

Dadansoddi ar gyfer Polisi



Analysis for Policy



Llywodraeth Cymru
Welsh Government

SOCIAL RESEARCH NUMBER:

11/2024

PUBLICATION DATE:

27/02/2024

Evaluation of the Tourism Attractor Destinations: final report

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

OGL © Crown Copyright Digital ISBN978-1-83577-521-9

Evaluation of the Tourism Attractor Destinations: final report

Brett Duggan, David Howells, Peter Cole, and Kara Stedman

Arad Research



Full Research Report: Duggan, B. Howells, D. Cole, P. and Stedman, K.: Arad Research (2024) *Evaluation of Tourism Attractor Destinations: final report*. Cardiff: Welsh Government, GSR Report number 11/2024.
Available at: <https://www.gov.wales/evaluation-tourism-attractor-destinations-final-report>

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

For further information please contact:

Andrew Booth

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Email: Research.evaluation@gov.wales

Table of contents

List of tables	2
List of figures	2
Glossary	3
1. Introduction	4
2. Background and context to the operation	11
3. Projects supported through the TAD operation	17
4. Data collection processes at operation and project level	24
5. Evaluation findings	29
6. Integration of cross-cutting themes and the Welsh language in the operation	43
7. Conclusions and recommendations	59
Annex A: References	64
Annex B: Final evaluation phase research tools	65
Annex C: TAD project summaries	70

List of tables

Table 1: WEFO Indicators and targets for Priority 4.4 and accompanying targets for the TAD operation.....	12
Table 2 Overview of TAD projects	18
Table 3: Project TAD operation expenditure by individual project (2022 reprofile)	27
Table 4: TAD operation achievement against WEFO indicators and targets	28
Table 5: Anticipated wider impacts of TAD	30
Table 6: Summary of TAD project and operation achievement of CCT indicators.....	44

List of figures

Figure 1: Map illustrating locations of TAD projects.....	22
---	----

Glossary

Acronym/Key word	Definition
CCTs	Cross-cutting themes
E4G	Environment for Growth was a programme of 6 tourism projects supported through the 2007-13 round of European Funding
ERDF	European Regional Development Fund
FTE	Full-time equivalent
GBDVS	Great Britain Day Visitor Survey
GBTS	Great Britain Tourism Survey
IPS	International Passenger Survey
Joint beneficiaries / JBs	Lead organisations in each of the projects in receipt of funding via Visit Wales
Lead beneficiary	This refers to Visit Wales in its role in managing the delivery of the TAD operation
Managing Authority	WEFO is the Managing Authority for European Structural Funds in Wales
Operation	The Tourism Attractor Destinations or TAD operation. The abbreviated collective term for the funded projects.
Partner beneficiaries	Organisations delivering stand-alone elements of projects or supporting project delivery. Receive funding via joint beneficiaries.
Programme	The West Wales and the Valleys European Regional Development Fund Programme through which the Tourism Attractor Destinations operation is funded.
RIBA	Royal Institute of British Architects
SME	Small and medium sized enterprise
TAD (projects)	Tourism Attractor Destinations (projects)
TAIS	Tourism Amenity Investment Support
TISS	Tourism Investment Support Scheme
VW	Visit Wales
WEFO	Welsh European Funding Office

1. Introduction

- 1.1 Arad Research was commissioned by the Welsh Government in August 2018 to carry out an evaluation of the Tourism Attractor Destinations (TAD) operation. TAD was funded by the Welsh European Funding Office (WEFO) and formed part of the 2014-2020 West Wales and the Valleys ERDF Programme. It was funded under Priority 4.4 of the ERDF Programme to increase employment through investments in prioritised or regional infrastructure supporting a regional or urban economic strategy. Central to the operation was investment of £67.2 million in ‘regionally-prioritised tourism sites which have the potential to become iconic, must-see tourism destinations¹ and raise the quality and perception of destinations in Wales. The operation was delivered by Visit Wales as the lead beneficiary and 12 joint beneficiaries for the selected destinations.² Visit Wales is a division within the Welsh Government’s Culture, Sport and Tourism department.
- 1.2 The evaluation took the form of a broad and inclusive research process that involved engaging with Visit Wales, joint beneficiaries and partner organisations to collect and analyse both primary and secondary data. The study ran in parallel with the development and delivery of TAD projects and spanned the period September 2018 to June 2023. The evaluation process was extended in response to extensions to project delivery timeframes as a consequence of the COVID-19 pandemic. Through ongoing contact with joint beneficiaries over a period of four years, the evaluation was able to reflect on projects’ progress at different stages of their development. This enabled the evaluation team to collect a rich evidence base that offers an overarching assessment of the operation’s delivery and outcomes, as well as wider learning points to inform future strategic priorities to support the visitor economy.

¹ TAD Business Plan, 2016

² The portfolio of TAD projects changed at various points during the course of the operation. Initially 13 projects were supported. One project – the Porthcawl Maritime Centre, led by the Credu charity - was withdrawn from the TAD operation due to the project becoming financially unviable as a result of the withdrawal of match funding. ERDF funding totalling £1m was vired to the Bridgend PRIF project, led by Bridgend CBC. In addition, the operational plan was revised in 2019 to include an additional project, Yr Hen Goleg/the Old College, Aberystwyth. The Old College project was later removed from the TAD operation as part of the 2022 reprofiling. This was due to delays in the project timescale which meant it could not be completed within the TAD operational timescale.

1.3 The key phases and associated milestones of the evaluation were as follows:

Phase	Timings
Inception and scoping phase	September 2018-January 2019
Interim evaluation phase	January 2019-November 2019 (Publication of Interim Report , January 2020)
Break in evaluation activity	February 2020-September 2021 (longer than originally planned due to impact of COVID-19)
Re-engagement activity post-COVID-19	October 2021-January 2022 (Update paper, internal document)
Final evaluation phase	June 2022-June 2023

1.4 The evaluation team was commissioned to complete two reports: an interim report, published in January 2020 and a final evaluation report (this report). The interim report provided an assessment of progress up to the end of 2019. It was always intended that there would be a hiatus in research activity. Originally, this was planned as a six-month break to allow time for TAD projects to make sufficient progress to enable an exploration of initial impacts and transformation (at the project level) which would support a more rounded evaluation of the operation as a whole. However, due to the effects of the pandemic, timescales for the operation changed and the break in evaluation activity was extended to reflect this. In view of this longer break, it was decided to re-engage with joint beneficiaries in late 2021 through a series of interviews to check-in on project progress and collect feedback on the effect of the pandemic on longer-term plans and anticipated project outcomes.

1.5 This report provides a synthesis of the interim findings, insights collected as part of the post-COVID-19 re-engagement activity and the findings from the final evaluation phase. Data and findings on operation outputs and outcomes are set out in Sections 4-6 of this report.

1.6 In this introductory chapter we set out the following:

- the evaluation aims and objectives;
- an outline of the evaluation methodology.

Evaluation aims and objectives

1.7 The evaluation aimed to assess the success of the TAD operation against its stated outputs and delivery objectives, and measure outcomes and impact at operation level, illustrated by individual project-level examples. The evaluation objectives were defined as follows:

- Evaluate the strategic alignment of TAD activity to Welsh Government policies outlined in the business plan, and the Wales ERDF Programme.
- Evaluate the extent to which the operation activity addresses current challenges facing the Wales tourism industry.
- Examine the delivery model for TAD, with particular focus on evaluating the approach of investing in large scale sites.
- Assess the extent to which operation and projects have achieved the delivery commitments outlined in the business plans and met key performance indicator targets.
- Evaluate the extent to which wider impacts of the operation affect the tourism industry in Wales.
- Examine visitor experience and motivations for visiting Project sites and changes to these factors over time.
- Examine the approach to marketing the operation and Project sites and identify how marketing activity may be improved.
- Provide an assessment of the extent to which the operation has addressed the cross-cutting themes as part of the intervention.
- Examine the extent to which projects have encouraged and delivered initiatives in support of the Welsh Government's Welsh Language Strategy.

Methodology and evidence base

1.8 The findings presented in this report are based on the following research activity, completed over the lifetime of the evaluation between October 2018 and April 2023. It is important to recognise that the evaluation has taken place during the COVID-19 pandemic, which had significant impact on the tourism sector. Consequently, the

key objective for tourism businesses and Joint Beneficiaries has been survival and recovery planning. This has affected the research methodology particularly the fieldwork and primary research.

Desk research

1.9 The evaluation team reviewed the background documentation relating to the ERDF Programme; policy documents and strategic plans for the tourism sector in Wales; TAD-related documentation; relevant research and evaluation reports.

Documentation reviewed included:

- Tourism Attractor Destinations Business Plan and individual TAD project Business Plans;
- West Wales and the Valleys: European Regional Development Fund (ERDF) operational programme 2014 to 2020, Welsh Government;³
- Partnership for Growth, Welsh Government's Strategy for Tourism 2013-2020;⁴
- Partnership for Growth: Strategy for Tourism 2013-2020: Strategy Progress Review, Welsh Government;⁵
- Welcome to Wales: priorities for the visitor economy 2020-2025, Welsh Government;⁶
- Let's Shape the Future, Welsh Government;⁷
- Vibrant and Viable Places: New Regeneration Framework, Welsh Government;⁸
- Wales Tourism Performance Reports, Welsh Government;⁹
- Great Britain Tourism Survey;¹⁰

³ [West Wales and the Valleys ERDF operational programme](#)

⁴ [Partnership for Growth, Welsh Government Strategy for Tourism 2013-2020](#)

⁵ [Partnership for Growth, Welsh Government Strategy for Tourism 2013-2020: Progress Review](#)

⁶ [Welcome to Wales: priorities for the visitor economy 2020-2025](#)

⁷ [Let's Shape the Future](#)

⁸ [Vibrant and Viable Places Framework](#)

⁹ [Wales Tourism Performance](#)

¹⁰ [Great Britain Tourism Survey 2017](#)

- Environment for Growth Monitoring & Evaluation Reports, Welsh Economy Research Unit, Cardiff Business School;
- Operation monitoring information: quarterly monitoring data and a sample of project completion reports; examples of cross-cutting theme assessment; output data from completed projects.

1.10 The strategic and policy documentation, which is referenced in the TAD Business Plan, along with statistical releases, provided useful context and reference points for the evaluation.

Scoping interviews

1.11 Scoping interviews were carried out with eight Visit Wales and Welsh Government representatives in late 2018 and early 2019. These interviews provided further insight into the background and strategic context to the operation and helped inform future phases of the evaluation. Initial introductory interviews were completed with representatives of all joint beneficiaries, providing an opportunity to learn about progress to date and facilitators and challenges linked to project delivery.

Interim evaluation fieldwork

1.12 Between October 2018 and June 2019 the evaluation team engaged with representatives of all 13 projects at the time of the interim evaluation and also with partner beneficiaries and external organisations with links to some projects.¹¹ Interviews were also carried out with Welsh Government representatives and other strategic stakeholders. The interim evaluation focused mainly on qualitative methods in order to develop an understanding of projects' progress, challenges and the local factors and context that impact on implementation.

1.13 In June 2021, it was agreed that a revised two-stage programme would be undertaken to complete the final evaluation as follows:

- Phase 1: Re-engagement with Joint Beneficiaries: November / December 2021

¹¹ There were 13 projects at the time of the interim report. This later reduced to 12 following the withdrawal of the Porthcawl Maritime Centre project.

- Phase 2: Final impact research and review of operation output data:
Summer 2022-June 2023

Re-engagement activity

- 1.14 Interviews with representatives of TAD projects between November 2021 and January 2022 provided an opportunity to check-in with sites and to get an update on plans and progress following the impact of the COVID-19 lockdown periods. A short internal paper was presented to Welsh Government in January 2022 following this activity, which has been used as part of the analysis for this final report.

Final research phase

- 1.15 The final phase of the evaluation was focused on a synthesis of data to draw conclusions on the overall impact at operation level. This involved further qualitative research with joint beneficiaries between July 2022 and January 2023 to examine examples of project outcomes and impacts. This has been informed by the impact framework developed during the interim evaluation phase, with joint beneficiaries invited to provide examples of project impacts on visitors, on places/sites, and wider community impacts (including links to other regeneration activity).
- 1.16 TAD projects were asked to collect data on visitor experiences at sites, using a questionnaire tailored for each individual project. These short questionnaires asked for visitors' views on changes to the sites, levels of satisfaction with the visit and whether they would recommend the site to others. A mixed response was received to the visitor survey. Only four projects were successful in collecting a reasonable sample of responses from visitors to sites. These were: Vale of Rheidol (162 responses); Llys y Frân (109); Rock UK (52); and Caernarfon Waterfront – Welsh Highland Railway (48 responses). Across the eight other projects, fewer than 12 responses were received, and a decision was taken to not include data from these sites in the analysis, given the limited numbers of responses.
- 1.17 The evaluation team has also reviewed available monitoring information, including samples of quarterly claim forms, progress reports and completion reports.

Structure of this report

1.18 This report includes the following sections:

- Background and context to the operation (Section 2)
- Overview of projects supported through the TAD operation (Section 3)
- Data collection processes at operation and project level (Section 4)
- Evaluation findings (Section 5)
- Integration of cross-cutting themes and the Welsh language in the operation (Section 6)
- Conclusions and recommendations (Section 7)

2. Background and context to the operation

- 2.1 The 2014-2020 ERDF Programme was focused on supporting investments that contribute to the creation of sustainable jobs and economic growth. The TAD operation was designed to support the ERDF objectives under Priority 4.4: 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 will attract further business investment and business growth to deliver key outcomes in terms of employment and regeneration.
- 2.2 Since Wales first became eligible for European Structural Funds in 2000, Visit Wales and its predecessor bodies have led a series of strategic EU-funded programmes to help focus capital investment to develop tourism quality, products and destinations in support of Wales' wider economic, regeneration and environmental objectives. TAD was arguably the most ambitious of these initiatives in terms of its scale and aims, with its emphasis on supporting iconic destinations capable of achieving transformational change for the Welsh visitor economy and delivering an increase in visitor numbers at targeted sites.

Management and delivery of TAD

- 2.3 The management and delivery of TAD comprised multiple partners with varying functions and roles in supporting the operation. WEFO, as the Managing Authority (MA) for the European Structural and Investment Funds in Wales, is responsible for overseeing and monitoring Programmes, including the West Wales and the Valleys ERDF Programme. Visit Wales, a division within the Economy, Treasury and Constitution department of the Welsh Government was the lead beneficiary and is responsible for delivery at the operational level. Joint beneficiaries led on projects and engaged with local stakeholders to support project delivery. In some cases, designated partner beneficiaries led on specific elements of projects. It was, therefore, a fairly densely layered operation, with relationships and joint-working key to delivery.

The TAD operation and its role in supporting the 2014-2020 ERDF Programme

2.4 Activity was targeted at sites in West Wales and the Valleys, as defined in the Operational Programme.¹² The associated result indicator for Specific Objective 4.4 measures the reduction in the claimant count in travel to work areas and includes a target to reduce the claimant count by 8 per cent on average. Specific output indicators identified have been set for Objective 4.4, with accompanying targets for the TAD operation by 2023. These are set out in Table 2.1. TAD projects have set additional targets to increase visitor numbers. Across all TAD sites there was a combined target of 410,839 additional visitors, however this was not an indicator required by WEFO. The WEFO indicators set out in Table 2.1 reflect its role in ensuring funds are used in ways that contribute to defined ERDF Programme Objectives. Visit Wales' priorities are to support and promote the tourism sector, to increase visitor numbers and enhance visitor experiences.

Table 1: WEFO Indicators and targets for Priority 4.4 and accompanying targets for the TAD operation

Indicator	Measurement Unit	Target Value - Priority 4.4 (2023)	TAD operation targets
Land developed	Ha	100	25.4
Premises created or refurbished	m ²	120,232	20,591
Jobs accommodated	Number	2,405	312.3
SMEs accommodated	Number	235	50

Strategic context: Partnership for Growth, Welcome to Wales and beyond

Partnership for Growth

2.5 The TAD operation was designed to align with the Wales tourism strategy, 'Partnership for Growth (P4G)¹³, which covered the period 2013-2020. The strategy defined a series of priorities for the tourism sector, placing an emphasis on

¹² [West Wales and the Valleys ERDF operational programme 2014-2020](#)

¹³ [Partnership for Growth, Welsh Government Strategy for Tourism 2013-2020](#)

partnership working between the Welsh Government, the private sector and other stakeholders. The strategy recognised the various internal and external influences that impact the tourism sector and invited “the industry and other local, regional and national public sector bodies, to align themselves with its goals and to work together to achieve them”. A number of ‘Partnership for Growth’s’ strategic priorities echoed the underpinning objectives of the TAD operation, including to:

- Promote Wales as a destination by making a high-quality tourism offer;
- Work to extend the tourism season and associated benefits;
- Identify funding opportunities to improve the visitor infrastructure and product in Wales.

2.6 A key outcome of P4G was the development of a new Wales brand by Visit Wales/Welsh Government with the brand execution for tourism being ‘This is Wales/Gwlad Gwlad’. All tourism projects supported via Visit Wales were required to demonstrate compliance and complementarity in terms of the brand objectives:

- Elevate our status
- Surprise and inspire
- Change perceptions
- Do good things
- Be unmistakably Wales

2.7 To reinforce this brand development Visit Wales provided focused leadership for marketing and product development through themed ‘years’. This included ‘Years of: Adventure, Legends, Sea, Discovery’, together with route-based tourism (the Wales Way) – the latter particularly aimed at overseas and first-time visitors to Wales, with a view to promoting itineraries and encouraging longer dwell time.

2.8 In devising the TAD operation Visit Wales emphasised that it sat at the apex of a ‘pyramid’ of complementary investment mechanisms to enhance the overall visitor experience in Wales. These other funding mechanisms all shared the same brand imperatives in support of the strategic goals of P4G and included:

- Wales Tourism Investment Fund – ‘patient’ finance (grant/ loan) up to £5m

- Micro Small Business Fund – up to £500k (supported through the Welsh Government Rural Communities - Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development)
- Tourism Amenity Investment Fund – public realm improvements (EU RDP supported)
- Tourism Product Innovation Fund – revenue fund (new product development)
- Regional Tourism Engagement Fund – revenue fund (destination activities)
- A fund to support businesses and organisations operating in the foundational economy. Tourism is one of seven foundational sectors and businesses are able to access support through the Foundational Economy Challenge Fund aimed at supporting experimental projects in these sectors.

2.9 It is important to recognise, therefore, that TAD was designed as being one important element in a suite of initiatives and funds that collectively contribute to a common vision for the sector in Wales, as set out in 'Partnership for Growth'. The targets set for Partnership for Growth were to increase revenue derived from tourism (by 10 per cent in real terms); a growth in tourism-related employment; and an increase in the contribution by tourism to gross value added (GVA) (from 4.4 to 4.8 per cent).

2.10 The 2016 'Partnership for Growth' Strategy Progress Review confirmed that the sector was well on course to exceed these targets with employment already at 132,400 and GVA at 6 per cent.¹⁴ The revenue growth target was recast explicitly in terms of staying visitors, and this was also well on course to substantially exceed the target. Analysis undertaken by Visit Wales, based on the Great Britain Tourism Survey (GBTS), International Passenger Survey (IPS) and the Great Britain Day Visitor Survey (GBDVS), ahead of consultation on a new tourism action plan for 2020 onwards shows a growth in overall tourism value from £4.5bn to £6.3bn or 40 per cent in cash terms.

Welcome to Wales

¹⁴ [Partnership for Growth, Welsh Government Strategy for Tourism 2013-2020](#)

- 2.11 The current national tourism plan, 'Welcome to Wales'¹⁵, was launched in January 2020 and set out priorities for the visitor economy during the period 2020-2025. The primary goal of this plan – launched shortly before the COVID-19 pandemic unfolded – was set out as being “to harness the potential for tourism to improve the wider economic wellbeing of Wales’ and to grow tourism ‘in a way that also delivers benefits for people and places, including environmental sustainability, social and cultural enrichment, and health benefits” ('Welcome to Wales', p.8). The plan aimed to address a number of challenges facing the visitor economy, notably:
- An over-reliance on regular repeat visitors from the UK and under-performance in new and overseas markets;
 - Below UK average spend by visitors per trip – with no growth since 2012;
 - Seasonality of visits;
 - The need for an effective strategic response post-Brexit.
- 2.12 Although Welcome to Wales was launched several years into the delivery of the TAD operation, it built on the vision of 'Partnership for Growth' and its core priorities resonate with many of the projects supported through TAD. The plan emphasises the three pillars of landscape, culture and adventure as a basis for prioritising development. Among the core objectives are to 'elevate our status' as a visitor destination and 'change perceptions', aspirations that are central to TAD projects.
- 2.13 Visit Wales is encouraging the sector to combine a **local-first focus in terms of 'sense of place', culture, community engagement and benefit, local supply chains, home-grown skills and businesses** with a 'world' perspective in terms of breadth of vision, quality comparisons, welcome, environmental awareness. In terms of Visit Wales' own investment, key priorities will be around 4 core areas of activity:
- Great products and places
 - Quality visitor experiences
 - An innovative Cymru / Wales Brand
 - An engaged and vibrant sector

¹⁵ [Welcome to Wales: priorities for the visitor economy 2020-2025](#)

- 2.14 Success will be measured through ‘hard’ volume and value data, but also through perception and awareness analysis and contributions to the Well-being of Future Generations Act indicators. Development and consolidation of the ‘This is Wales/ Gwlad Gwlad’ Brand will continue. While the overall vision for the visitor economy is set out in ‘Welcome to Wales’, the pandemic has forced the sector to adapt and for all partners to be agile and creative in responding to the unprecedented challenges faced in recent years. Alongside the strategic plan, the Welsh Government has produced ‘Let’s Shape the Future’¹⁶, which sets out the priorities for reconstructing a resilient future for tourism, hospitality and events post COVID-19. Its core focus is to secure a resilient and responsible tourism sector that allows local people and visitors to coexist, ensuring that the Welsh welcome is at the heart of the visitor experience.
- 2.15 The plan includes 8 essential themes:
- Supporting business
 - Valuing people
 - Reopening safely
 - Rebuilding consumer confidence
 - Stimulating and managing demand
 - Developing local visitor economies
 - Transforming the sector to be more resilient
 - Developing tailored recovery plans
- 2.16 Targeting the three key challenges of seasonality, spend and spread continue to be an important focus in stimulating and managing demand as well as the importance on partnership working and collaboration. Visit Wales is committed to drive forward integrated place-making programmes in destinations where tourism is a key economic sector.

¹⁶ [Let's Shape the Future](#)

3. Projects supported through the TAD operation

TAD projects: selection process and overview of projects

- 3.1 The selection of joint beneficiaries through the TAD operation involved a different approach to that taken through previous funding programmes supported through ERDF, including Environment for Growth (E4G). TAD projects were identified and selected through a regional prioritisation exercise, involving regional economic boards and key delivery partners, some of whom became joint beneficiaries. The process involved identifying and short-listing potential projects at a regional level, with the regional economic boards engaged in this process, in discussion with Visit Wales. This contrasts with the approach taken under E4G previously, which involved tendering processes as a means of selecting projects.
- 3.2 Projects were identified before Programme funding was confirmed, which was also a departure from the way in which previous programmes had been planned. There was consensus among stakeholders that this approach was important (and 'unique') in securing buy-in and ownership at the regional level and that it also helped establish partnership working as a key feature of the operation from the outset.
- 3.3 As part of the process of formulating project proposals, joint beneficiaries were required to conduct option appraisals, assessing proposals to develop local sites or attractions against ERDF Programme's investment aims. Projects' alignment with national priorities for the tourism sector was also assessed during this process. The TAD Business Plan summarises the options and scenarios considered by joint beneficiaries during the planning and selection process.
- 3.4 The 12 projects selected, supported and completed as part of the TAD operation were broad in their scope and aims. A list of supported projects and brief description of their focus is set out below. Eight out of the twelve joint beneficiaries are public sector organisations. At the time of compiling this report, all projects have completed. Output data included in section 4 is based on final reports for these projects.

Table 2 Overview of TAD projects

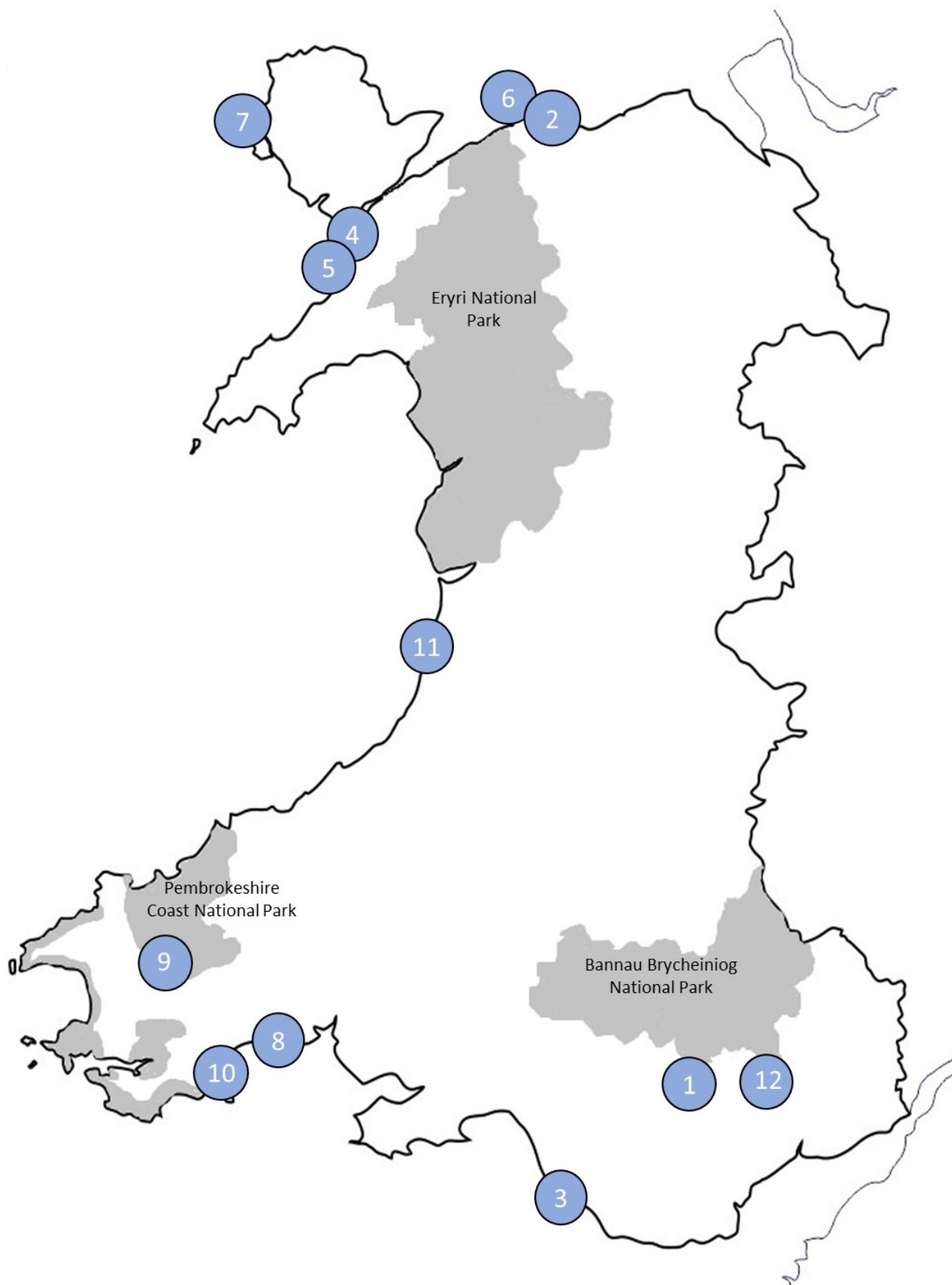
No. in Figure 1	Project / Joint Beneficiary (Location)	Summary
1	<p>Adventure Welsh Valleys / Rock UK Adventure Centres Ltd</p> <p>(Merthyr Tydfil)</p> <p>Project start: Oct 2016</p> <p>Project completion: Nov 2019</p>	<p>The project involved the development of a residential adventure climbing regional facility targeting markets across South Wales and the English Midlands situated on the outskirts of Merthyr Tydfil. The project aimed to become a regional outdoor activity hub for South East Wales, working in partnership with other stakeholders and activity businesses including Bike Park Wales and the Brecon Beacons National Park. It involved the extension and refurbishment of the old colliery building, converting it into a modern, welcoming leisure facility – including a new cafe, outdoor play area and additional outdoor activities, with en-suite accommodation for 100 residential guests.</p>
2	<p>Colwyn Bay Waterfront / Conwy CBC</p> <p>(Colwyn Bay Promenade)</p> <p>Project start: July 2016</p> <p>Project completion: Dec 2022</p>	<p>This project built on Phase 1 developments on the waterfront, improving a further 1km of the promenade, creating additional spaces for permanent and mobile refreshment kiosks, additional car parking and new activity and interest points. As such the investment through TAD further enhanced the re-emergence of Colwyn Bay as a key visitor destination in North Wales and provided improved local amenity within Communities First wards. Creating an additional kiosk of 100sqM and space for 3 additional seasonal concessions as part of the scheme will provide additional business and employment opportunities as well as further visitor facilities and increased spend in the locality.</p>
3	<p>Porthcawl Resort Investment Focus – (PRIF) Waterside / Bridgend CBC</p> <p>(Porthcawl)</p> <p>Project start: April 2016</p> <p>Project completion: June 2023</p>	<p>The overall aspiration was to make Porthcawl a high quality signature destination within Wales, which would deliver a wide range of activities and facilities to attract new visitors, both at home and overseas, and provide compelling reasons to visit. The project has developed a bustling waterside; a base for watersports excellence not matched in Wales with complementary hubs: watersports and maritime. A place that delivers high quality waterside leisure and sporting facilities and attractions including a flagship watersports centre. PRIF waterside has delivered a harbour enhancement facility that will improve the offer for harbour users whilst providing business opportunities locally and creating a new community facility, retail units, changing places toilet and an events area on the Cosy Corner Site, on Porthcawl waterfront.</p>

<p>4</p>	<p>Caernarfon Waterfront / Gwynedd Council (Caernarfon)</p> <p>Project start: March 2016</p> <p>Project completion: May 2023</p>	<p>The project involved investment in key attractions on the Caernarfon Waterfront to ensure it becomes one of Wales' must visit destinations.</p> <p>Welsh Highland Railway Terminus: Development of new station/terminus facilities for the internationally renowned Ffestiniog and Welsh Highland Railways within the Slate Quay area.</p> <p>Galeri Creative Enterprise Centre: Enhancement to the Galeri Creative Enterprise Centre to expand the cinema offer and also to programme other cultural events and night-time entertainment that will appeal to tourists.</p> <p>Waterfront Environment: Access and Linkages - investment in the development of the waterfront and the development of links between the previous and proposed investments to integrate relevant individual developments into a cohesive single destination.</p>
<p>5</p>	<p>Caernarfon Castle Kings Gate / Cadw, Welsh Government (Caernarfon)</p> <p>Project start: Sept 2016</p> <p>Project completion: Dec 2022</p>	<p>The aim of the project was to improve access to the upper levels of the castle's main tower – including disabled access – via a lift and new viewing platform. The project also provided new disabled WC facilities, upgraded the existing gift shop, provided a small café offer for visitors and improved the facilities for Cadw's custodians.</p> <p>Central to the enhancement project is new artistic interpretation focusing on the theme 'the hands that built the castle.' This modern approach to interpretation aims to present the story of the castle from a different perspective encouraging visitors to re-think how they perceive the site's history.</p>
<p>6</p>	<p>Venue Cymru / Conwy CBC (Llandudno)</p> <p>Project start: Nov 2017</p> <p>Project completion: Oct 2022</p>	<p>The Venue Cymru reconfiguration involved a range of redevelopment work packages at Venue Cymru, Llandudno to enhance the venue's market position in the conference and events sector and grow its value to the regional economy.</p>
<p>7</p>	<p>Holy island International Visitor Gateway / Isle of Anglesey Council (Holyhead)</p> <p>Project start: April 2016</p> <p>Project completion: May 2023</p>	<p>Ferry port terminus signage and interpretation for international visitors; access improvements to St Cybi's Church and Roman Fort; new signage and interpretation for self-guided tours on Holy Island; improvements to the visitor centre and toilets at Breakwater Park, Holyhead, and the refurbishment of the toilets at Swift Square, Holyhead.</p>
<p>8</p>	<p>Pendine Land Speed Cultural Centre and Eco</p>	<p>The project involved the development of indoor and outdoor high quality, year round visitor destination facilities that will aim to maximise Pendine's heritage & its</p>

<p>Resort Complex / Carmarthenshire CC (Pendine)</p> <p>Project start: Sept 2016</p> <p>Project completion: March 2023</p>	<p>natural assets to drive forward the resort's future economic regeneration as a 'day and stay' event destination. Specifically the project involves the creation of a new, first of its kind modern and exciting sea front visitor attraction facility. The project aimed to deliver an additional economic boost to the regional economy in excess of £3m per annum and included individual projects:</p> <ul style="list-style-type: none"> ◦ Caban Accommodation - 13 bedrooms/42 beds with ground floor accessible rooms, public accessible changing facilities and 60 cover restaurant. ◦ Museum of Land Speed ◦ Events Arena and Exhibition Esplanade ◦ Children's adventure play area ◦ Dune garden ◦ Improved parking
<p>9 Llys y Frân Park and Activity Centre / Dwr Cymru Welsh Water (Llys y Frân, Pembrokeshire)</p> <p>Project start: Oct 2018</p> <p>Project completion: Dec 2022</p>	<p>The project aimed 'to re-energise Llys y Frân country park and trout fishery to become an iconic tourist destination for SW Wales and the UK as it is developed into a water-themed outdoor activity and educational recreational site'.</p> <ul style="list-style-type: none"> • The existing Visitor Centre has been refurbished and extended to include an attractive and high-quality restaurant; • A new outdoor activity centre has been constructed and provides a base for water sports on the reservoir, land-based activities and a cycling hub. • A bike pump skills area and circular bike trail has been developed to encourage cycling and to act as a cycling hub supporting a wider development of mountain biking in Pembrokeshire. • The woodland and meadows and the environs of the dam have been re-landscaped and interpreted for visitors' enjoyment and education.
<p>10 Wales International Coastal Centre / Saundersfoot Harbour Commissioners (Saundersfoot)</p> <p>Project start: March 2017</p> <p>Project completion: May 2023</p>	<p>The Wales International Coastal Centre comprised four linked developments and improved parking facilities that create a unique coastal tourism experience both through active and passive participation, engaging all ages and abilities, addressing the current missed tourism opportunities within the region establishing Saundersfoot as an iconic marine coastal tourism destination for Wales.</p> <p>The work package included: Marine Centre of Excellence and Coastal Storm Centre; Ocean Square Heritage & Arts</p>

<p>11</p>	<p>Wales to the World / Vale of Rheidol Railway Ltd (Vale of Rheidol, Aberystwyth) Project start: March 2016 Project completion: June 2023</p>	<p>Centre; Coastal Schooner Centre; and National Events Deck; new car parking layout.</p> <hr/> <p>To create a new visitor experience at the Aberystwyth terminus of the Vale of Rheidol railway. Protect the historic rolling stock and enable disabled access to all areas of the railway. Conversion of existing engine shed into a new visitor attraction and steam engine museum; new platform, ticket office and café; relocation of toilet block and canopy; and storage building for the Heritage coaching stock.</p>
<p>12</p>	<p>Monmouthshire and Brecon Canal Adventure Triangle / Torfaen & Caerphilly CBC (Monmouthshire & Brecon Canal) Project start: April 2017 Project completion: March 2023</p>	<p>The project was delivered by a partnership consisting of Torfaen CBC (Lead), Caerphilly CBC, and the Canal and River Trust. The M&B Canal Adventure Triangle project aimed to develop outdoor recreation, tourism and leisure activity along the canal in Torfaen and Caerphilly and connecting upland area of Mynydd Maen. The resulting destination forms an 'Adventure Triangle' bounded by the Canal and the A472 Crumlin to Pontypool Road.</p> <p>A programme of 16 complementary investments in infrastructure was proposed along the canal corridor to develop its offer as a major destination and resource for outdoor recreation and tourism in SE Wales. The proposed activities include the development of visitor facilities, access improvements, cycling and walking infrastructure, and the restoration and enhancement of the historic structure of the canal.</p>

Figure 1: Map illustrating locations of TAD projects



Tourism Attractor Destination Marketing Fund

- 3.5 The original Business Plan included a marketing budget of £2m to maximise promotional opportunities during the course of the operation to target new and lapsed visitors. In 2018/19, an approach was developed to carry out joint and complementary marketing, which included:
- A pan-Wales marketing campaign with a focus on TAD projects;
 - Procured resource to focus on setting/directing TAD marketing assets, and
 - TAD marketing fund to be offered to joint beneficiaries and project partners.
- 3.6 The intention was that the marketing fund would be used to allocate money to partners, which would be matched by Visit Wales. The application process was launched in late 2019. Applications were evaluated and the fund was due to be accessed by partners in April 2020.
- 3.7 However, the COVID-19 pandemic prevented the allocation of funds. In April 2020 90 per cent of the Visit Wales budget was repurposed for business support. Wider marketing activity was largely curtailed for the remainder of 2020, other than delivery of responsible visit messaging when restrictions lifted. Throughout 2021 and during part of 2022, as spikes in COVID-19 cases occurred, marketing content and messaging changed to reflect the immediate priorities regarding recovery. For example, marketing focused on supporting areas such as hospitality and city/town centre products and also, unprecedented for Visit Wales, involvement in campaign activity to encourage staff recruitment and retention (via the Experience Makers campaign activity with Working Wales, still in place e.g. [Work in hospitality and tourism | Working Wales](#)).

4. Data collection processes at operation and project level

Operation monitoring arrangements

- 4.1 The monitoring and management of TAD relied on two pivotal relationships, or rather sets of relationships. Firstly, the relationship between WEFO and Visit Wales; and secondly the relationships between Visit Wales and joint beneficiaries. Both were critical to the effective delivery of the operation, particularly given the changes experienced and the disruption caused by external events during the operation.
- 4.2 WEFO, as the managing authority responsible for the European Structural Funds in Wales, approved and monitored the operation. Visit Wales, as the lead beneficiary, was responsible for managing all aspects of the operation, including decisions about which projects to include. Visit Wales worked directly with project representatives to provide information and guidance to joint beneficiaries, and ensured that claims and reports were delivered by individual projects as required. This process was managed within Visit Wales by the TAD programme team. Funded projects were required to provide quarterly claim forms to Visit Wales, accompanied by progress reports. Progress reports, which are a fundamental part of identifying and managing risks during operation delivery, were required before payments were authorised. Visit Wales paid the financial claims to joint beneficiaries before claiming the ERDF back from WEFO.
- 4.3 In addition to quarterly financial claims, the following information was required as part of quarterly progress reports:
- An update of progress and achievements in the relevant period;
 - Expenditure and variance in delivery profile;
 - Forward plans over the next period;
 - Progress made against cross-cutting themes;
 - Issues relating to monitoring data and planned evaluation activity;
 - Publicity;
 - Procurement activity undertaken;
 - Progress against milestones or conditions that apply to the operation;

- Payments received;
- An updated risk register.

4.4 The dates of quarterly returns across the operation were staggered so that Visit Wales did not receive returns and claims from all joint beneficiaries during the same month. The rationale for this was to spread payments and monitoring activity (and associated engagement with joint beneficiaries) more evenly across the calendar year, helping to ensure a more even workload for the relatively small operational team in Visit Wales. In the view of joint beneficiaries and stakeholders interviewed, this was deemed to be a prudent approach. Drawing on information provided by joint beneficiaries, Visit Wales in turn provided quarterly claims and reports to WEFO.

Data on TAD operation projected expenditure

4.5 Table 3 presents total TAD operation project expenditure, based on the 2022 reprofiling of the operation. It notes total profiled expenditure, ERDF allocation and match funding for each project. Total expenditure incurred by projects was not available at the time of preparing this report – not all projects had reported their match funding related expenditure at the time of writing. TAD operation expenditure was projected to be £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).

4.6 The most notable changes to the overall operation profile were:

- Old College, Aberystwyth: Total projected costs changed when the Old College project was added and later removed from the operation. Removing the Old College reduced expenditure by £5.7m, however this was partially offset by an increase in overall costs across all projects due to a range of factors, including inflationary price increases across the construction industry.

- Llys y Frân: an increase of £596k due to the need to retender for the main construction contract when the original contractor went into administration. The increase in project costs were met by Dwr Cymru.
- Porthcawl Maritime Centre: this project, led by the Credu charity, was withdrawn from the TAD operation due to the project becoming financially unviable as a result of the withdrawal of match funding. ERDF funding was vired to the Bridgend PRIF project, led by Bridgend CBC.
- Bridgend PRIF: a £2.5m increase in costs due to the addition of an additional work package – the Cosy Corner project - to Bridgend’s PRIF Business Plan. This work package is funded from an additional £1m of ERDF vired from the Credu project and increased match funding from Bridgend County Borough Council.
- Pendine: project costs increased by £4.3m. This was primarily due to two incidents involving damage to the roof during construction and also the retendering of the contract due the original contractor going into administration. The additional costs were met by Carmarthenshire County Council.
- Kings Gate, Caernarfon Castle: Project costs increased by £2.2m because of general cost increases within the construction industry and COVID related costs. The cost increase was met by Cadw.
- Saundersfoot Harbour: Project costs increased by £1.1m due to overall prices increases within the construction industry and covid delays. The increase in costs is being matched by an increase in borrowing and from Saundersfoot Harbour Commissioners’ own resources.
- Vale of Rheidol: Project costs increased by £827,758 due to overall price increases within the construction industry. These were met by the Vale of Rheidol Railway. The project has also attracted increased match funding from the Coastal Communities fund.
- Monmouthshire and Brecon Canal Adventure Triangle: There was an overall reduction of £382,955 to the total project costs. This was primarily due to

the withdrawal of the Pontymoile Activity Centre Work Package but was offset by cost increases to other work packages within the project.

Table 3: Project TAD operation expenditure by individual project (2022 reprofile)

	Total expenditure	ERDF allocation	Match funding
	Delivery profile 2022	Delivery profile 2022	Delivery profile 2022
Llys y Frân	£3,335,675	£1,700,000	£1,635,675
Venue Cymru	£2,791,642	£832,262	£1,959,380
Colwyn Bay	£3,816,405	£1,403,733	£2,412,672
Caernarfon Waterfront	£6,611,985	£2,410,634	£4,201,351
Caernarfon Castle	£5,313,553	£1,040,758	£4,272,795
Monmouthshire & Brecon Canal	£4,291,824	£1,645,691	£2,646,133
Vale of Rheidol	£3,309,260	£1,612,946	£1,696,314
PRIF, Bridgend CBC	£5,722,825	£2,565,940	£3,156,885
Pendine	£11,323,709	£3,000,000	£8,323,709
Rock UK	£4,738,288	£2,543,000	£2,195,288
Saundersfoot	£10,118,967	£4,350,000	£5,768,967
Holy Island	£2,820,207	£1,737,927	£1,082,280
Other			
Old College/Hen Goleg	£361,831	£151,969	£209,862
Porthcawl Maritime Centre	£1,291,914	£1,041,380	£250,534
Visit Wales	£1,352,858	£700,000	£652,858
Total	£67,233,743	£26,736,241	£40,497,502

4.7 As outlined in section 3, the pandemic led to a re-shaping of marketing activities associated with the operation. As part of the re-profile of 2022, the ERDF marketing allocation was reduced to £600,000. Marketing expenditure was included within the total Visit Wales expenditure of £632,450. This overall figure was made up of staff, evaluation and marketing costs. The ERDF claimed for Visit Wales' expenditure was £394,017. Visit Wales expenditure was therefore lower than the £1.35m set out in the reprofiled operation in 2022.

Progress against operation-level indicators

4.8 Below we present the aggregated data from all projects in relation to the four WEFO indicators. Across the operation as a whole, achievement was broadly positive. Overall the land developed across TAD projects exceeded the target for the operation. Although targets across the three other indicators were not met, in the case of premises created/refurbished and jobs accommodated, the final outputs were only marginally below the anticipated amounts. It is important to bear in mind the context in which the TAD operation was delivered: in view of the disruption caused by the pandemic and given the challenges faced by projects through a range of unforeseen external factors, the outputs presented in Table 4 represent a considerable achievement.

Table 4: TAD operation achievement against WEFO indicators and targets

WEFO Indicator	TAD target (reprofiled operation, 2022)	Final outputs reported in closure reports for all 12 projects	% of target attained
Land developed (Ha)	25.4	26.2	103.2%
Premises created or refurbished (m ²)	20,591	19,830.5	96.3%
Jobs accommodated (number)	312.3	306.6	98.2%
SMEs accommodated (number)	50	43	86.0%

NB The data set out in this table is based on output data reported by TAD projects in their closure reports. A breakdown of how each project's outputs contributed to the totals included above is set out in Annex C.

5. Evaluation findings

- 5.1 This section of the report presents findings in relation to the outcomes of the operation. It draws on information and evidence from multiple sources, including desk-based reviews of operation and individual project business plans, qualitative research with joint beneficiaries and stakeholders at multiple points in time, and reported final project output data and closure reports.

Project-level impacts

- 5.2 The range of outcomes referenced in this section reflects the diversity of projects supported. During the interim phase of the evaluation, project representatives were asked to summarise the impacts they expected their projects to deliver. These issues were discussed in order to explore a number of points: i) to what extent the impacts cited were aligned with the programme and operation targets; ii) what project-specific impacts were presented; iii) whether any common themes or threads run throughout the TAD projects.
- 5.3 The evaluation found alignment between the projects' anticipated outcomes and WEFO indicators, albeit some indicators and related outcomes feature more prominently than others. There was an emphasis on physical redevelopment and regeneration as an intended outcome, which aligns with the 'land developed' and 'premises created or refurbished' targets. However, unprompted, very few project representatives made reference to increasing employment as an intended outcome. There was a recognition that successfully delivered projects would provide employment opportunities or safeguard employment, however very few joint beneficiaries presented their projects as investments driven by the strategic aim of increasing local employment. All projects, however, acknowledged WEFO's targets as being overarching performance measurements against which core project delivery would be assessed.
- 5.4 As might be expected, joint beneficiaries outlined a range of anticipated impacts, reflecting the breadth of TAD projects also the level of ambition supported through

the operation. Below is a summary of issues raised, and it is possible to categorise these impacts under three inter-linked and inter-dependent headings:

Table 5: Anticipated wider impacts of TAD projects

Impacts on visitors / tourism offer (e.g...)	Impacts on places (e.g...)	Wider community and economic benefits (e.g...)
<ul style="list-style-type: none"> • Increase visitor numbers; • Improve the visitor experience; • Diversify a site’s offer to visitors; • Improve accessibility for visitors to sites/locations; • Reduce seasonality. 	<ul style="list-style-type: none"> • Upgrade physical infrastructure; • Support regeneration in the local area; • Serve as a catalyst for other associated developments. 	<ul style="list-style-type: none"> • Deliver commercial benefit / support joint beneficiaries sustainability; • Safeguard and create jobs; • Contribute to civic pride / sense of place; • Challenge and re-define perceptions of sites/local areas.

5.5 Thirdly, we considered what commonalities, if any, there were across the anticipated impacts of these diverse projects. Taking their cue from the overarching TAD operation business plan, all projects aspired to have a transformative effect on visitors or on their local areas. This aspiration to bring about transformational change was, however, not always clearly defined. One consistent feature that project representatives aspired towards was to raise the quality of their sites or attractions in a marked way – to elevate the visitor experience and alter perceptions of these destinations.

5.6 Following on from the issues summarised above, the remainder of this report is structured according to:

- Resilience and flexibility during the COVID-19 pandemic
- Strategic alignment of the operation
- Transformational change at sites
- Transforming perceptions of places and attracting further investment
- Business planning and viability
- Addressing seasonality

- Adding value to local regeneration
- Establishing new partnerships through the TAD operation
- Health and wellbeing
- Visitor perceptions of TAD sites

Resilience and flexibility during the COVID-19 pandemic

Finding:

- Despite the significant impact of the pandemic on the tourism sector, joint beneficiaries demonstrated great resilience and commitment in taking projects forward towards completion, supported by operation managers in Visit Wales. This has required all partners to work through the challenges they faced in an agile and flexible way.

- 5.7 The impact of the pandemic on the tourism sector is widely recognised. The Welsh Government’s ‘Let’s Shape the Future’ plan recognised that “tourism, hospitality and events businesses have faced extreme challenges...and devastating losses to custom and anticipated income” (Welsh Government, 2021)¹⁷. Projects supported through the TAD operation were impacted significantly, particularly those visitor attractions that have enhanced or developed indoor facilities. A number of projects reported major delays in completion timeframes (on average delays of between 12-24 months) brought about by the pandemic and other factors, including problems associated with procurement or contractors. Pendine and Llys-y-Frân projects experienced contractors going into administration, which impacted significantly on timeframes, costs, and project planning.
- 5.8 The main focus for a number of joint beneficiaries has been on survival rather than recovery and a number of projects were put on hold or directly impacted. Venue Cymru was re-purposed as a COVID-19 field hospital, which meant a further programme of refurbishment following the TAD investment. The majority of attractions continued to operate with reduced hours and limited capacity. Despite

¹⁷ [Let's Shape the Future](#) p3

some bounce-back driven by the staycation market, TAD attractions continue to operate in a challenging and uncertain marketplace.

- 5.9 Other TAD projects, particularly those that have a focus on outdoor activity and experiences have seen a sharper bounce-back following the easing of some lockdown restrictions. The package of projects in Porthcawl have made a positive contribution in the resort's vision to become a high-quality signature destination within Wales. The TAD investment has led to a huge increase in car park usage in Rest Bay and greater footfall across the seafront and harbour. Usage of the multi-purpose watersports and café facility at Rest Bay has led to a significant increase in visitor numbers and spend: 21,000 visitors spending £245,000 at the facility in 2021 compared to 6,000 visitors spending £70,000 in 2018.
- 5.10 All TAD projects have recognised the need for flexibility in business planning, project development and operational management. The impact of the pandemic and the realities of a continuing economic downturn has led to many joint beneficiaries re-thinking their future business plans and operational priorities. Joint beneficiaries reported that the overall operational management of TAD by Visit Wales has been supportive of the need to adapt project plans and work through re-profiling in a spirit of close cooperation.
- 5.11 Looking ahead, one of the key considerations is the need to build recovery through the domestic tourist market, catering to the growing staycation market in the UK. A number of joint beneficiaries are adapting their planning to meet new trends, specifically the growth in demand for outdoor experiences and activities linked to the natural environment. Rock UK has re-evaluated its business plan and restructured the centre to secure significant cost savings. The residential centre is beginning to pick up but they report that securing school bookings for the centre proved more challenging than anticipated during the first years of operation of the residential centre.
- 5.12 Despite major challenges brought on by the pandemic, joint beneficiaries have shown great resilience and commitment to complete delivery and to ensure that their attractions are sustained and strengthened in future.

Strategic alignment of the operation

Finding

- TAD was strategically well aligned with Welsh Government policies to support tourism and regeneration. The operation also directly supported the priorities set out in the West Wales and the Valleys ERDF Operational Programme.

- 5.13 As is noted in Section 2, the TAD operation business plan was designed to align with the Wales tourism strategy, 'Partnership for Growth (P4G)'¹⁸. The priorities that underpinned that strategy are reflected in the aims of the operation and have been realised through the achievements of individual projects. This includes promoting a high-quality tourism offer, overcoming issues of seasonality by extending the tourism season at key sites, and supporting partnership approaches to innovate and drive improvements to visitor experiences. TAD is considered to be complementary to other Visit Wales schemes and strategies. Some interviewees noted that the operation was providing additional impetus or a 'final push' for some longer-term plans. This demonstrates that there were strategic and pragmatic considerations behind the selection of some projects. Stakeholders noted that TAD complements other strategic funding schemes operating by Visit Wales, such as the Tourism Investment Support Scheme (TISS) and the Tourism Amenity Investment Support Scheme (TAIS).
- 5.14 The TAD operation supported the ERDF objectives under Priority 4.4, which aimed to increase employment through investments in prioritised or regional infrastructure. TAD's investment in tourism infrastructure projects supported a priority sector of the foundational economy identified by the Welsh Government. TAD projects continue to contribute to increasing employment both directly and indirectly through their operational activity, through construction activity supported and supply chains.
- 5.15 In the context of the wider West Wales and the Valleys ERDF Operational Programme, TAD incorporated the core design principles which guided the approach to using Structural Funds. The operation demonstrated greater concentration of resources, focusing on doing fewer things in fewer places for

¹⁸ [Partnership for Growth, Welsh Government Strategy for Tourism 2013-2020](#)

greater impact. TAD also provided examples of integration of funding with wider investment programmes across the public sector. This showed that the operation complemented and aligned with the wider ERDF programme and Specific Objective 4.4 under which the operation is funded.

Transformational change at sites

Finding:

- The TAD operation has had a transformative effect on individual tourism sites as a direct result of the significant investment provided in regionally prioritised locations. The operation has enhanced the quality of the visitor offer by supporting the construction of new facilities and improvements to existing sites.

5.16 ERDF Programme documentation emphasised the importance of concentrating Structural Fund resources in order to achieve a transformational impact. This language permeated the TAD Business Plan, which noted:

“The operation provides a framework for the development of a limited number of regionally-prioritised tourism sites which have the potential to become iconic, must see tourism destinations within the programme area. The scale of the capital investment envisaged has the potential to deliver transformational change for the Welsh visitor economy.”

5.17 Individual projects, in turn, echoed these aspirations and provided evidence of transformation at their sites through the upgrading of existing physical infrastructure or the development of new facilities and amenities. Rest Bay Watersports Centre (Bridgend CBC) has developed Rest Bay as a leading coastal activity destination. Rock UK has developed a larger range of activities and residential offer for visitors, including aerial adventure, archery, orienteering, all weather sports pitch, bushcraft and hill walks and a new cafe. At Caernarfon Castle, the development of the King’s Gate involved a complex engineering feat to install a lift in a World Heritage Site, facilitating access to areas of the ancient monument previously beyond the reach of individuals with limited mobility. The investment in additional facilities at Cwmcarn

has seen visitor numbers to the site increase from 239,181 in 2018/19 to over 350,000 in 2022/2023.

Transforming perceptions of places and attracting further investment

Finding:

- The operation has led to a shift in perceptions of sites, with indications that projects are attracting further investment.

- 5.18 The TAD operation has had a positive impact on raising the profile of destinations and in attracting private sector investment interest. Project beneficiaries in Caernarfon have collected visitor data demonstrating that the profile generated by Galeri has led to an increase in new visitors to the destination (as well as providing an additional year-round attraction and amenity for the local population). Project representatives and staff report that investment at Rock UK is challenging (and indeed changing) the local and national perceptions of Merthyr Tydfil as a destination for adventure and activity tourism. This is also supported by feedback collected by visitors to the site.
- 5.19 The development of the International Coastal Centre and hosting of the World Rowing Coastal Championships has rebranded Saundersfoot's image as a coastal village able to compete on a national stage with similar UK coastal resorts and harbours.
- 5.20 Private sector investment is an essential component in the effective delivery of regeneration and is a central theme in government policy. Although difficult to quantify, there are examples where TAD investment and delivery is attracting investment. The council has indicated that improvements and enhancements to Porthcawl seafront and promenade is leading to an up-lift in investor interest in development opportunities in and around the town.
- 5.21 The investment at Llys-y-Fran has supported the development of local holiday accommodation providers. This has included a new local campsite development and the refurbishment of local holiday cottages. Due to the success of the development of the outdoor activities hub and additional accommodation at Cwmcarn Forest (Monmouthshire and Brecon Canal Adventure Triangle), the site is

looking at additional funding to further develop their activities and facilities. This has already received some interest from private operators.

5.22 Despite concerns raised by joint beneficiaries about the withdrawal of a dedicated fund to support marketing and promotion, TAD projects have been included as part of Visit Wales marketing activities as valuable additions and enhancements to the overall Wales product offer to consumers. They have been covered in a range of activities including:

- Promotion via Visit Wales websites with circa 8 million users annually and via social media (circa 1.8 million followers across multiple platforms)
- Enabling of individual product listings on the Visit Wales site – e.g. all projects can own and manage their own listing information on VisitWales.com
- Press and media visits; Visit Wales run these throughout the year, many in partnership with Visit Britain, that have resulted in media/press coverage
- Ministerial press visits and activity picked up in consumer media, which have focused on projects funded by TAD, including Llys y Fran, Pendine, Saundersfoot, Caernarfon Castle/Kings Gate and Porthcawl.

Business planning and viability

Finding:

- Generating sufficient revenue streams to cover operational and management costs continues to be a challenge for a number of projects, particularly those operated by public agencies.

5.23 All TAD projects recognised the need for flexibility in business planning, project development and operational management. The impact of the pandemic and the realities of a continuing economic downturn has led to many joint beneficiaries re-thinking their future business plans and operational priorities. They report that the overall operational management of TAD by Visit Wales has been supportive of the need to adapt project plans in many cases.

- 5.24 A key consideration is to continue to build recovery through the domestic tourist and visitor market, catering to the growing staycation market in the UK and changes in consumer behaviour and trends. Despite TAD investment, a number of attractions continue to rely on a revenue subsidy. A number of joint beneficiaries are adapting their planning to meet new trends, specifically the growth in demand for outdoor experiences and activities linked to the natural environment.
- 5.25 Rock UK re-evaluated its business plan and restructured the centre in order to deliver significant cost savings. The residential centre is beginning to pick up but they report that it remains difficult to secure school bookings for the centre.
- 5.26 The remodelling work at Venue Cymru created four spaces seating between 200 and 350 delegates each which when used in conjunction with the Auditorium as a main plenary space has enabled Venue Cymru to bid for a number of new events that would not otherwise have considered Llandudno as a destination. Three new UK national medical and one scientific conference have already been secured as a direct result of this work.
- 5.27 Cwmcarn is looking to introduce new adrenaline activities to increase the length of visitor stay and spend and reduce the revenue subsidy provided by the council. Llys y Frân is developing a new camping facility to generate additional revenue to offset management and maintenance costs.

Addressing seasonality

Finding:

- The TAD operation has enhanced the year-round tourism offer at sites; over time, this has the potential to help address the seasonality of demand which contributes to low productivity and uncertain employment opportunities in the industry.

- 5.28 A core policy objective of Visit Wales is to maximise the economic and social benefits of tourism by promoting greater geographical and seasonal spread of visits. In many instances, TAD delivery has helped to address seasonality through providing all-year experiences. Investment at Llys-y-Frân has increased the operation to seven-days a week and has led to the development and delivery of off-

peak events and activities, which have proven successful. The expansion of facilities at Venue Cymru mean that events and conferences can be scaled up throughout the year. This is likely to help reduce the impact of seasonality, bringing increased numbers of visitors to the venue and Llandudno town year-round over time. The Wales International Coastal Centre has generated an up-lift in tourism within Saundersfoot throughout the winter months, with all retail shops remaining open throughout the year.

- 5.29 A number of projects have introduced events and activities outside the main holiday period to extend the season and generate additional spend. The Vale of Rheidol Railway will extend its programme of events during the winter through the use of the Great Western Railway Shed as a venue. Empirical evidence collected by the council has shown that the promenade in Colwyn Bay has experienced a significant increase in visitor numbers and use of the beach and promenade during the off-season. Many local user groups now use the space for formal activities such as exercise classes and sea swimming.

Adding value to local regeneration

Finding:

- The TAD operation has supported and served as a catalyst for the regeneration of local areas, underlining the contribution that capital investment in visitor attractions can make as part of wider economic development plans.

- 5.30 An outcome reported consistently by joint beneficiaries was the contribution made by the operation towards supporting local regeneration, helping to tackle broader social and economic challenges experienced in some of Wales' more deprived communities. The focus of capital investment to improve and enhance the visitor experience is making a positive contribution to other objectives.
- 5.31 Investment at Colwyn Bay waterfront is securing the long-term protection of Colwyn Bay including offering a modern, sustainable and attractive public realm to draw new visitors to the area. Similarly, investment at Saundersfoot has "primed regeneration for the area" through establishing a new water activity venue and

family activity facilities that complement and strengthen the town's current leisure and commercial maritime operation. The package of projects at Caernarfon Waterfront are providing both community facilities and services for local people and facilities for visitor. The new station facilities at the Welsh Highland Railway Terminus is building its reputation as a community venue for the town. The pre-project business plan for Galeri anticipated around 25,000 cinema visits in the first 12 months after opening whereas the actual number of visits during the first year of opening was 63,257.

- 5.32 Importantly for Visit Wales, the operation added significant value to local regeneration projects, through significant investment in priority sites. The new Welsh Highland Railway station in Caernarfon forms one part of a wider regeneration of the town's quayside and waterfront. Representatives at a range of sites – including Pendine, the Monmouthshire and Brecon Canal, Saundersfoot and Colwyn Bay – provided examples of the positive impact on local businesses, with developments serving as a catalyst for hospitality and catering businesses to open or expand their operations.
- 5.33 Evidence collected during the evaluation indicates that the operation has helped to change perceptions on the value of the visitor economy. TAD has resulted in a broader recognition of the benefits of involvement in tourism development and the wider visitor economy. Discussions with Dwr Cymru indicated that the success of TAD investment has led to corporate recognition of the economic, social and environmental value of tourism development and diversifying their core activities into visitor product development. Following the success of TAD investment at Llys-y-Frân, the company now has the confidence and commitment to create a network of visitor destinations across its portfolio of sites in Wales.

Establishing new partnerships through the TAD operation

Finding:

- The TAD operation enabled new local partnerships to be formed which supported project delivery. The network of joint beneficiaries also

benefitted from opportunities to discuss project delivery and learn from each other's experiences.

- 5.34 The TAD operation has led to the creation of new partnerships, which joint beneficiaries reported are likely to be sustained and built upon as further opportunities are explored. Joint beneficiaries and wider stakeholders reported that collaboration between a range of partners has been effective and has helped generate consensus and buy-in around the design, development and delivery of projects. This is specifically the case in terms of projects that have a 'package' of projects, for example the Adventure Triangle (Monmouthshire and Brecon Canal) and the Caernarfon Waterfront suite of projects. Joint beneficiaries noted that partnership working is seen as being resource intensive.
- 5.35 Bringing joint beneficiaries together during workshops from the start of the operation was seen as being helpful in enabling information, knowledge and experiences to be shared between project representatives. This provided joint beneficiaries with valuable insights into each other's projects and also enabled discussion around common challenges and solutions as part of project delivery.

Health and wellbeing

Finding:

- TAD projects are contributing to well-being by providing access to physical recreation opportunities for residents in local communities and visitors.

- 5.36 A number of projects have enhanced opportunities for residents and visitors to participate in physical recreation activity and to pursue outdoor activities. Although difficult to quantify the impacts associated with this, TAD is contributing to wider well-being outcomes given the mental and physical health benefits of increased access to the natural environment.
- 5.37 The Colwyn Bay Waterfront development has increased opportunities for events such as triathlons and charity walks. Many community groups also use the space including fitness and outdoor swimming groups. Investment at Pendine has created

indoor and outdoor spaces for the local community to meet, promoting health and wellbeing, combatting isolation and generating pride in the village.

- 5.38 As a result of the towpath improvements along the Monmouthshire and Brecon Canal, more walkers and cyclists are able to use and access the canal more safely, which has contributed to increased health benefits for local people and visitors.

Visitor perceptions

- 5.39 The following findings in relation to visitor perceptions are based on survey responses from visitors to four TAD sites. The findings are based on a small sample of 371 completed questionnaires across the four sites in question, which are Vale of Rheidol, Llys y Frân, Rock UK and Welsh Highland Railway (part of the Caernarfon Waterfront project). The analysis should therefore be treated with a degree of caution, given the limitations of the sample and coverage: the findings below should be considered as being illustrative of the views and experiences of visitors to the locations in question and cannot be said to be representative of visitors' perceptions of TAD more generally. The key findings are:

- **TAD sites as attractors:** Survey respondents were asked to indicate (on a scale of 1-10) to what extent TAD sites influenced their decision to visit that particular area of Wales. 54 per cent of respondents answered 8-10, indicating that the site was a significant factor in their decision to visit that town, location or area.
- **TAD sites drawing new visitors:** Among those who completed the survey 45 per cent across all four sites noted that this was their first visit.
- **Impact on visitors' perceptions of quality:** Of those who had visited the sites previously 72 per cent answered that the overall visitor experience had 'improved' compared with their previous visit. A further 24 per cent of survey respondents answered that the overall visitor experience had 'not changed' and small proportion of 4 per cent answered that it had 'worsened' compared to their previous visit.
- **Overall visitor satisfaction with site visit:** Respondents were asked to indicate (on a scale of 1-10) how satisfied they were with the overall visitor

experience during their visit. 90 per cent of respondents answered 8-10 indicating that respondents were overall satisfied with their visit. 63 per cent of respondents across the four sites gave a score of 10 indicating a high number felt 'Very satisfied' with their visit.

- **Future revisits to TAD sites:** 80 per cent of survey respondents said that they would be likely to revisit the site in future.
- **Visitors recommend sites to others:** When asked, 94 per cent of survey respondents said that they would recommend the site to others.
- **Seasonality of TAD sites:** Survey respondents were asked if they would visit the site out of season (i.e. between October and March), 68 per cent answered that they would.

6. Integration of cross-cutting themes and the Welsh language in the operation

- 6.1 The TAD Operation integrated the ERDF 2014-2020 cross cutting themes (CCTs) as part of delivery across the 12 projects funded. The cross-cutting themes were:
- Equal opportunities and gender mainstreaming;
 - Sustainable development, and
 - Tackling poverty and social exclusion.
- 6.2 The Welsh Government's ambition is for the tourism sector to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of communities within the operation area. The TAD operation comprised a number of wide-ranging projects, which cover multiple areas of potential environmental impact, equal opportunity and gender mainstreaming, and tackling poverty and social exclusion. A key emphasis for joint beneficiaries was to ensure that cross-cutting themes were embedded in project development, appraisal and monitoring from the outset.
- 6.3 The Visit Wales TAD operation included a monitoring analyst, who was responsible for managing and monitoring the 12 TAD projects' progress, including progress made in relation to the cross-cutting themes profiled in individual project business plans. The role provided central support to all projects to ensure that they were managed and monitored appropriately to enable an assessment of economic and environmental impacts.
- 6.4 The critical test of the effectiveness of the TAD operation's approach to CCTs was the extent to which they were embedded across the twelve projects and projects' success in delivering against profiled CCT indicators. Project business plans included varying numbers of cross-cutting theme targets, which joint beneficiaries reported on throughout the operation. Final project documentation included an assessment of whether targeted CCT case level indicators had been achieved, supported by evidence and commentary. Analysis of projects' CCT assessments reveals that four projects had achieved all CCT indicators, with the remaining achieving between 58 per cent and 93 per cent of the indicators. Across the

operation as a whole, 127 out of 147 CCT indicators were achieved, which equates to 86 per cent.

6.5 During interviews, a number of joint beneficiaries noted that supporting CCTs represented a continuation of previous work and, in many instances, aligned closely with existing strategies, policy objectives and programme delivery. This was particularly the case where projects were led by local authorities, where there appeared to be an effective integration of CCT in project design and development and the appraisal process. Indeed, the increasing importance and emphasis of the Well-being of Future Generations Act as a framework for public bodies for long term actions has meant integration of CCTs in project development and delivery.

Table 6: Summary of TAD project and operation achievement of CCT indicators

	Total CCTs profiled / targeted	Total reported achieved in closure reports	% achieved
Llys y Frân	15	15	100%
Venue Cymru	8	6	75%
Colwyn Bay Waterfront	6	6	100%
Caernarfon Waterfront	13	11	85%
Caernarfon Castle	12	9	75%
Monmouthshire-Brecon Canal	13	11	85%
Vale of Rheidol	13	13	100%
Bridgend	13	10	77%
Pendine	15	14	93%
Rock UK	13	11	85%
Saundersfoot	14	14	100%
Isle of Anglesey	12	7	58%
Total operation	147	127	86%

Equal opportunities and gender mainstreaming

Improved accessibility to sites for disabled people

6.6 A core element of the operation was the requirement that all destinations and attractions are accessible to visitors regardless of physical disability, sensory impairment, learning disability, mental health problem or any other impairment. TAD projects reported a range of ways in which accessibility for disabled people had been improved:

- King's Gate, Caernarfon Castle: A key objective of the project was to make inaccessible areas of the Castle available to a wider audience including the instalment of a new lift to increase physical accessibility through this part of the castle.
- Llys y Frân: Mountain bike trails built to Project Enduro specification which will enable the use of 4 wheel gravity bikes designed for disabled users when they become available on the market.
- Multiple sites:
 - Improved access for disabled visitors (Bridgend Land Train, bedrooms in Pendine Eco Hostel)
 - Accessible toilet facilities that go beyond DDA compliance and demonstrates best practice (Welsh Highland Railway, Caernarfon; Porthcawl, Cosy Corner site).
 - Tactile paving has been installed at the proposed access points to ensure that pedestrians, wheelchair-users and those with special mobility requirements can access sites safely (Rock UK, Colwyn Bay Waterfront).

Disability Access Group engagement

6.7 A number of projects' business plans included a target to engage with groups and organisations who represent disabled people to inform the design of facilities and other project outputs. This proved a challenge in some cases, with three projects

reporting they had not succeeded in engaging with relevant groups, as intended.

Examples of where this had been achieved included:

- Porthcawl: Consultation with the Bridgend Inclusive Network Group (BING) on the Cosy Corner design and DDA layout. This group were able to make suggestions to the layout, particularly the Changing Places facility which were actioned by the designers.
- Rock UK: The Summit Centre engages with the National Autistic Society, Mencap and Merthyr Tydfil Institute for the Blind, to ensure they have a good understanding of the adjustments and ways of working needed to maximise accessibility. The refurbished centre was designed for inclusive access – including ground floor access to all meeting rooms and catering facilities and accessible bedrooms with fully DDA compliant WCs and shower facilities.
- Colwyn Bay Waterfront: Consultation with the Conwy Voluntary Access Group regarding the scheme design.
- Llys y Frân: A number of disabled charities were consulted in the design of the overall facilities and activities, including the design of the mountain bike trails.

Older people

In a small number of cases, projects reported that they had taken steps to remove barriers for older people to enjoy sites. This included building rest areas along walking trails at Llys y Frân and also incorporating trails of various lengths and difficulty to ensure options for all ages and walkers of all abilities. Vale of Rheidol noted that its manned booking office enables visitors who many not have access to the internet to book tickets over the counter.

Sustainable development

- 6.8 For capital projects, the sustainable development CCT has had a clear impact on design. The view was consistently expressed that sustainable principles are an integral part of build design. In a number of instances, projects are looking to achieve the highest excellence awards in terms of construction and operation. This has certainly been a core principle for the Colwyn Bay Waterfront, which was awarded an ICE Wales Cymru Award in recognition of outstanding engineering achievement.

Local supply chain development

- 6.9 Sustainable procurement is an important factor in promoting inclusive and local sustainable economic growth. A number of projects have actively tried to make use of local business where possible, as part of their community benefits approach to help sustain the local economy.
- Llys y Frân: Their café is supplied with local food and drink produce wherever possible. Dŵr Cymru have held meet the supplier events with local food suppliers. Seasonal craft fairs have also been held at the site.
 - Monmouthshire & Brecon Canal: Pontymoile aqueduct - stone was re-used where possible and sourced from a local quarry.
 - Vale of Rheidol: Three local artists now showcase their locally produced artwork in the shop on site.
 - Multiple sites:
 - Almost all projects reported contracting out to Welsh companies to carry out work on the sites (Venue Cymru, Caernarfon Waterfront, Caernarfon Castle, Monmouthshire & Brecon Canal, Vale of Rheidol, Pendine, Rock UK, Isle of Anglesey).
 - Caernarfon castle and Rock UK held 'meet the buyer' events to contract work to local companies.

Support for biodiversity activity on a site funded through Structural Funds

6.10 A number of sites reported taking measures to support biodiversity on site.

- Llys y Frân: New bat entry boxes have been introduced to the Visitor Centre roofing to form roost space for a variety of Bat species. An otter management plan is being implemented to manage otters on the site. Restriction buoys have been introduced on the lake to protect breeding peregrine falcons and herons.
- Monmouthshire & Brecon Canal: Five Locks and Pontnewydd Park designs were sympathetic to surrounding area with little or no impact on canal bed and biodiversity. Materials were recycled/environmentally friendly. Geogrid used to protect tree roots. Geotextile used instead of weedkiller during the path construction. Natural stone used in some elements of the scheme.
- Vale of Rheidol: Large grass area in Aberystwyth. Numerous green spaces and trees planted created to encourage biodiversity.
- Porthcawl: Five species of fruiting trees will be planted on site which will encourage foraging birds and invertebrates.
- Isle of Anglesey: To support the local ecology and increase the net biodiversity benefit of the project, the Swift Square public conveniences in Holyhead incorporated swift boxes, a bat roost and bee bricks to create additional habitat spaces.

Resource efficiency measures

6.11 Projects reported on a range of different ways they have engaged in resource efficiency measures at their sites.

- Llys y Frân: The scheme is benefiting from the use of hydroelectric power being generated on-site which is being used to power the waterside building and the existing boatshed. The underfloor heating to the scheme utilises Air Source Heat Pump for energy-efficient heat production and solar thermal.
- Colwyn Bay Waterfront: 5,684 tonnes of waste arising from the contract was diverted from landfill (100% of the waste produced). 56 cubic meters of water were saved through initiatives to reduce water consumption through the

installation of self-closing taps that save an average of 6litres a day.(based on 260 days x 36 person average).

- Vale of Rheidol: Water systems in the toilet block are efficient with press buttons to prevent taps being left on. Water saver devices are used on urinal flushing systems as well as high level cistern toilets. Waste from railway activities is recycled, this includes building components and track materials being re-used. Waste from bins is recycled by an external contractor. Rainwater is used for watering the flower beds.
- Multiple sites:
 - Measures used by multiple sites included using Solar panels (Caernarfon waterfront, Vale of Rheidol, Isle of Anglesey) heat pumps (Caernarfon castle, Llys y Frân), using sustainable sources of material and recyclable materials (Pendine, Monmouthshire & Brecon Canal, Vale of Rheidol, Porthcawl), LED lighting (Isle of Anglesey, Venue Cymru, Vale of Rheidol) and light sensors (Porthcawl, Vale of Rheidol, Llys y Frân).

Develop an Eco Code

6.12 A small number of projects developed an eco-code including: Pendine, Vale of Rheidol and Llys y Frân.

- Llys y Frân: Dŵr Cymru has put in place an eco-code which is displayed as a poster in a prominent position within the visitor centre to raise awareness of environmental practices as well as practical tips and reminders for saving energy, conserving water and encouraging improved waste management.

Integration of green and blue infrastructure

6.13 Several projects included the integration of green and blue infrastructure as part of their business plans.

- Monmouthshire & Brecon Canal: Approx. 5.5km of new mountain bike trail (Red/black grade) which links up with existing trail of the Twrch enabling

riders to stay on the trail and at the site longer. Along with the provision of approx. 0.37km length of walking trail have been created. Work on Mynydd Maen to improve access to the site and improvements to walking trails. The Canal is a critical blue infrastructure that offers many recreational, health and tourism benefits and sections require significant enhancement works to enable navigation. Dredging, improvements of pathways and canal relining has been carried out. Improvements to the Lakeside which links the paths together over the water. Planting at Lakeside has been included and chosen by the Landscape Architect.

- Porthcawl: Trees introduced at cosy corner.
- Rock UK: The majority of the 2.4 hectares developed is being landscaped, not built on. This involved extensive landscaping and planting of new hedgerows. Swales have been designed adjacent to the west side of building. In addition, a significant area of car-park to the north/east has been constructed with Grasscrete. This self-venting paving system is ideal for sustainable drainage management.

Site environmental management plans

6.14 A number of projects had implemented site waste management plans, including Llys y Frân, Monmouthshire & Brecon Canal, Venue Cymru, Caernarfon Waterfront, Pendine and Rock UK.

- Llys y Frân: 128 Tonnes of waste were diverted from landfill, which represents 78% waste from the site being re-used or recycled. During the works the Contractor used a crusher to crush the existing surplus aggregate on site which was re-used for hardcore. The Contractor re-used all of the existing surplus material around the reservoir lake and all arisings to form the reservoir cycle track.
- Monmouthshire & Brecon Canal: Topographical, Ecological and Tree surveys undertaken. Ecology and Heritage officers consulted when necessary. Environmental appraisals undertaken and pollution control plans implemented when applicable.

- Rock UK: 90% of waste removed from the site was recycled. In addition to this, over 600 tonnes of demolished building were crushed on site and recycled as hardcore for the new building.

Use of Sustainable Drainage Systems (SuDS) where applicable

6.15 Several sites had used Sustainable Urban Drainage Systems (SuDS) where applicable including Llys y Frân, Monmouthshire & Brecon Canal, Vale of Rheidol, Porthcawl and Rock UK.

- Llys y Frân: Sustainable Urban drainage has been designed into the scheme with 100 year return period. The Activity Centre incorporates a dry pond. An attenuation tank supports the SUDS drainage works at the Visitor centre.
- Vale of Rheidol: The track work element of the project has been laid without weed/barrier membrane using large easy drainage granite to enable the whole area occupied by them to act as a slow drainage system. This is over 1 acre in size thus offering a really good rain catchment area. Tarmac and brick paving in the public areas is permeable.
- Rock UK: Historic inadequate surface water systems have been removed and replaced with storm-water management systems with significantly greater capacity which will reduce flood risk.

Development of an organisational travel plan and sustainable transport initiatives

- Caernarfon castle: Links to public transport including bus services and nearest rail station are provided on Caernarfon Castle's Visitor Information pages on Cadw's website. The castle is located on the NCN Cycle Route 8.
- Monmouthshire & Brecon Canal: Upgrading of canal towpath increased accessibility for walking and cycling. Dredging has now made the canal fully navigable from Brecon to Cwmbran. Improvement works to Pontymoile Aqueduct providing safer walking routes along the Canal.

- Porthcawl: All weather cycle storage at Rest Bay Watersports Centre. New off road cycle route connecting Rest Bay to Trecco Bay caravan park. Traveline link included on the Visit Bridgend /Porthcawl website. Enabling works for the Porthcawl Waterside Land train.
- Pendine: A transport assessment of the site to accompany the planning application was prepared, identifying existing public transport links, cycling routes, safe, well-lit walking routes to facilities. Bus times are currently on the Museum website and nearest train stations will be added, both will be uploaded onto the Caban website.

BREEAM

- 6.16 Several sites had achieved 'Good' or 'Very good' BREEAM standards. These included Colwyn Bay Waterfront, Saundersfoot, Caernarfon Waterfront and Porthcawl.

Tackling poverty and social exclusion

- 6.17 The operation actively sought to address poverty by supporting the creation of direct jobs, both permanent and temporary, for those who are out of work and by strengthening the conditions that will enable businesses to create jobs. The importance of employment, even if low paid, for avoiding deep/persistent poverty and promoting well-being is well-established. The Welsh Government's strategy 'Prosperity for All' provided a framework for a whole-government approach to increase prosperity and address the root causes of poverty in an effective, joined-up way. It puts forward strong evidence that employment offers a high level of protection against poverty for individuals and families and recognising that the best route out of poverty is through employment.

Community skill building activity

- Llys y Frân: All facilities are free of charge, providing access for visitors to a range of outdoor recreations. Exploration of placement opportunities for students of Pembrokeshire College who are studying catering, hospitality, business studies and sports courses.
- Caernarfon Waterfront: 64 apprenticeship weeks and 4 apprenticeships and 4 traineeships as part of the construction contract; workshops with local schools and career talks; trade skill taster days.
- King's Gate, Caernarfon Castle: Cadw's lifelong learning team engaged with local schools and, in November 2022, invited the castle's 'young custodians' to come to the castle to launch a programme of activity.

Stakeholder engagement good practice activity

- Monmouthshire and Brecon Adventure Triangle: the project involved widespread engagement with a range of stakeholders, residents and businesses at various locations along the canal. Monmouthshire, Brecon & Abergavenny Canal Trust were a key partner throughout, helping to share information with the public and other partners during the project. The project involved close working relationships with landowners at Mynydd Maen, and also developed an interactive website and social media to communicate progress to a wide audience and invite feedback during the different phases.
- Pendine: the Regeneration Master-plan for Pendine and the Transformational Strategy was developed in consultation with the Community Council, general public, private sector businesses and the local authority. Reports on progress prepared for the local monthly newsletter in Pendine. Project officer liaised regularly with local businesses.
- King's Gate, Caernarfon Castle: an online survey was issued to secure views/comments. Presentations and discussions were held with the town council and the multi-agency Caernarfon Waterfront Regeneration Group.

Volunteering schemes

- Caernarfon Waterfront: Galeri has a volunteering policy and uses volunteers as stewards/ushers and front of house. The Welsh Highland Railway use volunteers for a variety of roles at the new station such as station hosts; Booking Office and Shop assistants and as members of its events team.
- Vale of Rheidol: members of the local community in Ceredigion are involved in volunteering to maintain the station gardens, working at seven sites along the 12-mile railway.

Organisations paying the living wage

- Multiple sites: reported that they pay the living wage to all staff or to all permanent staff.

Welsh language

- 6.18 The TAD Business Plan set out a commitment that the operation would contribute to the Welsh Government's aims to support the Welsh language. The Business Plan committed to doing this by increasing 'the use of Welsh by participants', leading to 'increased provision of services', 'improved Welsh language skills' and 'enhanced economic opportunities in Welsh-speaking areas'. Since the TAD Business Plan was finalised, the strategic context has moved on with the publication of the Welsh Government's strategy for the promotion and facilitation of the use of the Welsh language 'Cymraeg 2050: A million Welsh speakers' (2017).¹⁹ 'Cymraeg 2050' sets out the Welsh Government's long-term approach to achieving the target of a million Welsh speakers by 2050 by:
- (i) Increasing the number of Welsh speakers;
 - (ii) Increasing the use of Welsh; and
 - (iii) Creating favourable conditions for the use of the Welsh language through infrastructure and context.

¹⁹ [Cymraeg 2050: A million Welsh speakers](#)

6.19 The 2017 strategy is ambitious in its vision and encourages a proactive approach across all sectors to enable the language to be used more extensively and for the number who speak it to grow. It refers to the opportunities in specific sectors and notes that in tourism the language can be ‘an integral part of provision’.

“The Welsh language can also enhance a sense of place and many brands already use it as a unique selling point.” (Cymraeg 2050)

6.20 The evaluation considered the use of the Welsh language during interviews with joint beneficiaries and by examining project documentation and reports. It found that projects had promoted (or committed to support) the Welsh language in the following ways:

- Through bilingual signage, publicity and advertising, including advertising for contractors to supply services;
- By specifying that Welsh language skills were desirable when advertising new posts as a result of the new developments or enhancements to sites supported through TAD;
- By undertaking to develop events programmes that promote the Welsh language and culture.

6.21 Joint beneficiaries explained that in many ways this represented a continuation of established practice. “Through our Welsh language policy as an organisation, promoting the language is tied into all contracts we let out. In the case of TAD, public consultation was bilingual, and the contractor was required to have a bilingual public liaison officer in place to be able to work with the public in Welsh and in English”.

6.22 In some cases, joint beneficiaries reported that they had recruited or intended to recruit Welsh speakers in public facing roles (ticket offices, reception areas, information desks) in order to “provide bilingual customer experiences for local people”. Others recognised the value of ensuring that visitors from outside Wales hear the language and appreciate that they are in a different country and culture, echoing the point about promoting a ‘sense of place’ in ‘Cymraeg 2050’.

6.23 A number of joint beneficiaries expressed their commitment to providing bilingual services but reflected on the difficulties experienced in recruiting Welsh speaking

staff to posts. One project representative noted: “It is still challenging to employ local Welsh speakers as many tend to move away. We are trying to offer good employment opportunities to keep young Welsh speakers in the area and (TAD) is supporting this”. Others also commented on the wider economic benefits of the operation, noting that the investment is supporting local businesses, suppliers and, through employment opportunities, encouraging people to stay in the area, including in communities with a high proportion of Welsh speakers.

- 6.24 There is emerging evidence, therefore, of the operation’s contribution to the aims of Cymraeg 2050. However, in many cases joint beneficiaries noted that, as public bodies, they have a statutory duty to comply with standards set out by the Welsh Language Commissioner and that their projects involved adhering to those standards. The sense of compliance driving behaviours in relation to the Welsh language is interesting. Throughout, the evaluation found only few examples of projects demonstrating proactive behaviours to support the language. For example, there was little unprompted reference to developing the Welsh language skills of the existing workforce in order to increase the use of Welsh, albeit that in isolated examples projects had encouraged staff to complete online language courses. This may reflect a general lack of awareness of provision to support skills. It also underlines a point in ‘Cymraeg 2050’ about the need for a ‘culture shift’ among organisations of all sizes and in all sectors to move from compliance with policies and legislation to a recognition of the benefits that a bilingual workforce can contribute to their organisations and the wider economy.

Contribution of TAD to the goals of the Well-Being of Future Generations (Wales) Act 2015

- 6.25 The TAD operation business plan recognised that tourism can have a significant impact on the economic, social and environmental well-being of communities. Sustainable tourism, it was noted “can be a driving force for the preservation and promotion of...a quality environment and cultural distinctiveness”. All joint beneficiaries were required to submit information in their business plans on their project’s alignment with the Well-being of Future Generations (Wales) Act 2015 and how they would contribute towards the well-being goals.

6.26 Below we provide examples of outcomes observed during the evaluation that illustrate the contribution of the TAD operation to the seven well-being goals. The examples provided below were observed frequently and across multiple projects.

A prosperous Wales:

- The operation has created or safeguarded employment in locations across Wales, including in areas of high unemployment and deprivation;
- Individuals have benefitted from opportunities to gain new skills that will enhance career prospects – this includes during both the development and construction phases of projects, and as part of operational delivery;
- The investment in tourism sites has supported local labour markets and supply chains.

A Resilient Wales:

- The operation has supported enhancements to the natural environment in locations across Wales - joint beneficiaries demonstrated a committed to supporting biodiversity and including habitat management measures at sites;
- The operation has also made a contribution to supporting social and economic resilience through the employment opportunities created and investment in sites.

A Healthier Wales:

- A large number of projects supported through the operation enhanced facilities and opportunities for physical recreation, which bring health and well-being benefits for local residents as well as visitors.

A Wales of Cohesive Communities:

- Projects have contributed to the regeneration of communities, through job creation which supports wider strategic aims to tackle poverty;

- TAD projects have been a catalyst for community engagement, providing high-quality spaces and facilities to enrich communities;
- Projects have both built on existing links in communities where projects were located and helped forge new partnerships; there is a commitment to sustaining these models of regeneration through collaboration that has the potential to support community cohesion in future.

A Wales of Vibrant Culture and Thriving Welsh Language:

- TAD funded improvements to arts and cultural venues, supporting access to arts events and promoting participation in cultural activity;
- Investments have, in some cases, enhanced opportunities to use the Welsh language. Some projects have strengthened economic opportunities in communities with high proportions of Welsh-speakers, contributing to the sustainability of these communities;
- Projects have ensured that the Welsh language is a visible in signage and in marketing materials.

A Globally Responsible Wales:

- There was an emphasis across TAD projects on resource efficiency measures and low environmental impact;
- Projects also encouraged visitors to engage with issues of sustainability and to appreciate the importance of supporting the natural environment.

A More Equal Wales:

- There is an emphasis on inclusivity and equality in how projects have been designed and delivered, including by ensuring accessibility to sites and accommodation for all visitors;
- TAD has provided employment opportunities to people from a range of backgrounds and ages.

7. Conclusions and recommendations

General

- i. 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.
- ii. It is important to reflect on the context within which the operation has been delivered. Joint beneficiaries reported substantial challenges at the interim evaluation stage in 2019, noting that progress had been hampered by a number of factors, including revisions to business plans, difficulties in securing match funding and problems associated with procurement and contractors. These operational challenges were put into stark perspective by the impact of the COVID-19 pandemic, which had a devastating impact on businesses and organisations across the tourism and hospitality sectors.
- iii. The fact, therefore, 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 colleagues in WEFO.

Strategic alignment

- iv. 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 operation was funded under Priority 4.4 of the West Wales and the Valleys ERDF Programme to increase employment through investments in prioritised or regional infrastructure supporting a regional or urban economic strategy. The evaluation found examples of integration between TAD projects and wider investment programmes at local and regional levels.
- v. 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

- vi. 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 stimulating transformational change.
- vii. 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.
- viii. The delivery model and the scale of investment also encouraged organisations to think differently about the sites they managed and promoted innovation. Organisations reported that they had been inspired through TAD to think differently about sites, leading to new business opportunities.

Delivery commitments

- ix. 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

- x. 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).

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 2-5 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

- xi. The withdrawal of a dedicated TAD marketing fund, necessitated by the pandemic, was seen by Joint Beneficiaries as having impacted 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.

- xii. 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 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

- xiii. 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.
- xiv. 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.

- xv. 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.
- xvi. 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: 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 Visit Wales' national tourism strategy.

Annex A: References

Munday, M., Jones, C. and Roche, N. (Welsh Economy Research Unit) (2016) The Economic Impact of the Environment for Growth (E4G) Programme

Welsh Government (2013a) Vibrant and Viable Places: New Regeneration Framework

Welsh Government (2013b) The Welsh Government Strategy for Tourism 2013-2020: Partnership for Growth

Welsh Government (2013c) Vibrant and Viable Places: Framework

Welsh Government (2014a) Operational Programme West Wales and the Valleys: European Regional Development Fund

Welsh Government (2014b) EU Structural Funds programmes 2014 to 2020: Operational Programmes

Welsh Government (2016a) Partnership for Growth: Strategy for Tourism 2013-2020: Strategy Progress Review

Welsh Government (2016b) Tourism Investment Support Scheme (TISS): Guidance Note

Welsh Government (2017) Cymraeg 2050: A Million Welsh Speakers

Welsh Government (2018) Great Britain Tourism Survey: 2017

Welsh Government (2019) Wales tourism performance: January to March 2019

Welsh Government (2020) Welcome to Wales: priorities for the visitor economy 2020-2025

Welsh Government (2021) Let's Shape the Future

Legislation

[Well-being of Future Generations \(Wales\) Act 2015](#)

Other non-published documentation reviewed

Visit Wales (June 2016), Tourism Attractor Destinations Business Plan (Version 6)

Individual joint beneficiary business plans

Operation monitoring information: quarterly monitoring forms and output data from completed projects provided by Visit Wales

Annex B: Final evaluation phase research tools

TAD EVALUATION: FINAL INTERVIEW WITH JOINT BENEFICIARIES

A. PROJECT DELIVERY

1. Please provide an overview of your Project's current status
 - Confirm that project is open and operational.
2. Have there been any significant amendments to your project?
 - Has the project been delivered as intended?
 - What were the main challenges you faced?
 - How did you overcome them?
3. What has been the main impact on the project both during and post-COVID 19?

B. TAD OPERATION – MANAGEMENT, PARTNERSHIP WORKING AND KNOWLEDGE SHARING

4. What are your reflections on the support from Visit Wales and WEFO during your project?
 - How effective was the support provided prior to, and post, completion of your project?
 - What are your thoughts on the monitoring processes in place?
5. How effective has the joint-working with partner beneficiaries / other delivery partners been to date?
 - What has worked well in securing local engagement among other stakeholders, businesses, the public?
 - Have you encountered any barriers?
6. Have you provided any advice or mentoring support to other TAD projects (either informally or via more structured channels)?

C. OUTCOMES AND IMPACTS

7. How has the completed project impacted to date on your wider organisation / business / operations?
 - Explore the following impacts:
 - Awareness and profile
 - Quality of customer experience (how is this captured?)
 - Community buy-in / community links

- Staff satisfaction
- Sustainability and longer-term planning

8. Were project level outputs in relation to WEFO PIs met? Were these indicators useful / suitable?

9. The TAD Programme supported the ERDF objectives under Priority 4.4, i.e. to increase employment through investments in prioritised or regional infrastructure. How has the project supported this objective?

D. ANTICIPATED LONGER TERM OUTCOMES AND IMPACTS

REFER TO THE IMPACT FRAMEWORK (AT BOTTOM OF TOPIC GUIDE) and talk through any impacts observed, including any evidence that supports these impacts.

10. What impact do you anticipate the project will have over the longer term on visitors and on the tourism offer at the site?

- How will you measure / evidence the impact on visitor numbers?
- How will you measure / evidence the impact on the visitor experience?

11. How does the project contribute to, or align with, regeneration priorities in the local area?

- Does the project feature as part of the local authority's regeneration plan?
- How is the project's impact on regeneration being measured / evaluated?
- Are there any examples of the project serving as a catalyst for other developments or associated activities?

12. What are the wider community and economic benefits that the project will deliver?

- Job creation?
- Commercial benefits or supporting the sustainability of joint beneficiaries and partners / local businesses?
- Enhance civic pride / renew perceptions of the local area?
- Have you thought about how these could be measured and demonstrated?
- Discuss possible methods for capturing evidence.

E. FUTURE PLANNING

13. Are you exploring / have you explored any additional investment opportunities for your project?

- a. If so, to what extent is this a continuation of developments supported through the TAD operation?

14. Are there opportunities for your project to develop links with other local regeneration activities and programmes?

F. CROSS-CUTTING THEMES AND THE WELSH LANGUAGE

15. How is the Project incorporating the following cross-cutting themes into its delivery:

- a. equal opportunities and gender mainstreaming;
- b. sustainable development; and
- c. tackling poverty and social exclusion?

16. Have you encountered any challenges in supporting or incorporating cross-cutting themes into your project?

17. To what extent has your Project delivered activities in support of the Welsh Government’s Welsh Language Strategy?

G. FINAL REFLECTIONS

18. Drawing on your experiences, does TAD provide a model that should be used in future to develop world-class visitor experiences in Wales?

19. What are the lessons learnt for you through TAD in terms of Project management and delivery?

a. What would you do differently in future?

20. What could strategic partners, including VW, do differently in future?

Impacts on visitors / tourism offer (e.g...)	Impacts on places (e.g...)	Wider community and economic benefits (e.g...)
<ul style="list-style-type: none"> • Increase visitor numbers; • Improve the visitor experience; • Diversify a site’s offer to visitors; • Improve accessibility for visitors to sites/locations; • Reduce seasonality. 	<ul style="list-style-type: none"> • Upgrade physical infrastructure; • Support regeneration in the local area; • Serve as a catalyst for other associated developments. 	<ul style="list-style-type: none"> • Deliver commercial benefit / support joint beneficiaries sustainability; • Safeguard and create jobs; • Contribute to civic pride / sense of place; • Challenge and re-define perceptions of sites/local areas.

Visitor questionnaire (blank version)

[SITE NAME]

Date of visit: [Day] [Month] 2022/23



This survey is being delivered by Arad Research on behalf of Welsh Government. No personal data is being collected and all data will be reported anonymously. For further information, please contact our team by email: Kara@arad.wales

1. Number of people visiting today, including yourself. Adults Children

2. Are you: On a day visit? On holiday in Wales? Staying in Wales for another reason?

3. Please explain briefly why you chose to visit this site today:

4. To what extent did visiting **[INSERT SITE NAME]** influence your decision to visit this area of Wales today? Please circle the appropriate number. 1 = No influence at all 10 = Main reason for visiting



5. How many times have you visited this site?

First visit		6-10 times	
2-5 times		10+ times	

6. When was your last visit to this site?

In the last 6 months		1-3 years ago	
In the last 12 months		3+ years ago	

7. If you have visited before, how has the overall visitor experience changed compared to your previous visit?

It has improved		Not changed	
It has worsened		Not applicable / First visit	

8. Please provide any brief comments to explain your answer.

9. How satisfied were you with your overall visitor experience today? Please circle the appropriate number.

1 = Very dissatisfied
←
→
 10 = Very satisfied

Overall visitor experience 1 2 3 4 5 6 7 8 9 10

10. How would you summarise your visitor experience today in a few words?

11. Are you likely to revisit this site?

Yes		No		Maybe	
Yes		No		Maybe	
Yes		No		Maybe	

12. Would you recommend this site to others?

Yes		No		Maybe	
Yes		No		Maybe	
Yes		No		Maybe	

13. Would you visit out of season (i.e. between October and March)?

Yes		No		Maybe	
Yes		No		Maybe	
Yes		No		Maybe	

14. What is your age? (Tick appropriate box)

16-19	<input type="checkbox"/>	20-24	<input type="checkbox"/>	25-34	<input type="checkbox"/>
35-44	<input type="checkbox"/>	45-54	<input type="checkbox"/>	55-64	<input type="checkbox"/>
65-74	<input type="checkbox"/>	75-84	<input type="checkbox"/>	85+	<input type="checkbox"/>

15. Please provide your postcode

16. If a non-UK resident, in which country do you live?

Thank you for your response / *Diolch yn fawr am eich ymateb*

Annex C: TAD project summaries

[Summary information on each project's outputs and achievements, drawn from closure reports submitted by joint beneficiaries on completion of the projects]

Colwyn Bay Waterfront

Lead: Conwy County Borough Council

The Colwyn Bay Waterfront Strategy is an integral part of the £100m strategic Bay Life Regeneration Programme, which aims to bring about a programme of physical, social and economic regeneration within the Bay of Colwyn area. This project built on Phase 1 developments on the waterfront, improving a further 1km of the promenade, creating additional spaces for permanent and mobile refreshment kiosks, additional car parking and new activity and interest points. As such the investment through TAD further enhanced the re-emergence of Colwyn Bay as a key visitor destination in North Wales and provided improved local amenity within Communities First wards. Creating an additional kiosk of 100sqM and space for 3 additional seasonal concessions as part of the scheme will provide additional business and employment opportunities as well as further visitor facilities and increased spend in the locality.



Start date: July 2016
End date: December 2022



Total Project Costs: £3,033,904
TAD/ERDF investment: £1,907,648
Match funding: £1,126,256

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	4	4.4
SMEs accommodated (number)	3	4
Land developed (Ha)	1.5	1.62
Premises created / refurbished (m ²)	80	79

Project objectives and achievements	
Key objectives	Achievements
<ul style="list-style-type: none"> • Create high quality public realm • Support wider regeneration initiatives • Attract businesses to the area • Create amenity for year round use 	<ul style="list-style-type: none"> • High quality finishes creating modern and accessible promenade • New concession opened and temporary concessions trading seasonally • Existing business on front have carried out improvements • Space used year round by residents and visitors

Impact of the project	
<p>Joint beneficiaries reported that the promenade area has seen significant increase in use since the completion of the works. Many local user groups now use the space for formal activities such as exercise classes and sea swimming as well an increase in informal use for recreation. Empirical evidence has shown a significant increase in visitor numbers and use of the beach and promenade in the off season also.</p>	
Cross cutting themes (achieved Y/N)	
<p>Disability Access Group engagement (Y) Activity supporting speakers of the Welsh language (Y) Resource efficiency measures (Y) BREEAM Excellent where applicable (CEEQUAL accreditation) (Y) Community skill building activity (Y) Integration of social clauses (Y)</p>	
Post project activity	
<p>Two further phases of the waterfront project have commenced in Old Colwyn and Rhos on Sea, representing significant further investment to complete wider scheme. Further additional concession buildings have been commissioned due for completion in 2024.</p>	

Adventure Welsh Valleys

Lead: Rock UK Adventure Centres Ltd

The project involved the development of a residential adventure climbing regional facility targeting markets across South Wales and the English Midlands situated on the outskirts of Merthyr Tydfil. The project aimed to become a regional outdoor activity hub for South East Wales, working in partnership with other stakeholders and activity businesses including Bike Park Wales and the Brecon Beacons National Park. It involved the extension and refurbishment of the old colliery building, converting it into a modern, welcoming leisure facility – including a new cafe, outdoor play area and additional outdoor activities, with en-suite accommodation for 100 residential guests.



Start date: October 2016
End date: November 2019



Total Project Costs: £4,738,288
TAD/ERDF investment: £2,543,000
Match funding: £2,195,288

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	55	52
SMEs accommodated (number)	1	1
Land developed (Ha)	2.4	2.4
Premises created / refurbished (m ²)	2990	2494

Project objectives and achievements

Key objectives

- Improve the visitor experience
- Diversify the sites offer to visitors
- Improve accessibility for visitors to site
- Reduce seasonality
- Impacts on places
- Wider community and economic benefits

Achievements

- The centre now offers a full experience for people coming to visit. Day visitors can do a range of activities, use the café, climbing wall and play area. It is no longer just a climbing wall but an attraction for the whole family with a range of activities to undertake
- The residential area is now separate from the leisure area, with 26 en-suite rooms accommodating up to 104 visitors. The old centre had no separation and was not appropriate for groups to stay due to safeguarding issues.
- The old accommodation area was large bunkrooms with separate bathrooms; the new smaller rooms with en-suite offer a better experience for groups.

- The site previously offered the climbing wall and caving system, it now has a larger range of activities including aerial adventure, archery, orienteering, all weather sports pitch, bushcraft and hill walks. We also offer off site activities into the Brecon Beacons.
- The whole of the first floor is wheelchair accessible with ramps and three fully accessible bedrooms
- The improved facilities ensure that people can visit year around with greater uptake in the off seasons
- Upgrade physical infrastructure
- Support regeneration in the local area
 - We work with other groups in the area such as Bike Park Wales, Dolygaer, Visit Merthyr, Visit Caerphilly
 - Where possible we use local suppliers,
 - Serve as a catalyst for other associated developments
- Deliver commercial benefit/support joint beneficiaries sustainability
- Safeguard and create jobs
 - In 1017 we had 5.5 FTE
 - In 2023 19 FTE and 5 volunteers
- Contribute to civic pride/sense of place
 - In February 2020 we were awarded best activity provider South East Wales
 - See notes above about survey for national lottery
- Challenge and redefine perceptions of sites/local areas
 - Day visitors regularly travel for up to 1 hour and residential visitors 4+ hours

Cross cutting themes (achieved Y/N)

Positive action – disabled people (Y)
 Disability Access Group engagement (Y)
 Activity promoting the Welsh language (Y)
 Resource efficiency measures (Y)
 BREEAM Excellent where applicable (N)
 Use of sustainable urban drainage systems (SUDs) where applicable (Y)
 Local supply chain development (Y)
 Integration of green infrastructure (Y)
 Integration of blue infrastructure (Y)
 Support for biodiversity activity on a site funded through SF's (Y)
 Site Environmental Plans (Y)
 Community skill building activity (N)
 Integration of social clauses (Y)

Post project activity

The centre is looking to redevelop the climbing wall to enable the centre to become the Welsh National Climbing Centre of excellence.

Caernarfon Waterfront

Lead: Gwynedd Council

The project involved investment in key attractions on the Caernarfon Waterfront to ensure it becomes one of Wales' must visit destinations.

Welsh Highland Railway Terminus: Development of new station/terminus facilities for the internationally renowned Ffestiniog and Welsh Highland Railways within the Slate Quay area.

Galeri Creative Enterprise Centre: Enhancement to the Galeri Creative Enterprise Centre to expand the cinema offer and also to programme other cultural events and night-time entertainment that will appeal to tourists.

Waterfront Environment: Access and Linkages - investment in the development of the waterfront and the development of links between the previous and proposed investments to integrate relevant individual developments into a cohesive single destination.



Start date: March 2016
End date: May 2023



Total Project Costs: £6,611,985
TAD/ERDF investment: £2,410,634
Match funding: £4,201,351

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	23.3	23.3
SMEs accommodated (number)	4	4
Land developed (Ha)	0.12	0.12
Premises created / refurbished (m ²)	2,042	1,957

Project objectives and achievements

Key objectives

Welsh Highland Railway Terminus

Development of new station/terminus facilities for the internationally renowned Ffestiniog and Welsh Highland Railways within the Slate Quay area

Galeri Creative Enterprise Centre Enhancement to the Galeri Creative Enterprise Centre to expand the cinema offer and also to programme other cultural events and night-time entertainment that will appeal to tourists.

Waterfront Environment: Access and Linkages

Investment in the development of the waterfront and the development of links between the previous and proposed investments to integrate relevant individual developments into a cohesive single destination.

Achievements

WHR Railway Terminus

The project extended beyond its original timescale due to the finding of a gas main in its foundations and reoccurring bad weather. All standards asked for an environmental level were adhered to and Secure by Design was passed. Permanent members of bilingual staff were recruited as per criteria and are still in post one year in. The station is now building its reputation both as a community venue for the town and for its use as a railway terminus and ongoing figures of visitor numbers are being kept.

Galeri

In accordance with its aims and objectives the project delivered two new cinema screens, a new creative space, a new reception area, one additional meeting room and a shop as an extension to the original Galeri building.

The proposal was conceived in response to external demand for cinema facilities showing on release titles in Caernarfon and in response to internal pressures to release more programming space in the Galeri theatre which had to be used to show films on an occasional basis.

On both counts the project has been successful in delivering its aim and objectives. Galeri is currently showing just over 1300 film screenings per annum compared to around 40 prior to the completion of the new development.

The new creative space has allowed Galeri to offer an additional 60 community workshops and around 8 overspill exhibitions per annum.

Although the numbers fluctuate, new employees far exceed the anticipated number of new employees that have been required in order to cope with vastly improved audiences and casual visitors to the building.

The number of different events happening within Galeri each year has increased from c500 to over 2,000 as a direct result of the project and even more as an indirect impact on the catering, formal meeting and conferencing trade and in the number of casual visitors to the building.

Impact of the project

Galeri

Caernarfon had been without a commercial cinema since the mid 1980s. The town's inhabitants had to make a 60-mile round trip to the nearest cinema in Llandudno Junction. For people living and visiting the Llyn Peninsula it was an even longer trek.

Galeri's new screens have attracted some people from Llandudno but from our records it would appear that the majority of cinema visits to Galeri since completion of the works have been made by a combination of local people who had got out of the habit of going to the cinema because it was too far to travel and week-end and summer tourists who were looking for wet weather facilities in the area.

The pre-project business plan had anticipated around 25,000 cinema visits in the first 12 months after opening. The actual number of visits during the first year of opening was 63,257.

A new technician post was created following project completion. 6 new members of the Customer Care Team have been appointed since project completion.

A new digital marketing post was created in early 2019 some three months following project completion.

From records derived from our ticketing system we have estimated that around 70% of the new cinema audience had never visited Galeri before the cinemas were completed and the audience crossover has had a noticeable effect on theatre audiences as well.

A number of improvements have also been made to Galeri's food and drink facilities, staff and offer over the past 4 years which has increased primary and secondary spend but which has also necessitated increasing the number of persons employed by the Company during the same period. 3 new kitchen staff members appointed.

What is more difficult to quantify but which has been mentioned time and time again is that the completion of the project has transformed Galeri into a constantly vibrant cultural, entertainment and social centre. The "feel" of the Centre is different and always busy.

Cross cutting themes (achieved Y/N)

Positive action – disabled people (Y)
Disability Access Group engagement (N)
Activity promoting the Welsh language (Y)
Development of an organisational travel plan and sustainable transport initiatives (Y)
Resource efficiency measures (Y)
BREEAM Excellent where applicable (Y)
Site Environmental Plans (Y)
Local supply chain development (Y)
Community skill building activity (Y)
Volunteering schemes (Y)
Organisations paying the living wage (Y)
Developing / engaging CCT Champions (N)
Integration of Social Clauses (Y)

Monmouthshire & Brecon Canal Adventure Triangle

Lead: Torfaen & Caerphilly County Borough Councils

The project was delivered by a partnership consisting of Torfaen CBC (Lead), Caerphilly CBC, and the Canal and River Trust. The M&B Canal Adventure Triangle project aimed to develop outdoor recreation, tourism and leisure activity along the canal in Torfaen and Caerphilly and connecting upland area of Mynydd Maen. The resulting destination would form an 'Adventure Triangle' bounded by the Canal and the A472 Crumlin to Pontypool Road.

A programme of 16 complementary investments in infrastructure was proposed along the canal corridor to develop its offer as a major destination and resource for outdoor recreation and tourism in SE Wales. The proposed activities include the development of visitor facilities, access improvements, cycling and walking infrastructure, and the restoration and enhancement of the historic structure of the canal.



Start date: April 2017
End date: March 2023



Total Project Costs: £4,291,824
TAD/ERDF investment: £1,645,691
Match funding: £2,646,133

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	1	1
SMEs accommodated (number)	0	0
Land developed (Ha)	17	17.7
Premises created / refurbished (m ²)	179	179

Project objectives and achievements

Key objectives

- To develop outdoor recreation, tourism and leisure activity along the canal in Torfaen and Caerphilly and connecting upland area of Mynydd Maen.
- To enhance the tourism/leisure offer of Cwmcarn within the region and implement infrastructure improvements to the Canal.
- Increase the navigable length of canal in Caerphilly to form a working heritage attraction and provide additional visitor accommodation and facilities at Cwmcarn Forest. This will link with new car parking and improved walking and cycling routes from the canal into the wider landscape.
- Improve connections between communities.
- Improve the navigable length of the M&B canal in Torfaen.

Achievements

7km of canal dredged in Torfaen making the M&B Canal fully navigable from Brecon to Cwmbran.

Pump out facility / charge points at Five Locks

Additional mooring facilities at Sebastopol

3600m² of towpath improvements in Torfaen - improved access for all users

Better access around the lakeside at Cwmcarn

30 additional parking spaces at Pitwheel car park in Cwmcarn

1 new playpark at Cwmcarn Forest

6 new glamping lodges at Cwmcarn

Additional and improved trails at Cwmcarn

865m of improvements to the Crumlin arm section of the Canal

Improvements to the Upland areas

An additional 5.5km of cross country single track trail creating an attractive loop of the existing Twrch trail, this will allow riders to enjoy more of the picturesque scenery and extend their riding before descending back into the valley.

Impact of the project

Where possible we have utilised local companies to carry out the work. The project has provided impetus for continued improvements at all sites. Our engineers are working with Regeneration and working with the Community and the Mon and Brecon Canal groups to look at improvements to the canal, and how businesses can be supported and activities carried out on the canal. The Mon and Brecon Crumlin Arm Working Group has been re-established in Caerphilly CBC.

A Masterplan has been developed for Cwmcarn Legacy and we are looking at providing additional projects and activities in Cwmcarn beyond the life of the Adventure triangle project. The establishment of adrenaline activities is continuing to be looked at to provide additional activities locally and provide new jobs and further connections into the communities surrounding the facility.

Since COVID the numbers have started to increase at the site and whilst we welcome Tourists, we see the facilities are important for our communities too. A place for them to walk their dogs, meet socially with friends and family and the educational activities that can take place at the facility.

The canal is now fully navigable from Brecon to Cwmbran (Five Locks) with additional facilities at Sebastopol for mooring and pump out and charging point at Five Locks to enable visitors to travel down to Cwmbran and stay overnight.

Since dredging works have completed additional boats are using the canal in Torfaen which will reduce future maintenance cost as dredging will be required less often.

As a result of the towpath improvement works more walkers and cyclists are able to use and access the canal more safely which has contributed to increased health benefits for local people and visitors.

Cross cutting themes (achieved Y/N)

Activity supporting speakers of the Welsh language (Y)

Disability Access Group engagement (N)

Local supply chain development (Y)

Integration of green infrastructure (Y)

Support for biodiversity activity on a site funded through SFs (Y)
Development sustainable transport initiatives (Y)
Resource efficiency measures (Y)
Site environmental management plans (Y)
Use of Sustainable Urban Drainage Systems (SUDs) where applicable (Y)
Volunteering schemes (N)
Stakeholder engagement good practice activity (Y)
Integration of social clauses (Y)
Developing / engaging CCT Champions (Y)

Post project activity

All work packages have been closed and closure reports completed which incorporate post project monitoring and lessons learned logs.

As a result of the project members of TCBC council have decided to invest in the canal by appointing a specific canal officer who has been in post since 2022. In addition, a canal investment and management plan is being developed.

Since the project has completed additional boats are using the canal in Torfaen which will reduce future maintenance cost as dredging will be required less often.

As a local authority CCBC are continuing to show our commitment to Cwmcarn as a tourist destination with circa 200,000 visiting the site a year, we are looking to increase this. We are looking at the Legacy of the site and submitted a Levelling Up application which was unsuccessful, but we are prioritising the projects and continue to look at a way forward for the site to include additional accommodation and adrenalin activities.

CCBC Engineering Team continue to maintain and manage the Canal and are looking at dredging works and supporting the Canal Trust. The Crumlin Arm Working Group has been re-established and meets every six months. We are looking at options to carry out collective marketing to promote Mynydd Maen and Cwmcarn and the works that have been carried out during this project and also continue to promote the sites as a visitor destination.

Llys y Frân Park and Activity Centre

Lead: Dŵr Cymru Welsh Water

The project aimed 'to re-energise Llys y Frân country park and trout fishery to become an iconic tourist destination for SW Wales and the UK as it is developed into a water-themed outdoor activity and educational recreational site'.

- The existing Visitor Centre has been refurbished and extended to include an attractive and high-quality restaurant;
- A new outdoor activity centre has been constructed and provides a base for water sports on the reservoir, land-based activities and a cycling hub.
- A bike pump skills area and circular bike trail has been developed to encourage cycling and to act as a cycling hub supporting a wider development of mountain biking in Pembrokeshire.

The woodland and meadows and the environs of the dam have been re-landscaped and interpreted for visitors' enjoyment and education.



Start date: October 2018
End date: December 2022



Total Project Costs: £3,335,675
TAD/ERDF investment: £1,700,000
Match funding: £1,635,675

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	9	9
SMEs accommodated (number)	0	0
Land developed (Ha)	0	0
Premises created / refurbished (m ²)	870	965

Project objectives and achievements

Key objectives

- Refurbishment and expansion of the Visitor Centre
- Refurbishment of the Café in the Visitor Centre
- Construction of the Café in the Visitor Centre
- Construction of a new Outdoor Activity Centre and Waterside Cabin
- Pump Skill Park and cycle trail
- External landscaping, road and infrastructure

Achievements

- The existing Visitor Centre has been refurbished and extended to include an attractive and high-quality restaurant celebrating local produce; a reception and retail area showcasing local products; and a large multi-use space for exhibitions and events. Seasonal craft fairs have

proven to be extremely popular; and a large corporate event was hosted for Visit Pembrokeshire.

- A new outdoor activity centre has been constructed and provides a base for water sports on the reservoir, land-based activities and a cycling hub. A wide range of water sports and land-based activities are available and supported by a team of expert and motivated staff. We are currently delivering a 4 week programme of watersports and land activities for 1,800 students from Pembrokeshire College. We are working with RYA to introduce sailing and a range of instructor lead courses.
- A bike pump skills area and circular bike trail has been developed to encourage cycling and to act as a cycling hub supporting a wider development of mountain biking in Pembrokeshire. A New Cycle-Hill Climb event was developed working with British Cycling and held on 17th September 2022
- The woodland and meadows and the environs of the dam have been re-landscaped and interpreted for visitors' enjoyment and education;

Impact of the project

Llys y Frân is open all year round and visitor numbers in the first 12 months after opening have achieved targets. 20 permanent posts have been created and 26 seasonal posts. 7 indirect jobs have been created (based on visitor spend methodology which equates £43,700 to the creation of one additional indirect job).

The investment has acted as a catalyst for the development of a campsite on a neighbouring farm.

During its first year of operation (July 2021 to July 2022) the site generated a gross income of £770,237 and attracted a total of 122,581 visitors generating an average on site visitor spend of £6.28. This figure has seen a steady increase since opening and during the summer period of 2022 has increased to an average spend of £7.99, as the site has grown and become fully operational with all activities now open.

Dwr Cymru held a meet the buyer event with local food producers which was attended by over 37 local suppliers.

Cross cutting themes (achieved Y/N)

Positive action measure – disabled people (Wheelchair friendly trails and rest-spots) (Y)

Positive action measure – older people (Y)

Activity promoting Speakers of the Welsh language (Y)

Disability Access Group engagement (Y)

Local supply chain development (Y)

Support for biodiversity activity on a site funded through SF's (Y)

Resource efficiency measures (Y)

Develop an Eco Code (Y)

Integration of green and blue infrastructure (Y)

Site environmental management plans (Y)

Use of Sustainable Urban Drainage Systems (SUDs) where applicable (Y)

Community skill building activity (Y)

Stakeholder engagement good practice activity (Y)

Developing / engaging CCT Champions (Y)

Integration of social clause (Y)

Post project activity

The successful delivery of the TAD project has given us the confidence to develop increasingly large and complex tourism projects; and to proactively seek out external funding to make our investments go further. This has become a cornerstone of our Visitor Attraction Strategy; and we now have a £19.5m Mid Wales Growth Deal project in the pipeline. We have also just created a new Fundraising Manager role as our ambitions are currently limited by capacity.

Welsh Water's Biodiversity team with the support of the site's rangers and volunteers from Pembrokeshire National Park have recently spread green hay to re-wild meadows and further enhance the biodiversity at Llys y Frân. We are also currently scoping a project with a view to applying for a Woodland Improvement Grant from the National Lottery Fund.

Porthcawl Waterside (PRIF)

Lead: Bridgend County Borough Council

The overall aspiration was to make Porthcawl a high quality signature destination within Wales, which would deliver a wide range of activities and facilities to attract new visitors, both at home and overseas, and provide compelling reasons to visit. The project has developed a bustling waterside; a base for watersports excellence not matched in Wales with complementary hubs: watersports and maritime. A place that delivers high quality waterside leisure and sporting facilities and attractions including a flagship watersports centre. PRIF waterside has delivered a harbour enhancement facility that will improve the offer for harbour users whilst providing business opportunities locally and creating a new community facility, retail units, changing places toilet children's play area and an events area on the Cosy Corner Site, on Porthcawl waterfront.



Start date: April 2016
End date: June 2023



Total Project Costs: £5,722,825
TAD/ERDF investment: £2,565,940
Match funding: £3,156,885

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	25	25
SMEs accommodated (number)	8	8
Land developed (Ha)	0	0
Premises created / refurbished (m ²)	863	863

Project objectives and achievements

Key objectives

- Creation of water sports centre at Rest Bay
- Redevelopment of the kiosk at Porthcawl Harbour
- Development of a building on Cosy Corner
- Improvements to the sustainable transport options.
- Increased marketing

Achievements

- Development of a water sports centre at Rest Bay with café, public facilities and public realm improvements.
- Redevelopment of the kiosk at Porthcawl Harbour. Better commercial premises created and facilities for Berth Holders and users of Porthcawl Harbour.
- 4km cycle path created across Porthcawl allowing shared access for pedestrians and cyclists.
- Improvements made to highways network and operator sought for land train route across Porthcawl Seafront.
- Successful targeted marketing campaign delivered attracting more visitors to Porthcawl.
- Development of a building on Cosy Corner creating retail opportunities for small businesses and improving public realm improvements.
-

Impact of the project

2018 - 6,000 visitors spend £70,000 operating from trailer in car park

2019 - 7,000 visitors. spend £90,000 operating from Trailer in Car park

Moved into water sport centre

2020 - 5,000 visitors spend £ 60,000 open July 16th - end of Sept. - partial closure for rest of the year due to COVID restrictions.

2021 - 21,000 visitors spend £245,000 (Inflated figures due to staycations)

2022 - 16,000 visitors spend £180,000

2023 - 5,000 visitors spend £68,000 up to end of May 23.

Cross cutting themes (achieved Y/N)

Activity supporting speakers of the Welsh language (Y)

Disability Access Group engagement (Y)

Development of an organisational travel plan and sustainable transport initiatives for bio-diversity activity on a site funded through SFs (Y)

Local supply chain development (N)

Integration of green infrastructure (Y)

Resource efficiency measures (Y)

BREEAM Excellent where applicable (Y)

Use of sustainable urban drainage systems (SUDs) where applicable (Y)

Integration of blue infrastructure (Y)

Site environmental management plans (Y)

Develop an Eco Code (Y)

Developing / engaging CCT Champions (N)

Integration of social clauses (N)

Wales International Coastal Centre

Lead: Trust Port of Saundersfoot

The Wales International Coastal Centre comprised four linked developments and improved parking facilities that create a unique coastal tourism experience both through active and passive participation, engaging all ages and abilities, addressing the current missed tourism opportunities within the region establishing Saundersfoot as an iconic marine coastal tourism destination for Wales.

The work package included: Marine Centre of Excellence and Coastal Storm Centre; Ocean Square Heritage & Arts Centre; Coastal Schooner Centre; and National Events Deck; new car parking layout.



Start date: March 2017
End date: May 2023



Total Project Costs: £10,118,967
TAD/ERDF investment: £4,350,000
Match funding: £5,768,967

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	91	97
SMEs accommodated (number)	27	20
Land developed (Ha)	0.7675	0.7675
Premises created / refurbished (m ²)	2,375	2,453.5

Project objectives and achievements

Key objectives

1. Establish a new identity and brand for Saundersfoot without losing its family seaside welcome.
2. Introduce a high-quality activity and events program, with all-weather attractions.
3. Establish up to 91 sustainable job opportunities within the heart of a coastal community.
4. Establish a new water sports Academy established within the Marine Centre of Excellence,
5. Establish Short stay accommodation to complement existing offers within the village of Saundersfoot.
6. Attracting a new range of retail shops to the Harbour to create a more rounded visitor experience.
7. Establish a welcome Centre and TIC into the new developments.
8. Establish a Heritage centre that offers both educational and tourism opportunities.
9. Premises Refurbished 2,375m².
10. Develop a new car parking Layout that both improves vehicle and pedestrian movement.

Achievements

The completion of the project retaining all that was outlined in the original business plan has been a significant achievement considering the constraints of COVID and the uncertainty that BREXIT placed on the scheme.

The Harbour has already achieved both National and international recognition by hosting the FISA World rowing event that sore 32 Nations battling for glory. The harbour will continue hosting a range of events throughout the year and seek to hold further National and International events.

With 22 of its 23 commercial units now tenanted out the harbour has exceeded its target of establishing 91 full-time equivalent job opportunities.

The water sports centre based in the MCOE has been established now for two seasons and offers hire facilities / coached activities and a training base for emergency service / and has been awarded the contract for Pembrokeshire school activities.

The Harbour has attracted a range of new and increased quality retailers to its units including Musto / Helly Hansen / Salt Rock / Chock Shop / outer reef.

All 24 short-stay accommodation units based in the MCOE and Ocean Square are now open and offering year-round facilities based in an unrivalled setting.

The welcome centre and heritage centre are programmed to be open in time for the school holidays all expeditions in the Schooner and Coal building are complete.

All premise refurbishment has been completed.

Car Park layout complete with EV car sharing facilities and installation of ne walkways and greater accessibility for wheelchair users.

Impact of the project

Saundersfoot was always a popular coastal destination during peak summer periods, however, the new developments have seen an uplift in tourism within the village throughout the winter months with all retail shops remaining open and viable sustaining full-time jobs, which has been attributed to the new developments.

This has been a transformational change in the overall perception of Saundersfoot as a tourist destination attracting new market segments to the region.

The development of a Centre of excellence and hosting the World Rowing Coastal beach championships has rebranded Saundersfoot's image as a coastal village able to compete on a national stage with similar UK south coast harbors.

Cross cutting themes (achieved Y/N)

Positive action – young people (apprenticeship opportunities) (Y)

Positive action – disabled people (Y)

Positive action – other (Health & Wellbeing) (Y)

Disability access group engagement (Y)

Integration of green infrastructure (Y)

Integration of blue infrastructure (Y)

Support for biodiversity activity on site funded through SF's (Y)

Development of an organisational travel plan and sustainable transport initiatives (Y)

Resource efficiency measures (Y)

Site environmental management plans (Y)

Use of Sustainable Urban Drainage Systems SUDs where applicable (TBC)

Achieved (Y)

Stakeholder engagement good practice activity (Y)

Developing / engaging CCT Champions (Y)

Post project activity

The village of Saundersfoot and its commercial businesses has undergone a complete transformation, in which the Harbour Phase 2 development played a considerable part in building new commercial confidence in the village which promoted further investment in the rejuvenation of many commercial units that were looking tired or simply closed and looking for new tenants.

Currently, there are no units up for rent with the village with the Harbour now having to create a waiting list for prospective tenants which will have a knock-on effect for the village. further, all year-round employment is now available, and it is hoped that this will ensure further opportunities for local residents and their families.

Going Forward now the developments are nearing final completion the Trust Port will actively engage with Pembrokeshire College to establish a new Apprenticeship scheme that addresses the marina tourism industries requirements of the region, offering a new avenue of training leading to local employment opportunities.

Conwy Coastal Tourism Project – Venue Cymru Reconfiguration

Lead: Conwy County Borough Council

Conwy Coastal Tourism Project – Venue Cymru Reconfiguration involved a range of redevelopment work packages at Venue Cymru, Llandudno to enhance the venue's market position in the conference and events sector and grow its value to the regional economy. This was to be achieved through 10 work packages that re-modelled parts of the existing Venue Cymru complex to deliver on three key objectives.



Start date: November 2017
End date: October 2022



Total Project Costs: £2,791,642
TAD/ERDF investment: £832,262
Match funding: £1,959,380

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	0	0
SMEs accommodated (number)	0	0
Land developed (Ha)	0	0
Premises created / refurbished (m ²)	3,777	4,482

Project achievements

1. Adapt the facilities to meet the changing expectations of the events market. A shift in demand for conference facilities had seen an increasing number of Venue Cymru's core clients seeking multiple sub plenary rooms demanding a capacity greater than that available in any of the current suite of meeting spaces. The proposed project aimed to deliver four spaces that meet this need.
2. Improve the flow of people and equipment round the building to allow the effective operation of multiple concurrent events. For reasons of both delivery standards and health and safety it is not ideal to be servicing the set up of key rooms through the same foyer areas that are being shared by patrons. Enhanced back of house servicing routes will reduce improving visitor safety and improving service delivery.
3. Enhance visitor experience and thus repeat visits by addressing known weaknesses within the existing facilities. Addressing the current need to walk outside to get from one side of the complex to another whenever the Orme Suite is booked for an event is an example of how this project will enhance visitor experience.

Achievements

1. The remodelling work created four spaces seating between 200 and 350 delegates each which when used in conjunction with the Auditorium as a main plenary space has enabled

Venue Cymru to bid for a number of new events that would not otherwise have considered Llandudno as a destination. Three new UK national medical and one scientific conferences have already been secured as a direct result of this work.

2. Food service and equipment needed for the set up of event spaces can now routinely be transported round the building out of sight of delegates attending other events. This has helped reduce periods of time when the building must be left empty to enable safe set up for future events.
3. A continuous link between foyer spaces in the conference atrium and box office foyer/café bar is now available without needing to send patrons outside. This along with upgrading of meeting facilities and the general refurbishment of the building that occurred as a result of the remodelling of key work packages, has enhanced visitor experience and positive feedback from clients.

Impact of the project

This project has helped to deliver an increase in the economic impact of Venue Cymru to the regional visitor economy, attracting inward investment from new events to the area and thus supporting businesses and employment in the region through direct, indirect and tertiary spend.

Employment in the area has benefitted both from the creation of five new FTE posts within Venue Cymru that are a direct result of the investment made through the TAD programme, but also due to the additional jobs supported in local businesses through the extra spend made by event organisers and delegates in hotels, restaurants and the retail sector. Pre-pandemic target growth was estimated to be supporting 40 extra jobs within 3 years of project completion, however due to the impact of lockdowns on the Business Events Market, this timeframe has now been revised to taking 5-6 years.

Cross cutting themes (achieved Y/N)

Activity supporting speakers of the Welsh Language (Y)

Disability Access Group Engagement (N)

Resource Efficiency Measures (Y)

Local supply chain development (Y)

Development of an organisational travel plan and sustainable transport initiatives (N)

Site environmental plans (Y)

Developing/Engaging CCT champions (Y)

Integration of social clauses (Y)

Post project activity

The project will continue to generate year on year benefits from new events coming to Venue Cymru ensuring ongoing economic benefit and support for employment into the future.

Pendine Land Speed Cultural Centre and Eco Resort Complex

Lead: Carmarthenshire County Council

The project involved the development of indoor and outdoor high-quality, year-round visitor destination facilities that will aim to maximise Pendine’s heritage & its natural assets to drive forward the resort’s future economic regeneration as a ‘day and stay’ event destination. Specifically the project involves the creation of a new, first of its kind modern and exciting sea front visitor attraction facility. The project aimed to deliver an additional economic boost to the regional economy in excess of £3m per annum and included individual projects:

- Caban Accommodation - 13 bedrooms/42 beds with ground floor accessible rooms, public accessible changing facilities and 60 cover restaurant.
- Museum of Land Speed
- Events Arena and Exhibition Esplanade
- Children’s adventure play area
- Dune garden
- Improved parking



Start date: September 2016
End date: March 2023



Total Project Costs: £11,323,709
TAD/ERDF investment: £3,000,000
Match funding: £8,323,709

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	60	46.4
SMEs accommodated (number)	4	4
Land developed (Ha)	1.97	1.95
Premises created / refurbished (m ²)	1765	1,802

Project achievements
Key objectives
<ul style="list-style-type: none"> • to intensify and diversify economic activity within the village • to help attract more visitors and to encourage them to stay longer and visit again. • create additional employment and a vibrant and sustainable coastal resort economy.
Achievements
<ul style="list-style-type: none"> • To date Caban is 80 % recruited an MOLS fully recruited. The majority of staff live in the village itself or within a 10 mile radius. A number of Caban staff were recruited via a local recruitment day or as a result of the community open day prior to official opening where the expressed an interest in working there. <ul style="list-style-type: none"> ◦ Until now the tourism trade in Pendine has been seasonal with most businesses closing at the end of October and reopening in spring. This facility will be open year round and with a year round calendar of events will attract visitors both

overnight and day visitors through the quieter season giving the other businesses in Pendine which are tourism dependent the opportunity to extend their trading months, there sustaining and retaining their staff too.

- The new facilities along with a year-round calendar of events which builds on the current regular events will attract more visitors into Pendine and build on the current tourism offer.
- Caban serviced accommodation provides another element to the current accommodation offer, predominantly static caravans with some B&B, self catering and camp site, which will appeal to and attract another audience.
- Accessible bedrooms, changing facilities, toilets, interactives in the museum, beach friendly wheelchairs and disabled parking bays ensure the resort is fully inclusive.
- Caban has created 8 FT and 11PT posts and is 80% recruited, MOLS has created IFT and 3 PT posts and is fully recruited, the majority of staff live within a 10 mile radius and some directly in Pendine.
 - Local businesses have reacted positively to the new facilities and are keen to work together to promote each others businesses, events etc and extend opening into the quieter seasons.
 - The community has reacted positively and are keen to enjoy the facilities, have input into the year round calendar of events and be a part of the new vibrant and sustainable coastal resort which hosts a variety of tourism businesses from cafes and ice cream parlours to beach and surf hire and outdoor pursuits and encourage new businesses to invest in Pendine.

Impact of the project

- Two weeks prior to opening Caban hosted an open day for the local community to have a tour of the building, meet the staff and answer any questions. Four hundred and twelve people attended, 98% gave positive feedback.
- Positive outcomes from this event as follows:
 - Enquiries to hire spaces for events and weekly gatherings
 - Networked with local businesses on ways to work together
 - Enquiries to book the rooms for residential groups including a college and a university
- Since then Caban has already linked with a number of local businesses who offer Caban guests discounts on the activities they provide.
- Bookings – postcodes are varied but suggest the majority are from London and along the M4 corridor thus bringing visitor spend in from outside the area and county.
- Food is sourced from local producers and suppliers thus supporting the local supply chain and local food industry. Caban also actively promotes the local producers.
- The venues provide indoor and outdoor spaces for the community to meet, promoting health and wellbeing, combatting isolation and elevating the village to a place to be proud to live in.
- The community has been asked for input on the type of activities and events they would like to see hosted at the venues throughout the year and for example the Easter Egg Hunt welcomed 140 children and their families - a successful event which had a positive impact on the local community.

Cross cutting themes (achieved Y/N)

Positive action – disabled people (Y)
 Disability access group engagement (Y)
 Activity supporting speakers of the Welsh language (Y)
 Activity promoting the Welsh (Y)
 Local supply chain development (Y)
 Development of an organisational travel plan and sustainable transport initiatives (Y)
 Resource efficiency measures (Y)

BREEAM standards (Y)
Use of SUDS (N)
Integration of green infrastructure (Y)
Develop an Eco Code (Y)
Support for bio-diversity activity on a site funded through SF's (Y)
Site environmental management plans (Y)
Developing / engaging a CCT Champion (Y)
Integration of social clause (Y)
Stakeholder engagement good practice activity (Y)

Post project activity

- Both Caban and Museum of Land Speed will apply to Visit Wales for VAQAS accreditation.
- Caban is linking with local businesses to offer discounts to Caban guests on the services they deliver e.g. coastal foraging, outdoor pursuits, beach/surf hire.
- The MOLS is in partnership with UWTSU Automotive Design course to showcase students' work
- The MOLS has linked with ERDF/TAD funded Saundersfoot Heritage and Facilities Manager to explore working together on projects/visitor experiences.
- MOLS will link with Dylan Thomas boat house to offer cross promotion/dual ticketing.
- Host travel and motorsport writers/bloggers to experience a stay at Caban and a tour of the MOLS.
- Host a varied calendar of year round events aimed at both visitors and the local community and will engage with the community for feedback and input into the type of events they would like to see. Also linking with local groups and other businesses to promote additional events on Caban website.
- Invest in staff training and development.
- Events for CCC staff to participate in as teams and individuals and use venues across the county. Following a recent meeting with ASG they are adding an additional venue/event to their timetable and including Beach Volleyball on the Sand Sport Arena.

Caernarfon Waterfront Tourism Attractor Destination – Caernarfon Castle

Lead: Historic Environment Service, Welsh Government

The aim of the project was to improve access to the upper levels of the castle’s main tower – including disabled access – via a lift and new viewing platform. The project also provided new disabled WC facilities, upgraded the existing gift shop, provided a small café offer for visitors and improved the facilities for Cadw’s custodians.

Central to the enhancement project is new artistic interpretation focusing on the theme ‘the hands that built the castle.’ This modern approach to interpretation aims to present the story of the castle from a different perspective encouraging visitors to re-think how they perceive the site’s history.



Start date: September 2016
End date: December 2022



Total Project Costs: £5,313,553
TAD/ERDF investment: £1,040,758
Match funding: £4,272,795

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	7.5	9
SMEs accommodated (number)	0	1
Land developed (Ha)	0	0
Premises created / refurbished (m ²)	300	719

Project achievements

Key objectives

The original aim of the project was to provide improved physical and intellectual access to Kings Gate, to provide new disabled WC facilities, to upgrade the existing gift shop, to provide a small café offer for visitors and to greatly improve the facilities for Cadw’s custodians.

Achievements

The works themselves comprised of extensive cleaning and conservation of historic masonry to Kings Gate Tower, the main entrance to Caernarfon Castle. New floorplates were installed to ground, first and roof levels and the interior spaces fitted out to provide accessible toilets, a ‘Changing Places’ toilet facility, a refurbished shop, greatly improved staff areas, new interpretation installation to all levels (and within the castle wards too), a refurbished education space, a new glazed glass lift to increase physical accessibility through this part of the castle and to access a new roof top deck. Existing passageways within the towers were conserved and new lighting installed. A medieval stone spiral stairs was completed in timber, creating a link to an outside, tiered, seating area.

Central to the enhancement project is new artistic interpretation focusing on the theme ‘the hands that built the castle.’ This modern approach to interpretation aims to present the story of the castle from a different perspective encouraging visitors to re-think how they perceive the site’s history.

All works had the benefit of Planning and Scheduled Monument consent and the approval of ICOMOS(UK) as the works were to part of a World Heritage Site. The team maintained the project’s focus throughout the contract.

The works were completed (and Possession certificates issued by the architect) by the end of December 2022 and opened to the public in April 2023.

Impact of the project

The number of custodian staff was increased at Caernarfon Castle to accommodate the expected increase in visitors.

The cafe facility within Kings Gate was put out to tender via Sell2Wales. Eventually, a contract was awarded to a local café operator (an SME) based in Caernarfon.

Some of the lawned areas within the castle’s confines were used for siting new interpretation pieces to explain the narrative created by the interpretation designers for the project.

Cross cutting themes (achieved Y/N)

Positive action measures – older people (N)

Positive action measures – disabled people (Y)

Disability Access Group Engagement (Y)

Activity promoting the Welsh language (and Culture) (Y)

Local supply chain development (Y)

Development of an organisational travel plan and sustainable transport initiatives (Y)

Resource efficiency initiatives (Y)

Site environment management plans (N)

Community skill building activity (Y)

Developing / engaging CCT Champions (N)

Integration of Social Clauses (Y)

Stakeholder engagement good practice activity (Y)

Holy island International Visitor Gateway

Lead: Isle of Anglesey County Council

Ferry port terminus signage and interpretation for international visitors; access improvements to St Cybi's Church and Roman Fort; new signage and interpretation for self-guided tours on Holy Island; improvements to the visitor centre and toilets at Breakwater Park, Holyhead; and refurbished toilets at Swift Square, Holyhead.



Start date: April 2016
End date: May 2023



Total Project Costs: £2,820,207
TAD/ERDF investment: £1,737,927
Match funding: £1,082,280

WEFO Indicator	Target	Progress to date
Jobs accommodated	3	
SMEs accommodated	1	
Land developed	0.49ha	
Premises created / refurbished	250m2	
Additional indicators		
Visitor numbers	18,000	
Indirect jobs created	13	

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	2.5	2.5
SMEs accommodated (number)	1	0
Land developed (Ha)	0	0
Premises created / refurbished (m ²)	250	250

Project achievements

The project successfully achieved the majority of the output targets on jobs accommodated and premises created/ refurbished target.

The refurbished and extended Breakwater Park Visitor Centre will accommodate 2 jobs. The North Wales Wildlife Trust kiosk will accommodate 0.5 jobs (part time). Over 250m2 of premises have been refurbished or extended that include Breakwater Park Visitor Centre, Breakwater Park toilets, North Wales Wildlife Trust Kiosk, Swift Square Public Conveniences and St. Cybi's Roman Tower. The project didn't achieve the target for 1 SME accommodated which was planned for the Breakwater Park visitor centre.

Impact of the project

Access to facilities, history, heritage and culture

The improved facilities are available for the local community to access, and provides greater opportunities to engage with local history, heritage and culture that would have been less

available without this project. In particular, the Visitor Centre at the Breakwater Park is located nearby a recently created play area and provides the opportunity to access information about the history of the area and the local environment through a variety of newly installed interpretation collection.

Benefits to local economy and visitor economy

The improved wayfinding scheme provides high quality maps and navigation information to allow visitor to easily find key locations, attractions, and businesses. This will have a positive impact on several local businesses as the area is easier to navigate and promote visitors to explore. In particular the high volume of independent cruise ship passengers that arrive at the port and will promote visitors to explore the town and wider area.

The modernised public conveniences at Swift Square helps encourage footfall and duration of stay in the town centre area which in turn has a positive impact for businesses in the area.

Cross cutting themes (achieved Y/N)

Equal Opportunities, Gender Mainstreaming, and the Welsh Language (Y)
Sustainable Development (Y)
Tackling Poverty and Social Exclusion (Y)

Post project activity

1. Reduced running costs – The reduced running costs of the public conveniences and Visitor Centre will be noticed after a year of operating due to the low-energy and lowcarbon features such as solar PV systems, infrared heaters and air-source heat pumps.
2. The Breakwater Park Visitor Centre will host a range of additional events and activities via the Council AONB/ Countryside team and other external partners during the next 12 months and beyond.
3. Improved Cruise Passenger perception – It is expected the new developments will results in positive reviews/ feedback and an improved perception of the area that will promote future cruise ship passengers to explore the area when calling at the port. This is expected to be realised during this cruise season and following cruise seasons.

Vale of Rheidol Railway: Wales to the World

Lead: Vale of Rheidol Railway Ltd

The aims of the project were to create a new visitor experience at the Aberystwyth terminus of the Vale of Rheidol railway and to protect the historic rolling stock and enable disabled access to all areas of the railway. Conversion of existing engine shed into a new visitor attraction and steam engine museum; new platform, ticket office and café; relocation of toilet block and canopy; and storage building for the Heritage coaching stock. (All ERDF-funded elements will be completed in June 2023. An additional work package, funded outside the operation will be completed in August 2023).



Start date: March 2016
End date: June 2023



Total Project Costs: £3,309,260
TAD/ERDF investment: £1,612,946
Match funding: £1,696,314

WEFO Indicator	Target	Achieved
Jobs accommodated (number)	34	37
SMEs accommodated (number)	1	1
Land developed (Ha)	1,618	1,618
Premises created / refurbished (m ²)	5100	3,587

Project achievements

Key objectives

- Railway Infrastructure, associated works design and project management
- Improve the visitor experience through the provision of new platform, toilets and canopy
- Improve accessibility for visitors
- Supply of Mobile Booking Office
- Construction of Heritage Coaching Stock storage building
- Construction of Booking Office
- New display space conversion of existing Great Western Railway engine shed into a new visitor attraction.

Achievements

Upgrading the physical railway infrastructure for efficient working of locomotive servicing which included; ergonomically designed ashing pits designed to minimise manual handling of ash, recycled mainline 1930s water crane for quick watering of locomotives, coaling stage with dust

suppression system reducing manual handling of coal by half from previous setup along with water tap so crews have easy access to drinkable water to top up water bottles which is essential during summer months. All features improve efficiency and allow crews more time for train turn-arounds or to use improved washing facilities.

Groundworks included landscaping, levelling, drainage and provision of communications infrastructure. This was project managed in house.

The railway's track maintenance teams have built and commissioned new railway infrastructure in the form of tracks, points, sidings and associated signalling Requirements.

A new platform has been created for passengers to board the trains. The platform has a smooth surface for wheelchairs, and pushchairs. Tactile paving is provided at the platform edge.

Fencing has been provided to control the flow of visitors from the platform when one train arrives and the train is being prepared for the next trip. This allows staff to ensure the train is cleaned and prepared to a high standard before additional passengers board the train.

The station lavatory building provides a high quality toilet facility for railway visitors. The toilets were entered into the "Loo of the Year" awards described as the washroom Oscars and received a platinum grading and a raft of other prizes.

A canopy from the old station has been re-sited and provides a covered waiting area. The platform has a viewing area which allows visitors to see the locomotives coming out of the engine shed and gives views of the water column and coaling stage adding to the visitor experience.

A temporary Booking Office was purchased and fitted out on the platform. A large ticket sale counter greatly enhanced the ticket purchasing experience compared to the facility it replaced.

A heritage coaching stock secure storage building was constructed. The facility includes dedicated maintenance facilities for the carriage fleet, some of which is over 100 years old.

Historic wagons previously stored outside are now able to be kept indoors, protecting these artefacts from damage from the sea air. This includes the historic Cattle Wagon which was recently restored in the Aberystwyth workshop

A new Booking Office has been constructed on the site of an old storage building. The modern building is constructed in a traditional railway architectural style and designed in a way to be sustainable making use of natural light and heated using air source heating powered by the solar panels on the site.

The retail space has increased considerably compared to the temporary Booking Office. This has allowed the railway to increase the number of product ranges stocked.

The Great Western shed engine shed is being converted to new visitor attraction work once complete it will provide a unique display area in an atmospheric railway environment showcasing our historic collection of narrow-gauge locomotives, rolling stock and artefacts.

The building will provide an events space with a difference available for public hire.

Alongside the stated indicators the predicted long term benefits associated with the operation include:

- **Better transport integration with the Network rail station and bus terminal.** A dedicated pathway has been constructed to link to the Aberystwyth town centre, with easy access direct to the mainline railway station and bus station.

- **Enhanced coach party access.** An enhanced car park has been built using the railway's own funds. This provides a large number of additional spaces for visitors.
- **Potential for evening use of the site as a venue for live performance.** Some areas of the site have been used for live performances including entertainment for wedding guests travelling on charter trains and school bands and musicians entertaining visitors. Once the Great Western Railway shed has been completed, there is huge scope for utilising the facility for a variety of uses. There is scope for the building to be used for evening events such as comedy performances during the Aberystwyth Comedy Fest.
- **Further revenue streams from themed events such as special Christmas events.** The Great Western Railway shed will allow the railway to reduce the seasonality of the business by expanding our programme of events during the winter which includes Christmas events such as Santa trains.
- **Improved disabled access to not only the site but also our future disabled carriages.** The railway visitor experience is now fully accessible for wheelchair users. The new Booking Office and platform facilities make it easy for a wheelchair user to move around the site, and have been designed in conjunction with each other.
- **Increased spend from passengers and visitors within the ticket office and display shed.** Whilst visitor figures have diminished slightly owing to pre Covid pandemic levels, the secondary spend per head on retail has increased considerably owing to the larger range of products on offer, greater circulation space for browsing and promotional initiatives.

Impact of the project

- Fully accessible visitor experience from drop off to train rides. This includes toilets.
- Improved parking and access for visitors.
- Enhanced visitor experience.
- Enlarged booking office and retail space to enable wet weather protect of visitors prior to train boarding.
- Heritage rolling stock protected and stored in a suitable environment rather than kept outside
- New museum display space allowing year round opening (Still being completed with works outside of the Visit Wales project)
- Enabling us to open during the height of restrictions during the pandemic. The new buildings and space allowed socially distanced operation.
- Delivered commercial benefit through increased retail revenue
- Reduced seasonality of the railway business
- Safeguarding and creating jobs
- Contributing to civic pride and sense of place – a quality visitor experience and positive image of Aberystwyth and Mid Wales

Cross cutting themes (achieved Y/N)

Positive action measure – disabled people (Y)
 Positive action measure – older people (Y)
 Activity supporting speakers of the Welsh Language (Y)
 Encourage entrepreneurship and business start-up initiatives to encourage more take up from women (Y)
 Integration of green infrastructure (Y)
 Support for biodiversity activity on a site funded through SFs (Y)
 Resource efficiency measures (Y)
 Integration of blue infrastructure (Y)
 Develop an Eco Code (Y)
 Local supply chain development (Y)
 Use of Sustainable Urban Drainage Systems (SUDs) where applicable (Y)

Community Skill building activity (Y)
Volunteering schemes (Y)

Post project activity

- The ability to open the main Aberystwyth site all year round for both public access and tourism related activities.
- Further visitor number improvements over the coming years.