



Llywodraeth Cymru  
Welsh Government

RESEARCH, DOCUMENT

# Evaluation of Tourism Attractor Destinations: final report (summary)

An evaluation of selected tourism destinations funded through the European Regional Development Fund (ERDF) and delivered through the 2014 to 2020 European Structural Funds Programmes.

**First published:** 27 February 2024

**Last updated:** 27 February 2024

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

# Contents

[Introduction](#)

[Methodology](#)

[Evidence synthesis](#)

[Footnotes](#)

[Contact details](#)

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

# Introduction

Arad Research was commissioned by the Welsh Government in August 2018 to carry out an evaluation of the Tourism Attractor Destinations (TAD) operation. TAD is funded by the Wales European Funding Organisation (WEFO) and forms part of the 2014-2020 West Wales and the Valleys ERDF Programme. It was supported under Priority 4.4 which aimed to increase employment through investments in prioritised or regional infrastructure supporting a regional or urban economic strategy.

TAD's objective was to deliver economically significant investment in key tourism assets that would attract further business investment and business growth to deliver key outcomes in terms of employment and regeneration.

Twelve TAD projects were selected through a regional prioritisation exercise, involving regional economic boards and key delivery partners. [\[footnote 1\]](#)

TAD operation expenditure totalled £67.2m, consisting of £26.7m in ERDF funding and £40.5m in match funding through various sources (mostly local authority contributions, joint beneficiaries' own contributions, Welsh Government funding, loans and other funding sources).

An interim evaluation report was published in January 2020, providing an assessment of progress up to the end of 2019. This final report provides a synthesis of interim findings, insights collected as part of post-COVID-19 re-engagement activity and the findings of the final evaluation phase.

## Methodology

The research methods for the evaluation included:

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

- desk research to review ERDF Programme and TAD operation documentation
- scoping interviews with Visit Wales, Welsh Government representatives and joint beneficiaries
- interim evaluation fieldwork, involving mainly qualitative research to develop an understanding of projects' progress, challenges and the local factors that impacted on implementation
- re-engagement activity: interviews with project representatives in order to receive updates on plans and progress following the impact of the COVID-19 lockdown periods
- final research phase: further qualitative research with joint beneficiaries between July 2022 and January 2023 to examine examples of project outcomes and impacts; TAD projects were also asked to collect data on visitor experiences at sites, using a questionnaire tailored for each individual project

## Evidence synthesis

### General

The TAD operation successfully supported the delivery and completion of 12 ambitious projects that aimed to raise the quality and perceptions of tourism destinations in Wales.

Joint beneficiaries faced substantial challenges during the process of completing projects, particularly during the COVID-19 pandemic, which had a devastating impact on businesses and organisations across the tourism and hospitality sectors. The fact that joint beneficiaries were able to adapt, re-group and see projects through to completion is, in itself, a notable achievement. It demonstrates the resilience, perseverance and flexibility of all involved from TAD project managers, the programme management team in Visit Wales and

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

colleagues in WEFO.

## Strategic alignment

In its aims and in the range of projects supported, TAD was well aligned strategically with Welsh Government policies to support tourism and regeneration. The evaluation found examples of integration between TAD projects and wider investment programmes at local and regional levels.

The operation business plan identified a number of the challenges facing the tourism industry in Wales and noted the potential of TAD projects to help address these issues, including issues of spend, seasonality and spread. Across the suite of projects there are positive examples of increased visitor spending as a direct result of the investment in sites. TAD has enhanced the year-round tourism offer at sites which could, over time, help to address the seasonality of demand which contributes to low productivity and uncertain employment opportunities in the industry. Finally, the investment in projects has contributed to enhancing the diversity of the offer for visitors to Wales, leading to innovative and high-quality attractions.

## Delivery model

The delivery model for TAD focused on investing in large scale sites. Evidence collected and reviewed during the evaluation suggests that significant investment in a relatively small number of destinations has succeeded in enhancing the tourism offer, attracting new visitors and serving as a catalyst for other tourism-related and regeneration activity. The scale of investment in a small number of regionally-prioritised tourism sites distinguished the operation from other investment funds such as the Tourism Investment Support Scheme, Wales Tourism Investment Fund and Micro Small Business Fund. There is continued support for such an investment model that can be effective in

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary.html> for the latest version.

Get [information on copyright](#).

stimulating transformational change.

During what was a turbulent time for the tourism industry, the scale of the projects supported, and the fact that they were managed by large public sector organisations in most cases, meant that they were better placed to withstand the financial and operational challenges presented during the pandemic.

The delivery model and the scale of investment also encouraged organisations to think differently about the sites they managed and to promote innovation. Organisations reported that they had been inspired through TAD to think differently about sites, leading to new business opportunities.

## **Delivery commitments**

Taking into account the context of the operation, TAD was broadly successful in terms of the outputs achieved against delivery commitments. Although only one of the four indicators (land developed) was met, the others were missed by only small margins. In view of the disruption caused by the pandemic and the changes to the configuration and profiles of projects, this is a creditable achievement.

## **Visitor perceptions of sites**

The evaluation was only able to collect a partial picture of visitors' perceptions of TAD sites through primary data collection. There are indications that sites have been successful in attracting new visitors. Visitors who completed a survey recognised that TAD sites had improved and reported high levels of satisfaction with the quality of the visitor experience. A high proportion of visitors noted that they would recommend the site to others and over two-thirds noted that they would re-visit the site out of season (i.e. between October and March).

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary.html> for the latest version.

Get [information on copyright](#).

## Recommendation

As part of any future programmes, there is a need to ensure that funded projects are more firmly focused on carrying out self-evaluation activity, including the collection of visitor data.

## Recommendation

Many of the outcomes and impacts at TAD sites will only be fully revealed over a longer period of time, arguably 2 to 5 years after projects are operational. Visit Wales should consider undertaking longer term evaluations of sites in order to understand their impact on visitor perceptions over time and their contribution to enhancing the local and regional tourism landscape.

## Marketing and promotion

The withdrawal of a dedicated TAD marketing fund, necessitated by the pandemic, was seen by Joint Beneficiaries as having impacted on their ability to promote and market attractions at 'launch', particularly given the limited revenue funding available among partners. The delays in launch timetables for individual TAD project also meant that timing and messaging of marketing needed to be adjusted. The projects are treated as valuable additions and enhancements to the Wales product offer and Visit Wales has indicated that it will continue to include TAD projects within its marketing activities according to product, season and audience.

As a result of the COVID-19 pandemic, potential joint marketing, discussed in (early) operational meetings between TAD joint beneficiaries, could not take place. Under normal circumstances the opportunities for joint marketing or promotion could have been leveraged given the complementary nature of some

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

of the TAD projects at a regional level however this was not possible for the TAD operation because of the impact of COVID-19.

## **Recommendation**

Visit Wales should explore further opportunities to facilitate collaborative marketing and promotion amongst TAD projects and other local and regional attractions as part of a themed tourism offer, where appropriate.

## **Cross-cutting themes and the Welsh language**

The cross-cutting themes of i) equal opportunities and gender mainstreaming, ii) sustainable development, and iii) tackling poverty and social exclusion were embedded as part of the delivery plans of the twelve projects. Projects were successful in achieving their CCT indicators, with 88 per cent of targeted indicators delivered. Many projects improved accessibility to sites for disabled people. Joint beneficiaries sought out opportunities to develop local supply chains, establishing new links with business and enhancing the community benefits of projects. In addition, TAD projects took action to ensure resource efficiency and to support biodiversity at sites.

The evaluation found some evidence of projects' contribution to the aims of Cymraeg 2050. However, across the operation as a whole this was often driven by compliance with statutory duties as part of the Welsh language standards.

When planning their projects joint beneficiaries were required to ensure that projects were aligned with the goals of the Well-being of Future Generations Act. There was a commitment to sustainability across all projects, as well as a desire to collaborate with communities throughout. Inclusivity and equality were also very prominent features across the operation. Based on the achievements and outcomes observed, the operation has made a demonstrable contribution to

supporting the goals of the Well-being of Future Generations Act.

The Business Plan for TAD stated the ambition to support sites that can become iconic, must-see tourism destinations across Wales. TAD has undoubtedly transformed sites, raising the quality of sites and diversifying the offer available to visitors. It is debatable whether the operation has achieved the bold ambitions it set, however for some projects further developments are planned and TAD represents one stage in a longer-term strategic plan.

## Recommendation

Visit Wales should consider how TAD projects can be further supported through strategic programmes to continue their growth and develop as world-class, quality, authentic visitor experiences as part of the national tourism strategy.

## Footnotes

[1] A list of projects, and a summary of activity, is set out in Table 2 of the full report.

## Contact details

Report authors: Duggan, B. Howells, D. Cole, P. and Stedman, K.: Arad Research

Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

For further information please contact:

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).

Andrew Booth

Email: [research.evaluation@gov.wales](mailto:research.evaluation@gov.wales)

Social research number: 11/2024

Digital ISBN 978-1-83577-519-6



**This document may not be fully accessible.**

For more information refer to our [accessibility statement](#).

**This document was downloaded from GOV.WALES and may not be the latest version.**

Go to <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report-summary-html> for the latest version.

Get [information on copyright](#).