend money on site?</b>		%		
Yes	80.6			
No	19.4			
<b>Total</b>	<b>100.0</b>			



## PEN Y FAN POND 2010

### SITE BACKGROUND

Interviews were carried out between the 9th August and the 8th September 2010.

The total number of visitors to Pen Y Fan in 2010 was 80,000 (*Source: Caerphilly CBC*).

100 face-to-face interviews were carried out by Caerphilly County Borough Council. The total number of people in respondents' parties was 261.

### OTHER RESULTS

#### Ideas given by respondents for improvement of the site included (mentions):

- more seating (4)
- playground for children/ more facilities for children (8)
- better toilets/ toilets open longer hours (4)
- sheltered area against rain needed (4)
- more refuse bins/ dog bins (7)
- café needs indoor area (2)

#### Did respondents know that Caerphilly CBC was the 'owner' of the site?

Over two-thirds of respondents (67.7%) were able to correctly name Caerphilly CBC.

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PARTY IN THE PAST 2010			VRP	
<b>ATTENDANCE:</b>			<b>EVENT SATISFACTION</b>	
		%		% agree
	Leisure trip from home	94.9	a. "Overall, I have enjoyed my visit"	100.0
	Leisure trip as part of longer break	3.4	b. "The staff here are friendly & helpful"	100.0
	Other	1.7	c. "The staff here are knowledgeable"	100.0
	<b>Total</b>	<b>100.0</b>	d. "The site facilities are appropriate"	75.0
			e. "The site is easy to find"	100.0
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	
	Yes	3.4	Yes	100.0
	No	96.6	No	0.0
	<b>Total</b>	<b>100.0</b>	<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>			<b>Age breakdown</b>	
		%		
	Private Car/Van/Taxi	100.0	16-24	1.8
	<b>Total</b>	<b>100.0</b>	25-34	3.6
<b>Where did respondents stay?</b>				
		%	35-44	16.1
	Caravan	50.0	45-54	19.6
	Friends Family	50.0	55-64	30.4
	<b>Total</b>	<b>100.0</b>	65+	28.5
			<b>Total</b>	<b>100.0</b>
<b>Average length of stay: hours</b>			<b>Long term limiting health problem?</b>	
		3	Yes	14.3
<b>Had respondents visited before?</b>			No	85.7
		%	<b>Total</b>	<b>100.0</b>
	Once or twice before	50.9	<b>Full Time employment?</b>	
	First time visitor	30.5	Yes	52.6
	Not for a while	16.9	No	47.4
	Am a regular visitor	1.7	<b>Total</b>	<b>100.0</b>
	<b>Total</b>	<b>100.0</b>	<b>Ethnic Grouping</b>	
<b>What prompted visit?</b>				
		%	Welsh	68.5
	Concert	98.3	British	24.1
	Other (family)	1.7	English	5.6
	<b>Total</b>	<b>100.0</b>	Afghan Pashtun	1.8
			<b>Total</b>	<b>100.0</b>
<b>How did respondents travel to event?</b>			<b>ECONOMIC IMPACT</b>	
		%	94.8% of respondents stated they spent money at the event.	
	Private car/van/taxi	96.6	Expenditure data collected was minimal, only indicating type (mainly refreshments) and in majority of cases not amounts. An economic impact assessment has not yet been attempted.	
	Bicycle/walk	3.4		
	<b>Total</b>	<b>100.0</b>		
<b>Did respondents spend money at event?</b>				
		%		
	Yes	94.8		
	No	5.2		
	<b>Total</b>	<b>100.0</b>		

## PARTY IN THE PAST 2010

### EVENT BACKGROUND

The Party in the Past took place at Blaenavon Ironworks on the 12th September 2010.

Total attendance for the event was 800.

59 face-to-face interviews were carried out under the guidance of Torfaen County Borough Council. The total number of people in respondents' parties was 200.

Party in the Past is supported by 'The Valleys - Heart and Soul' campaign, a three year campaign led by partnership organisations from the Western Valleys, Heads of the Valleys and The Valleys Partnership. The aim is to change perceptions of The Valleys, attract more tourists and bring long-term economic benefits to the area.

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TURNER EXHIBITION 2010			VRP	
<b>ATTENDANCE- Purpose of visit:</b>			<b>TRIP SATISFACTION</b>	
		%		% agree
	Leisure trip from home	71.8	a. "Overall, I have enjoyed my visit"	90.6
	Leisure trip as part of longer trip	2.6	b. "The staff here are friendly & helpful"	90.0
	Volunteer	2.6	c. "The staff here are knowledgeable"	90.0
	Other (" <i>just passing</i> ")	23.0	d. "The site facilities are appropriate"	63.6
	<b>Total</b>	<b>100.0</b>	e. "The site is easy to find"	69.7
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
	Yes	2.6	<b>Respondents resident in the UK?</b>	
	No	97.4	Yes	100.0
	<b>Total</b>	<b>100.0</b>	No	0.0
<b>Average length of stay: hours</b>			<b>Total</b>	<b>100.0</b>
		1.3	<b>Age breakdown</b>	
<b>Had respondents visited site before?</b>				%
	Am a regular visitor	92.3	16-24	2.9
	Once or twice before	5.1	25-34	11.4
	Not for a while	2.6	35-44	11.4
	First time visitor	0.0	45-54	8.6
	<b>Total</b>	<b>100.0</b>	55-64	45.7
<b>How did respondents travel to exhibit?</b>			65+	20.0
	Bicycle/walk	65.8	<b>Total</b>	<b>100.0</b>
	Private car/van/taxi	34.2	<b>Long term limiting health problem?</b>	
	<b>Total</b>	<b>100.0</b>	Yes	30.8
<b>OPINIONS ON PARK</b>			No	69.2
<b>The appearance of park &amp; facilities...</b>			<b>Total</b>	<b>100.0</b>
	Very good	46.2	<b>Full Time employment?</b>	
	Good	35.8	Yes	30.8
	Fair	15.4	No	69.2
	Poor	0.0	<b>Total</b>	<b>100.0</b>
	Very poor	2.6	<b>Ethnic Grouping</b>	
	<b>Total</b>	<b>100.0</b>	British	100.0
<b>Cleanliness &amp; maintenance of park</b>			<b>Total</b>	<b>100.0</b>
	Very good	54.1	<b>ECONOMIC IMPACT</b>	
	Good	40.5	The sample size was minimal (with 40 interviews carried out), and relatively few respondents stated they had spent monies during their trip to the exhibit (12.8% of those questioned).	
	Fair	5.4	Average expenditure per person for those that had spent money was £1.37 (typically refreshments such as a coffee/tea).	
	Poor	0.0	Given these factors, an economic impact assessment has not yet been attempted.	
	Very poor	0.0		
	<b>Total</b>	<b>100.0</b>		
<b>Access and signage at the park</b>				
	Very good	69.2		
	Good	19.3		
	Fair	11.5		
	Poor	0.0		
	Very poor	0.0		
	<b>Total</b>	<b>100.0</b>		

## TURNER EXHIBITION 2010

### EVENT BACKGROUND

The free to view Turner and Penry Williams Exhibition took place between the 1st and 31st August 2010 at Cyfartha Castle Museum and Art Gallery.

On display were 10 paintings on loan from the Tate Gallery, London, covering all stages of Turner's career, including two sketches from Turner's time passing through Merthyr Tydfil in the 18th century.

There were daily 15 minute gallery talks at Noon every Monday to Friday throughout the month, as well as weekly watercolour classes and a family colouring workshops course.

40 face-to-face interviews were carried out under the guidance of Merthyr Tydfil County Borough Council. The total number of people in respondents' parties was 59.

Data from a separate study overseen by Cyfartha Castle volunteer gallery attendants, was undertaken to assess the visitor experience. A total of 200 questionnaire responses were completed, with these indicating that:

During the period of the exhibition 14,782 people visited the museum . This was the second highest monthly total the museum had recorded. The visitors comprised :

Adults	5,920
Children	2,772
OAPs	2,025
Cafe	4,001
Guests	64
<b>Total</b>	<b>14,782</b>

59% of those questioned during this separate study indicated that it was their first visit to the exhibition.

99% agreed that their visit was interesting;

83% agreed that their visit was inspiring ;

99% agreed that the staff were helpful;

and 76% stated that they intended to visit the gallery again.

(Source: Merthy Tydfil CBC)

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WELSH WATERWAYS FESTIVAL 2011			VRP
<b>ATTENDANCE:</b>		%	
Leisure trip from home	95.0		
Leisure trip as part of a longer break	4.1		
Other	0.8		
<b>Total</b>	<b>100.0</b>		
<b>Visitors were on:</b>		%	
Short break (<=3 nights in NPT)	75.0		
Holiday (4+ nights in NPT)	12.5		
Other	12.5		
<b>Total</b>	<b>100.0</b>		
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	
Yes	14.0		
No	86.0		
<b>Total</b>	<b>100.0</b>		
<b>Travel to accommodation:</b>		%	
Private Car/Van/Taxi	88.2		
Bicycle/walk	11.8		
<b>Total</b>	<b>100.0</b>		
<b>Where did respondents stay?</b>		%	
Self-catering/camping/caravan	41.2		
Friends Family	35.3		
Hotel	11.8		
Other (boat)	11.8		
<b>Total</b>	<b>100.0</b>		
<b>Nights in Wales away from home</b>		%	
Two	23.5		
Three	52.9		
Four or more	23.6		
<b>Total</b>	<b>100.0</b>		
<b>Average length of stay:</b>		hours	3
<b>Visited the Vale of Neath before?</b>		%	
Am a regular visitor	51.7		
First time visitor	11.0		
Have been a number of times	16.9		
Once or twice before	20.3		
<b>Total</b>	<b>100.0</b>		
<b>What prompted visit?</b>		%	
Day out/day trip	38.1		
Interest in canals	28.6		
Friends/family	14.3		
Internet: looking for things to do	9.5		
Other	9.5		
<b>Total</b>	<b>100.0</b>		
<b>How did respondents travel to the event?</b>		%	
Private car/van/taxi	86.0		
Bicycle/walk	12.4		
Scheduled bus/coach	1.7		
<b>Total</b>	<b>100.0</b>		
<b>EVENT SATISFACTION</b>			% agree
a.	"Overall, I have enjoyed my visit"		71.4
b.	"The staff here are friendly & helpful"		95.6
c.	"The staff here are knowledgeable"		97.2
d.	"The site facilities are appropriate"		92.5
e.	"The site is easy to find"		82.5
f.	"The Neath Canal is appealing"		98.3
g.	"I will visit the Vale of Neath again"		100.0
<b>DEMOGRAPHICS</b>			
<b>Respondents resident in the UK?</b>			%
	Yes		100.0
	No		0.0
	<b>Total</b>		<b>100.0</b>
<b>Age breakdown</b>			%
	16-24		0.0
	25-34		7.5
	35-44		16.7
	45-54		25.8
	55-64		26.7
	65+		23.3
	<b>Total</b>		<b>100.0</b>
<b>Long term limiting health problem?</b>			%
	Yes		11.8
	No		88.2
	<b>Total</b>		<b>100.0</b>
<b>Full Time employment?</b>			%
	Yes		55.8
	No		44.2
	<b>Total</b>		<b>100.0</b>
<b>Ethnic Grouping</b>			%
	British/ Northern Irish		100.0
	<b>Total</b>		<b>100.0</b>
<b>ECONOMIC IMPACT</b>			
<b>a. Gross spending by event attendees</b>			<b>£8,870</b>
<b>b. Total economic impact</b>			<b>£12,280</b>
<b>c. Gross value Added</b>			<b>£5,950</b>
<b>d. Employment supported by visitor spend</b>			<b>0.27 FTEs</b>
<p>a. Gross spending by event attendees (Welsh goods &amp; services only; net of VAT)</p> <p>b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)</p> <p>c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes &amp; profits)</p> <p>d. Employment supported by visitor spending (Person-years equivalent) FTEs= full Time Equivalentts</p>			

## WELSH WATERWAYS FESTIVAL 2011

### EVENT BACKGROUND

The Welsh Waterways Festival took place between the 28th and 30th May 2011.

Total attendance for the event was 1,676. This was split 1,275 adults and 401 children (source: NPT CBC).

121 face-to-face interviews were carried out under the guidance of Neath Port Talbot County Borough Council. The total number of people in respondents' parties was 355.

### OTHER RESULTS

#### Q20. Were respondents aware of the Welsh Waterways Festival website?

	%	www.welshwaterwaysfestival.co.uk
No	60.3	
Yes	39.7	
<b>Total</b>	<b>100.0</b>	

#### Q23. Before visiting the Festival which sources of information were consulted?

	Yes %	Source (mentions):
Guidebook	0.0	
Leaflets/Brochures	10.7	"What's on" (4); Posters (3)
Adverts in newspapers/magazines	16.5	Evening Post (15); What's on (3)
Articles in newspapers/magazines	2.5	Evening Post (2)
Internet	22.5	
Advice from friends/relatives/TV prog	25.6	
Visit to Tourist Information Centre	0.0	
Other	25.0	Posters (13); Radio (6); Just passing (2)

### GLOSSARY

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**Gross Spending:** measures the total expenditure by attendees on Welsh goods and services. Only monies related to the event are included in the analysis. This is the direct impact of visitor expenditure.

**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

**Induced effects:** A proportion of the increase in regional household income created by the direct and indirect effects is spent within the region, giving rise to further increases in economic activity. This is the induced effect.

CWMBRAN BIG EVENT 2011			VRP	
<b>ATTENDANCE:</b>			<b>EVENT SATISFACTION</b>	
		%		% agree
	Leisure trip from home	82.5	a. "Overall, I have enjoyed my visit"	95.0
	Non-routine business	6.8	b. "The staff here are friendly & helpful"	96.8
	Volunteering	5.8	c. "The staff here are knowledgeable"	91.1
	Other	4.9	d. "The site facilities are appropriate"	84.3
	<b>Total</b>	<b>100.0</b>	e. "The site is easy to find"	91.2
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
		%	<b>Respondents resident in the UK?</b>	
	Yes	1.9	Yes	99.0
	No	98.1	No	1.0
	<b>Total</b>	<b>100.0</b>	<b>Total</b>	<b>100.0</b>
<b>Travel to accommodation:</b>			<b>Age breakdown</b>	
		%		%
	Private Car/Van/Taxi	100.0	16-24	9.9
	<b>Total</b>	<b>100.0</b>	25-34	13.9
<b>Where did respondents stay?</b>				35-44
		%		41.6
	Guest house/ B&B	100.0	45-54	16.8
	<b>Total</b>	<b>100.0</b>	55-64	9.9
<b>Nights in Wales away from home</b>				65+
		%		7.9
	one	50.0	<b>Total</b>	<b>100.0</b>
	six	50.0	<b>Long term limiting health problem?</b>	
	<b>Total</b>	<b>100.0</b>		%
<b>Average length of stay: hours</b>				Yes
		3.5		5.9
<b>Visited the event before?</b>				No
		%		94.1
	Am a regular visitor	57.3	<b>Total</b>	<b>100.0</b>
	Not for a while	18.4	<b>Full Time employment?</b>	
	First time visitor	14.6		%
	Once or twice before	9.7		Yes
	<b>Total</b>	<b>100.0</b>		82.4
<b>What prompted visit?</b>				No
		%		17.6
	Day out for the family	44.6	<b>Total</b>	<b>100.0</b>
	Friends/family in the event	23.9	<b>Ethnic Grouping</b>	
	Saw advertising	14.1		%
	Activities at the event	8.7		British/ Northern Irish
	Work/business related	8.7		95.1
	<b>Total</b>	<b>100.0</b>		White & Asian
<b>How did respondents travel to the event?</b>				1.0
		%		Any other ethnic group NEC
	Private car/van/taxi	76.7		3.9
	Bicycle/walk	21.4	<b>Total</b>	<b>100.0</b>
	Scheduled bus/coach	1.9	<b>ECONOMIC IMPACT</b>	
	<b>Total</b>	<b>100.0</b>	a. Gross spending by event attendees	£21,100
<b>Did respondents spend money at the site?</b>			b. Total economic impact	£33,000
		%	c. Gross Value Added	£16,000
	Yes	87.4	d. Employment supported by visitor spend	0.9 FTEs
	No	12.6	<p>a. Gross spending by event attendees (Welsh goods &amp; services only; net of VAT)</p> <p>b. Total economic impact (output/turnover) (a. minus sales taxes plus multiplier effects)</p> <p>c. Of which Gross Value Added (proportion of b. which comprises Welsh incomes &amp; profits)</p> <p>d. Employment supported by visitor spending (Person-years equivalent) FTEs= full Time Equivalents</p>	
	<b>Total</b>	<b>100.0</b>		



## CWMBRAN BIG EVENT 2011

### EVENT BACKGROUND

Source: <http://www.torfaen.gov.uk/LeisureAndCulture/Cwmb BranBigEvent/Home.aspx?ContensisTextOnly=text>

"...Around 7000 people turned out on Saturday 16th July to join in the Big Event finale celebrations at Cwmb Bran Boating Lake. The finale marked the culmination of a packed week of events and activities which saw local clubs opening the doors for people, young and old, to come along and try out a huge range of new activities.

The Big Event was billed as the biggest celebration of physical and cultural activity ever in Torfaen and didn't disappoint with everything from tug-o-war to dodgeball, zumba to angling and a full programme of music and dancing to offer something for everyone..."

107 face-to-face interviews were carried out under the guidance of Torfaen County Borough Council.

The total number of people in respondents' parties was 405.

### OTHER RESULTS

#### Home postcode areas of respondents in sample:

	<i>Number in sample</i>	<i>Percentage</i>
NP10	2	2.0
NP11	2	2.0
NP15	1	1.0
NP18	3	2.9
NP19	2	2.0
NP20	4	3.9
NP4	17	16.7
NP44	68	66.7
Outside "NP"	3	2.9
All	<b>102</b>	<b>100.0</b>

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THE BIG VALLEYS ("BIG V") FESTIVAL 2011			VRP	
<b>ATTENDANCE:</b>		<b>%</b>	<b>EVENT SATISFACTION</b>	
Leisure trip from home	78.6			<b>% agree</b>
Leisure trip as part of longer break	7.1	a.	"Overall, I have enjoyed my visit"	85.0
Non-routine business	7.1	b.	"The staff here are friendly & helpful"	84.6
Volunteering	2.4	c.	"The staff here are knowledgeable"	84.6
Other	4.8	d.	"The site facilities are appropriate"	76.9
<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find"	79.5
<b>STAYING AWAY FROM HOME IN WALES?</b>		<b>%</b>	<b>DEMOGRAPHICS</b>	
Yes	4.9	<b>Respondents resident in the UK?</b>		
No	95.1		Yes	100.0
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>Average length of stay: hours</b>		<b>3.1</b>	<b>Age breakdown</b>	
<b>Visited the site before?</b>		<b>%</b>		<b>%</b>
Am a regular visitor	47.6		16-24	15.0
Once or twice before	21.4		25-34	27.5
First time visitor	16.7		35-44	25.0
Not for a while	14.3		45-54	12.5
<b>Total</b>	<b>100.0</b>		55-64	5.0
			65+	15.0
			<b>Total</b>	<b>100.0</b>
<b>What prompted visit?</b>		<b>%</b>	<b>Long term limiting health problem?</b>	
The Big V Event	77.4		Yes	7.9
Other (on youth trip/usual walk)	22.6		No	92.1
<b>Total</b>	<b>100.0</b>		<b>Total</b>	<b>100.0</b>
<b>How did respondents travel to the event?</b>		<b>%</b>	<b>Full Time employment?</b>	
Private car/van/taxi	53.7		Yes	67.5
Bicycle/walk	34.1		No	32.5
Organised coach trip	7.3		<b>Total</b>	<b>100.0</b>
Scheduled bus/coach	4.9		<b>Ethnic Grouping</b>	
<b>Total</b>	<b>100.0</b>			<b>%</b>
<b>Did respondents spend money at the site?</b>		<b>%</b>	British/ Northern Irish	
Yes	76.2			100.0
No	23.8		<b>Total</b>	<b>100.0</b>
<b>Total</b>	<b>100.0</b>		<b>ECONOMIC IMPACT</b>	
<p>Just over three-quarters (76.2%) of respondents stated that they had spent money at the event. Respondents (who had spent money) spent an average of £4.42 per adult .</p> <p>With only a relatively small dataset of expenditure available, an economic impact assessment has not yet been attempted.</p>				

## THE BIG VALLEYS ("BIG V") FESTIVAL 2011

### EVENT BACKGROUND

The "Big Valleys Festival", which is free of charge to attendees, is run annually by the Community First Partnership. The event offers a wide range of activities, such as water zorbing; inflatables; a rodeo bull; face painting; archery; and a petting zoo.

(Source: <http://www.visitmerthyr.co.uk/attractions/parc-taf-bargoed/park-ranger-services.aspx>)

In 2011 the festival took place on Wednesday August 17th, from 11am to 3pm. As well as offering community information and advice, there were a number of attractions and activities. These included: tropical animals; face painting; bouncy castles; soccer skills; cookery; farm animals; funfair rides; and a "Stars in their Eyes" stage.

(Source: <http://www.thevalleys.co.uk/site/whats-on/the-big-valley-festival-p196471>)

Attendance at the festival was an estimated 250 people (Source: MTCBC).

46 face-to-face interviews were carried out under the guidance of Merthyr Tydfil County Borough Council.

The total number of people in respondents' parties was 163 (split by 81 adults and 82 children).

### OTHER RESULTS

#### Home postcode areas of respondents in sample:

	<i>Number in sample</i>	<i>Percentage</i>
CF15	1	2.4
CF37	1	2.4
CF46	28	68.3
CF47	1	2.4
CF48	8	19.5
CF82	1	2.4
CF83	1	2.4
All	<b>41</b>	<b>100.0</b>

#### Comments from respondents about the event (single references to:)

"...more parking required and clearer direction into the park..."

"...My only complaint is the water logged field..."

"...info on pony rides required...we see pony trails but no ponies..."

"...Not enough toilets and no toilet paper. Very few noticeable rubbish bins..."

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PARC TAF BARGOED 2011			VRP		
<b>ATTENDANCE:</b>		%	<b>SITE SATISFACTION</b>		
Leisure trip from home	71.0			<b>% agree</b>	
Volunteering	6.5	a.	"Overall, I have enjoyed my visit"	96.8	
Leisure trip as part of a longer break	3.2	b.	"The staff here are friendly & helpful"	90.3	
Non-routine work business	3.2	c.	"The staff here are knowledgeable"	83.9	
Other ( <i>"using Parc as travel link"</i> )	16.1	d.	"The site facilities are appropriate"	80.6	
<b>Total</b>	<b>100.0</b>	e.	"The site is easy to find"	90.3	
<b>STAYING AWAY FROM HOME IN WALES?</b>		%	<b>DEMOGRAPHICS</b>		
Yes	3.3	<b>Respondents resident in the UK?</b>		%	
No	96.7		Yes	100.0	
<b>Total</b>	<b>100.0</b>		No	0.0	
<b>Nights away from home in Wales</b>		%		<b>Total 100.0</b>	
1-3 nights short break	0.0	<b>Age breakdown</b>		%	
4+ nights long holiday	100.0		16-24	16.1	
<b>Total</b>	<b>100.0</b>		25-34	3.2	
<b>Travel to accommodation:</b>		%		35-44	12.9
Organised coach	100.0		45-54	12.9	
<b>Total</b>	<b>100.0</b>		55-64	35.5	
<b>Where did respondents stay?</b>		%		65+	19.4
Self catering/camping	100.0		<b>Total</b>	<b>100.0</b>	
<b>Total</b>	<b>100.0</b>		<b>Long term limiting health problem?</b>		
<b>Average length of stay at park: hours</b>		1.5		%	
<b>Had respondents visited before?</b>		%		Yes	32.3
Am a regular visitor	93.5			No	67.7
Once or twice before	6.5			<b>Total</b>	<b>100.0</b>
<b>Total</b>	<b>100.0</b>		<b>Full Time employment?</b>		
<b>How did respondents travel to the site?</b>		%		%	
Bicycle/walk	83.3			Yes	54.8
Private car/van/taxi	13.4			No	45.2
Scheduled bus/coach	3.3			<b>Total</b>	<b>100.0</b>
<b>Total</b>	<b>100.0</b>		<b>Ethnic Grouping</b>		
<b>Did respondents spend money on site?</b>		%		%	
Yes	19.4			White British/ Northern Irish	100.0
No	80.6			<b>Total</b>	<b>100.0</b>
<b>Total</b>	<b>100.0</b>		<b>ECONOMIC IMPACT</b>		
			!Awaiting visitor numbers!		

## PARC TAFF BARGOED 2011

### SITE BACKGROUND

Interviews were carried out on August 11th 2011, during which the weather conditions were slightly wet/drizzly. There were no events planned at the park on that date.

The total number of visitors between.....

33 face-to-face interviews were carried out by Merthyr Tydfil County Borough Council. The total number of people in respondents' parties was 99.

### OTHER RESULTS

Postcode areas of visitors	number	percentage
CF46	27	87.1
CF47	1	3.2
CF82	1	3.2
OX	2	6.5
	<b>31</b>	<b>100.0</b>

#### Comments given by respondents regarding their visit (mentions):

"Café should be open more hours" (6 mentions)

"Cyclists riding wildly" "Cyclists should be encouraged to use bells" (2)

"Tollets should be open longer hours... keep them working" (2)

"Better enforcement of dogs being kept on leads needed" (2)

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PARC CWM DARRAN 2011			VRP	
<b>ATTENDANCE:</b>			<b>SITE SATISFACTION</b>	
		%		% agree
	Leisure trip from home	85.2	a.	"Overall, I have enjoyed my visit" 89.8
	Leisure trip as part of a longer break	10.2	b.	"The staff here are friendly & helpful" 88.0
	Other	4.6	c.	"The staff here are knowledgeable" 76.0
	<b>Total</b>	<b>100.0</b>	d.	"The site facilities are appropriate" 75.7
			e.	"The site is easy to find" 80.4
<b>STAYING AWAY FROM HOME IN WALES?</b>			<b>DEMOGRAPHICS</b>	
	Yes	8.3	<b>Respondents resident in the UK?</b>	
	No	91.7		%
	<b>Total</b>	<b>100.0</b>		Yes 100.0
<b>Nights away from home in Wales</b>				No 0.0
	1-3 nights short break	77.8		<b>Total 100.0</b>
	4+ nights long holiday	22.2	<b>Age breakdown</b>	
	<b>Total</b>	<b>100.0</b>		%
<b>Travel to accommodation:</b>				16-24 5.7
	Private car/van or taxi	100.0		25-34 22.5
	<b>Total</b>	<b>100.0</b>		35-44 25.5
<b>Where did respondents stay?</b>				45-54 12.3
	Friends/ Family	44.4		55-64 17.0
	Self catering/camping	33.3		65+ 17.0
	Hotel	22.3		<b>Total 100.0</b>
	<b>Total</b>	<b>100.0</b>	<b>Long term limiting health problem?</b>	
<b>Average length of stay: hours</b>				%
		2.5		Yes 17.6
<b>Had respondents visited before?</b>				No 82.4
	Am a regular visitor	52.3		<b>Total 100.0</b>
	First time visitor	8.4	<b>Full Time employment?</b>	
	Have been a number of times	27.1		%
	Once or twice before	12.2		Yes 62.6
	<b>Total</b>	<b>100.0</b>		No 37.4
<b>What prompted visit?</b>				<b>Total 100.0</b>
	Walk	29.6	<b>Ethnic Grouping</b>	
	Taking children out	34.0		%
	Dog walking	8.2		1. British 96.1
	Visit café	17.0		4. Any other White background 1.9
	Cycling	3.8		13. Any other Asian 1.0
	Other (photo shoot/meet family)	7.4		17. Arab 1.0
	<b>Total</b>	<b>100.0</b>		<b>Total 100.0</b>
<b>How did respondents travel to the site?</b>			<b>ECONOMIC IMPACT</b>	
	Private car/van/taxi	86.0	!Awaiting visitor numbers!	
	Bicycle/walk	10.2		
	Scheduled bus	1.9		
	Other	1.9		
	<b>Total</b>	<b>100.0</b>		
<b>Did respondents spend money on site?</b>				
	Yes	81.1		
	No	18.9		
	<b>Total</b>	<b>100.0</b>		

## WALES COAST PATH

WALES COAST PATH Winter 2011, Convergence Area			WCP	
<b>Why Using the path?</b>			<b>AVERAGE DISTANCE TRAVELLED</b>	
	%		<i>start point on path, to furthest point along path</i>	
Leisure trip from home	59.4			miles
Leisure trip as part of a longer break	38.5			
Other	0.7		calculated estimate	1.3
To go to work or other destination	0.7		respondent estimate	2.3
Non-routine work trip purpose	0.7			
<b>Total</b>	<b>100.0</b>			
<b>How travelled on path?</b>			<b>AVERAGE EXPENDITURE</b>	
	%		Av spend per adult while <u>ON</u> coast path	
Walking	84.5		£1.28	
Cycling	14.0		Av spend per adult for entire trip today	
Using an assisted/disability vehicle	1.5		£6.78	
<b>Total</b>	<b>100.0</b>		Av spend per adult: trip today+accommodation	
			(* includes estimate for 1 nights accommodation	
			for those staying in Wales overnight away from home)	
<b>Stay away from home in Wales?</b>			<b>DEMOGRAPHICS</b>	
	%		<b>Age breakdown</b>	
Yes	40.6			%
No	59.4		16-24	2.3
<b>Total</b>	<b>100.0</b>		25-34	7.6
			35-44	10.6
<b>Where did respondents stay?</b>	%		45-54	19.7
Campsite/caravan	48.1		55-64	31.8
Self-catering (cottage/house)	20.4		65+	28.0
Hotel	14.8		<b>Total</b>	<b>100.0</b>
Guesthouse/B&B/Pub	7.4			
Other	5.6		<b>Long term limiting health problem?</b>	
With Friends or Family	3.7			%
<b>Total</b>	<b>100.0</b>		Yes - limited a lot	8.5
			Yes - limited a little	5.4
<b>Number of nights stayed</b>	%		No	86.1
One to three	55.6		<b>Total</b>	<b>100.0</b>
Four plus	44.4			
<b>Total</b>	<b>100.0</b>		<b>Respondent status in household</b>	
				%
<b>The Coastal Paths in Wales are....</b>	%		Chief income earner	76.3
"joined up into one path"	14.8		Other adult (aged 16+)	23.7
"not joined up, probably never will be"	15.6		<b>Total</b>	<b>100.0</b>
"not joined up, but will be in long term"	27.4			
"not joined up but will be in near future"	17.8		<b>Working status of respondent</b>	
"don't know"	24.4			%
<b>Total</b>	<b>100.0</b>		Working full-time (30+hrs)	49.7
			Retired	40.7
<b>If not had access to this section of path</b>			Working part-time (<30 hrs)	6.7
<b>what would respondent have done?</b>	%		Not working	2.2
"visited another route elsewhere"	59.7		Other	0.7
"Other"	15.7		<b>Total</b>	<b>100.0</b>
"undertaken journey by car/bus/train"	12.7			
"not made journey at all"	10.4		<b>Social Class</b>	
"don't know"	1.5			%
<b>Total</b>	<b>100.0</b>		AB	40.0
			C1	33.3
<b>Respondent used Coast Path...</b>	%		C2	14.8
Weekly	36.3		DE	11.9
At least once a month	24.4		<b>Total</b>	<b>100.0</b>
Daily	17.8			
At least once a year	11.1		<b>Ethnic Grouping</b>	
Hardly ever	5.9			%
This is the first time	4.4		White British	75.5
<b>Total</b>	<b>100.0</b>		White Welsh	22.4
			Asian or Asian British -Indian	0.7
			White- Other	0.7
			Mixed- White & Black Caribbean	0.7
			<b>Total</b>	<b>100.0</b>

## WALES COAST PATH Winter 2011, Convergence Area

### SITE BACKGROUND

Interviews were carried out in October and November 2011 in seven different local authorities: Anglesey; Bridgend; Carmarthenshire; Ceredigion; Conwy; Pembrokeshire; and Swansea.

135 questionnaires were completed in Convergence Area locations of the Wales Coast Path, with the information being collected by Beaufort Research. The total number of people in respondents' parties was 348.

### GLOSSARY

**Economic Impact:** Economic activity such as household income (measured by Gross Value Added, GVA) and employment (measured in Full Time Equivalents, FTEs) resulting from the combined effects of all the direct, indirect and induced impacts associated with visitor expenditure.

**Gross Spending:** measures the total expenditure by attendees on Welsh goods and services. Only monies related to the event are included in the analysis. This is the direct impact of visitor expenditure.

**Gross Value Added (GVA):** Measures the additional activity in the regional economy. GVA sums locally earned incomes, company profits and some taxes.

**Indirect effects:** The initial direct expenditure shock to the region has indirect effects as, for example, companies call on their suppliers for extra goods and services to meet the extra demand generated by the visitor spending.

**Induced effects:** A proportion of the increase in regional household income created by the direct and indirect effects is spent within the region, giving rise to further increases in economic activity. This is the induced effect.



**Appendix 2 E4G Visitor Surveys- Summary information by question**

E4G VISITOR SURVEYS				1. Why at site? %					2. Adults %	3.Children %	4.Stay away from home in Wales? %		5. How many nights? %	
E4G PROJECT	SURVEY	TYPE	SURVEYS	Non-routine work purposes	Leisure trip from home	Volunteering	Leisure trip as part of longer break	Other			Yes	No	1-3 Nights Short break	4+ Nights Long Holiday
CAN	Ystradlyn Cadair Idris 2011	Site	179	0.6	46.1	0.0	47.7	5.6	88.1	11.9	65.5	34.5	34.5	65.5
CAN	Cors Dyfi Ospreys 2011	Site	530	0	37.8	0	62.2	0			62.2	37.8		
CAN	Moelyci Open Day 2011	Event	57	3.6	80	7.3	3.6	5.5	76.9	23.1	7.3	92.7	50.0	50.0
CAN	Great Orme 2011	Site	163	1.2	31.5	0.0	66.7	0.6	67.9	32.1	82.6	17.4	30.2	69.8
HTP	Blaenavon 2011	Site	183	0.0	43.2	0.0	56.3	0.5	79.6	20.4	53.0	47.0	23.7	76.3
HTP	Caernarfon 2011	Site	209	0.0	10.0	0.0	89.5	0.5	67.6	32.4	88.0	12.0	33.7	66.3
HTP	Caerphilly 2011	Site	223	0.0	40.8	0.0	58.3	0.9	75.9	24.1	57.8	42.2	47.3	52.7
HTP	Conwy 2011	Site	226	0.0	14.2	0.0	84.5	1.3	67.2	32.8	82.7	17.3	26.2	73.8
HTP	Harlech 2011	Site	207	0.0	7.7	0.0	92.3	0.0	61.6	38.4	91.8	8.2	19.5	80.5
HTP	St Davids 2011	Site	199	0.0	7.5	0.0	92.5	0.0	69.5	30.5	92.5	7.5	15.2	84.8
ST	Halo British Series 2011	Event	95	1.1	42.2	0.0	5.6	51.1	87.5	12.5	91.1	8.9	96.2	3.8
ST	ETAPE bicycle event 2011	Event	75	3.1	81.6	0.0	1.5	13.8	89.4	10.6	36.1	63.9	84.2	15.8
ST	One Historic Gdn Bryngarw 2011	Event	50	0.0	85.4	2.1	4.2	8.3	85.1	14.9	0.0	100.0		
VRP	Six Bells Event 2010	Event	138	15.9	51.6	18.3	0.8	13.4	80.2	19.8	13.5	86.5	64.7	35.3
VRP	Cordell Event 2010	Event	102	3.9	81.4	1.0	0.0	13.7	94.8	5.2	4.9	95.1	100.0	0.0
VRP	Dare Valley 2010	Site	100	0.0	34.0	0.0	55.3	10.7	67.5	32.5	33.0	67.0	33.3	66.7
VRP	Pen Y Fan 2010	Site	100	5.1	83.7	0.0	1.0	10.2	69.0	31.0	1.0	99.0	0.0	100.0
VRP	Party in the Past 2010	Event	59	0.0	94.9	0.0	3.4	1.7	94.0	6.0	3.4	96.6	50.0	50.0
VRP	Turner Exhibition 2010	Event	40	0.0	71.8	2.6	2.6	23.0	94.9	5.1	2.6	97.4	100.0	0.0
VRP	Welsh Waterways 2011	Event	121	0.0	95.1	0.0	4.1	0.8	85.9	14.1	14.0	86.0	85.7	14.3
VRP	Cwmbran Big Event 2011	Event	107	6.8	82.5	5.8	0.0	4.9	62.0	38.0	1.9	98.1	50.0	50.0
VRP	The Big V Festival 2011	Event	46	7.1	78.6	2.4	7.1	4.8	49.7	50.3	4.9	95.1	100.0	0.0
VRP	Parc Taf Bargoed 2011	Site	34	3.2	71	6.5	3.2	16.1	52.5	47.5	3.3	96.7	0.0	100.0
VRP	Parc Cwm Darran 2011	Site	108	0.0	85.2	0.0	10.2	4.6	68.3	31.7	8.3	91.7	77.8	22.2
VRP	Pen Y Fan 2011	Site	100	1.0	94.0	0.0	2.0	3.0	72.1	27.9	1.0	99.0		
WCP	Wales Coast Path Winter 2011	Site	135	0.7	59.4	0.0	38.5	1.4	91.5	8.5	40.6	59.4	55.6	44.4

E4G VISITOR SURVEYS 6. Travel to accommodation %										7. Type of accommodation? %					9. How long intend to stay at site?
E4G PROJECT	SURVEY	private car/van/taxi	scheduled bus/coach	organised coach trip	train	bicycle/walk	aeroplane	ferry or boat	other	hotel/motel	guesthouse, B&B or pub	self-catering/camping/caravan or hos	with friends or family	other	hours
CAN	Ystradlyn Cadair Idris 2011	93.9	1.7	1.7	0.0	0.0	1.7	0.0	1.0	15.5	15.5	55.2	2.6	11.2	4.8
CAN	Cors Dyfi Ospreys 2011									7.9	11.9	72.0	6.7	1.5	
CAN	Moelyci Open Day 2011	66.7	0.0	0.0	33.7	0.0	0.0	0.0	0.0	0	0.0	25.0	50.0	25.0	3
CAN	Great Orme 2011	74.4	1.7	14.5	7.7	0.0	0.0	0.0	1.7	33.9	16.1	34.7	8.5	6.8	2.8
HTP	Blaenavon 2011	79.4	11.3	5.2	1.0	0.0	0.0	0.0	3.1	27.8	3.1	39.2	28.9	1.0	1.5
HTP	Caernarfon 2011	85.9	1.1	1.6	6.5	0.5	0.0	2.2	2.2	18.5	12.0	54.9	13.6	1.0	2.5
HTP	Caerphilly 2011	77.4	5.4	1.6	10.9	0.0	2.3	0.8	1.6	35.6	8.5	20.2	34.1	1.6	2.0
HTP	Conwy 2011	84.0	2.1	3.2	9.1	0.0	0.0	0.5	1.1	20.9	16.6	49.7	11.8	1.0	1.5
HTP	Harlech 2011	95.8	0.0	0.0	1.6	0.5	0.5	0.0	1.6	6.3	10.5	66.3	15.3	1.6	2
HTP	St Davids 2011	90.2	3.3	0.5	1.7	0.0	3.3	0.5	0.5	12.5	10.3	60.3	12.0	4.9	1.75
ST	Halo British Series 2011	89.7	0.0	1.3	0.0	6.4	1.3	1.3	0.0	11.4	11.4	55.7	8.8	12.7	23.0
ST	ETAPE bicycle event 2011	95.8	0.0	0.0	4.2	0.0	0.0	0.0	0.0	44.0	12.0	12.0	32.0	0.0	6.0
ST	One Historic Gdn Bryngarw 2011														2.65
VRP	Six Bells Event 2010	47.1	0.0	0.0	5.9	0.0	29.4	17.6	0.0	76.5	0.0	0.0	23.5	0.0	5.0
VRP	Cordell Event 2010	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.0	0.0	0.0	60.0	0.0	3.5
VRP	Dare Valley 2010	84.9	0.0	0.0	3.0	3.0	0.0	0.0	9.1	6.7	6.7	70.0	10.0	6.6	11.0
VRP	Pen Y Fan 2010	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	2.0
VRP	Party in the Past 2010	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	50.0	50.0	0.0	3.0
VRP	Turner Exhibition 2010														1.3
VRP	Welsh Waterways 2011	88.2	0.0	0.0	0.0	11.8	0.0	0.0	0.0	11.8	0.0	41.2	35.2	11.8	3.0
VRP	Cwmbran Big Event 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	3.5
VRP	The Big V Festival 2011														3.1
VRP	Parc Taf Bargoed 2011	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	1.5
VRP	Parc Cwm Darran 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.2	0.0	33.3	44.5	0.0	2.4
VRP	Pen Y Fan 2011														1.1
WCP	Wales Coast Path Winter 2011									14.8	7.4	68.5	3.7	5.6	

E4G VISITOR SURVEYS		10. Visited site before? %				12. Travel to site by... %									13. Spent money at site/event? %	
E4G PROJECT	SURVEY	first time	once or twice before	not for while, but have been number of times	am a regular visitor	private car/van/or taxi	scheduled bus/coach	organised coach trip	train	bicycle/walk	aeroplane	ferry or boat	other	yes	no	
CAN	Ystradlyn Cadair Idris 2011	41.0	24.7	18.0	16.3	93.2	2.8	2.3	0.0	1.1	0.0	0.0	0.6	77.1	22.9	
CAN	Cors Dyfi Ospreys 2011	64.0	20.9	4.5	10.6											
CAN	Moelyci Open Day 2011	25.5	27.3	14.5	32.7	75.5	1.9	0.0	0.0	17.0	0.0	1.9	3.7	74.5	25.5	
CAN	Great Orme 2011	42.7	32.1	19.5	5.7	54.6	0.7	2.7	3.3	16.0	0.0	0.0	22.7	70.2	29.8	
HTP	Blaenavon 2011	81.4	11.5	4.9	2.2	89.6	3.3	3.3	1.1	0.5	0.0	0.0	2.2	59.0	41.0	
HTP	Caernarfon 2011	62.2	18.2	15.3	4.3	77.5	4.3	2.9	6.2	7.7	0.0	0.0	1.4	54.1	45.9	
HTP	Caerphilly 2011	68.7	17	9.4	4.9	81.2	4.9	3.6	7.2	2.2	0.0	0.0	0.9	43.0	57.0	
HTP	Conwy 2011	70.3	16.4	11.1	2.2	79.6	4.0	3.6	4.0	7.5	0.0	0.0	1.3	42.9	57.1	
HTP	Harlech 2011	62.8	17.9	8.2	11.1	89.4	0.0	0.0	4.3	4.3	0.0	0.0	2.0	55.6	44.4	
HTP	St Davids 2011	67.3	14.6	16.1	2.0	87.9	1.6	1.0	0.0	9.5	0.0	0.0	0.0	41.2	58.8	
ST	Halo British Series 2011	20.0	45.6	23.3	11.1	89.2	0.0	0.0	0.0	6.0	2.4	2.4	0.0	67.0	33.0	
ST	ETAPE bicycle event 2011	25.4	6.8	20.3	47.5	83.3	1.9	0.0	0.0	12.9	0.0	0.0	1.9	63.6	36.4	
ST	One Historic Gdn Bryngarw 2011	8.9	13.3	26.7	51.1	93.5	2.2	0.0	0.0	4.3	0.0	0.0	0.0	93.2	6.7	
VRP	Six Bells Event 2010	35.2	15.6	19.7	29.5	60.7	4.3	2.6	0.0	30.8	0.9	0.0	0.7	71.4	28.6	
VRP	Cordell Event 2010	27.0	21.3	21.3	30.4	93.8	3.7	0.0	0.0	2.5	0.0	0.0	0.0	63.7	36.3	
VRP	Dare Valley 2010	19.2	24.2	9.1	47.5	84.9	0.0	0.0	0.0	10.8	0.0	0.0	4.3	75.0	25.0	
VRP	Pen Y Fan 2010	4.1	9.2	12.2	74.5	83.7	0.0	0.0	1.0	13.3	0.0	0.0	2.0	80.6	19.4	
VRP	Party in the Past 2010	30.5	50.9	16.9	1.7	96.6	0.0	0.0	0.0	3.4	0.0	0.0	0.0	94.8	5.2	
VRP	Turner Exhibition 2010	0.0	5.1	2.6	92.3	34.2	0.0	0.0	0.0	65.8	0.0	0.0	0.0	12.8	87.2	
VRP	Welsh Waterways 2011	11.0	20.4	16.9	51.7	85.9	1.7	0.0	0.0	12.4	0.0	0.0	0.0	76.9	23.1	
VRP	Cwmbran Big Event 2011	14.6	9.7	18.4	57.3	76.7	1.9	0.0	0.0	21.4	0.0	0.0	0.0	87.4	12.6	
VRP	The Big V Festival 2011	16.7	21.4	14.3	47.6	53.7	4.9	7.3	0.0	34.1	0.0	0.0	0.0	76.2	23.8	
VRP	Parc Taf Bargoed 2011	0.0	6.5	0.0	93.5	13.4	3.3	0.0	0.0	83.3	0.0	0.0	0.0	19.4	80.6	
VRP	Parc Cwm Darran 2011	8.4	12.2	27.1	52.3	86.1	1.9	0.0	0.0	10.2	0.0	0.0	1.8	81.1	18.9	
VRP	Pen Y Fan 2011	5.1	4.0	23.2	67.7	88.9	0.0	0.0	0.0	11.1	0.0	0.0	0.0	81.1	18.9	
WCP	Wales Coast Path Winter 2011	4.4	11.1	5.9	78.5	Travel mode at site was collected (e.g. walk, cycle etc.)							21.5	78.5		

<b>E4G VISITOR SURVEYS</b> 14. Satisfaction ratings (those agreeing with statements)							15. Resident in UK?		16. Age profile						17. Limiting LT health prob?		18. Household includes anyone in FT?	
E4G PROJECT	SURVEY	Overall, have enjoyed visit	Staff are friendly and helpful	Staff are knowledgeable & informative	Facilities are appropriate	Site is easy to find	yes	no	16-24	25-34	35-44	45-54	55-64	65+	yes	no	yes	no
CAN	Ystradlyn Cadair Idris 2011	95.4	100.0	100.0	83.8	74.0	93.7	6.3	6.8	18.1	23.2	25.4	17.5	9.0	7.5	92.5	78.2	21.8
CAN	Great Orme 2011	84.1	87.2	80.6	83.3	82.7	95.9	4.1	16.2	5.1	18.4	19.9	22.0	18.4	16.4	83.6	55.6	44.4
CAN	Cors Dyfi Ospreys 2011						98.5	1.5										
CAN	Moelyci Open Day 2011	94.1	93.6	95.7	89.4	93.9	100.0	0.0	3.6	9.1	21.8	27.3	25.5	12.7	7.3	92.7	60	40
HTP	Blaenavon 2011	96.7	99.2	92.4	64.8	84.4	80.9	19.1	6.0	12.0	14.8	23.0	25.6	18.6	16.4	83.6	66.7	33.3
HTP	Caernarfon 2011	98.1	99.4	100.0	88.7	94.2	88.5	11.5	3.9	11.2	32	25.3	15.5	12.1	9.1	90.9	80.9	19.1
HTP	Caerphilly 2011	96.4	93.4	93.2	66.1	89.4	71.3	28.7	6.3	16.7	25.2	24.8	14.4	12.6	7.9	92.1	76.7	23.3
HTP	Conwy 2011	98.2	98.1	96.2	87.9	94.2	77.9	22.1	10.2	22.7	31.0	17.8	11.6	6.7	5.3	94.7	88.1	11.9
HTP	Harlech 2011	97.6	98.0	100.0	80.7	92.2	93.2	6.8	2.5	18.6	41.2	19.1	13.7	4.9	10.6	89.4	89.9	10.1
HTP	St Davids 2011	98.0	99.5	100.0	83.6	98.0	80.4	19.6	2.0	12.1	31.1	26.1	17.1	11.6	4.5	95.5	86.9	13.1
ST	ETAPE bicycle event 2011	92.3	82.4	64.7	35.3	73.3	98.5	1.5	4.2	21.1	39.5	18.3	16.9	0.0	1.6	98.4	80.7	19.3
ST	Halo British Series 2011	76.1	66.3	60.5	68.6	77.0	96.6	3.4	57.3	31.5	10.1	1.1	0.0	0.0	6.7	93.3	95.6	4.4
ST	One Historic Garden Brynagar	94.6	91.3	86.0	88.9	91.3	100.0	0.0	10.4	14.6	12.5	20.8	22.9	18.8	13.3	86.7	64.4	35.6
VRP	Dare Valley 2010	96.9	99.0	97.4	92.6	93.7	93.0	7.0	4.1	17.5	26.8	12.4	19.6	19.6	10.0	90.0	71.0	29.0
VRP	Pen Y Fan 2010	85.3	81.5	71.8	59.4	85.3	100.0	0.0	7.1	6.1	23.6	15.3	21.4	26.5	31.6	68.4	54.1	45.9
VRP	Parc Cwm Darran 2011	89.8	88.0	76.0	75.7	80.4	100.0	0.0	5.7	22.5	25.5	12.3	17.0	17.0	17.6	82.4	62.6	37.4
VRP	Parc Taf Bargoed 2011	96.8	90.3	83.9	80.6	90.3	100.0	0.0	16.1	3.2	12.9	12.9	35.5	19.4	32.3	67.7	54.8	45.2
VRP	Pen Y Fan 2011	96.0	78.2	66.7	64.6	95.9	100.0	0.0	7.5	18.3	17.2	12.9	23.7	20.4	23.0	77.0	53.0	47.0
VRP	Cordell Event 2010	96.9	97.9	94.6	94.6	94.7	96.7	3.3	2.1	6.3	11.6	17.9	36.8	25.3	14.7	85.3	51.0	49.0
VRP	Party in the Past 2010	100.0	100.0	100.0	75.0	100.0	100.0	0.0	1.8	3.6	16.1	19.6	30.4	28.5	14.3	85.7	52.6	47.4
VRP	Six Bells Event 2010	96.1	97.0	91.0	87.0	91.0	86.5	13.5	16.8	11.8	22.7	16.0	15.1	17.6	17.5	82.5	57.1	42.9
VRP	Turner Exhibition 2010	90.6	90.0	90.0	63.6	69.7	100.0	0.0	2.9	11.4	11.4	8.6	45.7	20.0	30.8	69.2	30.8	69.2
VRP	Cwmbran Big Event 2011	95.0	96.8	91.1	84.3	91.2	99.0	1.0	9.9	13.9	41.6	16.8	9.9	7.9	5.9	94.1	82.4	17.6
VRP	The Big V Festival 2011	85.0	84.6	84.6	76.9	79.5	100.0	0.0	15.0	27.5	25.0	12.5	5.0	15.0	7.9	92.1	67.5	32.5
VRP	Welsh Waterways 2011	71.4	95.6	97.2	92.5	82.5	100.0	0.0	0.0	7.5	16.7	25.8	26.7	23.3	11.8	88.2	55.8	44.2
WCP	Wales Coast Path Winter 2011								2.3	7.6	10.6	19.7	31.8	28.0	13.9	86.1		

E4G VISITOR SURVEYS		19. Ethnic Group %																	
E4G PROJECT	SURVEY	1. White British/ NI	2. White Irish	3. Gypsy or Irish traveller	4. any other White	5. White & Black Caribbean	6. White & Black African	7. White & Asian	8. Any other mixed	9. Indian	10. Pakistani	11. Bangladeshi	12. Chinese	13. Any other Asian background	14. African	15. Caribbean	16. any other Black/ African/ Caribbean	17. Arab	18. other NEC
CAN	Ystradlyn Cadair Idris 2011	93.8	0.7	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1
CAN	Cors Dyfi Ospreys 2011																		
CAN	Moelyci Open Day 2011	90.2	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9
CAN	Great Orme 2011	95.8	0.7	0.0	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
HTP	Blaenavon 2011	87.5	0.0	0.0	11.5	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0
HTP	Caernarfon 2011	86.1	0.0	0.0	12.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HTP	Caerphilly 2011	68.2	0.0	0.0	28.3	0.4	0.0	0.4	0.0	0.9	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0
HTP	Conwy 2011	74.8	0.0	0.0	21.8	0.4	0.0	0.0	0.0	0.4	0.4	0.4	0.0	1.4	0.0	0.4	0.0	0.0	0.0
HTP	Harlech 2011	89.4	0.0	0.0	9.6	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HTP	St Davids 2011	79.3	0.0	0.0	19.2	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0
ST	Halo British Series 2011	94.0	0.0	2.4	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	0.0	0.0	0.0
ST	ETAPE bicycle event 2011	90.4	0.0	0.0	5.4	0.0	1.4	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
ST	One Historic Gdn Brynagarw	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Six Bells Event 2010	91.8	0.0	0.0	8.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Cordell Event 2010	98.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Dare Valley 2010	90.8	0.0	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Pen Y Fan 2010	98.0	0.0	0.0	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Party in the Past 2010	98.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8
VRP	Turner Exhibition 2010	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Welsh Waterways 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Cwmbran Big Event 2011	95.1	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9
VRP	The Big V Festival 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Parc Taf Bargoed 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VRP	Parc Cwm Darran 2011	96.1	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	1.0	0.0	0.0
VRP	Pen Y Fan 2011	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WCP	Wales Coast Path Winter 2011	97.9	0.0	0.0	0.7	0.7	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

E4G VISITOR SURVEYS		ECONOMIC IMPACT: EVENTS				ECONOMIC IMPACT: SITES				Visitors
E4G PROJECT	SURVEY	a. Gross spend by event attendees	b. Total economic impact	c. GVA	d. Employment supported by visitor spend? FTEs	Supported GVA	Supported FTE	Of which on-site GVA	on-site (near site) FTEs	(attendance at event or annual year count for site)
CAN	Ystradlyn Cadair Idris 2011					£1,876,000	84	£276,000	0 (15)	35,000
CAN	Cors Dyfi Ospreys 2011					£2,150,000	95			40,000
CAN	Moelyci Open Day 2011	£1,706	£2,650	£1,210	0.06					800
CAN	Great Orme 2011					£8,245,000	370	£2,271,000	95	145,183
HTP	Blaenavon 2011					£1,643,000	73	£263,000	14	28,085
HTP	Caernarfon 2011					£14,029,000	630	£3,618,000	197	191,871
HTP	Caerphilly 2011					£4,433,000	199	£1,230,000	63	84,631
HTP	Conwy 2011					£12,622,000	565	£3,317,000	180	177,411
HTP	Harlech 2011					£6,799,000	305	£1,347,000	70	93,624
HTP	St Davids 2011					£2,186,000	95	£697,000	35	26,165
ST	Halo British Series 2011	£104,000	£154,000	£71,800	4.0					2,310
ST	ETAPE bicycle event 2011	£29,036	£47,540	£23,040	1.24					1,000
ST	One Historic Gdn Bryngarw 2011	£631	£955	£325	0.02					175
VRP	Six Bells Event 2010	£45,900	£56,500	£32,000	1.50					7,500
VRP	Cordell Event 2010	£4,850	£6,860	£3,350	0.16					1,568
VRP	Dare Valley 2010					£4,367,000	190	£280,000	15	142,000
VRP	Pen Y Fan 2010					£435,900	19	£54,500	2.9	80,000
VRP	Party in the Past 2010									800
VRP	Turner Exhibition 2010									14,782
VRP	Welsh Waterways 2011	£8,870	£12,280	£5,950	0.27					1,676
VRP	Cwmbran Big Event 2011	£21,100	£33,000	£16,000	0.9					7,000
VRP	The Big V Festival 2011									250
VRP	Parc Taf Bargoed 2011									
VRP	Parc Cwm Darran 2011									
VRP	Pen Y Fan 2011					£514,000	22	£18,800	1	81,000
WCP	Wales Coast Path Winter 2011									