

Ken Skates AC/AM
Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure



Llywodraeth Cymru
Welsh Government

Russell George AC
Cadeirydd
Pwyllgor yr Economi, Seilwaith a Sgiliau

17 Tachwedd 2016

Annwyl Russell,

Rwy'n ysgrifennu atoch wedi imi fod yn bresennol ym Mhwyllgor yr Economi Seilwaith a Sgiliau ar 3 Tachwedd.

Yn y cyfarfod, dywedais y byddem yn ysgrifennu atoch gyda nodyn i ddarparu gwybodaeth ychwanegol ar gyfer nifer o feysydd o fewn fy mhortffolio. Mae amlinelliad o'r wybodaeth ychwanegol yn yr atodiad.

Yn gywir,

Ken Skates AC/AM
Ysgrifennydd y Cabinet dros yr Economi a'r Seilwaith
Cabinet Secretary for Economy and Infrastructure

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

GWYBODAETH YCHWANEGOL PWYLLGOR YR ECONOMI, SEILWAITH A SGILIAU CRAFFU AR Y GYLLIDEB

1. Asesiadau yr Effaith ar y Gymraeg

Mae Pwyllgor yr Economi a'r Seilwaith wedi gweithredu fel a ganlyn:

- Trafod dros y tri mis diwethaf gyda phob tîm uwch-reoli gan roi amlinelliad o'r ymrwymadau cyfreithiol sy'n sail i Fesur y Gymraeg 2011.
- Yr Uned Cymorth Cydraddoldeb yn rhoi cymorth, cyngor ac arweiniad ar fodloni Safonau newydd y Gymraeg o fewn y portffolio. Bydd y cyngor yn help i sicrhau bod safonau'r Gymraeg wedi eu cynnwys ym mhob contract, grant a chytundeb fframwaith yn y dyfodol.
- Lefel uchel o flaenoriaethu ac asesu effaith ymrwymadau y Rhaglen Lywodraethu sy'n syrthio o fewn portffolio yr Economi a'r Seilwaith. Bydd hyn yn sail i asesiadau effaith mwy manwl ar y Gymraeg wrth i'r gyllideb gael ei datblygu tuag at gyflawni hyn.

2. Gardd Fotaneg Genedlaethol Cymru

Rydym yn parhau i ariannu Gardd Fotaneg Genedlaethol Cymru ar gyfer 2017-18 ar yr un lefel â'r flwyddyn bresennol, sef refeniw o £581 mil a chyfalaf o £95 mil.

3. Rhaglen Lywodraethu

Yn y Pwyllgor, rhoddais amlinelliad o'r prif ymrwymadau o fewn fy mhortffolio. Yn **Atodiad A** rwyf wedi darparu aliniad gyda llinellau gwariant y gyllideb a'r ddarpariaeth.

4. Y Buddsoddiad yn Zip World

Ynghylch ein trafodaethau ar werthusiad o elw a buddsoddiad Croeso Cymru, rhoddais enghraifft o gefnogaeth Llywodraeth Cymru i Zip World. O ran y £255,000 (Titan ar safle Llechwedd) a ddarparwyd drwy'r Cynllun Cymorth Buddsoddi mewn Twristiaeth, roedd hyn yn amodol ar ddarparu 20 o swyddi cyfwerth ag amser llawn gyda chyfanswm buddsoddiad o £510,000.

Rydym wedi monitro'r ddarpariaeth drwy gydol y broses, ac mae pob un o amodau'r grant wedi eu bodloni, ac rydym yn parhau i fonitro ein allbynnau. Fel yr addawyd, rwyf hefyd yn atodi dolen at yr adroddida gwerthuso "Assessing Zip World's Impact on the North Wales Economy" a gafodd ei gomisiynu yn annibynnol gan Zip World gyda Twristiaeth Gogledd Cymru.

5. Ymgyrchoedd marchnata Croeso Cymru

Mae swyddogion yn gweithio ar y ffigurau ar hyn o bryd a byddant yn cael eu darparu maes o law.

O ran y gwaith o werthuso yr ymgyrch, mae fy swyddogion yn gweithio ar y gwerthusiad ar hyn o bryd a byddaf yn cysylltu â chi eto unwaith y bydd gennyf ragor o wybodaeth.

6. Cymharu y prosesau caffael ar gyfer y masnachfaint rheilffyrdd

Y prif wahaniaeth rhwng ein dull ni o weithio a dull yr Adran Drafnidiaeth yw ein gofyniad i integreiddio y gwasanaethau rheilffordd gyda seilwaith y Metro. Mae proses gaffael yr Adran Drafnidiaeth ar gyfer y masnachfaint rheilffyrdd yn cael ei llywio fel arfer gan Rheoliad (CE) Rhif 1370/2007 ar wasanaethau trafnidiaeth teithwyr ar y rheilffyrdd a'r ffyrdd ("Rheoliad Gwasanaethau Teithwyr"). Fodd bynnag, mae ein bwriad i gaffael gwasanaethau teithwyr rheilffyrdd ochr yn ochr â gwaith sylweddol ar y seilwaith yn golygu nad yw'r Rheoliad Gwasanaethau Teithwyr yn berthnasol.

Mae cymhlethdod ein proses gaffael a'n hawydd i weld arloesedd sy'n arwain at drawsnewid y Metro yn golygu bod angen inni drafod atebion posibl cyn y tendr terfynol, gan fireinio yr atebion i fodloni ein gofynion a sicrhau ein bod yn edrych ar pob ateb posibl. Mae'n debygol, er enghraiff, y byddai cynigydd yn cynnig gwaith technegol arloesol fyddai yn golygu bod angen ei drafod â ni. Heb y cyfle i drafod hyn gyda ni, byddai llawer o risg ynghlwm yng nghynnwys y cynnig (ac o ganlyniad y datrysiad) yn eu cynnig, a allai olygu bod cyfyngu ar unrhyw syniadau arloesol.

Mae hyn wedi golygu bod angen defnyddio dull arloesol, ac un yr ydym eisoes wedi ei defnyddio yn llwyddiannus mewn sefyllfaoedd eraill; rydym yn defnyddio'r dull Dialog Cystadleuol o dan y Rheoliadau Cyfleustodau Cyhoeddus (2016). Mae'r Adran Drafnidiaeth wedi cefnogi ein dull o weithio.

Y prif wahaniaethau masnachol rhwng ein dull o weithio a'r Adran Drafnidiaeth yw:

- Gallwn amrywio'r dull o weithio yn ôl y risg yn y referniw fel ei fod yn fwy addas ar gyfer y ffordd y mae gwasanaethau rheilffyrdd yn cael eu hariannu yng Nghymru.
- Nid oes angen inni nodi'n fanwl sut y bydd y darperir y gwasanaethau rheilffordd
- Gallwn ddatblygu manyleb ar y cyd â'r cynigwyr gan arwain at ddeall y gofynion yn well.
- Gallwn annog arloesi cyn darparu tendr.
- Bydd cynigwyr yn ystyried ffordd o fynd i'r afael â'r system gyfan, gan ystyried darparu'r seilwaith ar yr un pryd â darparu gwasanaethau i deithwyr
- Nid oes angen i gontractau atodol (megis hysbysebu/parcio) gael eu rheoli gan y sefydliad wedi'i freinio.

7. Cyllid ar gyfer Trafnidiaeth yng Nghymru

Cafodd Trafnidiaeth yng Nghymru ei sefydlu i ddarparu cymorth a chyngor arbenigol ar gaffael Gweithredwr a Phartner Datblygu ar gyfer gwasanaethau rheilffordd Cymru a'r Gororau a darparu'r Metro. Cynhelir y broses gaffael yn ystod 2016/2017 a 2017/18. Caiff Trafnidiaeth yng Nghymru gymorth cyllideb o £8.5miliwn yn 2016/17. Defnyddiwyd y gallu o ran adnoddau ar gyfer cymorth a chyngor. Mae wrthi yn penderfynu ar ei gylch gwaith a'i gyllideb ar gyfer 2017/18.

Mae cyllideb weithredu Trafnidiaeth Cymru ar ôl 2018 yn cael ei benderfynu, a bydd yn dibynnu ar y cylch gwaith. Rhagwelir ar hyn o bryd mai Trafnidiaeth Cymru fydd yn gyfrifol am reoli gwasanaethau rheilffyrdd Cymru a'r Gororau ac am weithredu a chynnal Rheilffyrdd craidd y Cymoedd ar ein rhan. Bydd union ddyletswyddau a chyfrifoldebau Trafnidiaeth Cymru yn dibynnu ar atebion y cynigydd llwyddiannus ar gyfer Gweithredwr a Partner Datblygu, ac i ba raddau y byddwn yn trosglwyddo cyfrifoldebau statudol a chontract i Trafnidiaeth Cymru iddynt eu gweithredu ar ein rhan.

8. Gwybodaeth am fanyleb tendr y fasnachfaint rheilffyrdd

Cafodd yr ymgynghoriad ar bolisi Llywodraeth Cymru – Gosod y Trywydd ar gyfer Rheilffordd Cymru a'r Gororau – ei gyhoeddi yn gynharach eleni fel rhan o'n hymrwymiad parhaus i drafod â phawb sy'n rhan o'r broses.

Yn y ddogfen ymgynghori, cyflwynwyd y canlyniadau lefel uchel ar gyfer rheilffyrdd y mae Llywodraeth Cymru yn ceisio ei gyflawni erbyn 2030. Mae'r rhain yn cynnwys:

- Amseroedd teithio llai trwy ddarparu gwasanaethau cyflymach ac amlach, a chyfnewidfeydd gwell rhwng dulliau teithio.
- Mwy o bobl yn defnyddio trafniadaeth gyhoeddus trwy ddarparu gwasanaethau teithwyr newydd a gwell.
- Lleihau costau gweithredu a chynnal a chadw drwy arbed mwy o arian, a thrwy defnyddio mwy ar wasanaethau.
- Y gallu i fodloni'r galw yn ystod cyfnodau prysur a digwyddiadau arbennig.
- Gwell hygyrchedd a chydymffurfio gwell â Deddf Cydraddoldeb 2010 trwy gyd-gysylltu gwasanaethau a gwella cynlluniau gorsafoedd.
- Llai o allyriadau trwy sicrhau bod llai o gerbydau'n defnyddio'r ffyrdd.
- Gwasanaethau uniongyrchol rhwng y prif ardaloedd preswyl a chanolfannau economaidd.
- Ansawdd gwell i'r gwasanaeth trwy ddarparu cerbydau newydd a chydlynnu gwasanaethau'n well.

- Trenau ar amser.

Mae'r rhain, yn ogystal â chrynodeb o atebion i'r ymgynghoriad, wedi eu darparu i Trafnidiaeth Cymru.

Ar y cam hwn o'r broses mae blaenoriaethau polisi Llywodraeth Cymru wedi eu cynnwys yn y gwahoddiad i gymeryd rhan yn y trafodaethau, sydd wedi ei ddapraru i bob cynigydd ar yr un telerau ac yn destun i'r un amodau.

Bwriad y gwahoddiad i gynnal trafodaethau oedd lansio cyfnod trafod y gystadleuaeth. Mae'n rhoi gwybodaeth i gynigwyr am ein gofynion ac yn rhoi manylion strwythur y gystadleuaeth at ddibenion gwerthuso.

Bydd y fanyleb fanwl yn cael ei datblygu trwy drafodaeth gystadleuol. Caiff hyn ei wneud drwy sicrhau bod contractau yn bodloni blaenoriaethau, canlyniadau ac allbynnau Llywodraeth Cymru, a'u bod yn fforddiadwy.

Cyllideb Ddrafft 2017/18 - Rhaglen Lywodraethu - Darpariaeth Gyllidebol

Ymrwymiadau	BEL	Cyllideb	Refeniw	Cyfalaf				
			2017/18 £'000	2017/18 £'000	2018-19 £'000	2019-20 £'000	2020-21 £'000	Cyfansw m £'000
Creu Banc Datblygu Cymru.	3758	Cronfeydd Cyllid Busnes	0	17,750	7,000	18,000	3,000	45,750
Sbarduno buddsoddiad mewnol, arloesi a chreu swyddi newydd drwy Gynllun Cyflymu Busnes ar gyfer busnesau cartref â phosibiliadau byd-eang, wedi'u cynllunio i wella marchnata, hysbysebu, rhwydweithio a buddsoddi mewn sgiliau.	3901	Gwybodaeth Fusnes	618	-	-	-	-	-
Hyrwyddo canolfannau technegol, yn enwedig mewn trefi a dinasoedd ble y ceir colegau a phrifysgolion.	3744	Canolfannau Arloesi a Chyfleusteru Ymchwil a Datblygu	2,553	-	-	-	-	-
Darparu cymorth wedi'i deilwra ar gyfer cwmnïau cydweithredol a chymunedol.	3894	Mentrau Cymdeithasol a'r Economi	814	-	-	-	-	-
Hyrwyddo Twf Gwyrdd i greu swyddi cynaliadwy ar gyfer y dyfodol.	Darpariaeth trawsbynciol i'r gyllideb							
Cynorthwyo gyda datblygu busnesau Diwydiannau Creadigol a Thwristiaeth ac adeiladu ar ein llwyddiant blaenorol wrth gynnal digwyddiadau diwylliannol, chwaraeon, busnes a digwyddiadau mawr eraill.	3762	Diwydiannau Creadigol	851	2,949	1,070	5,000	2,500	11,519
	4231	Digwyddiadau Mawr	3,918	-	-	-	-	-
	6250	Twristiaeth a Marchnata	15,762	4,000	4,000	4,000	1,000	13,000
Hyrwyddo Cymru ar gyfer buddsoddiadau o Brydain a ledled y byd, tra'n helpu i ysgogi allforion i farchnadoedd newydd a rhai presennol.	3754	Masnach a Buddsoddi Mewnol	1892	-	-	-	-	-
Sefydlu Comisiwn Seilwaith Cenedlaethol i roi mwy o sicrwydd a chynaliadwyedd ar gyfer buddsoddi yn y dyfodol.	Darpariaeth trawsbynciol i'r gyllideb							
Gweithio ochr yn ochr â Chomisiwn Seilwaith Cenedlaethol Prydain i sicrhau bod penderfyniadau allweddol sy'n gysylltiedig â buddsoddiadau yn cydnabod anghenion Cymru.	Darpariaeth trawsbynciol i'r gyllideb							
Darparu ffordd liniaru ar gyfer yr M4, a gwelliannau i'r A55, yr A40 yng Ngorllewin Cymru a chefnffyrdd eraill.	1888	Adeiladu Ffyrdd Newydd a Gwella Ffyrdd	-	155,562	50,354	44,294	106,615	356,825
Creu Metro De Cymru a hyrwyddo datblygiad system Metro Gogledd Cymru.	1891	Buddsoddi yn y Rheilffyrdd	-	20,463	55,080	88,500	117,500	281,543
Datblygu cwmni newydd di-elw, masnachfaint rheilffyrdd a darparu rhwydwaith mwy effeithiol o wasanaethau bysiau unwaith y bydd y pwerau wedi eu datganoli.	1890	Masnachfaint Rheilffyrdd	183,283	-	-	-	-	-
Sicrhau bod trefniadau syml ar gyfer tocynnau a gwell marchnata fel rhan o drefniadau teithio newydd Cymru.	1881	Cardiau Clyfar	2,000	1,000	1,000	1,000	1,000	4,000
Sicrhau gwell mynediad i deithio llesol i bawb.	2030	Teithio Cynaliadwy - Cerdded a Beicio	850	6,650	6,650	6,650	6,650	26,600
Cynnal polisi o fynediad am ddim i Amgueddfeydd Cenedlaethol.	5540	Amgueddfeydd Cenedlaethol	22,960	5,258	435	1,086	697	7,476



North Wales Tourism
Twristiaeth Gogledd Cymru



Assessing **Zip World's** Impact
on the North Wales Economy

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Zip World
is responsible for
bringing at least
£121,172,258

The average
spend of a
Zip World visitor
in North Wales
is £251 - £500

Zip World
acts as a driver
for tourism from
North Wales'
key markets



Introduction

An assessment of Zip World's impact on the North Wales economy has been undertaken. The assessment will review the attraction's economic impact by examining the value of visitor spend and employment opportunities made available. (For the purpose of this report the participant who took part in the Zip World activity is referred to as visitor)

The research has a number of purposes. The main purpose is to form an understanding of the attraction's impact to the North Wales economy. The secondary purpose is to understand the importance of the economic benefits it brings. Tertiary, to examine the economic trends for forecasting purposes.

To ensure of a comprehensive assessment, three indicators have been examined closely. These include a visitor analysis, value of Zip World and employment. By analysing these three areas, a complete review of Zip World's economic impact will be gained.

Also included in the report is headline figure chart, which shows the stand-out data from the primary research. The reports main findings from the assessment will then be summed up in the conclusion.

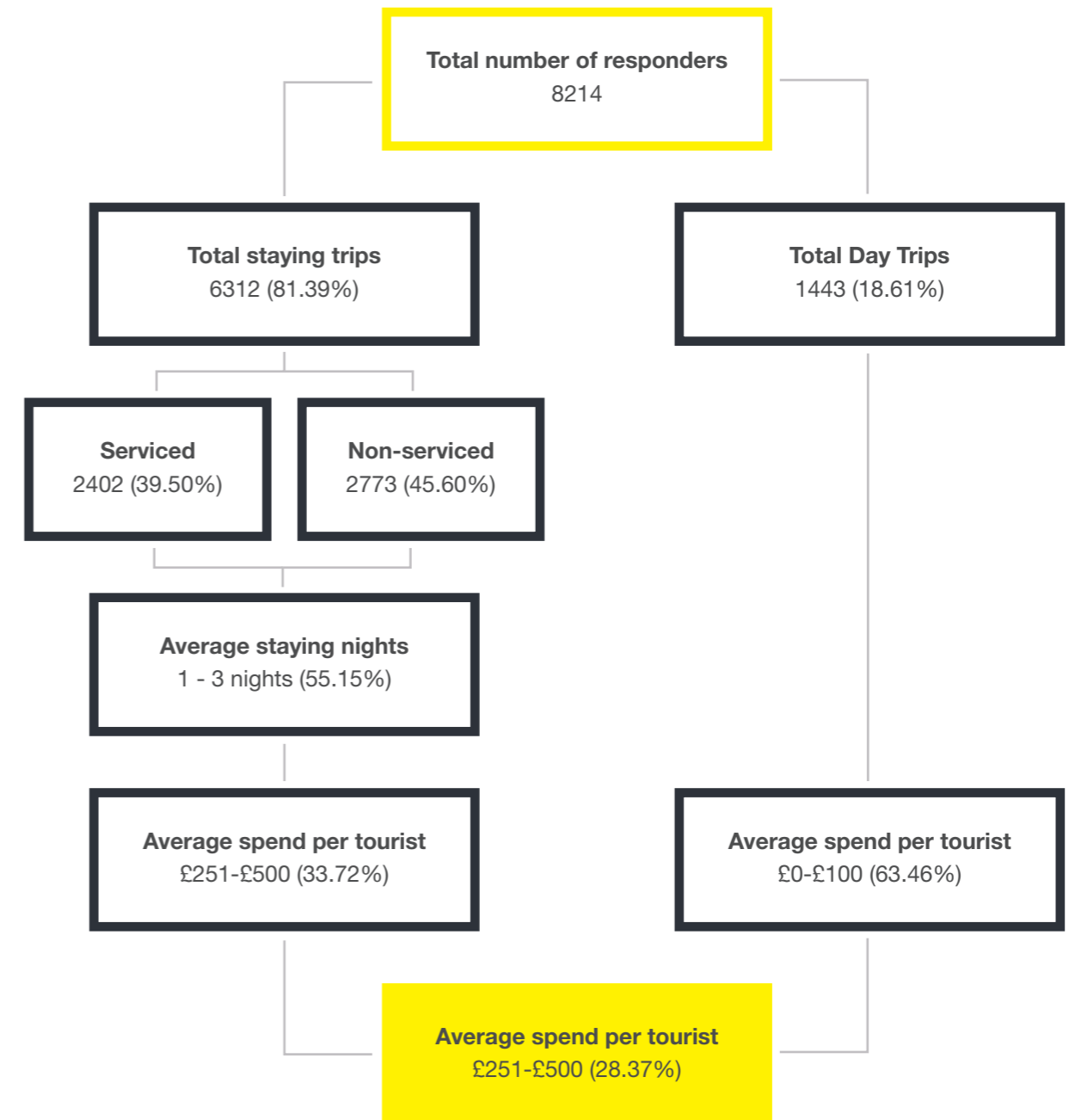
Research Methodology

The work has two stages, the first stage involved carrying out primary research using Zip World's visitor database. North Wales Tourism sent a survey to Zip World's database of 147,926 previous visitors. From this, 8214 people responded.

The data was collected using Survey Monkey; a reliable data collection tool. The data was then put into tables and charts using Survey Monkey's software.

The second stage involved desk analyse using North Wales Tourism's economic measuring approach. This involved analysing the factors effecting the economy. To draw conclusions, primary and limited secondary data were used. The secondary data was carried out by Visit Wales.

Zip World Economic Impact Headline Summary Chart



Visitor Analysis

Introduction

It is important to carry out continued research into the changing visitor behaviours. Tourists are notoriously prone to change, more so than other buyers. Understanding visitors, particularly their motivations, will enable us to understand the visitors better which will have significant implications to future economic growth.

Date visited

Research into the dates visited shows the relevance of the study. We can evaluate this data to see economic trends overtime.

Table 1 gives a breakdown of the visitor’s surveyed responses.

The table shows that a high percentage of respondents (48.81%) stated that they had visited Zip World less than a year ago. Followed by 1 year ago (29.83%) and 2 years (15.67%).

This data could be interpreted in a number of different ways. The data of a visitor who visited Zip World less than a year ago, will be more up-to-date than someone who visited 3 or more years ago. Therefore, this data should be treated with caution.

Table 1 also shows that 304 responders haven’t visited Zip World. For the relevance of the study, these respondents’ answers have been removed from the research.

When did you visit Zip World?		
	%	Response
Less than a year	48.81%	3996
1 year ago	29.83%	2442
2 years ago	15.67%	1283
3 years or more	1.98%	162
Not visited	3.71%	304

Location

Segmenting visitors by location is important to understand key and growth markets to further stimulate the North Wales economy.

Table 2 gives a breakdown of the visitor’s surveyed responses.

The main markets for Zip World are the Midlands (21.96%) and the North West (21.31%). As key domestic markets for North Wales, Zip World acts as a major pull factor, supporting the marketing efforts of North Wales Tourism and Visit Wales.

The North Wales market (11.22%) is the 4th largest. This market can certainly be seen as a growth market. Providing less economic leakages and with fewer barriers to entry, the North Wales market has potential for growth.

Your location		
	%	Response
Scotland	1.14%	90
North West	21.31%	1667
North East	4.26%	335
East Anglia	4.55%	358
Midlands	21.96%	1728
South West	7.48%	589
South East	11.74%	924
London (Inside M25)	4.63%	364
North Wales	11.22%	883
South Wales	6.73%	530
Other	4.98%	392

NB – popular “other” locations included Mid Wales and USA (no specific location)

Further data was analysed to monitor growth markets. Significant increase was noticeable in the South East (+.64), South Wales (+.34%) and London (+.33) over the last year. Other locations fluctuated only slightly.

Zip world
has created
over 218
paying jobs

74.74% of
visitors stayed
at least
one night

93.3% of
Zip world
employees
were local
to the area

ZIP
WORLD®

Visitor Influences

Evaluating the influences of visitors will determine the most effective means of communicating. Finding the most effective communication methods will ultimately improve awareness and bring more visitors to North Wales.

From table 3, word of mouth is the most effective form of marketing communication (34.99%). This is followed by website (20.31%) and TV (18.44%).

At 8.48% “other” was a popular choice for this question. Noted on the table is that “gift” was cited a number of times. This could also be considered “word of mouth”. Other factors that scored high were television shows such as Blue Peter and search networks like Google.

	%	Response
Word of mouth	34.99%	2751
TV	18.44%	1450
Website	20.31%	1597
Social media	12.68%	997
Publication	2.01%	158
Flyer	3.09%	243
Other	8.48%	667

NB – High percentage of “other” quoting gifts

Pull Factors Overtime

Table 4 shows the effectiveness of the communication overtime.

Word of mouth has consistently been the most powerful way to communicate with visitors. Visitors are more susceptible to visiting somewhere based on the feedback from others. Success models include TripAdvisor and more recently Facebook reviews. As Zip World’s product has matured, more people are recommending the attraction, as presented in table 4. Word of mouth was responsible for 37.51% of the trips made by our respondents last year.

Other significant increases were flyers. The influence of flyers have risen over the last three years. Social media has become more influential overtime, increasing by 4.73% from 3 or more years ago.

Decreases were noted in almost all other communication methods. Websites influence decreased by over 6.53%. TV also decreased, with the percentage falling by 5.06%.

	Less than a year ago	1 Year ago	2 years ago	3 years ago or more
Word of mouth	37.51%	33.47%	30.47%	31.25%
TV	20.56%	21.64%	23.05%	25.62%
Website	14.72%	19.96%	20.08%	21.25%
Social media	12.86%	12.32%	13.36%	8.13%
Publication	1.68%	2.09%	2.73%	3.13%
Flyer	3.51%	2.67%	2.73%	1.88%
Other	9.15%	7.84%	7.58%	8.75%

Value of Zip World

Introduction

This section covers the value of Zip World to the economy of North Wales. The data is of both primary and secondary research. Examined in this section is the average visitor spend and the change overtime. The assessment then looks at the influence of Zip World and how this effects the economy.

Visitor Spend

Research into the visitor spend was carried out.

Table 5 shows that the average visitor spend is £251 - £500 (28.37%).

Only 10.32% of responders answered that they spent more than £1,001 during their visit. This number is lower than the top 4 grades (£0 - £1000).

Zip World has attracted over 482,758 visitors since 2013. Combining this with the average spend, we are able to calculate that Zip World has brought in excess of £121,172,258 to the North Wales economy.

Table 5: What was your spend in North Wales during your visit? (Including accommodation)

	%	Response
£0-£100	17.31%	1328
£101 - £250	26.35%	2022
£251 - £500	28.37%	2177
£501 - £1,000	17.66%	1355
£1,001 - £1,500	4.89%	375
£1,501 - £2,000	2.41%	185
£2,000 - £3,000	0.93%	71
£3,001 +	2.09%	160

Visitor Spend Overtime

Table 6 shows that visitors to Zip World's average spend in North Wales is increasing. 12.77% of visitors who went to Zip World less than a year ago spent more than £1,001. This is a 4.46% increase from the year previous.

Also encouraging is the increase in the minimum spend. Visitors spending £0-£100 has decreased by 7.8% from 3 years ago and 3.27% from the previous year.

Factors influencing the growth in spend include more accommodation on offer. More products in the glamping and self-catering markets have supported this development. Our research shows that 45.03% of visitors choose to stay in self-catering accommodation when visiting Zip World compared to 39.67% serviced and 15.29% family and friends.

North Wales' strong occupancy growth rate for serviced accommodation has been supported by Zip World's product (Visit Wales, 2016). Occupancy has increased year-on-year to 68% for hotels (+1% YoY) and to 37% for B&Bs & guesthouses (+2% YoY).

Another factor in the visitor spend is the increase in visitor attractions. New additions like Surf Snowdonia and investment in Greenwood have helped boost the tourism product in North Wales. Visitor numbers for attractions in North Wales grew by at least 5.4% last year (Visit Wales, 2016).

Table 6: Visitor spend over the years

	Less than a year ago	1 Year ago	2 years ago	3 years ago or more
£0 - £100	15.77%	19.04%	18.01%	23.57%
£101 - £250	23.83%	28.51%	29.70%	29.30%
£251 - £500	27.54%	29.31%	29.62%	24.84%
£501 - £1,000	20.09%	14.84%	15.77%	15.29%
£1,001 - £1,500	6.05%	4.03%	3.04%	3.82%
£1,501 - £2,000	3.09%	1.68%	1.92%	0.64%
£2,000 - £3,000	1.34%	0.63%	0.24%	0.64%
£3,001 +	2.29%	1.97%	1.68%	1.91%

Influence

Zip World's direct effect on the North Wales economy has been measured. This is calculated by examining the primary motivation for visiting North Wales. The primary motivation acts as the instigator and main pull reason to North Wales. Therefore, we can assume that these visits wouldn't have taken place without Zip World's influence.

Table 7 shows the main influence to visit North Wales. 60.79% of the visitors who responded cited Zip World as their main motivation to visit.

Table 7: Main motivation		
	%	Response
Visit Zip World	60.79%	4775
Visit attractions	9.98%	784
Take part in adventure activities	17.58%	1381
Visit family or friends	7.27%	571
Other	19.01%	1493

NB – popular answers included “visiting Snowdon” and “holiday”

New Visits

Table 8 shows the amount of respondents whose main motivation was to visit Zip World and if they had visited North Wales before. This will show the exact amount of visits Zip World is directly responsible for.

Table 8: Main motivation Zip World / never been to Wales before		
	%	Response
Been to Wales before	74.90%	3566
Haven't been to Wales before	25.10%	1195

The data shows that Zip World is directly responsible for 25.10% visits to North Wales based on the responses from the survey. Further research shows that the average spend of these tourists average spend is £101 - £250.

Length of stay

The length of stay indicates the amount of visitors Zip World converted into tourists.

Citing their main motivation to visit North Wales as Zip World, 74.74% of responders stated that they stayed for at least one night, and by definition, became tourists. This provides strong reason to believe that Zip World is a strong tourism generator for North Wales.

Table 7: Main motivation		
	%	Response
Day Visit	25.26%	1,200
1-3 Nights	53.40%	2,537
4-7 Nights	16.78%	797
8 Nights or Longer	4.57%	217

Employment

Introduction

The focus of this section is to review the job opportunities made available by Zip World. A strong economy relies on an abundance of jobs for local people. The model reviews the type of employment created by Zip World and the locality of the employee. From this, we can accurately review the economic leakages and job creation.

Type of employment

Table 10 shows the type of employment of the Zip World Staff who replied.

	%	Response
Part-time	63.33%	19
Full-time	36.67%	11

In a highly seasonal industry, Zip World provides a high amount of part-time jobs. 63.33% of responders stated that they were in part-time employment with Zip World.

A trend that developed was the progression of employment that was responsible by Zip World. 30% of employees who came from no income previously (student, unemployed and volunteer) were in paying jobs at Zip World. 14% of employees who were previously in part time jobs are now in full-time jobs in Zip World.

Local Jobs

Research was carried out into where the member of staff lived before their employment with Zip World. This was to show the local job creation the attraction is responsible for. As of September 2016, Zip World employed a total of 218 people.

Our study has shown that Zip World hires locally. 60% of responders indicated they were from Gwynedd - whilst 33.3% stated they were from neighbouring Conwy. From the results of the study, we can see that 93.3% of employees were local to the area.

	%	Response
Gwynedd	60%	19
Conwy	33.3%	11
Anglesey	0.00%	0
Denbighshire	0.00%	0
Flintshire	0.00%	0
Other	6.67%	2

The locality of the employee shows that Zip World employs very few people from outside of the area - only 6.67%. Because of this, there are fewer leakages, with the money ultimately being made and spent in the local economy.

Conclusion

The report shows a number of key findings. These have been summarised below:

Zip World is responsible for bringing at least £121,172,258 into the North Wales economy.

Based on amount of visitors vs. average spend.

The figure above does not include non participants on Zip World products.

Zip World acts as a driver for tourism from North Wales' key markets.

The Midlands and North West were the most popular locations.

The average spend of a Zip World visitor in North Wales is £251 - £500.

Higher than the UK average, £161.

Minimum and maximum spend have increased over the last 3 years.

Attributed to the rise of adventure tourism and development of attractions.

Zip World is a strong pull factor.

Zip World was the main factor to visit for 60.79% of responders, with over 25.10% stating that they hadn't been to North Wales before.

74.74% of visitors stayed at least one night.

Zip world's pull further boosts the amount of tourists in North Wales.

Zip World has created over 218 paying jobs. A major employer in Gwynedd.

93.3% of Zip world employees were local to the area.

Majority employed from Gwynedd and Conwy.

The findings above show the importance of Zip World to the North Wales economy. The attraction stimulates the wider tourism industry, generating additional business for the accommodation sector.

From an employment prospective, the attraction creates jobs, supports progression and employs local people. 30% of Zip World's staff had no income previously (student, unemployed or volunteer) were now employed by Zip World. Whilst 14% went from part-time to full-time jobs.



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