

Dadansoddi ar gyfer Polisi



Analysis for Policy



SOCIAL RESEARCH NUMBER:

1/2018

PUBLICATION DATE:

09/01/2018

Evaluation of the Coastal and Sustainable Tourism Projects

Evaluation of the Coastal and Sustainable Tourism Projects

Regeneris Consulting in partnership with The Tourism Company



Full Research Report: Regeneris Consulting and the Tourism Company (2017). *Evaluation of the Coastal and Sustainable Tourism Projects*. Cardiff: Welsh Government, GSR report number 1/2018.
Available at: <http://gov.wales/statistics-and-research/evaluation-coastal-sustainable-tourism-projects/?lang=en>

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

For further information please contact:

Jo Coates

Social Research and Information Division

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Tel: 0300 025 5540

Email: Joanne.coates@gov.wales

Table of contents

List of Tables	2
List of Figures.....	4
Glossary	5
1. Introduction.....	6
2. Methodology.....	12
3. Sustainable South Wales Cycling – Cognation	49
4. Sustainable One Historic Garden.....	68
5. Sustainable: North Wales Cycling	84
6. Sustainable: The Eryri Centre of Excellence	101
7. Coastal: Watersports - Swansea Bay	119
8. Coastal: Aberdaron – National Trust	140
9. Coastal: Pembrokeshire Coastal	157
10. Coastal: Saundersfoot.....	175
11. The Green Sea Programme	189
12. Conclusions, Recommendations and Lessons.....	214
Annex A - Tourism Business Survey	225
Annex B - Consultations	227

List of Tables

Table 1.1: Funding into Sustainable and Coastal Tourism (£s), claimed in Sept. 2015	9
Table 2.1: Attractions for which there is published visits data	17
Table 2.2 Local Authorities and ERDF investments	26
Table 2.3 Visitor numbers and spending by local authority area (annual av. 2010-2012)....	29
Table 2.4 Priorities from Achieving Our Potential 2006 - 2013	33
Table 2.5 ERDF Grant Awarded (£m)	36
Table 2.6 Project Assessment Criteria	37
Table 2.7 Evolution in Expenditure and Grant Approved	39
Table 2.8 ERDF Grant Paid Over Time, Cumulative (£m)	40
Table 2.9 Categories of Expenditure, Total Forecast Cost, June 2015 (£m)	40
Table 2.10 Total Forecast Income, June 2015 (£m)	42
Table 2.11 Projected Final Achievement	44
Table 3.1 Focus of the Proposed Cognation Investments	50
Table 3.2 Location of Main Investment Projects	53
Table 3.3 Cognation Funding Profile and Outturn	54
Table 3.4 Cognation Expenditure and Funding Outturn by Investment, June 2015	55
Table 3.5 Lifetime Revenue Expenditure, June 2015	56
Table 3.6 Cognation Investment and Support Activities	57
Table 3.7 Achievement of Output Targets	60
Table 3.8 Achievement of Outcome Targets	60
Table 3.9 Visit Analysis for 2013, Cardiff University	61
Table 3.10: Visits to Cwmcarn and Afan Forest Park Trails, 2007 to June 2015	62
Table 4.1: Location of Investment Projects	69
Table 4.2: Funding Profile and Out-turn (£m)	72
Table 4.3: Expenditure and Funding Outturn by Investment Strand, June 2015	73
Table 4.4 Activities delivered and variations	75
Table 4.5: Achievement of Overall Output Targets	78
Table 4.6: Achievement of Overall Outcome Targets	79
Table 4.7: Visitor Numbers at One Historic Garden Sites, 2006-12	79
Table 5.1: Location of Projects	85
Table 5.2 Funding Profile and Outturn	87
Table 5.3 Expenditure and Funding Outturn by Investment Strand, 2015	88
Table 5.4 Match funding profile (£ millions)	89
Table 5.5: Delivering of Investments	91

Table 5.6 Achievement of Overall Output Targets	93
Table 5.7 Achievement of Output Targets by Investment Projects	94
Table 5.8: Achievement of Overall Outcome Targets	95
Table 5.9: Achievement of Outcome Targets by Investment Projects	95
Table 5.10 Visit Wales Visitor Survey numbers	96
Table 5.11: Visitor Numbers at Brenig Forest Attractions	96
Table 6.1: Location of Investment Projects	104
Table 6.2 Funding Profile and Outturn	105
Table 6.3 Expenditure and Funding Outturn by Investment Strand, June 2015.....	106
Table 6.4: Overheads, June 2015.....	107
Table 6.5: Activities delivered and variations	108
Table 6.6: Achievement of Overall Output Targets	111
Table 6.7 Achievement of Output Targets by Investment Projects	112
Table 6.8 Achievement of Overall Outcome Targets	112
Table 6.9 Achievement of Outcome Targets by Investment Projects.....	113
Table 6.10 Visitor Numbers by Attraction.....	114
Table 7.1 Location of investment projects.....	121
Table 7.2 Funding profile and outturn (£m).....	123
Table 7.3 Expenditure and funding outturn by investment strand, June 2015	123
Table 7.4 Cost breakdown	124
Table 7.5: Activities Delivered.....	125
Table 7.6 Achievement of Overall Output Targets	129
Table 7.7 Achievement of general outcomes	131
Table 7.8 User numbers for 360° Beach and Watersports Centre	134
Table 8.1:Location of Investment Projects	141
Table 8.2 Funding Profile and Outturn (£ millions).....	143
Table 8.3 Expenditure and Funding Outturn by Investment Strand, June 2015.....	144
Table 8.4 Anticipated cost breakdown as shown in business plan.....	144
Table 8.5: Activities Delivered.....	146
Table 8.6 Achievement of Overall Output Targets	149
Table 8.7 Achievement of general outcomes	150
Table 8.8 Achievement of Outcome Targets.....	152
Table 9.1 Location of Investment Projects	158
Table 9.2 Funding Profile and Outturn (£ millions).....	160
Table 9.3: Expenditure and Funding Outturn by Investment Strand, June 2015.....	161

Table 9.4 Anticipated cost breakdown as shown in business plan.....	161
Table 9.5 Activities delivered	163
Table 9.6 Achievement of Overall Output Targets	167
Table 9.7 Achievement of general outcomes	168
Table 9.8 Outcomes attributable to site – 2013	171
Table 10.1 Location of Investment Projects	177
Table 10.2 Funding Profile and Outturn	179
Table 10.3 Anticipated cost breakdown as shown in business plan (2014)	179
Table 10.4 Activities Delivered.....	181
Table 10.5 Achievement of Overall Output Targets	184
Table 10.6 Achievement of General Outcomes	185
Table 10.7 Achievement of Outcome Targets.....	186
Table 11.1 Components of the Green Sea Programme	190
Table 11.2: Location of Investment Projects	191
Table 11.3 Funding Profile (£m).....	193
Table 11.4: Expenditure and Funding Outturn by Investment Strand, June 2015 (£s).....	193
Table 11.5 Breakdown of project cost and grant contribution (£s)	194
Table 11.6 Activities delivered	196
Table 11.7 Achievement of Overall Output Targets	202
Table 11.8 Blue Flag Beach Criteria addressed	203
Table 11.9 Achievement of general outcomes	204
Table 11.10 Data on number of visits	207
Table 11.11 Calculations on economic impact.....	209
Table 11.12 Factors affecting choice of beaches to visit.....	210
Table B.1: Consultations.....	227

List of Figures

Figure 2.1 Geography of Investment.....	25
Figure 4.1: One Historic Garden Locations	70
Figure 4.2: Scolton Manor Beekeeping Centre	81
Figure 6.1 Eryri Centre of Excellence	103

Glossary

Acronym/Key word	Definition
ERDF	European Regional Development Fund
E4G	Environment for Growth
WEFO	Welsh European Funding Agency
COE	Centre of Excellence
CCT	Cross Cutting Themes
WERU	Welsh Economic Research Unit
ONS	Office for National Statistics
NRW	Natural Resource Wales
GVA	Gross Value Added
FCW	Forestry Commission Wales
CBC	County Borough Council
CC	County Council
NPTCBC	Neath Port Talbot County Borough Council
MTCBC	Merthyr Tydfil County Borough Council
CCBC	Caerphilly County Borough Council
BPW	Bike Park Wales
DDA	Disability Discrimination Act

1. Introduction

1.1 Visit Wales commissioned Regeneris Consulting and The Tourism Company to undertake a final evaluation for the two Visit Wales Environment for Growth (E4G) projects – Sustainable Tourism and Coastal Tourism - that have been supported by the European Regional Development Fund (ERDF). The evaluation also included the Green Sea programme.

1.2 The evaluation and its underpinning framework has been developed collaboratively with colleagues in Visit Wales and Welsh Government. The findings draw from extensive reviews of available project plans and documentation; consultations with project managers, officers, and stakeholders; and analysis of reported data on finances, outputs, and outcomes. The availability of evidence and consultees has varied widely across different parts of the projects and so depth of evaluation, and the confidence in the findings also varies.

The E4G Programme

1.3 The E4G programme received funding from the ERDF via the Convergence Programme 2007-13, covering West Wales and the Valleys, and the Competitiveness programme 2007-13 covering East Wales. Since 2008, work has progressed on six strategic project packages:

- Valleys Regional Park
- Heritage Tourism
- Communities and Nature
- Wales Coast Path
- Coastal Tourism
- Sustainable Tourism.

1.4 Each of these six strategic packages shares related goals to:

- Improve the attractiveness of existing - or develop new - natural and manmade facilities, as well as develop Centres of Excellence and spin-out activities related to the environment
- Develop marinas, cycle and walking trails for recreational use as well as ancillary services and facilities.
- Improve access to the coast and countryside through developing coastal footpaths and other routes

- Develop the potential for sustainable recreation and economic activity linked to the natural environment around important conservation and Natura 2000 sites.

Sustainable Tourism, Coastal Tourism, and the Green Seas Programme

- 1.5 This study does not cover all of the E4G programme. The focus is on two strategic projects for “Sustainable Tourism and “Coastal Tourism” in which Visit Wales is the lead authority. Specifically, this concentrates on:
- The Sustainable Tourism Centres of Excellence
 - The Coastal Tourism Centres of Excellence, including the Green Sea Programme.
- 1.6 This Sustainable Tourism programme developed as consisting of four “Centres of Excellence”. The centres are:
- South Wales Cycling – Cognation
 - One Historic Garden
 - North Wales Cycling Centre of Excellence
 - The Eryri Centre of Excellence – One Big Adventure.
- 1.7 This Coastal Tourism programme consisted of three Centres of Excellence; an additional fourth Centre of Excellence subsequently became part of the coastal tourism strand; and the Green Sea Programme. These are:
- Centre of Excellence for Watersports, Swansea Bay
 - Aberdaron – National Trust
 - Pembrokeshire Coastal Centre of Excellence.
 - Saundersfoot Marine Harbour, now included as a “Marine Centre of Excellence”.
 - The Green Sea Programme of which:
 - South, consists of projects managed by Pembrokeshire County Council to enhance the coastal environment and visitor experience.
 - North, that consists of projects managed by Conwy County Council to enhance the coastal environment and visitor experience.
- 1.8 The scope for evaluation is therefore across nine investment themes. Four of these are called “Sustainable Centres of Excellence”, four are “Coastal Centres of Excellence”, and one is the Coastal Green Sea programme. Within each of these, there are often multiple projects which have received funding and undertaken activity. We refer to these in the report as “investment activities”.

Financial Commitments

- 1.9 The Sustainable and Coastal Tourism projects have received funding of some £37.7 million. Some £16.9 million of this is funding from the ERDF Convergence programme. We also know from the most recent financial claims that:
- Sustainable Tourism received a total of £18.9 million of funds (£8.2m from ERDF).
 - Coastal Tourism received a total of £18.8 million of funds (£8.7 million from ERDF).
- 1.10 The most significant share of funding has been directed towards:
- Eryri – 12 percent of funds, £4.6 million, over £2 million from ERDF.
 - One Historic Garden – 12 percent of funds, £4.6 million, £1.9 million from ERDF.
 - South Wales Cycling / Cognation – 12 percent of funds, £4.4 million, over £2 million from ERDF.
 - Swansea Bay Watersports – 11 percent of funds, £4.2 million, £2.2 million from ERDF.
 - Pembrokeshire Coastal – 11 percent of funds, over £4 million, £1.9 million from ERDF.
- 1.11 Table 1.1 presents the financial commitments across Coastal and Centres of Excellence and the Green Sea Programme as reported in September 2015. It must be noted that around 16 percent of funds was not allocated but was instead retained centrally for Visit Wales activity such as marketing, administrative and travel expenses.

Table 1.1: Funding into Sustainable and Coastal Tourism (£s), claimed in September 2015

	Total (£m)	ERDF (£m)	% of Total	% of ERDF
<u>E4G – Sustainable Tourism and Coastal Tourism</u>	<u>37.7</u>	<u>16.9</u>	<u>100</u>	<u>100</u>
Sustainable Tourism	18.9	8.2	50	48
<i>Of which Centres of Excellence</i>			0	0
Eryri	4.6	2.1	12	12
North Wales Cycling	1.8	0.8	5	5
South Wales Cycling - Cognation	4.4	2.0	12	12
One Historic Gardens	4.6	1.9	12	11
<i>Remainder (e.g. central marketing)</i>	3.5	1.4	9	8
			0	0
Coastal Tourism	18.9	8.7	49	51
<i>Of which Centres of Excellence</i>			0	0
Swansea Bay Watersports	4.2	2.2	11	13
National Trust – Aberdaron	3.4	1.5	9	9
Pembrokeshire Coastal	4.0	1.9	11	11
Saundersfoot Trust	0.9	0.5	2	3
<i>Of which Green Sea:</i>			0	0
The Green Sea Programme South	1.9	0.8	5	5
The Green Sea Programme North	0.9	0.4	2	2
<i>Remainder (e.g. central marketing)</i>	3.5	1.4	9	8

The Evaluation Needs of Visit Wales

1.12 The questions and objectives Visit Wales looked to address through the final evaluation were ambitious in scope.

Questions for the Evaluation

- How and to what extent did project activity reflect the commitments set out in the business plan?
- What are the perceived outcomes of the project from the perspective of beneficiaries?
- How and to what extent are project outcomes making a difference compared to if the improvements had not been implemented?
- Based on evidence, what would be the outcome, and potential long term impacts, of withdrawal of project funding for beneficiaries of the project?

- Which aspects of project delivery have led to positive outcomes, or could be viewed as ‘good practice’?
- What barriers and constraints has the project faced? What are the ‘lessons learnt’ from dealing with such barriers and constraints?

Specific Objectives for the Evaluation

- To provide an independent, evidenced based, understanding of the performance indicators and targets of the two EU Sustainable and Coastal Tourism projects delivered by Visit Wales
- To review the delivery and partnership project management of the four Sustainable Centres of Excellence, three Coastal Centres of Excellence (with the subsequent addition of Saundersfoot as a fourth) and the Green Sea Joint Sponsor partnership arrangements and delivery mechanism
- Address the project’s delivery and achievement against the cross cutting themes (CCT) aims, objectives and CCT-related indicators outlined in their business plan
- To review the progress against the social impacts assessment framework issued in 2012 and provide a qualitative evidence case study based report on the achievements within the project period
- To review Visit Wales’s match funding support programme offered to all the partners in relation to transport, marketing, wildlife, waste and energy
- To review the external collaborative monitoring and evaluation contract with Cardiff Business School for the two Visit Wales projects
- To consider legacy impacts, including the extent to which the project has contributed to structural and sustained impact on the targeted sectors, products and businesses;
- To review the marketing programme for each project, namely the Autumn/Winter 2013 and Spring Summer 2014 campaigns in delivering results for the Visit Wales projects.

1.13 The scope of question and objectives covers three different aspects of evaluation – process evaluation, impact evaluation, and economic evaluation. The aim throughout this study has been to address these wide-ranging questions within a clear evaluation framework (see section 3) that follows a logical approach and follows good practice.

1.14 In practice, across such a wide number of diverse projects, the evidence that is available to inform evaluation varies widely. The research has found some Centres of Excellence have undertaken monitoring and commissioned their own evaluations; and others where some of the information to inform an evaluation is comparatively light and inconsistent. This creates challenges in undertaking an evaluation of this type. Our approach has been to research each of the centres individually to develop as granular and robust an evidence base as we can.

2. Methodology

The Evaluation Framework

The Logic Model

- 2.1 The questions and objectives for evaluation set by the Welsh Government are ambitious in scope and seek to cover aspects of three very different types of evaluation:
- Process evaluation – that asks how the projects were delivered addressing issues of implementation, barriers, and good practice.
 - Impact evaluation – that asks what difference did the projects make, addressing issues of perceived outcomes and benefits.
 - Economic evaluation – that begins to ask whether benefits justified costs and the extent to which the projects made a difference compared to if other choices had been made.
- 2.2 In practice, within the parameters of this evaluation, we have had to develop an evaluation framework that focuses on answering process evaluation questions and some impact evaluation questions that mostly test how the projects were delivered and whether the projects achieved the outputs and results that were intended at the start.
- 2.3 This compromises the extent to which the evaluation can address the objectives about the extent to which project outcomes make a difference compared to if the improvements had not been implemented, and potential long term impacts or implications of withdrawal of funding. It also means the evaluation does not consider the extent to which the investments did or did not offer value for money.
- 2.4 We have therefore developed an evaluation framework that follows guidance from HM Treasury’s Magenta Book. We have applied a “logic model” that is built upon the causal pathway of Project; Inputs; Activities; Outputs / Processes; Outcomes / Results; and Impacts.



2.5

Our evaluation therefore takes this approach where we have sought to apply evidence for each Sustainable/Coastal Centres.

Project

- 2.6 We have looked to clearly define and describe each Sustainable/Coastal Centre through reviewing business plans and supporting documentation to explore:
- The rationale for intervention – why the project is considered as suitable for support from ERDF and matching public funds. In practice, the rationale is usually explained in terms of links with wider local economic strategy and visitor strategy rather than particular economic barriers.
 - Descriptions of what the Centres of Excellence and their investment activities actually are. While all the Centres are linked by “tourism”, there is actually a large number and wide range of different interventions.
 - Locations – to be clear of where the projects have taken place, in terms of local authority district but also more precisely by town/locality and postcode.
 - Development – Identifying the project leads, the delivery partners and sponsors and articulating when the project was developed.
 - Goals – what aims and objectives were set out in the Business Plans for the projects to achieve; from clear goals on visitor numbers and spending, to ambitious and harder-to-define goals on the environment and society.

Inputs

- 2.7 The investments across the Sustainable and Coastal tourism projects have financial inputs from public authorities, ERDF, and in some cases private investors. Therefore, a precondition for evaluation is to have clarity of the total money invested and where the money came from, and why the project was chosen. The key sources of evidence for financial inputs are:
- The Business Plan submitted by each Centre in 2010 about their anticipated sources on funding and expenditure.
 - The Final Claim document of July 2015 that summarises the headline out-turns of funding and expenditure by each Centre.
- 2.8 Where information is available, we seek to specify who has contributed financial inputs, for example to understand the mix of investment from ERDF, the Welsh Government, local authorities, public agencies, and private investors.
- 2.9 These financial inputs may pay for capital inputs (e.g. construction activity) and revenue activities (e.g. project staff and related goods and services, business services such as marketing activity, etc.). For example “jobs created” that are

associated with construction or delivery of the projects, should for evaluation purposes be assessed as inputs rather than outcomes or results.

Activities and Processes

- 2.10 These inputs generate activity – this may take the form construction activities, or activities in services such as marketing and training etc. The choices shaping these activities and the effectiveness of the delivery of activities is the focus of a process evaluation.
- 2.11 Our focus for evaluating activities and processes is on exploring how the Centres were implemented and delivered, learning from available business plans and information, the mid-term-review, and our own consultations, to establish evidence of decision-making about how activities were prioritised. This was a central aspect of the mid-term review and is revisited as part of this final evaluation.
- 2.12 Our approach for each has considered:
- The activities undertaken, the priorities set, and funding allocations across activities.
 - The delivery of the investments – outlining what has been undertaken and how this may have changed from what was set out in original Business Plans.
 - Background on operational management and how this changed from original plans.

Outputs

- 2.13 An effective evaluation must be clear about “outputs” that arise from the activities. These are largely physical outputs such as visitor facilities, bike trails, and coastal paths; but also measures such as enterprises supported by training sessions, that are directly produced from all the activities. These outputs should be definable and measurable. Any evaluation should as a minimum be able to report on the outputs.
- 2.14 Projects supported by the ERDF must match with the ERDF Indicators Guidance provides measures for outputs that are directly relevant to the types of tourism projects we are evaluating. In particular, the ERDF indicators selected as relevant to these projects are:
- Initiatives developing the natural and/or historic environment; the number of initiatives improving or developing new visitor attractions or visitor facilities in natural and/or historic environments;

- Managed access to countryside or coast; the number of kilometres of reconstructed or created footpath or cycleway providing access to countryside or coast (the footpath and cycleways should primarily be for leisure use).
- The number of enterprises assisted; any entity engaged in an economic activity, irrespective of its legal form (includes self-employed persons and partnerships or associations), receiving a minimum of seven hours of consultancy advice; and a project should count each enterprise only once during the project's lifetime.

2.15 These ERDF-defined outputs form the basis for evaluation and for comparing how the final outputs claimed in July 2015 compare with the original outputs committed to in business plans and offer letters of 2009/10 to see the extent to which outputs were achieved.

2.16 These ERDF-defined outputs are limiting in that they do not provide an indication of what constitutes "initiatives" or "managed access". Where information is available, we highlight whether these are visitor facilities, toilets, signage etc.

Outcomes / Results

2.17 The outcomes occur because of the delivery of the outputs. That is there must be a causal relationship that demonstrates how attributable outcomes emerge from the outputs. The outcomes must be definable and measurable. The key outcome and explicit goal across tourism related outputs is the change (increase) in the number of visitors and the value of their spending in the local area.

2.18 Projects supported by the ERDF must match with the ERDF Indicators. Guidance provides measures for outcomes (or "results" in ERDF terms) that are directly relevant to the types of tourism projects we are evaluating. In particular, the ERDF indicators that were selected as relevant to these projects are:

- *Visits*. This is defined as the gross number of visits to the infrastructure referred to in the output "Initiatives developing the natural and/or historic environment" or to the countryside or coast referred to in the output "Managed access to countryside or coast". This should be counted on a cumulative basis during the life time of the project. Visits can be made by any person, regardless of locale, and may include multiple visits. The guidance advises using evidence from till receipts, if applicable, to attraction or sample monitoring of sites or paths.
- *Gross jobs created*. The gross number of jobs created; a new post which is expected will exist for at least 12 months and did not exist prior to the ERDF

activity. This does not include jobs which have been relocated. The post itself should be counted, not an estimate of the number of people that may occupy the post over time.

2.19 The selection of indicators on “visits” and “gross jobs” associated with those visits is significant as ERDF indicators that were not selected include (i) Number of new and lapsed visitors; and (ii) Spend by new/lapsed visitors that could have been used to give a more complete understanding of tourism outcomes.

2.20 The significant challenge the evaluation faces in assessing the key tourism related outcome of “visits” is that the extent to which this has been measured and recorded varies hugely.

2.21 At the early outset of the Sustainable/Coastal Tourism programme, it was clear that this was a priority concern in how to monitor the programme. All successful applicants in 2009/10 were provided with an “Environment for Growth Project Guidance Pack” that placed its emphasis on monitoring and evaluating visits. The pack stated that, “at an absolute minimum site managers must be able to estimate, with a reasonable degree of accuracy, the number of visitors to their destination, even if they are not in a practical position to undertake interviews due to low visitor volumes”. It set out in its appendices:

- Guidance on how to measure visitor volumes, and templates on which to record visitor numbers/estimates,
- A core visitor questionnaire applicable to E4G projects,
- Guidance on when and how to undertake visitor surveys, including specific help on technical statistical issues, such as sampling,
- Indicative resource implications of monitoring and evaluation activity,
- A database template in Microsoft Excel™ format within which to input and store visitor data

2.22 In practice, it is not clear the extent to which this guidance was followed, and there are costs and barriers that have prevented helpful collections of visitor data. Therefore, the extent to which we are able to have an understanding of outcomes for “visits” is patchy; and therefore related estimates around “jobs created” will be highly uncertain. The key sources of visitor monitoring that that we have accessed are:

- Welsh Economy Research Unit, data underpinning the report on “The Economic Impact of the Environment for Growth (E4G) Programme”. These are single year

survey snapshots that do allow for analysis before or after the intervention; or estimates modelled by WERU for attractions that did not have surveys. The data are therefore helpful, but less than ideal for evaluation purposes.

- Visit Wales Survey of Visits to Tourist Attractions, 2007 to 2014 additions. The 2014 release was published in October 2015. This includes time series data from most of the sites for “One Historic Garden” but is less helpful for the other attractions.

2.23 These two sources give us visitor information on the Centres and sites shown in the table below.

Table 2.1: Attractions for which there is published visits data

Projects	Sites	Source
Sustainable Tourism		
Eryri	All sites (2013)	WERU modelled numbers
North Wales Cycling	All sites (2013)	WERU modelled numbers
South Wales Cycling - Cognition	Cognition (2013 Total) Afan Forest Park (2012)	WERU
One Historic Garden	Aberglasney Gardens Bryngarw Colby Cwmdonkin (2012) Margam Penllegare (2012) Scolton (2012)	WERU
Coastal Tourism		Visit Wales Survey & WERU
Swansea Bay Watersports	Total (2013)	Visit Wales Survey
National Trust – Aberdaron	n/a	Visit Wales Survey
Pembrokeshire Coastal	Pothgain (2013) Solva (2013)	WERU
Saundersfoot Trust	Coppet Hall (2013)	Visit Wales Survey
Green Sea	North (2012) South (2012)	WERU

Source: Visit Wales Survey of Visits to Tourist Attractions and Welsh Economy Research Unit

Impacts

- 2.24 The impacts are those changes that are likely be the consequence of an increase in visitor numbers. Our interest is in gross impacts, as there is insufficient information to assess what would have occurred without the funding or with alternative investment.
- 2.25 The ERDF Indicators Guidance on impact suggests possible metrics of income generated, defined as the spending associated, directly or indirectly, to increased visits, but this indicator was not selected or monitored as part of the programme. Therefore, there are no official metrics on which to evaluate impacts.
- 2.26 Our assessment of impacts is then largely qualitative. It draws from documentation about the wider economic development, environment and society goals set for the project; and more widely from extensive consultation with project officers, managers, and stakeholders about the perceived impacts of the projects. We therefore present commentary on what consultees perceive the projects have achieved in terms of:
- Gross economic impacts and visitor economy impacts. This includes, for example, perceived effects on confidence in the local tourism offer and competitiveness, length of the visitor season, and effects on wider businesses.
 - Environmental and social impacts. This includes, for example, observation and examples around environmental awareness of visitors, initiatives related with the attractions to promote equality of opportunities, promotion of public transport options, and perceived promotion of health and well-being.
 - Legacy and long-term sustainability. This includes perceptions of how the attractions will continue beyond the end of ERDF funding and opportunities to secure further funding; and observations on how embedded these projects have become within the local community and with other partners in the area.

Our Method

- 2.27 Our method for undertaking the evaluation consists of two strands:
- Consultations.
 - Analysis of business plans and related documents.

Consultations

- 2.28 The major part of our research has been consultations with:
- Officials in Visit Wales and the Welsh European Funding Office (WEFO).
 - Visit Wales's project managers for each of the projects and with the managers for all of the Centres of Excellence and the Green Sea Programme.
 - Consultations with project officers for a sample of the investment activities funded.
 - A wider range of stakeholders and relevant partners drawn from national thematic leads, major delivery partners, and local private or public tourism representatives.
- 2.29 A list of the project managers, project officials and stakeholders consulted with is presented in the appendices. This consisted of 3-7 consultations for each of the Centres of Excellence. The project consultees were identified with Visit Wales, and these project consultees helped identify subsequent stakeholders to consult with. The consultations took place over a period of August to October 2015. The consultations were arranged as either face-to-face interviews or telephone interviews depending of the availability of consultees and the practicalities of site visits.
- 2.30 Each of the consultations followed an interview aide-memoire / questionnaire that was agreed with Visit Wales and WEFO. This covered over 30 questions about the projects and their purpose; the processes for delivering inputs and activities; and evidence of outputs; and helped us to secure supporting evidence about outcomes. The scope of the questions meant that each consultation was of at least one hour to fairly capture the views and insights of each consultee.

Consultations: Aide Memoire Questions

- 2.31 **Project** – Understanding the rationale and objectives:
1. What was their (their organisation's) role and engagement with the project?
 2. What was the context of the project – who initiated it and why?
 3. What were their organisation's objectives?
 4. What is their understanding of Visit Wales's overall programme objectives – how did it fit?
 5. How was the experience of bidding to Visit Wales and the contracting process?

2.32 **Inputs** - Clarifying the resources:

6. What funding/resources were put into the project? (ERDF; own/other funds)
7. What human resources have been put into the project (development, operation)? (ERDF revenue; own/other contribution)
8. Was the budget right/sufficient – e.g. unforeseen costs or unexpected underspend?
9. What organisations and structures have been involved in the governance and management of the project? How well has this worked?
10. What support has been provided by Visit Wales or WEFO to assist in project development and delivery (including specialist areas such as ERDF rules, tourism marketing, etc)?
11. Has sufficient external support been given?

2.33 **Activities** – What was done and how it was done

12. What specific actions have been taken?
13. How do these actions relate to the original plan – were any dropped or changed?
14. How were cross cutting themes addressed through the delivery of these activities?
15. What worked well (in terms of implementation)?
16. What worked less well (what barriers and challenges were faced) and how were challenges addressed?

2.34 **Outputs** – What was delivered

17. What has been delivered in terms of investment and product on the ground?
18. What other outputs have been delivered? (e.g. training programmes, marketing campaigns, events, community initiatives, businesses supported)
19. Has the project met its target outputs/deliverables?

2.35 **Outcomes** – Monitoring of visitors and spending

20. What evidence is available on a) visitor numbers b) length of stay c) visitor profiles/types d) visitor spend at the site(s)?
21. Is there comparable evidence of the situation before the investment was made?
22. To what extent can any changes be attributable to the project? (e.g. new visitors attracted)

23. Can any direct jobs be attributed to the project (including meeting equal opportunities objectives)?
24. How has the project affected the nature of the tourism economy locally?
25. How has the project affected visitors?
26. How has the project affected the local community (including generating social and health benefits)?
27. How has the project affected the environment? (use of resources, conservation benefits)?
28. Have outcome targets and overall aspirations been met? If not, why not?
29. Have there been any clear unintended consequences?

2.36 **Impacts – Wider Effects**

30. Are the activities and outcomes sustainable in the long term?
31. What lasting legacy is anticipated from the project?
32. Have projects gone on to secure further funding from other investors or public sources and did European funding help secure this?
33. How could the project have been improved and any lessons learned?

2.37 In practice, the consultation process was not straightforward. Over the lifetime of the programme i.e. from 2008/09 to 2015; people moved on to other jobs, and in a period of change in the public sector, whole organisations and their functions have changed. This made it challenging to identify consultees with a clear understanding across the whole programme and specific projects; and many consultees that have engaged lack the background or confidence to provide upfront responses to queries.

Analysis of Business Plans and Related Documents

- 2.38 Our method was to gather and review a comprehensive set of documents relating to the development and delivery of the programme. This included assembling a detailed picture of the different aspects of the projects and Centres of Excellence and the underpinning investment activities which have been progressed as well as the funding allocated to them and their targets.
- 2.39 Visit Wales have shared with us a large volume of documents. Some of these documents are more useful for evaluation purposes than others. We reviewed:
- The project applications for Sustainable and Coastal Tourism plus the offer letters issued.

- Some documentary evidence around the strategic development of projects for the E4G programme. This includes prior information notices, invitations to tender, notifications of interest, and selection of projects by a Panel.
- The business plans for each of the Centres of Excellence and the Green Sea Programme and Visit Wales offer letters.
- A mid-term review produced in June 2012 by Wavehill Ltd which provides a sense of progress of the E4G projects run by Visit Wales. The review provides a helpful overview of the selection of investment activities; and progress in activities up to 2012. At this time, the projects were largely in their construction and development phases. Wavehill Ltd found that there was some re-profiling of delivery timetables across projects to adapt to some delays.
- Evidence of inputs with claim forms for both the Coastal Tourism and Sustainable Tourism project as a whole but not broken down by separate centres or underpinning investment activities. To clarify, individual Centres of Excellence do not provide individual claim forms. These give overall financial inputs by ERDF, public sector, and unnamed private partners. The most recent claim forms are for June 2015.
- The latest summaries of progress for each centre, including headlines for the underpinning investment activities. Documentary evidence of activities in the form of an E4G induction pack (a guidance pack produced to assist project managers) and a selection of minutes from meetings over 2012 to 2013.
- A number of audits undertaken by WEFO auditors, including the Article 62b audits (covering implementation, expenditure and output verification, and compliance).
- Work to assess outcomes by the Welsh Economy Research Unit at Cardiff Business School. This research is largely driven by data of capital spending inputs and calculating the number of jobs needed as inputs (plus further jobs assumed through multiplier effects). More relevantly, it draws from visitor surveys (in 2012/13) to estimate total visitor spend and resulting jobs. The research includes only very limited 'baseline' visitor data from the pre-project period.

2.40 In practice, the review of documents has raised some challenges. There are gaps in the documentary evidence around the selection of particular Centres of Excellence and the selection of investment activities; and gaps in the documentary evidence of how activities evolved or were revised from original business plans. Over different interventions and over periods of time, there also appear to be inconsistencies

across documents about how progress has been recorded; and how different targets, outputs, and outcomes were defined. This has helped to generate some confusion that adds complexity to the task of evaluation and of comparing different Centres of Excellence and investment activities consistently.

Pilot Survey

- 2.41 The evaluation team piloted a business survey. The aspiration was for a web based business survey to capture views of visitor economy organisations and businesses which may have benefitted from the Centres of Excellence and their investments. This envisaged an achieved sample of around 200 responses (c. 20-30 per Centre of Excellence) anchored around questions on perceptions of the Visit Wales E4G programme, perceive change in visitor numbers and spending in the area, and how this may have affected the business.
- 2.42 It was anticipated at the outset that survey would be a challenge. In practice, it proved difficult to obtain a suitable database for a sample frame and the Visit Wales database used had problems of selection bias in the limited number of businesses and types of businesses registered. When looking to deploy a survey based on this database it was clear that the spread of investment activities, often in sparsely populated and coastal areas, meant the potential sample of tourism businesses within a suitable 0-10 kilometre radius was very small.
- 2.43 Nevertheless, an on-line survey was piloted in December 2015 targeting accommodation providers within proximity to investment activities related to the Cognation Centre of Excellence. The response rate was negligible. Therefore the survey was not considered appropriate for the evaluation and was not rolled out more widely.

The Context for Evaluation: part of a much bigger story

Scale of Investment

- 2.44 The investment in the Sustainable and Coastal tourism projects is significant. It totals over £37.7million of investment, of which around half was from the ERDF. In a period of public sector spending constraints, the ERDF and the matching funds that are leveraged alongside them represent an important source of funding for tourism-related projects in Wales. The scale of investment must, however, be placed in context:

- The £37.7 million (£16.9 million of ERDF) covers the funding period of 2007-2013 for European programmes. In practice, for Sustainable and Coastal tourism projects the application process commenced in 2009 with funding over the six year period from 2010 to 2015. This allows for an approximation that from a total of £6.3 million of this each year, £2.8 million is ERDF (unadjusted for the effects of price inflation over the period).
- This funding is allocated over both the Sustainable programme and Coastal programme, within which there are multiple projects and work packages. The annual investment in individual projects therefore becomes relatively more modest. With up to 50 projects, this averages at a little more than £100,000 per centre each year (with a little more than £50,000 each year from ERDF).
- These individual investments are important for the recipient projects; but in terms of evaluation we must recognise that these sums are unlikely to be economically transformative in many instances, although they can nevertheless be important locally. The scale of annual investment is not significant when set within the context of the economy of Wales or total tourism and visitor spending in Wales.

The Period for Evaluation

- 2.45 The applications for funding for the Sustainable and Coastal tourism projects took place over 2009/10 with final claims lodged by June 2015. We can therefore understand the time period of 2011 to 2014 as when most investment and activity within the projects occurred.
- 2.46 The relevant time period is likely to vary across projects. Some will have been more “shovel-ready” with work beginning quickly; others will have taken more time to prepare to get off the ground or initial plans may have been delayed and revised.
- 2.47 For consistency and simplicity, our approach to evaluation is to understand the time period as:
- Before: That is 2011 when investment was beginning.
 - After: That is 2014 when most investment was completed and for which we may now (in 2015) have some evidence of change.

The Geography for Evaluation

- 2.48 The supported Sustainable and Coastal tourism centres are largely concentrated in South Wales and North Wales. The official Visit Wales map below (figure 2.1)

provides approximate locations. This official map does not include the Coastal Saundersfoot Centre of Excellence in Pembrokeshire which was a later addition.

Figure 2.1 Geography of Investment

E4G Centres of Excellence



Source: Visit Wales

2.49 This shows that projects were clustered within a number of local authority areas within Wales. Most resources were concentrated within a few local authority areas, such as Pembrokeshire, Gwynedd and Swansea. In some cases, for example where the local authority was a lead partner, this provided some potential to coordinate administration and marketing across projects.

Table 2.2 Local Authorities and ERDF investments

Local Authority	Investment Activities
Pembrokeshire	Pembrokeshire Coastal Green Sea Saundersfoot One Historic Garden
Carmarthenshire	Green Sea One Historic Garden
Swansea	Swansea Watersports Green Sea One Historic Garden
Neath Port Talbot	Green Sea One Historic Garden Cognition
Bridgend	Swansea Watersports One Historic Garden Cognition
Merthyr Tydfil	Cognition
Caerphilly	Cognition
Gwynedd	Eryri National Trust – Aberdaron Green Sea
Conwy	North Wales Cycling Green Sea
Denbighshire	North Wales Cycling Green Sea

Visitors to Wales

Visitors and Spending in Wales

2.50 There is no single source of information on visitor numbers and visitor spending in Wales. Headlines from the key tourism surveys are presented below. Together these indicate the past few years have not been a time of growth for tourism visits to Wales.

2.51 The Great Britain Tourism Survey published in October 2015 is a national consumer survey measuring the volume and value of overnight trips taken by residents of Great Britain. It shows:

- In Wales, during 2014, some 10 million domestic tourism trips were taken, staying for 35 million bednights and spending £1.7 billion.
- This reflects a gradual annual increase throughout recent years. In 2009, there were 8.9 million domestic tourism trips, staying for 32.6 million bednights and spending £1.4 billion (in 2009 prices).
- Over 60 percent of these trips are holidays; and nearly 30 per cent are visiting friends and families, with the remainder for business trips. Estimates show that around 25 percent of domestic tourism trips are from within Wales, with North West England and the West Midlands being the key areas of origin of visitors from England.
- This means that the time period we are interested in is largely one of growth in domestic overnight tourism to Wales, with growth of over 12 per cent in the number of visits from 2009 to 2014. This presents a positive context for the tourism-related investments to attract domestic visitors.

2.52 The Great Britain Day Visits Survey published in October 2015, which began in 2011. This is the source of official statistics on day visits by British residents to destinations throughout Britain. It estimates that:

- In Wales, during 2014, there were 90 million day visits; with spending of up to £2.7 billion.
- This represents a fall from 2011, the earliest comparable data, when there were over 100 million day visits and spend of over £2.9 billion.
- Around 10 per cent of day visitors to Wales highlighted “Undertaking outdoor activities” as the main activity; and over 4 per cent highlighted “Going to visitor attractions” as the main activity. Nearly 30 per cent of day visits to Wales were from elsewhere within Wales.
- This means that the time period we are interested in is largely one in which there is little evidence of growth, and possibly a small decline in the number of day visits to Wales. This presents a negative context for the tourism-related investments to attract domestic day trip visitors.

2.53 Visit Britain presents the results from the International Passenger Survey. The ONS International Passenger Survey is the source of statistics on inbound tourism to the UK, including the number of visits from overseas. This shows that:

- There were 34.4 million visits to the UK in 2014 - London is a key destination for inbound visitors as 17.4 million visitors spent time in the capital. This UK total is up from 29.9 million in 2009.
- For Wales, there were 0.9 million inbound visitors, that stayed 6.7 million nights in Wales, and spent an estimated £370 million. Over half of international visitors came from just five countries – Ireland, France, Germany, USA, and Australia.
- This reflects a modest change from 2009 when there were near 1 million inbound visitors to Wales; that stayed 6.3 million nights in Wales; and spent an estimated £330 million (in 2009 prices).
- This means that the time period we are interested in is largely one in which there appears to be little evidence of significant absolute change in international tourism to Wales, with a slight decrease since 2009, at a time when international tourism to the UK overall was increasing. This presents a negative context for the tourism-related investments to attract international visitors.

Visitors by Relevant Local Authority Areas

2.54 Visit Wales publishes local authority tourism profiles for each local authority in Wales. These are produced by the Tourism Intelligence Unit at the ONS and bring together the data on domestic overnight stays and international visits at a local level, while recognising the challenges around survey sample size. For the local authority areas in Wales that have had Sustainable/Coastal tourism projects, this provides some evidence of recent patterns in visitor numbers and spending.

Table 2.3 Visitor numbers and spending by local authority area (annual average 2010-2012)

Local Authority	Overnight trips (000s)	Visitor spending (£m)	Change in overnight trips, 2007-09 - 2010-12
Pembrokeshire	1,129	240	+10%
Carmarthenshire	429	72	+14%
Swansea	620	121	+1%
Neath Port Talbot	87	13	0%
Bridgend	270	49	n/a
Merthyr Tydfil	18	3	-67%
Caerphilly	104	19	+58%
Gwynedd	1,602	271	+13%
Conwy	923	176	-5%
Denbighshire	695	112	+6%

Source: Visit Wales and ONS (note inconsistencies in data for Bridgend)

2.55 This points to a high volume of visits with overnight stays, often for holiday purposes in Pembrokeshire and in Gwynedd, which are also two areas that received a significant proportion of funding and Sustainable/Coastal tourism projects. In contrast, areas such as Merthyr Tydfil and Neath Port Talbot are generally less established in attracting visitors and spending.

2.56 The evidence of changes in overnight trips and visitor spending must be treated cautiously due to the limitations in the data. But it indicates that the period 2007-09 to 2010-12 saw significant growth in visitor numbers and spending in Pembrokeshire, Gwynedd, and Carmarthenshire, and from a much lower base, Caerphilly. The multiple Sustainable/Coastal projects in these were therefore introduced in a relatively supportive context for tourism growth. In other areas, it is not quite as clear how supportive the wider tourism context was.

Factors Affecting Visitor Numbers

2.57 There are a number of factors that may have affected visitor numbers and spending to Wales over the 2011 to 2014 period. The publication from Visit Wales of Visits to Tourist Attractions in Wales (November 2014) highlighted a number of contextual considerations:

- **Economic uncertainty in recent years.** Alongside limited growth in real wages, this is likely to have placed a relative squeeze on UK household spending for holidays and day trips. Data from ONS Family Spending shows that the share of

UK household spending on recreation and cultural services was steady over 2009 to 2013 (at around 3.6 per cent of spending).

- **Climate.** In particular, in 2013 which was characterised by some significant weather events in the UK including an exceptionally cold spring followed by an exceptionally hot summer. The Visit Wales, Wales Business Tourism Survey reports how “weather” is identified by tourism related business as the key driver of visitor numbers.

2.58 Over the period, the evaluation also recognises the fluctuation in the exchange rate of £ sterling in particular against the Euro. From lows of £1 to 1.00/1.10 Euro during 2009, to highs of 1.20/1.30 Euro in 2014 (and higher in 2015). This recovery in the £ means European destinations become much cheaper for UK holiday-makers and the UK more expensive for overseas visitors.

Investment and public funding

Constraints in Investment in Tourism

2.59 A particular challenge in evaluating interventions such as providing funding for tourism-related projects is considering what would have happened in the absence of intervention, such as what funding may have been received anyway.

2.60 What we can demonstrate is that recent years, such as the period 2008 to 2014, have been a challenging time to secure private investment in tourism related projects. The Sustainable and Coastal projects were developed during a time of considerable constraints upon private/business investment in tourism. For example, official statistics from the ONS Annual Business Survey that tracks patterns of investment expenditure across the UK as a whole shows that over 2008 2013:

- Investment (capital expenditure) in accommodation services, namely hotels, fell sharply, from 2008 and has only recovered a little from a low in 2010 and 2011.
- Investment fell across “Arts, entertainments, and recreation”. This included investment in operation of historical sites and buildings, in botanical and zoological gardens, and in sports activities and sport clubs.

2.61 This matters because it illustrates that “tourism” related activities in the UK have not been attracting substantial new investment during recent years, and where there is investment this may be concentrated in particular areas and within particular activities. Without support from the ERDF and leveraged match-funding, many of

the supported projects may have faced a difficult financial environment to secure alternative investment from private funders.

Reductions in Public Funding

- 2.62 Many of the investment activities that support tourism may typically receive some financial support from the public sector, such as through local government or national public agencies. For example, investment activities as part of the Sustainable/Coastal programmes have included a range of things from public realm improvements, toilet facilities, countryside maintenance, recycling facilities, coastal protection etc. Activities such as these, creating local public goods with environmental and social effects, may have a case for public investment irrespective of a relationship with tourism and visitor attractions.
- 2.63 But the sources of public funding that may have provided support for such projects in the past have faced substantial constraints and spending reductions, as the UK Government have pursued policies to consolidate public spending. Therefore, the evaluation recognises, for example that:
- Local authorities in Wales have faced budget reductions. The Welsh Local Government Association argues that local councils in Wales face a £900 million budget shortfall and that since the onset of the recession (in 2008) the local government budget in Wales for economic development is down 34 per cent, and for culture, sport and leisure by 27 per cent.
 - Natural Resources Wales is a key funding partner for many environmental projects that may affect tourism across Wales. NRW has an annual budget of nearly £200 million but over recent years has faced substantial organisational change, and a significant reduction in Grant in Aid.
 - Visit Wales itself as the body responsible for promoting tourism in Wales is managing reductions in its funding. As its core annual budget falls to £7 million, the focus of Visit Wales has had to become more one of providing leadership and strategic direction to the tourism industry, rather than funding specific interventions.
- 2.64 This matters because it illustrates that sources of funding from local government and national agencies have been, and continue to be, under pressure. Without support from the ERDF and leveraged match-funding, many of the supported

projects may have faced a difficult financial environment to secure alternative investment from public sector funders.

Tourism Strategy in Wales

- 2.65 The strategic context for tourism in Wales throughout the time that the Sustainable and Coastal projects were developed was set by “Achieving Our Potential 2006 – 2013, Tourism Strategy for Wales”. This followed on from the Achieving Our Potential national strategy launched in 2000, and was refreshed and extended to 2013 to meet with the incoming European Structural Funds Programme for 2007 - 2013.
- 2.66 This revised vision for tourism in Wales was based around four strategic aims:
- Realising the importance of understanding and responding to customer needs.
 - Accepting that there is a value to be gained from doing things differently to our competitors through innovative ways of working.
 - Acknowledging the need to secure a sustainable, long-term future through responsible destination and business management.
 - Seeking to maximise business profitability to drive growth in the tourism economy.
- 2.67 The strategy document, Achieving Our Potential, responds to these strategic aims by setting out five strategic challenges and objectives, and the key priorities to address them. These are presented in Table 2.4 in which we also consider their fit with Sustainable and Coastal projects.

Table 2.4 Priorities from Achieving Our Potential 2006 - 2013

Strategic Challenge	Objectives	Priorities	Fit with Sustainable and Coastal Projects
Branding	Develop strong brand to challenge perceptions and communicate to raise awareness	<ul style="list-style-type: none"> • Link tourism to wider Wales brand • Achieve consistency in use of brand • Deliver strategic marketing framework • Promote to less seasonal markets • Encourage development of icon products 	<ul style="list-style-type: none"> • Tourism in heritage, sports and the Welsh coast has strong links to the wider Wales brand. • Potential for greater awareness and development of projects to offer less seasonal markets. • Project themes are naturally coherent with one another, promoting consistency in use of brand.
Quality	Raise the quality of the tourism experience in Wales	<ul style="list-style-type: none"> • Raise overall quality standards and develop more luxury accommodation • Enable tourism businesses growth through support, investment and best practice • Improve quality of overall visitor experience at destination level • Introduce statutory accommodation registration and higher level of industry participation in quality grading • Monitoring and projecting product trends in tourism • Encourage innovative marketing and product development activity to grow tourism seasonally and spatially 	<ul style="list-style-type: none"> • Improving quality of sports, heritage and coastal areas further enhances experience at destination level. • Projects are able to draw upon creative marketing, particularly in the potential for developing growth for different seasons and linking spatially.
Access	Improve accessibility of Wales as a destination	<ul style="list-style-type: none"> • Encourage tourism businesses to use web-based and IT innovations • Provide information to visitors via traditional and more modern channels • Encourage initiatives promoting use of public transport by visitors • Improve business links with international airports 	<ul style="list-style-type: none"> • Sustainable and Coastal projects encompass a wide range of themes, able to improve offer to a variety of people • Potential to improve access for local communities (particularly hard to reach groups) through community engagement

		<p>serving Wales</p> <ul style="list-style-type: none"> • Development of more direct air links between Cardiff and key overseas markets • Encourage tourism industry to make adequate provision for people with special needs 	<ul style="list-style-type: none"> • Partnership with volunteer groups possible in these project areas, providing a good fit for special needs to be considered throughout.
Skills	Encourage higher skill levels in tourism	<ul style="list-style-type: none"> • Increase levels of professionalism through skills development and improved employment conditions • Encourage training providers to understand and meet needs of industry • Improve links between HE and tourism industry • Improve perceptions of tourism as a career choice to stimulate recruitment • Encourage improvement of management and leadership skills 	<ul style="list-style-type: none"> • Supporting enterprise and the creation of jobs contributes towards skills development, particularly of local communities • Themes are able to support a wide range of services and roles required to develop skills and employment. • Leadership and professionalism skills linked strongly to educational projects such as sports and heritage.
Partnership	Develop effective collaboration within industry	<ul style="list-style-type: none"> • National, regional and local level partnership for tourism and marketing • Strategic support on parts of tourism industry driving future growth • Encourage local community participation to develop and promote local tourism • Co-ordinated and joined up working across all parts of government • Mitigate social impacts of tourism through visitor, business and environmental management • Encourage sourcing of local goods, services and labour by tourism businesses 	<ul style="list-style-type: none"> • Projects all have potential to strengthen local, regional and national offer. • Community engagement and partnership with volunteer sector highly possible through accessible themes • Projects aim to promote environmental and social benefits and take into account environmental management in delivery

Source: Achieving Our Potential 2006-2013, Tourism Strategy for Wales

- 2.68 The priorities set out in “Achieving Our Potential” therefore highlighted scope for investment in tourism activities involving sports such as cycling and water-sports; involving heritage; and to develop the potential of the Welsh coastline and beaches.
- 2.69 The strategy also highlighted how it would be essential to ensure that tourism makes its contribution to the Welsh Government’s vision for the crosscutting themes. These were set out as:
- Social Justice - providing opportunities for people to live prosperous and healthier lifestyles through tackling poverty and poor health. Tourism plays an important role to achieve this, by sustaining cultural activities, enhancing environments and supporting local services, shops and community amenities.
 - Equality - promoting gender and racial equality, and tackling discrimination on the grounds of age and disability. Tourism contributes towards this aim by providing opportunities for employment which is accessible for many sectors of the working population and underrepresented groups. Furthermore, promotion and development of cultural tourism in Wales fulfils the Assembly Government’s vision to protect the Welsh language.
 - Sustainable Development involves protecting and enhancing the high quality of the natural and built environment in Wales which are vital to the tourism industry. Also, this theme looks at the potential for the social, economic and cultural development of an area to be driven by tourism, if developed responsibly. Furthermore, the direct engagement of communities in planning and preparing for tourists has sustainable benefits for both visitors and the host

Overall Progress in Delivering the Projects

The Original Goals for the Programme

- 2.70 In 2009, the Welsh European Funding Office (WEFO) informed Visit Wales that the application for a Grant to fund the Sustainable Tourism Project was successful as part of the ERDF West Wales and the Valleys Convergence Operational Programme ERDF 2007-2013.; and also that the application for a Grant to fund the Coastal Tourism Project was also successful as part of the ERDF West Wales and the Valleys Convergence Operational Programme.
- 2.71 At this initial stage, both Sustainable and Coastal Tourism (including Green Seas) projects were awarded a maximum ERDF grant of over £8.4 million.

Table 2.5 ERDF Grant Awarded (£m)

	Capital element. Maximum Grant Payable	Revenue element. Maximum Grant Payable	Total Maximum Grant Payable
Sustainable Tourism	7.080	1.375	8.455
Coastal Tourism	7.080	1.375	8.455

2.72 Visit Wales invited bids to be submitted for ERDF funding within both the Sustainable and Coastal projects. The original invitation to provide expressions of interest to the published notice was issued in July 2009, followed by formal submission of proposals in December 2009 such that Visit Wales could announce all successful bids in January 2010 with the proposals subsequently being developed and delivered over a 5 year period.

2.73 Key parts of the guidance for applicants outlined that:

- Proposals must adhere to the principles of the Welsh Assembly Government's Sustainable Tourism Framework for Wales and the Coastal Tourism Strategy.
- An organisation or individual may submit a proposal as part of a consortium, but there will need to be a lead responsible organisation.
- The proposal would need to deliver an appropriate number of additional visitors and jobs. Outputs and outcomes would need to be verifiable and core monitoring information would need to be provided to Visit Wales.
- The bids should reflect Visit Wales's priorities and champion roles for golf, heritage and culture, family attractions, food, business travel, walking, adventure and activity, and mountain biking.

2.74 Visit Wales developed an approach to short-listing and selecting from the applications for Sustainable and Coastal tourism projects, using its Selection and Prioritisation Criteria. This included a matrix to set out, with transparency, how project proposals would be selected, prioritised and approved. These incorporated WEFO's own guidance and also included specific criteria on the fit with both existing tourism strategy and relevant elements of regional spatial plans.

2.75 The criteria, presented below in Table 2.6, were separated into what Visit Wales named "contribution factors" that appear to be largely about the fit with existing strategy and policy objectives, and "certainty factors" that appear to be around issues of deliverability, capabilities, and addressing risks. A panel of selectors at

Visit Wales scored the projects on a basis of (i) Minimal, (ii) Low, (iii) Medium, and (iv) High.

Table 2.6 Project Assessment Criteria

Contribution Factors	Certainty Factors
Fit with and contribution to agreed: Strategy Extent to which the project delivers against the OP & Strategic Framework & is integrated with other related activity	Achievement against indicators: Degree of certainty that the project's projected outputs and results are deliverable, measurable and achievable
Partnership engagement: Extent to which the project and has comprehensive stakeholder buy in / involvement	Funding Certainty: Extent to which funding for the project is confirmed, conditional and includes 'in kind' match funding contribution
Meeting market needs: Extent to which the project is responding to evidence of specific market failure or gap in provision	Reliable delivery plans in place: Extent to which the delivery plan (deliverables, timescales and milestones) and 3rd party performance can be relied upon
Contribution to cross cutting themes: Extent to which the project incorporates the cross cutting themes & supports their integration into mainstream operations, delivery & monitoring	Organisational competence and capability to deliver: Extent to which the right level of resources with the necessary skills and organisational capability are in place and effective
Value contribution: Extent to which the project will add value & deliver positive benefits proportionate to the investment sought – including private sector leverage, jobs, visitor numbers and growth	Achieving the exit strategy: Extent to which there is a clear and sustainable exit strategy in place and there is no risk of grant dependency
Legacy contribution: Extent to which the project will deliver structural change and / or sustained impact beyond the funding period	Compliance: Is the project compliant with all relevant rules and regulations?
Contribution to Sustainable tourism project /Coastal Tourism Strategy: Extent to which the project will deliver key aims, outputs of the strategy (as outlined in guidance)	
Contribution to regional spatial plan priorities: Extent to which the project meets the priorities of the regional spatial strategy.	

2.76 The Visit Wales panel had originally received 20 notifications of interest for Sustainable Tourism projects, applying for a total of over £16 million of ERDF grant. We have not seen documents that provide similar information about the selection process for Coastal projects. Visit Wales reviewed the submissions for both Coastal Tourism and Sustainable Tourism. This selection process resulted in:

- The 4 Sustainable Tourism Centres of Excellence.
- The original 3 Coastal Tourism Centres of Excellence and the Green Sea Programme.

2.77 Following the final selection of Sustainable/Coastal tourism Centres, there is not a clear document trail available to us that demonstrates evidence of how original targets for finances, outputs, and results were originally agreed.

2.78 The Welsh Government / Welsh European Funding Office shared its analysis of the 2007-13 European Funding Claim Form Reports for both Sustainable Tourism and Coastal Tourism. These cover the periods December 2010, December 2011, December 2012, December 2013, December 2015, and the most recent claims for July 2015; and so indicate how the projects performed against its early targets.

Analysis of Aggregate Performance Data

2.79 The Funding Claim Form Reports provide the centralised information that is collated and held by the Welsh Government for all the projects. These do not provide information on specific Centres of Excellence or for specific projects. They provide two sets of aggregated data – for Sustainable Tourism and Coastal Tourism.

2.80 The Funding Claim Form Reports provide data on:

- Basic details – including claim dates and gross approved expenditure,
- Expenditure to date and total forecast project cost by category,
- Match-funding from partner organisations,
- ERDF indicators - that is cumulative and projected measures of outputs and results.

2.81 This section provides performance data analysis that draws from these Funding Claim Form Reports.

Planned Approved Expenditure to Final Approved Expenditure

2.82 The first December 2010 claim form report and the final July 2015 claim form report present data on the total gross expenditure approved and the (ERDF) grant approved for Sustainable tourism and Coastal tourism. In the July 2015 forms this approximates closely to completed expenditure.

2.83 The forms show that total gross expenditure in both Sustainable and Coastal tourism increased substantially – rising from £35 million (£17.5 million each for

Sustainable and Coastal tourism) to £37.7 million (£18.8 and £18.9 million respectively) indicating costs and funding contributions increased.

2.84 In contrast, the ERDF grant funding, in total remained largely on track at a little under £17 million. But the composition of the £17 million shifted from £8.5 million each for Sustainable and Coastal tourism, to a lower £8.2 million for Sustainable tourism and a higher £8.8 million for Coastal tourism.

Table 2.7 Evolution in Expenditure and Grant Approved

Case Name	December 2010		July 2015	
	Gross Exp. Approved (£m)	Grant ERDF Approved (£m)	Gross Exp. Approved (£m)	Grant ERDF Approved (£m)
Sustainable Tourism	17.5	8.4	18.9	8.2
Coastal Tourism	17.5	8.4	18.8	8.7
Total	35.0	16.8	37.7	16.9

Source: 2007-13 European Funding Claim Report

Timing of Expenditure

2.85 Grants were paid for Sustainable and Coastal projects from December 2010 up to December 2014. The majority of grants were paid within the final three years of this period (2012-2014), with over half of the cumulative ERDF grant paid in 2013 for both streams.

2.86 Coastal projects paid a larger proportion (14 per cent) of grants in the first two years compared to Sustainable projects (4 per cent). This suggests that the Coastal projects overall were quicker to progress than those in the Sustainable group.

Table 2.8 ERDF Grant Paid Over Time, Cumulative (£m)

	Sustainable	Coastal
December 2010	0.026	0.699
December 2011	0.253	1.038
December 2012	2.043	2.482
December 2013	5.816	6.232
December 2014	7.132	7.295
June 2015	7.132	7.295

Source: 2017-13 European Funding Claim Report

Categories of Expenditure

2.87 The July 2015 claim form presents the “total forecast project cost”. This indicates how:

- For Sustainable and Coastal projects, the largest category of expenditure is the capital spending on estates which accounts for over 75 per cent of spending.
- The largest share of revenue spending was allocated towards marketing and promotion which accounted for around 17 per cent of spending.
- Modest sums were allocated towards travel and transport and administration.

Table 2.9 Categories of Expenditure, Total Forecast Cost, June 2015 (£m)

	Sustainable	Coastal
Estates	13.78	14.83
Administration	0.03	0.02
Marketing and Promotion	3.17	3.16
Staff	1.07	0.62
Travel & Transport	0.04	0.03

Source: 2007-2013 European Funding Claim Report

Sources of Matched Funding

- 2.88 The July 2015 claim form provides details on the “total forecast income” that has (and on completion, will) contribute alongside the ERDF.
- 2.89 The total forecast income is over £11 million for the Sustainable project of which £8.3 million is capital funding and £2.8 million is revenue funding; and the total forecast income is over £10 million for Coastal projects of which almost £8 million is capital funding and over £2 million is revenue funding. The total income sourced was greater in Sustainable projects than Coastal projects. But the share of revenue and capital funding acquired was similar between Sustainable and Coastal projects, with capital funding comprising around three quarters for both streams.
- 2.90 Public match funding comprised the largest income stream in capital funding, with the proportion notably higher in Sustainable projects (84 per cent) than Coastal (67 per cent). We note that:
- The Sustainable projects had a major contribution of capital funding of almost £6 million from “various public match funders”. The claim forms do not report who the public funders are – but research into the individual projects shows that this includes partners such as Natural Resources Wales.
 - The Coastal projects had substantial National Trust funding comprising around a quarter of total capital funding.
 - Sustainable projects received over £11 million of funding from local authorities and Coastal projects over £10 million from local authorities. But the greater match funding into Sustainable projects means that the relative dependence on local funds is much less than that for Coastal projects.
 - Sustainable and Coastal projects both had significant revenue contribution of around £2 million each from WG Heritage (the Welsh Government’s Heritage Department), i.e. Visit Wales.

Table 2.10 Total Forecast Income, June 2015 (£m)

	Sustainable		Coastal	
	Capital	Revenue	Capital	Revenue
Various Private Match Funders	1.371	0.027	0.813	
National Trust			1.820	0.063
Cyngor Gwynedd Council	0.122	0		
Denbighshire County Borough Council	0.330	0.146		
Neath Port Talbot County Borough Council	0.064	0.122		
Pembrokeshire County Council	0.456	0.136	0.664	0.091
City and County of Swansea			1.531	0.109
Conwy County Borough Council			0.143	
WG Heritage		2.080	0.199	1.979
Various Public Match Funders	5.981	0.347	2.805	0.005
TOTAL	8.325	2.864	7.976	2.241

Source: 2007-2013 European Funding Claim Report

Claimed Outputs and Results

2.91 The July 2015 claim form provides the most recent estimates of “projected final achievement” in terms of ERDF defined outputs and results/outcomes. The first estimates of projected final achievement were reported 3.5 years earlier in the December 2011 claim forms. December 2011 is therefore the earliest reference to expected outputs and results. July 2015 by contrast provides the final estimates on expected outputs and results and therefore reflects the ‘actual’ outputs and results at the close of the projects. The information enables us to contrast how expectations for the Sustainable and Communities programmes changed over the period for late 2011 to mid-2015.

2.92 Overall, most of the projected outputs expected in 2011 were the projected/actual outputs of mid-2015. In particular:

- The headline output metric on “initiatives developing the natural and/or historic environment” –
- For the Sustainable project, the 13 initiatives of 2011 reduced slightly to 12 initiatives by 2015.
- Within the Coastal project jumped from 7 to 32 initiatives – although this may largely reflect a lack of clarity about what counts as an “initiative” rather than a major change in the programmes.
- The output (measured in kilometres) of “managed access to the countryside” is largely one for the Sustainable project which remained largely on target from an original 460 km to more than 400 km. This is largely mountain bike and cycling trails.
- The number of “enterprises assisted” is relatively modest within these projects – and the 2015 projected final achievement of the number of “enterprises assisted” was similar to the initial projections in 2011 (from 49 to 44 in the Sustainable project, and 15 to 17 in the Coastal projects). Once again, there is some uncertainty about how this output indicator has been interpreted throughout the lifetime of the projects.

Table 2.11 Projected Final Achievement

	Sustainable		Coastal	
	Dec 2011	July 2015	Dec 2011	July 2015
<u>ERDF Outputs</u>				
Initiatives developing the natural and/or historic environment	13	12	7	32
Managed access to countryside or coast (km)	461	403	8	27
Enterprises assisted	49	44	15	17
<u>ERDF Results</u>				
Gross jobs created	59	59	53	71
Visits	756,000	1,668,654	250,000	1,154,248

Source: 2007-13 European Funding Claim Report. Projected final achievement as of 2015 is proxy for actual reported outputs.

2.93 The projected results expected in 2011 are difficult to compare with those that were reported for 2015. In particular:

- The number of “gross jobs created” remained constant for the Sustainable project (projected as a target of 59 in 2011 and reported as 59 in 2015); but for Coastal project the difference is substantial (from a target of 240 in 2011 to a reported 71 in 2015).
- The number of ‘visits’ reported in the 2015 claim form suggest that both projects exceeded the targets set in 2011, within the Sustainable programme (from 756,000 to over 1.6 million) and the Coastal programme (from 250,000 to 1.15 million)

2.94 However, it is necessary to highlight some concerns about the claimed numbers for ‘visits’. The figures are difficult to verify and it is necessary to approach the claimed numbers with some caution. There is some inconsistency through the programmes about whether the measured outcome is ‘total visits’ or ‘additional visits’. There is also some confusion over whether the measured outcome is ‘visits’ or ‘visitors’. This confusion sits alongside significant limitations on how visits/visitors have been counted or estimated (below we discuss the visitor estimates used by the Welsh

Economy Research Unit). Therefore, the visit numbers in the claim forms are not wholly plausible.

Findings from the Mid-Term Review

2.95 This final evaluation builds upon the Mid-Term Review undertaken for Visit Wales in 2012 by Wavehill Ltd. The review largely consisted of fieldwork and interviews with project officers and explored how the overall Sustainable/Coastal projects were being delivered. The Review presented conclusions about:

- **The overall structure.** This was perceived to have facilitated support in delivering projects and that support from Visit Wales was relevant and useful. There were some concerns flagged that there may be one layer too many between the management and ultimate delivery of investment activity and that this may have introduced delays.
- **Management.** Interviewees were, on the whole, positive about the performance of Visit Wales in managing and aiding delivery of projects. The impression was that Visit Wales had helped the delivery of the projects and had balanced 'policing' (ensuring delivery, monitoring etc.) and supporting (providing advice, information and guidance) of the projects. Questions were raised about the role for Visit Wales beyond the funding period. Interviewees at this time were also positive about lead bodies (such as local authorities) in providing support and resources.
- **Processes for procurement.** The mid-term review reported some initial delay as applications worth over a £150,000 threshold were held up with Value Wales; but processes improved when approvals were moved to lead bodies.
- **Processes for monitoring and evaluation.** The mid-term review focused on the submissions to Cardiff Business School and how progress on this was variable, largely reflecting the stage projects were at. Significant and useful data was emerging from Visitor Surveys conducted as part of this monitoring.
- **Progress of projects.** At the mid-term, progress was variable across projects. The key constraints reported were about loss of partners and match funding; changes of approach, challenges in procurement and obtaining planning permission; and around staffing and internal organisational issues. At this mid-term-stage, some initiatives still face significant hurdles such as planning and faced risk in terms of delivery and spend. The review commented that Visit Wales

had reacted by increasing the frequency of contact and support with these projects.

- **Progress of partnerships.** The review found that the nature and make-up of partnerships was diverse and each was at different stages of delivery. Some were operating as delivery partnerships, convening meetings to update on progress; others had established a series of sub-partnerships targeting specific elements. A key theme was that there is little planning in place for partnerships post funding.

2.96 The mid-term review in 2012 therefore pointed to some key challenges for the remaining three years of the projects (up to 2015). The concerns were around the timescales for delivery; marketing of the projects; the sustainability of the partnerships that had been established; and what risks the economic climate would bring to the viability of the projects.

Findings from Research on Economic Impact for the E4G Programme

2.97 The Welsh Economy Research Unit at Cardiff Business School was commissioned by the Welsh Government to better understand the economic effects leveraged by improvements to E4G sites, visitation to E4G sponsored events, and capital spending. The estimation of the economic impact of the E4G strategic projects covered the period from November 2009 to August 2014.

2.98 The Welsh Economy Research Unit was contracted to provide a central management service to help evaluate economic impacts in Wales. The team provided a set of monitoring forms to be completed by initiatives; a monitoring and evaluation guidance pack; off-site workshop days for initiative managers and stakeholders; a central website offering advice and useful materials; and centralised data analysis and reporting (including summary reports for individual sites). This activity was complementary to the core monitoring requirements undertaken for grant purposes.

2.99 The approach to assessing economic impact consisted of two key assessments:

- Visitor spending economic impact. Visitor volume estimates were combined with data from the visitor surveys and estimates of the indirect impacts of visitors' spending.
- Capital spending economic impact. Estimated construction expenditure associated with the E4G strategic projects, with assumptions about rates of local sourcing to consider the effects of this construction spending.

- 2.100 These estimates of visitor spending and capital spending were then applied to the Input-Output models and Tourism Satellite Account models developed by the Welsh Economy Research Unit to provide an estimation of overall economic impact.
- 2.101 The approach is helpful in terms of estimating the scale of economic value (whether in terms of spending, employment, and output) of the initiatives within Wales. The approach is essentially an economic appraisal that models the possible effects of injecting visitor and capital spending into the economy. It is not therefore an evaluation tool.
- 2.102 The assessment and estimates provided for the Sustainable Tourism projects are that:
- The economic impacts take place largely away from the visitor sites themselves, in particular there are limited on-site spending opportunities.
 - Estimates of visitor spending combined data from visitor surveys and estimates of the indirect impacts of visitors spending. For sites where surveys were not undertaken, estimates were derived based on average spends.
 - The model estimated that the impact of visitor spending was £4.9 million of gross GVA per year and 230 gross full time equivalent jobs (approximately £21,300 per job).
 - The projects also involved considerable amounts of capital spending (construction type activity). Total estimated construction expenditure was £14.2 million. The model calculated that once assumptions for leakage effects are subtracted and multiplier effects are added to this construction spending, then some £10.3 million of GVA is supported in Wales and around 240 jobs (at over £42,900 per job).
- 2.103 The assessment and estimates provided for the Coastal Tourism projects (including Green Seas) are that:
- As with Sustainable Tourism projects, the economic impacts attributable to the Coastal Tourism programme take place largely away from the visitor sites.
 - The modelled visitor estimates were that the impact of visitor spending was £6.2 million of gross GVA per year and with this supported employment of around 310 full-time equivalents (approximately £20,000 per job).
 - Again the projects also involved considerable amounts of capital spending on construction type activity. Total estimated construction expenditure was £13.9

million and the model calculated that that £10 million of GVA supported in Wales and around 240 jobs (at around 42,000 per job).

2.104 The research provides results from visitor surveys and events which inform our subsequent chapters for specific Centres of Excellence. Overall, the research considers the economic consequences of visitor activity consistently and comparably across very different and geographically scattered sites and projects, and this enables tourism investment to be appraised in comparison to other investments. But the approach has its limitations and is unable to identify impacts on the 'supply side' of tourism, such as price changes or business starts, and can say little formally about crowding out and displacement and so the numbers are not a net additional impact.

2.105 The research also made key observations about engaging stakeholders in data collection and data management related to all E4G projects. The Welsh Economy Research Unit suggested that:

- This project was notable for the mostly enthusiastic engagement of project managers in the area of visitor volume measurement and surveys, but at the same time an inability for the WERU research team to gather useful information despite the provision of straightforward data collection templates.
- Project managers were unwilling or unable to engage in this new type of data collection activity despite strong messaging from the E4G research and management teams, and despite a strong intuitive link to wider Welsh Government sustainability approaches and duties.
- The E4G structure on project managers and other stakeholders' engagement, particularly its status as time limited capital investments with specifically proscribed set of outcome metrics means that engagement and data collection was always seen 'one off' (or 'two off') exercise, that is with limited evidence that the toolkits, approaches and learning developed as part of E4G have any long term implementation. Projects did not restructure their data collection or analysis along E4G lines and early indications by Welsh Government that future rounds of EU funding would not prioritise spending on tourism may not have been helpful to encouraging data collection.

3. Sustainable South Wales Cycling – Cognation

The Project

Rationale

- 3.1 During the late 1990s the Forestry Commission Wales (FCW) and its partners helped to establish Wales as one of the UK's leading locations for trail centre based mountain biking, providing purpose built way marked trails of various grades. The underpinning strategy was to establish a network of trail centres across Wales catering for a broad range of riders, including:
- Cwm Carn and Afan Forest Park in South Wales, with the M4 providing good access to a large catchment in South East and South West England
 - Nant yr Arian and Machynlleth in the more remote rural Mid Wales
 - Coed y Brenin and Betys y Coed providing a wider range of trails in or close to Snowdonia, some with good access from North West England and the Midlands.
- 3.2 In the light of concerns that South Wales was losing its competitive edge as a result of increased competition from other mountain biking locations (e.g. Scotland's investment in the Seven Staines and the growing popularity of destinations in other parts of Europe), the South East Wales Economic Forum commissioned consultants in 2009 to consider the potential for South Wales to become an Off-Road Cycling Centre of Excellence and to investigate the potential to further develop the off-road cycling product in South Wales. The study included:
- A review of the existing mountain bike offering in South Wales
 - A competitor review
 - A consultation with a range of stakeholders and interest groups, e.g. mountain bike clubs, mountain bike businesses, hospitality businesses, etc.
 - A detailed SWOT (Strengths & Weaknesses and Opportunities & Threats) analysis.
- 3.3 A key finding from the study was that the South Wales mountain bike offering was too focused at the intermediate cross country riders and needed to be developed to meet the needs of beginners, families and downhill riders. Also it lacked the critical mass in its offer that was felt to be necessary to secure longer (stays of 2-3 nights) and higher levels of repeat visits, and hence the associated economic benefits this activity brings to local economies.

3.4 The research provided an excellent basis upon which to identify the need and opportunity for mountain biking in the South Wales Valleys and the associated visitor economy. The Cognation Centre of Excellence project was subsequently developed and sought funding through Visit Wales’s Sustainable Tourism framework. Cognation aimed to increase:

- The visitor numbers from existing and new market segments
- The number of overnight stays, including stays in the shoulder periods (quieter seasons of the year).
- The Gross Value Added supported in the local economy, by increasing visitor spend particularly in the Valley areas, creating jobs for local people and supporting existing and helping to create new businesses
- The usage of trail centres and other outdoor activities by the local population.

3.5 In addition it aimed to achieve a number of important social aims:

- Through working with appropriate partners engage with local young people and integrate with the education agenda
- To encourage responsible usage of forestry and other countryside areas for recreational tourism and health promoting activities.

3.6 The broad focus of the proposed investments are outlined in the table below:

Table 3.1 Focus of the Proposed Cognation Investments

Core activities	The best all-round, purpose built trail centre in the UK at Afan Forest Park and refresh and extend the product offering at the gateway to the Valleys site at Cwmcarn
	A world-leading commercial bike park in the Heads of the Valley area at Gethin Woods
	A world class mountain bike events centre in Margam Park, Neath Port Talbot
	A coherent brand and an integrated marketing strategy and plan, supported by a programme of events
Supporting activities	Integrate the regional centres with local centres, low level linear and circular cycling routes and skills areas, including cross-valley routes
	Work with partners to develop innovative ways of involving the local population e.g. Kids Clubs, training of local leaders and providing free bike hire
	Encourage participation in other activities e.g. walking, orienteering, etc. by providing additional infrastructure

3.7 Although not specifically highlighted in the business plan, a number of the consultees identified the aim of using the investment to help improve the longer term sustainability of the trail centres. This included the funding of improved car parking and retail facilities which would secure a revenue stream which could be used to support maintenance and renewal.

Project Description

3.8 Fuller descriptions of project components are presented below:

- Afan Forest Park – Creating the UK’s best all-round mountain bike destination. The focus was upon expanding the extensive current offering in a way which would establish the Forest Park as the leading all round trail centre in the UK. A key part of this was the creation of new trails that would be attractive to beginners and the family market.
- Cwmcarn – a centre for downhill, freeride and cross-country enthusiasts. Cwmcarn has been a successful centre for downhill and cross country riding for a number of years, with a major new visitor centre being built in 2010. The proposed additional investment would enhance the downhill and cross country trails, skills loops and related facilities, all of which would help to improve and lengthen the visitor stay.
- Bike Park Wales - the UK’s first commercial mountain bike park. Gethin Woods was proposed as the location for one of the UK’s first purpose built and charged for mountain bike parks, being delivered through an innovative solution between a private developer and operator and Natural Resources Wales (the land owner). The new centre was intended to offer a variety of downhill and more challenging cross country trails and to provide a high standard of onsite catering and retail facilities, and support (including uplift).
- Margam Park – a national and International events venue. Building on the previous use of Margam Park for national level competitive mountain bike events, the project was intended to improve the standard of the mountain bike trails and support facilities so that they could meet the higher standards being sought by national and international race organisers, including British Cycling and the UCI.
- Downhill enhancements. The purpose was to improve the management and sustainable operation of a number of existing downhill event venues (including Rhoelin) by improving the quality of informal tracks and their trailheads.

- Marketing activities. The intended focus was the creation of a South Wales Off-road Cycling brand to better promote the product to potential visitors across the whole of South Wales, the creation of a marketing strategy and plan for the South Wales brand, as well as the implementation of key aspects of this, including a website.

- 3.9 The focus of these strands have evolved to some extent during the delivery phase and these changes are covered in more detail below.
- 3.10 In terms of the management of the project, the intention was for it to be led by Neath Port Talbot County Borough Council working in partnership with a project Steering Group. The project aims to employ three full time officers to deliver the project, a Project Manager, Marketing and Communications Officer and an Administration/Finance officer. These officers will be employed by Neath Port Talbot CBC. As well as these officers, key drivers in the capital developments will be the three LA's in whose areas the proposals are located in (NPTCBC, MTCBC, CCBC) and Forestry Commission Wales (land owners). In addition, the marketing element of the programme was driven forward by a Marketing Sub-group of key stakeholders, with some support from the Regional Tourism Companies. The Project Officers within NPTCBC were responsible for working closely with these key partners to ensure that all targets are met and are in line with the proposal.
- 3.11 The project manager indicated that the project will continue to be overseen by a project Steering Group who will meet occasionally following the ending of ERDF funding. This should help to ensure the development of Cognation is continued.

Location

- 3.12 The location of the existing trails centres and the new Bike Park Wales has been an important factor influencing the proposed investments. The existing centres are all very accessible from the M4, providing easy access from the major conurbations in South Wales and further afield in South East and West England. Bike Park Wales, located close to Merthyr Tydfil, also has very good accessibility from the south and also to the Midlands along the M5/M50 and A40.
- 3.13 Table 3.2 identifies the locations and local authority districts of the main trail centre investments. It excludes the smaller scale investment in the informal downhill tracks. Figure 2.1 in chapter two shows these locations alongside both the other Sustainable Tourism and Coastal Tourism investments.

Table 3.2 Location of Main Investment Projects

Project	Town and postcode	Local Authority District
Afan Forest Park	Afan Valley, SA13 3HG	Neath Port Talbot
Cwmcarn Forest Park	Cwmcarn, NP11 7FA	Caerphilly Borough
Bike Park Wales	Merthyr Tydfil,	Merthyr Tydfil
Margam Park	Neath, SA13 2TJ	Neath Port Talbot

Development

3.14 The development of the overall Cognition Centre of Excellence has been led by Neath Port Talbot Borough Council, in conjunction with a number of local authority and public agency partners including Caerphilly Borough Council, Merthyr Tydfil Borough Council and Natural Resources Wales¹. Neath Port Talbot County Borough Council has a strong track record in mountain bike trail centres, having worked closely with FCW in the original development and evolution of the Afan Forest Park trail centre and the Margam Park trails.

3.15 The development and implementation of the specific investments were undertaken by:

- Afan Forest Park investments - Neath Port Talbot CBC and NRW
- Cwmcarn Forest Park investments – Caerphilly BC and NRW
- Bike Park Wales – Merthyr Tydfil CBC and NRW
- Margam Park cycling related investments² - Neath Port Talbot CBC.

3.16 The development and delivery of the Bike Park Wales project was distinct from the other trail centre investments due to the intention of NRW competitively procuring a private sector developer and operator. Historically, NRW, as the land owner, has developed and operated the trail centres in its own right, but sought to adopt a different approach in this instance. One of the key advantages of this approach was seen to be the opportunity to secure a substantial proportion of funding from, and to shift more risk onto, the private sector. A 25 year service level agreement has been used to provide both partners with the security and certainty they need to progress and deliver the project.

¹ Natural Resources Wales was formed in April 2013, taking over the functions of the Forestry Commission Wales, as well as the Countryside Council for Wales and the Environment Agency in Wales.

² Margam Park has also received funding through the Gardens Centre of Excellence.

Inputs

Financial Inputs

3.17 The application form (March 2010) and offer letter set out the financing of the Cognation Centre of Excellence, including ERDF and sources of match-funding. The agreed level of ERDF funding was £2m (a grant rate of 39.84 per cent), split between £1.71m capital and £0.29m revenue. The match funding contributions were intended to be split between the main public sector local authority partners (although the split was not available, with the exception of Neath Port Talbot CBC) and the private sector through Bike Park Wales.

Table 3.3 Cognation Funding Profile and Outturn

Funding source	Business Plan 2010	Final Claim July 2015
ERDF	£2.00m	£2.03m
Neath Port Talbot	£0.97m	£0.23m
Other Public sector	£1.55m	£1.64m
Private Sector	£0.50m	£0.53m
Total	£5.02m	£4.43m

Source: Cognation Application Form, Neath Port Talbot District Council (2010); Sustainable Tourism Project Profile, Visit Wales (June 2015)

3.18 The lifetime expenditure outturn is £4.43m compared to the original budget of £5.02m. There are a number of points to note about this:

- A number of trail investments or supporting infrastructure works have not occurred or been reduced in scale (including a number of investments in Margam Park) – see paragraph 3.30 below.
- Linked to this, the ERDF grant has increased significantly from a rate of 40 per cent to 46 per cent.
- The lifetime outturn for the revenue and capital expenditure was not made available to the evaluator, although the final evaluation report³ indicates that the split is around £3.72m capital and £0.62m revenue (which is a total of £4.35m rather than the eventual outturn of £4.43m). The implication is that the lower

³ Final Evaluation of Cognation MTB Trails, Visit Wales, September 2014

lifetime expenditure is due to the reduction in capital expenditure, whilst revenue expenditure has remained broadly the same.

3.19 Whilst a detailed breakdown of the original budget across the trail centres was not made available to the evaluator, the breakdown of actual lifetime outturn expenditure is summarised in Table 3.4 below. It is not possible to separately to identify total expenditure by trail centre due to a large proportion of expenditure being allocated through a construction contract covering all centres which was let competitively to Parsons Brinkerhoff. However, it is clear that Bike Park Wales and Cwmcarn accounted for the largest shares of direct expenditure.

Table 3.4 Cognation Expenditure and Funding Outturn by Investment, June 2015

	ERDF Grant (£m)	Total Project Cost £m	% ERDF Grant
Trail construction and fees	0.53	1.16	46%
Bike Park Wales	0.71	1.60	45%
Afan Forest Park visitor centre renovations	0.12	0.26	46%
Cwmcarn Car Park & Visitor Centre Improvements	0.22	0.48	46%
Margam Infrastructure & Trail Improvements	0.11	0.24	48%
Other Downhill Improvements	0.02	0.05	46%
Staff Costs	0.14	0.31	46%
Other Revenue Costs	0.14	0.31	46%
Total	2.01	4.41	46%

Source: Sustainable Tourism Project Profile, June 2015, Visit Wales

3.20 Table 3.5 below presents a more detailed breakdown of lifetime revenue expenditure. The main expenditure categories were staff costs and advertising and promotion. The staff costs shown are, we believe, mainly associated with Neath Port Talbot's overall management of the implementation of Cognation, although

other additional staff costs would also have been borne by other public sector partners. The substantial advertising costs are due to the development of a brand, website and undertaking promotional activity for Cognation as a whole. This coordinated approach to the promotion of Cognation was an important aspect of the vision for the project.

Table 3.5 Lifetime Revenue Expenditure, June 2015

Item	£m
Advertising & Promotion	£0.29
Evaluation, Development & Monitoring	-
Project Managers	£0.14
Project Workers	£0.08
Finance & Accounting	£0.08
Travel & Transport & subsistence	-
Administration Others	-
Total	£0.62

Source: Final Evaluation of Cognation MTB Trails, Visit Wales, September 2014

Activities and Processes

What Has Been Done

3.21 Table 3.6 presents an overview of the components of Cognation.

Table 3.6 Cognation Investment and Support Activities

Component	Description
Afan Forest Park	<ul style="list-style-type: none"> • Creation of a range of new trails as well as improvements to existing trails • Creation of downhill, freeride, pumptrack and skills loop • Redevelopment of the visitor centre to better meet visitor needs • New loop trail from Bryn Bettws Lodge Visitor Centre, creating a new hub focus for Afan Forest Park
Bike Park Wales	<ul style="list-style-type: none"> • Creation of a purpose built bike park including downhill network; uplift facility; freeride; dirt jump and pump track; natural cross-country trails to suit a wide variety of abilities and fitness levels • Creation of visitor facilities including a visitor centre and opportunities for café, bike shop and rental, and other necessary visitor facilities
Cwmcarn Forest Park	<ul style="list-style-type: none"> • New downhill and cross country trails, plus improvements to existing trails • Improvements to car parking including doubling of size, introduction of car park charges to provide revenue source • New visitor facilities in car park providing cycle sales, hire and repair, showers, changing and toilets
Margam Park	<ul style="list-style-type: none"> • Create purpose built competition level cross-country events trails • Investment in infrastructure to support the creation of a National and International events venue • Improvement of camping infrastructure
Other Downhill Improvements	<ul style="list-style-type: none"> • Improve management operation and sustainability of existing downhill event venues by improving the quality of informal tracks, their reception points and trailheads

3.22 The Cognation team, working with NRW, competitively tendered the design, implementation and management of the civil engineering work on the trails. The contract was awarded to Parsons Brinckerhoff in partnership with Back on Track. Whilst there was general satisfaction with the overall implementation of the contract by Parsons Brinckerhoff, a number of consultees noted that avoidable delays and cost overruns occurred in a few instances.

3.23 Bike Park Wales (BPW) was a distinct aspect of the Cognation project given the development of a new trail centre. It was originally proposed for the Cognation partners to adopt the traditional approach of undertaking a feasibility study, developing the infrastructure and subsequently appointing a private sector operator.

However, it was eventually decided to procure a private sector partner upfront to manage the development and operation of the facility, which would enable them to be involved in the development of a sustainable business model from an early stage.

- 3.24 BPW were appointed as the successful operator in December 2011 and signed a 21-year rolling lease with NRW, with the trail centre opening in August 2013. It has been supported through the process by a number of organisations including NRW, Merthyr Tydfil CBC, Neath Port Talbot CBC, Visit Wales and Heads of the Valleys Strategic Regeneration Area. The support included over £1m grant funding from various sources including, ERDF Convergence Funding, Heads of the Valleys SRA funding, RDP funding and MTCBC. In addition to this investment through the Cognation project, it has had contributions from sponsors including Vito Sport, Trek and Mojo.
- 3.25 Our consultation with the BPW team highlighted a number of considerations:
- BPW were very positive about the advice and other practical support provided by NRW, Merthyr Tydfil CBC and Neath Port Talbot CBC.
 - Whilst appointing BPW at an early stage in the development process was seen as being positive overall, it meant exposure to additional risk and uncertainty, aspects of which were challenging to address and could have ultimately resulted in their withdrawal from the project.
- 3.26 The promotional programme included the development of the Cognation brand, an integrated series of events, on-line promotions, print campaigns, press releases, and community and business liaison. Orchard and Golley Slater were appointed following a procurement exercise to lead these activities.

Project Management

- 3.27 The strategic management of the project was overseen by a steering group comprising officers involved in the delivery of the investments drawn from NRW and the local authorities, supplemented by Sport Council for Wales, private sector Representation, Valleys Partnership and Third Sector representation. The consultations suggested this was an effective mechanism for reviewing progress, monitoring financial and output progress and resolving issues. However, its usefulness declined later in the life of the project, albeit at a time when much of the delivery was achieved. It has provided a partly effective means for resolving longer

term issues of long term sustainability and direction following the completion of ERDF funding.

- 3.28 The consultations with stakeholders provided very positive feedback on the project management team within NPTCBC, including the guidance and support provided to Bike Park Wales (there was also very positive feedback on MTCBC and NRW in this regard).

Outputs and Results

- 3.29 Table 3.7 sets out the original output and result targets, the revisions agreed in the January 2015 variation letter and the achievements at June 2015. The main changes were:

- A reduction in the length of the new trail created or improved (i.e. managed access to countryside (km)) from 105km to 72km as some trail proposals were withdrawn.
- An increase in the number of visits from 142,000 to 185,000, a change which compensated for other reductions in outputs/results and which could be accommodated due to the strong performance of BPW. However, there is a discrepancy in the basis of this indicator and target, as the original Cognation business plan refers to net additional visits whilst the ERDF result indicator against which the project is contracted is expressed as gross visits⁴.
- A reduction in gross jobs created from 167 to 20. Whilst the reason for this change is not clear, it appears to be a correction of a misinterpretation of the target. The job creation target in the business plan appears to include employment which would be supported by visitor expenditure and possibly multiplier effects, whilst the ERDF result indicator which the project is contracted to deliver is direct gross job creation.

⁴ <http://gov.wales/docs/wefo/publications/deliveringguidance/rme/130315erdfindicatordefinitionsen.pdf>

Table 3.7 Achievement of Output Targets

Outputs and Outcome Targets:	Original Offer Letter 2010	Contract Variation Letter January 2015	Achieved June 2015
Initiatives developing natural environment	1	1	0
Managed access to countryside (km)	105	72	72
Enterprises assisted	25	25	14

Source: Offer Letter, Visit Wales (March 2010); Contract Variation Letter, Visit Wales (January 2015); Sustainable Tourism Project Profile, Visit Wales (June 2015)

Table 3.8 Achievement of Outcome Targets

Outcome targets	Original Offer Letter 2010	Contract Variation Letter January 2015	Achieved June 2015
Visits	142,038	185,013	416,068
Jobs created (gross)	167	20	14

Source: Business Plans and 2015 Project Profiles

3.30 In terms of the overall achievements, the important points to note are outlined below:

- Around 72km of new or improved access has been delivered, which is consistent with the revised target.
- Fewer enterprises have been assisted compared to the target – 14 compared to 25.
- Job creation has lagged behind the revised target (14 compared to 20), with the majority being created by BPW (12) but also some new employment in the new retail and associated facilities at Cwmcarn. There is little or no new direct permanent employment associated with the other investments, largely due to the enhanced trails or associated facilities being managed through the existing numbers of staff.
- The reported visits is 416,000, over twice the revised target – we assume this is measured as gross rather than net additional (further discussion of this follows). This is primarily associated with the new BPW centre at Gethin Woods.

- 3.31 We do not have access to the monitoring data on outputs and results achieved by each investment, although discussion with the project managers and analysis of other sources has cast some light on this.
- 3.32 The Cardiff University assessment for all E4G projects indicates 141,000 gross visits in 2013. In 2013, the investment was underway and so the impact on the number of visits was not complete. Information was not provided for Margam Park trails and the other informal downhill trails which received investment.

Table 3.9 Visit Analysis for 2013, Cardiff University

Investment	Number of Visits 2013
Afan Forest Park	82,300
Bike Park Wales	20,000
Cwmcarn Forest Park Trails	39,200
Margam Park Trails	Not available
Downhill Trails	Not available
Total	141,500

Source: E4G Impact Evaluation, Cardiff University 2015

- 3.33 Table 3.10 sets out the rider counts for Afan and Cwmcarn Forest Park trails for the period 2008 to June 2015. The rider numbers are also affected not only by the timing of new trails being opened, but also the complete or partial closure of some existing trails due to plantation logging between 2013 and 2015.
- 3.34 Whilst the number of riders using Afan trails have increased over a 2012 baseline (+87,500), the situation is less clear at Cwmcarn where the number of riders in 2014 lagged behind the 2010 numbers, although these have been affected in 2013 and 2015 by closures and diversions on the existing Twrch trails.

Table 3.10: Visits to Cwmcarn and Afan Forest Park Trails, 2007 to June 2015

	Afan Forest Park	Cwmcarn Forest Park
2007	59,857	64,415
2008	72,168	81,866
2009	82,667	77,263
2010	65,084	68,255
2011	61,247	73,260
2012	62,586	2012
2013	82,311	39,170
2014	115,206	60,295
2015 (January to June)	46,523	16,452
Total Visits 2013 to June 2015	244,040	115,917
Aggregate Increase 2013-15 over 2012 Baseline	87,575	-36,138

Source: NRW trail user data

- 3.35 BPW is a new facility which opened in March 2014 and so all of the users of the trails and other facilities are additional to the site. By the end of February 2015 BPW recorded 98,000 visits, of which around 8,000 were non biking visitors and around 700 were school children attending as part of a school visit.
- 3.36 Taking the gross visits between 2013 and June 2015 for Afan, Cwmcarn and BPW, the total is around 460,000 (and it should be noted that this excludes users of Margam Park Trails and the informal downhill trails, both of which will include the combination of leisure users and competition use). No visitor expenditure data has been collected for these centres as far as we are aware.
- 3.37 Whilst there are not official estimates of the net additional visitors for the three main centres, a simple estimate of the visits over a 2012 baseline suggests this could be in the order of 149,000 (i.e. 87,500 plus –36,000 plus 98,000).

Outcomes and Impacts

Gross Economic Impacts

- 3.38 The Cardiff University assessment estimated an overall GVA impact for 2013, based on the visitor estimates noted above of £4m, which would support around 182 FTE jobs. Of these, around £1.3m and 58 FTE jobs were estimated to be on or close to the three trail centres included in the assessment. However, it should be borne in mind that these are based on gross visits and our own estimate of the additional visits suggests that only around 40,000 would have been in addition to the 141,500 gross visits (and hence around £1.1m GVA and 50 FTE jobs).
- 3.39 The Cardiff University survey also provides a useful insight into the types of visitors and how the Cognation investment has been received by users:
- 20 per cent of visits were as part of a longer trip, possibly included multiple trail centres, with a similar number staying away from home (the majority stayed less than 3 nights)
 - The vast majority of visitors interviewed enjoyed their visit (98 per cent) and a large majority thought the facilities were appropriate for the type of destination (78 per cent).
 - Estimates of impacts of visitor numbers and visitor spending in local economy

Overall Outcomes

Key Intended Outcomes:	Level of Achievement
Create the best all-round, purpose built trail centre in the UK at Afan Forest Park	Afan Forest Park offers a wide of trails for a range of users including some of the best singletrack trails in the UK. The improvements to the visitor centre have also improved the overall quality of the offer for visitors including facilities. The centre is now well positioned as an all-day mountain biking experience.
Refresh and extend the product offering at the gateway to the Valleys at Cwmcarn	Cwmcarn now offers an excellent range of downhill and cross country trails and enhanced visitor facilities, with excellent access from the M4. The centre now has greater critical mass in terms of its offer and the average length of stay should increase as a consequence, although trail closure due to logging may have undermined this to some extent.
A world leading commercial bike park in the Heads of the Valley area at Gethin Woods.	BPW is one of the most significant new additions to the UK trail centre network, with the public-private sector partnership which delivered the investment being an example of good practice. The centre is exceeding its visitor forecasts and continues to demonstrate a highly

	commercial and innovative approach to attracting events and visitors, as well as delivering new trails and the enhancement of existing trails.
A world leading mountain bike events venue in Margam Park	The consultations suggest the new trails and facilities have been well received by users and competitors alike, although the long term potential of Margam Park as a venue for major national and international events has yet to be fully demonstrated.
A coherent 'brand' and an integrated marketing strategy and plan within the wider Valleys Heart and Soul brand, supported by a programme of events	The team has developed the Cognation brand and both industry and customer facing marketing tools. However, the geographically focused Cognation brand has possibly caused confusion alongside the existing Mountain Bike Wales brand and website, as well as the new branding for other destinations within Wales (e.g. One Adventure). The strength and longevity of the brand alongside others such as the Seven Stanes is questionable.
Integrate the regional centres with local centres, low level and circular cycling routes and skills areas, including cross-valley routes.	Although the Cognation project intended to secure better integration between trail centres and other popular mountain biking locations, this aspect of the project has been fairly weak both in terms of the development of the necessary trail infrastructure, the marketing and provision of resources for riders.
Work with partners to develop innovative ways of involving the local community e.g. Kids clubs, training of local leaders and providing free bike hire.	Relatively little evidence was provided to indicate that aspirations had been achieved in a systematic way. None of the websites provide information specific to schools or local community groups for example. BPW stands out as being reasonably proactive in this regard, working with local schools in providing free training, use of bikes and access trails.
Wider Impacts:	
Extension of the visitor season	The available quantitative evidence is not comprehensive enough to robustly assess this as part of this assessment. However, the available evidence points to a fairly substantial increase in additional visitors, with the inherent year round nature of the activity and improved all weather facilities likely to have a positive impact in this regard.
Tourism Related Local Regeneration	Again, the evidence is limited in this regard. However, the evidence points to the increased visitors and expenditure supporting investment. some of this expenditure is captured in local retail and hospitality sectors. However, as ever, the challenge is to integrate these facilities with local centres more effectively.

Legacy

- 3.40 A persistent challenge for projects of this nature is the ability ensure the long term physical sustainability of the trails and related infrastructure and to ensure the sustained awareness and appeal of the offer.
- 3.41 Whilst the development of new sources of income for the main public sector trail centres (Afan and Cwmcarn) will contribute towards some of these costs⁵, it is unclear how these centres will ensure sufficient long term funding given the very challenging public sector funding environment. BPW may be in a stronger position to secure the earned revenue it requires given its 'pay for access' funding model, providing it continues to hit its visitor targets.
- 3.42 A number of consultees were concerned about the lack of resource available following the completion of the project for the continued joint marketing of the Cognation trail centres and trails. There was also a concern about the lack of resources from Welsh Government and Welsh Cycling to secure major competitive mountain biking events at Margam Park.
- 3.43 All of these points raise concerns about the long term sustainability of different aspects of the Cognation project and the potential deterioration of the important economic benefits it has been delivering.

Conclusions and Lessons

- 3.44 The key conclusions are set out below:
- The core Cognation concept of investing in a few existing trail centres, plus a major new private sector operated bikepark, in order to strengthen the offer and compete with other emerging locations is considered to be a major strength of the project.
 - The project has been well delivered on the whole, although issues have been encountered which led to some delays and changes in the mix of activities which could be delivered. The amount of management resource needed to deliver the project was underestimated.
 - In the case of a number of the Cognation investments, there was insufficient pre-planning which could have helped avoid some of the issues which arose around planning and other permissions, site constraints and costs.

⁵ Cognation also explored the potential use of payback schemes with business consultants, whereby visitors contributed voluntary for their use of the facilities. This does not appear to have been implemented.

- The private public sector partnership between NRW and BPW is an example of an innovative approach to the delivery of trails and related visitor infrastructure which has traditionally been delivered by the public sector. It has taken a lot of hard work on the part of NRW, BPW, VW and Merthyr Tydfil CBC to ensure the viability and success of this project. BPW recognises the important role which its public sector partners have played in this regard.
- Cognation has achieved many but not all of its revised contractual outputs and results (SMEs assisted and jobs created), whilst exceeding others (visitors). There appears to have been some confusion initially on the part of Visit Wales about the precise definition of indicators and targets, although these issues were resolved with the revision of some targets.
- More importantly, the evidence suggests that Cognation has achieved many of its intended outcomes and impacts (although the available baseline and evidence of activity and expenditure which is necessary to draw a robust conclusion is not available). Nevertheless, the project appears to have enhanced the trail centre based mountain biking offer for a mix of distinct user groups, providing the critical mass and quality of experience necessary to increase (or sustain market presence in some centres) the number and mix of visitors, the length of stay and the associated local spend. Our own estimate of the cost per job created either directly or indirectly through visitor expenditure between 2013 and 2015 over suggests around £20,000 per FTE job.
- Cognation has, in the view of the evaluators, under delivered in a number of regards:
 - It has not been able to achieve a distinct, widely recognised and sustainable branding for Cognation when compared to competitors like the Seven Stanes in Scotland. It has also, arguably, led to some confusion about Wales's overall mountain bike offer. There is also a lot of concern about the long term sustainability of these marketing resources (especially the website), given the cessation of funding.
 - There has been little progress in terms of improving integration with non-trail centre based mountain biking and cycling in South Wales, which was one of the wider aspirations of the project. This is important due to the potential it offers to secure longer stays and greater involvement of local communities.

- Although the centres have achieved a range of social outcomes, more could have been done to promote access amongst community and educational groups, as well as recording the achievements which had been secured.

3.45 A challenge for the Cognation project will be the need to both maintain and renew the existing network of trails and related infrastructure on a sustainable long term basis, their effective promotion to new users, as well as the running of linked events and festivals. There does not currently appear to be a long term strategy in this regard.

4. Sustainable One Historic Garden

Project Background and Description

Rationale

- 4.1 The original business plan set out the aim of the “One Historic Garden” project as to establish a Centre of Excellence through capital enhancements to existing garden attractions in South West Wales. This vision was to link these together by their common historical thread to form a ‘trail’ branded as One Historic Garden.
- 4.2 The argument was to build on the relative success of existing gardens and country parks, such as Bryngarw Country Park to the east of the area, and to connect this to other garden sites across the region and use the One Historic Garden theme to incorporate the design and development and social history of the estates and gardens over time. The early business plans set out the aim to package this into a ‘niche’ product – on a par with the market reputation of Kent as ‘The Garden of England’.
- 4.3 The business plan does not articulate the economic rationale for the One Historic Garden project. The description of the project however, points to a need for the project to address a barriers of economies of scale i.e. branding under the One Historic Garden umbrella should give the smaller gardens and country parks a marketing reach they would not otherwise have. This corresponded with local aspirations to use the gardens to support tourism (for example, Bridgend Council’s park management plan had pointed towards a redevelopment of Bryngarw House & Country park to create a tourist destination).
- 4.4 The case for ERDF funding highlights barriers that individual gardens/parks may have in accessing alternative funds for investment in the absence of ERDF or other public support. Consultations with project managers and stakeholders indicated that for many projects, interventions had been planned for a length of time but action was constrained by a lack of funding sources.

Project Description

- 4.5 The 'One Historic Garden' project links heritage, gardens and opportunities across south and south west Wales. Investment through seven existing garden attractions, each site enhanced through capital improvements ranging from redevelopment of the gardens to visitor centre upgrades.
- 4.6 With a total investment in the region of £4.6 million, work on One Historic Garden commenced in 2010 and all improvement activities are scheduled to be completed during 2014. The scheme is part-funded by the EU's Convergence European Regional Development Fund through Visit Wales and the Welsh Government.

Locations

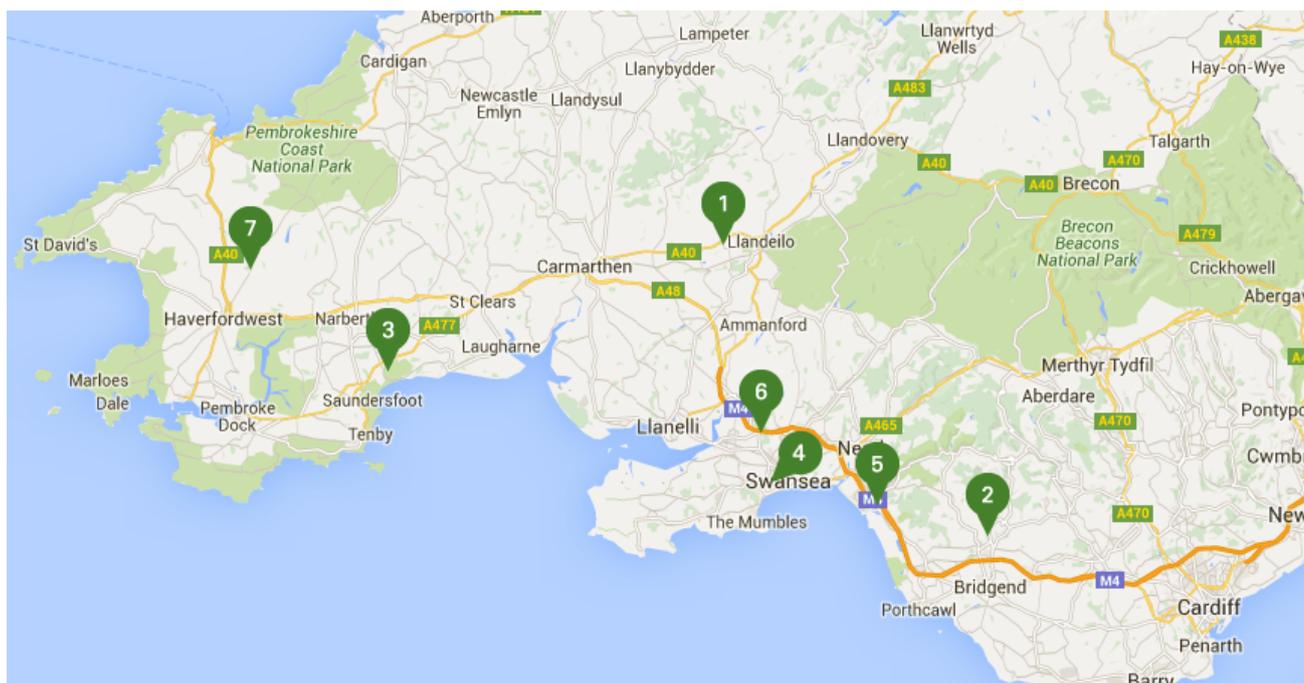
- 4.7 One Historic Garden comprises seven sites in five local authority areas in south west Wales: Bridgend, Carmarthen, Neath Port Talbot, Pembrokeshire, and Swansea. These are presented in the table and map below.

Table 4.1: Location of Investment Projects

Garden	Town and postcode	Local Authority District
1. Aberglasney Gardens	Aberglasney Dyfed SA32 8QH	Carmarthen
2. Bryngarw House & Country Park	Bryngarw Country Park Brynmenyn CF32 8UU	Bridgend
3. Colby Woodland Garden	Colby Woodland Garden Amroth SA67 8PP	Pembrokeshire
4. Cwmdonkin Park	Park Drive Uplands SA2 0PP	Swansea
5. Margam Country Park	Groes Port Talbot SA13 2TJ	Neath Port Talbot
6. Penllergare Valley Woods	Penllergare Swansea SA4 9GS	Swansea
7. Scolton Manor	Spittle Haverfordwest SA62 5QL	Pembrokeshire

Source: One Historic Garden Website, 2015

Figure 4.1: One Historic Garden Locations



Source: One Historic Garden Website, 2015

4.8 It is not clear from the documentation or consultations how the seven sites agreed to come together under one brand, and whether other gardens and sites were also considered. But each site, while of varied size and history, claimed existing success and investment needs and the case to come together under one initiative.

4.9 The locations, while all within south west Wales, are varied, namely that:

- Some of the gardens are located in areas already largely associated with tourism; for example those in Pembrokeshire at Colby Woodland and Scolton Manor;
- Others are in areas more associated with industry and have proximity to areas associated with relative deprivation; for example in Swansea, Neath Port Talbot and Bridgend. These three local authorities contain many of the areas which are classified as being amongst the most deprived in Wales (for example, Cwmdonkin Park is located next to one of the most deprived areas of Swansea).

Development

4.10 The Grant Funding Agreement for up to £1,900,000 was awarded for the period 8th June 2010 to 30th June 2014. Neath Port Talbot County Borough Council was the lead applicant. The other partners included Pembrokeshire County Council; National Trust; Aberglasney Trust; City and County of Swansea; Penllergare Trust; Bridgend County Borough Council; Margram

4.11 A European Contract Management team was set up to manage delivery of the projects across Wales in partnership with Pembrokeshire County Council. One of their primary roles was supporting partners in project management, in particular with documentation required to meet EU conditions.

Goals for the Project

4.12 The Business Plan set out that developments for One Historic Garden would:

- Contribute to an increase in visitor numbers
- Encourage visitors to stay in the area and experience other sites
- Extend the visitor season
- Lead to job creation
- Enhance the parks and gardens to maximise the economic benefits and impacts from the natural and heritage environments

4.13 The Business Plan argued that without investment, the likely result would be decreased visitor numbers.

4.14 The Business Plan described wider ambitions for:

- Equality: One Historic Garden would appeal to a wide range of visitors. The key market areas would be gardener groups, older persons, families, and tourists. In addition, the project also aimed to attract people from lower socio-economic backgrounds, younger adults, families with children, and educational groups.
- Equal opportunities in delivery through recruitment of economically inactive persons and offering on-site work experience. Employers would offer flexible working and work-life balance benefits.
- Environmental sustainability. The project proposed to source materials and labour locally, to meet BREEAM standards in new buildings, to promote public transport and cycle use, and good practice in waste management. There were also proposals around archaeological good practice, and promoting sustainable recreation.

Project Inputs

Financial Inputs

4.15 The claim up to June 2015 for One Historic Garden is a little over £4.6 million, of which the claim from the ERDF is £1.92 million, around 42 per cent of the total. The total investment for One Historic Garden was largely in line with what was anticipated in the 2010 business plan, although the ERDF grant was somewhat less than the £2.17 million anticipated in 2010.

Table 4.2: Funding Profile and Out-turn (£m)

Funding Source	Business Plan 2010	Final Claim July 2015
ERDF	2.17	1.92
CoE Lead (cash)	0.57	0.46
Other Public sector (cash)	1.62	0.16
Other Public sector (in-kind)	0	0
Voluntary sector (cash)	0.22	n/a
Voluntary sector (in-kind)	0.05	n/a
Income generated	0	
Total	4.63	4.61

Source: One Historic Garden. Business Plan and Final Claims

4.16 Funding was allocated across each of the seven garden projects, with some reserved for overall One Historic Garden management and marketing. The data available on this funding shows that:

- Five of the seven projects received over 80 per cent of the ERDF grants for One Historic Garden – the grants to Colby and to Penllergare are modest and total less than £100,000.
- ERDF grants are part of a much larger package of funding for total project costs. The ERDF accounts for around half of project costs in Aberglasney, Bryngarw, and Margam.
- A significant share, 12 percent, of the ERDF grants were allocated to management and marketing to operate across all of the One Historic Garden projects.

- The majority of works were capital works, with particular focus on renovating heritage buildings and improving parkland. Revenue works were predominantly events and marketing.
- Most projects overrun in their costs. In some cases this was due to original costings and estimations in 2009/10 being inaccurate, general increases in costs, and lack of resource to estimate costings in areas of little expertise.

Table 4.3: Expenditure and Funding Outturn by Investment Strand, June 2015

Garden	ERDF Grant (£m)	% of ERDF Grant	Total Cost (£m)
Aberglasney Gardens	£0.32	17%	£0.64
Bryngarw House & Country Park	£0.33	17%	£0.60
Colby Woodland Garden	£0.02	1%	£0.05
Cwmdonkin Park	£0.25	13%	£1.26
Margam Country Park	£0.33	17%	£0.70
Penllergare Valley Woods	£0.07	4%	£0.29
Scolton Manor	£0.34	18%	£0.79
Management	£0.13	7%	£0.13
Marketing	£0.10	5%	£0.10
Total	£1.9	£100%	£4.6

Source: One Historic Garden. Business Plan and Final Claims

4.17 Some of the sites will have accessed other sources of public funding alongside investment from Visit Wales and ERDF. For example consultations and research indicate:

- The Heritage Lottery Fund has provided further financial inputs to Aberglasney Gardens (£1 million), Margam Country Park (£2 million) and Penllergare Valley Woods (over £0.4 million). The investment of this funding is likely to have gone on different activities and outputs – but the effect on outcomes on visitor numbers and spending will not be possible to differentiate.

- Bryngarw House & Country Park received match funding from the Welsh Government as part of the designated Western Valleys Strategic Regeneration Area fund. Bridgend Council were the first to acquire match funding of the seven projects, which could be attributed to the Welsh Government's understanding the benefits of the funding.
- Cwmdonkin acquired the Heritage Lottery Fund before ERDF funding, which initially acted as the catalyst for the project.

4.18 Most of the projects overran in project costs. The overrun in costs was due to the nature of capital works programmes and the increasing costs of materials and labour (compared to when the project was first procured). Expenditure across the investments remained more or less the same, with no significant changes during the lifetime of the programme. Some variations to compensate for underestimates on costings were made, but these had little impact on expenditure.

Activities and Processes

4.19 The business plan set out the broad activities that would be undertaken to develop the concept of One Historic Garden across the seven sites. These were:

- Provide new and improved services for visitors
- Improve access and sustainable transport links
- New and improved signage and interpretation
- Upgraded footpaths to encourage walking and cycling
- Improved sustainable management of heritage and environmental aspects
- Create a coherent theme with an integrated marketing strategy.

4.20 Most of the activities planned were carried out, with minor variations at individual project level requiring small reallocations of funding.

4.21 The Clyne gardens project was included in the initial business plan but not in the final offer, as Swansea Local Authority advised they would not be able to raise the match funding required to facilitate the work. In discussion with Visit Wales it was agreed that the grant and expenditure budgeted for Clyne would be reallocated to Cwmdonkin Park.

Delivering of the Investments

4.22 In total, all key project components set out in the business plan (2010) have been delivered through the One Historic Garden. The table below provides a more detailed description of each investment project and activities delivered, highlighting

any variance in activities against what was originally set out. Any variances to what was originally proposed in the business plans across each project are also highlighted.

Table 4.4 Activities delivered and variations

Project	Description of Activities Delivered
Aberglasney	<ul style="list-style-type: none"> • The listed building was restored and additional facilities include renewable heating centre, improved gardens • <i>Change - Renewable heating centre was originally supposed to be liquid petroleum gas (LPG) heating, but changed due to tenders being too high for original plans.</i>
Bryngarw	<ul style="list-style-type: none"> • Redevelopment of visitor centre and cafe • Landscaping works • Reinstatement of pathways • Series of events and marketing
Cwmdonkin	<ul style="list-style-type: none"> • Restoration of park, key buildings, cycle paths and pavilions • Re-establishing key Victorian features of the park and historic links • Creation of a new café • Improved access and signage
Scolton	<ul style="list-style-type: none"> • Two listed sheds were restored and turned into a museum for historical artefacts and bee-keeping • Manor was restored and a visitor centre created • <i>Change - Original restoration of wall planned to be a certain height, but was lowered due to unsuccessful funding stream</i>
Margam	<ul style="list-style-type: none"> • Restoration of broad walk, Japanese garden water feature, part of garden boundary • Implementation of irrigation systems sustained using lake water • Holiday cottage restored for letting • <i>Change - Restoration of vine house was omitted due to overrun in costs in over project streams</i> • <i>Change - Repair of kitchen garden walls was omitted due to overrun in costs in over project streams</i>

Strategic and Operational Management

4.23 Pembrokeshire Council were the lead delivery body, in charge of overseeing the strategic and operational management of the overall project. They worked closely with other partners including National Trust; Aberglasney Trust; City and County of Swansea; Penllergare Trust; Bridgend County Borough Council; and Margam Country Park.

- 4.24 Pembrokeshire Council supported individual projects through the tender process, assisting with EU documentation requirements, arranging monthly draw-downs and acting as a liaison between project partners and Visit Wales. Operational management of individual projects was undertaken by project managers at each site. External expertise in construction management and capital works was sourced when applicable, and an external marketing team was used to design and implement the promotional campaign.
- 4.25 Opportunities were provided for joint working between partners in monthly meetings arranged by Pembrokeshire Council. Consolidating the individual projects into one project was a challenge, considering the disjointed project completion dates. In particular, acquiring match funding (attempted after the project had been initiated) differed greatly across each of the gardens / investment activities.
- 4.26 Match funding was secured after initial ERDF funding was allocated, meaning partners were not guaranteed a certain amount at any particular time. This led to delays in completing the works, but also in some cases led to aspects of individual projects not being delivered. For example, Scolton Manor had plans to renew a garden wall using a particular funding stream which turned out to be unsuccessful.
- 4.27 Progressing capital works in natural habitats brought about environmental challenges and raised questions about the environmental sustainability of the interventions. As a result, projects required specialist delivery methods and products which required that the projects source external financial and operational expertise.

Marketing Management

- 4.28 Given the aim to establish a unified One Historic Garden project, the resources put into developing a collective approach to marketing the initiative was significant. An external organisation was used for the marketing campaign which lasted around 14 months. The aims of the campaign were:
- To raise awareness of the projects with the local community and wider tourism
 - Increase day trips and staying visitors in the region
 - Ensure partners were fully engaged and informed
- 4.29 The project managers and officials, and the marketing company involved with One Historic Garden, pointed to a number of challenges faced in meeting these goals:

- **Project completions:** Differing project completion dates impacted on the effectiveness of the marketing, due to the greater difficulty in engaging partners whose projects had not yet completed and were therefore still under time and resource constraints.
- **Resource constraints:** A concern among about whether there was enough resource for joint marketing activity. This resulted in some partners focusing less on marketing for the wider audience.
- **Inward looking:** Some projects were perceived to be individual and inward looking. The challenge here was engaging successfully with partners (given their potential resource constraints).
- **Legacy:** The marketing organisation said that 14 months was sufficient to run a campaign but activities need to be sustained in order to capitalise on the benefits. There were varying levels of commitment from partners to collaborate on formulating future marketing strategy largely driven by individual projects' resource constraints and competing project completion dates.

Outputs

Original Output Targets

- 4.30 The Business Plan (phase 2 detailed application) set out expected physical outputs of:
- Eight initiatives improving or developing new visitor attractions or visitor facilities (including visitor centres, transport measures, and car parking facilities); the final target in the contract variation letter was seven;
 - 21.5 km of managed access to countryside (including upgraded footpaths and signage); the final target in the contract variation letter was 15km.
- 4.31 The Business Plan (phase 2 detailed application) set out expected non-physical outputs of:
- 25 enterprises assisted (including gift shops, cafes, social-economy partnerships, day services projects, and a Go Ape leisure facility); the final target in the contract variation letter was 15.

Achieved Outputs

- 4.32 Final outputs were provided by each project partner and supplied by Visit Wales. This gives an indication of overall project performance but may lack some reliability

where partners evaluated outputs based on their own methods (rather than a consistent method of evaluation).

- 4.33 The project originally set out to deliver eight initiatives developing the natural environment, however following the withdrawal of one of the projects the target was changed to seven. From this new target, all seven initiatives were delivered. The project was unable to reach the target of assisting 15 enterprises.

Table 4.5: Achievement of Overall Output Targets

Outputs Targets:	Original Offer Letter 2009	Contract Variation Letter January 2015	Achieved June 2015	% Achievement of Target (from contract variation)
Initiatives developing natural environment	8	7	7	100%
Managed access to countryside (km)	23.25km	15km	33.99	226%
Enterprises assisted	25	15	11	73%

Source: Business Plans and 2015 Project Profiles

Outcomes

Original Outcome Targets

- 4.34 The offer letter set out goals outcomes/results for:
- A total over 2,054,000 visits, or 564,234 per annum, although it was not clear how this was defined or specified. The visitor numbers set out in the phase 2 business plan are set out in Table 6.6.
 - 11 direct gross jobs created (including converting temporary seasonal jobs to permanent, gardeners, and park-keepers); the final target in the contract variation letter was eight.

Achieved Outcomes

- 4.35 Information on outcomes was provided by each project partner and supplied by Visit Wales. As with the outputs, this gives an indication of overall project performance but may lack credibility. The project exceeded the gross jobs created target, based upon direct employment created by individual initiatives i.e. in new positions in maintaining the gardens and in the creation of new visitor services.

4.36 The number of visits achieved was in line with the contract variation letter target, accomplishing 120 per cent of the target; although it is not clear how the total visit numbers were estimated or to what extent these additional visits can be attributed to the investment.

Table 4.6: Achievement of Overall Outcome Targets

Outcome Targets:	Original Offer Letter 2010	Contract Variation Letter January 2015	Achieved June 2011-2013	% Achievement of Target (from contract variation)
Job Created (gross)	11	8	14	175%
Visits (000s)	2,259	660	789	120%

Source: Business Plans and 2015 Project Profiles

4.37 Visit Wales conducts an annual Survey of Visits to Tourist Attractions. This captures visitor numbers for some attractions where it is feasible to charge admission for the purpose of sightseeing. It therefore includes information for four of the attractions within “One Historic Garden” but this is not complete for all years between 2006 and 2012. Individual years may also be affected by particular events (e.g. Margam Country Park hosts a number of festivals, concerts each year). But for those sites what the visitor survey does provide visitor numbers, there is no evidence of a before-after increase in visitor numbers following the investments through the One Historic Garden programme.

Table 4.7: Visitor Numbers at One Historic Garden Sites, 2006-12

Garden	2006	2007	2008	2009	2010	2011	2012
Aberglasney	49,500	47,100	47,500	44,600		32,700	26,200
Bryngarw				50,800	50,050		
Colby	29,500	31,200	27,800	28,400	33,800	33,900	31,300
Cwmdonkin	No results reported in Visit Wales Survey						
Margam	192,700	-	154,000	203,800	143,000	232,700	105,300
Penllergare	No results reported in Visit Wales Survey						
Scolton	No results reported in Visit Wales Survey						

Source: Visit Wales Survey of Visits to Tourist Attractions, 2007 to 2013 editions.

Impacts

Economic and Visitor Economy Impacts

4.38 The consultations with officials and stakeholders engaged with One Historic Garden highlighted a range of perceived economic and visitor impacts.

- **Extending season:** Part of the investment activities aimed to extend the tourist season through improving indoor facilities to provide an attraction all year round. For example, indoor facilities did not exist previously at Scolton Manor.
- **Improving links to the regional offer:** evidence suggests some projects have improved the prospects of their garden as part of the wider regional offer in Wales. For example, Cwmdonkin Park is part of the Dylan Thomas trail (a series of landmarks associated with the life of Dylan Thomas).
- **Refreshing and strengthening the offer:** in all cases, is it perceived the tourist offer was strengthened with improvements in facilities at the garden attractions. Investments were geared towards encouraging people to the areas, in particular first time users and local communities, in order to provide exposure and increase visitor numbers. This was especially the case in Bryngarw, which used a series of events in addition to a farmers market held once a month through the summer season. Unlocking the potential of this space and bringing a new attraction was able to attract a wider audience and increase visibility of the country park.

Sustainability and Social Impacts

4.39 The ambitions set out in the business plan -The Business Plan (phase 2) set out wider social impacts for the investments to support. These were:

- Environmental sustainability – with increased awareness and minimised impact by visitors; that products used are ethical, environmentally-friendly, and local; and that the visitor infrastructure is appropriate to deal with increased visitor pressures.
- Equal opportunities – compliance with regulations on access to information; and compliance with regulations on access for all.

4.40 Our consultations with project officials explored the perception of impacts on environmental sustainability:

- **Environmental conservation.** Each initiative renovated environmental assets which otherwise would have deteriorated. For example, heritage buildings in Scolton Manor were due to be demolished as a result of structural instability.
- **Sustainable measures.** Some projects were able to install pollution prevention measures. This was demonstrated in Margam Country Park through the installation of an irrigation system which uses water from the lakes as opposed to the mains water. A grey water recycling system was installed in an upgraded toilet facility in Cwmdonkin as part of the funding for One Historic Garden.
- **Improved maintenance of the parks.** Many of the projects engaged with, and strengthened the offer of, local volunteer groups that carry out conservation activities, such as cleaning rivers and maintaining parts of the nearby countryside.
- **Spin off projects.** Some partners used the One Historic Garden project as a platform to explore further environmental aims. In Scolton Manor, the provision of a bee keeping facility (through the renovation of a derelict shed) led to a spin off pilot project investigating how honey bee populations are being affected in the local area. The project required funding from the Prince's Countryside Fund, with £40,000 achieved as a direct result of the creation of the facility. The honey bee population in the area benefits the farming industry.

Figure 4.2: Scolton Manor Beekeeping Centre

The centre was opened on the 18th July 2014 and was offered to the Pembrokeshire Beekeeping Association. Providing the association with a free permanent residence further legitimised the organisation's work and helped them to secure over £40k in funding from Environment Wales and Prince's Countryside Fund collectively. The opening of the centre comes at a time where bee populations are under increasing threat from disease, habitat reduction and poor beekeeping practice, leading to colony losses of between 5 per cent and 10 per cent per year.

4.41 Our consultation explored the perception of impacts on equal opportunities:

- **Interventions improving accessibility.** In each project, a wide range of local groups were engaged in the discussion, through providing attractions which were accessible; for example, providing indoor facilities and improving access to pathways enables a leisure offer to all age groups and people with disabilities.

- **Facilitating social programmes.** There were efforts to facilitate social and work programmes organised by outside organisations through renovations i.e. the Scolton Manor construction works enabled a social enterprise named Normand industries to provide work opportunities to people with disabilities.
- **Community engagement.** There were efforts to foster greater community engagement: Part of the programme at Bryngarw was to support the volunteer group “Friends of Bryngarw” in cleaning rivers and maintaining parts of the nearby countryside.

Legacy and Long Term Sustainability

4.42 Our research and consultations with project officials explored the legacy and long-term sustainability of the One Historic Garden initiative. This brought out messages of:

- **Sustained revenues.** Cwmdonkin and Bryngarw invested to create café’s and visitor centres, which are now functioning as businesses which do not require further public support. Interventions were able to establish ongoing revenue streams which can be reinvested into further improvements to the gardens. For example, the conversion of unused changing facilities in Margam Country Park to a three bed holiday cottage has proved successful, earning the park around £15,000 each year. Furthermore, the creation of visitor centres run directly by the garden associations are able to capitalise on merchandise (and honey produce in the case of Scolton Manor). Raising the funds to reinvest should help ensure maintenance of the gardens is self-sustaining.
- **Securing further funding.** Efforts to use investment as leverage to strengthen future bids. Bryngarw bid successfully for other Council pots for further improvements to areas of the park and main toilet facilities.
- **Challenges in sustaining the One Historic Garden concept.** The ability for the One Historic Garden concept to remain unified in the long term is not certain. The concept currently relies largely on a One Historic Garden website. There is little collaboration to retain the concept but One Historic Garden could merge with other consortia (e.g. Great Gardens of Wales).

Conclusions and Lessons

4.43 Our main conclusions to be drawn from our consultations and analysis are that:

- The One Historic Garden demonstrated limited evidence that it had provided additional benefits. This is due to a lack of coordination between partners in joint marketing and no collaborative group moving forward. Although, given the limited size of investments and the inward looking nature of improvements, these additional aims show signs of being over-ambitious.
- Original business plans /applications were adhered to throughout the projects and in cases where changes were made, projects were flexible and able to strategically modify activities to best suit overall objectives.
- The project has to some extent achieved its objectives. Individual gardens demonstrated strategic use of small scale interventions by commercialising assets, supporting enterprise and strengthening volunteer groups.
- The overall impact of the project was hindered by the tendency for outcomes to be project-specific and focused at very local scale. Evidence is lacking on how improvements have made a difference on the wider scale, namely on the visitor economy. Inadequate monitoring means we are unable to draw conclusions about visitor numbers and spending.
- The One Historic Garden provided funding for improvements that the different garden sites had required for a length of time but were not carried out due to funding shortages. In some cases, without intervention historic gardens may have fallen in to disrepair.
- The individual projects established some self-sustaining practices which may enable positive outcomes to continue into the long term. The withdrawal of funding should not impact on the ability for some benefits to be sustained such as continued maintenance of gardens and the viability of enterprises.
- Acquiring match funding proved to a challenge, with delays affecting the overall marketing strategy and leading to time and cost overruns. It is important to ensure partners have a fully developed business case and have a reliable source of match funding.

5. Sustainable: North Wales Cycling

Project Background and Description

Rationale

- 5.1 North Wales Cycling Centre of Excellence is a network of cycling routes, destinations and facilities that links a number of existing cycling destinations in North Wales and creates a new hub of cycling activity within Denbighshire and Conwy. Ride North Wales is the overarching marketing site, and was formed by merging the existing Ride the Clwyds and Ride Hiraethog sites and a collaboration between Conwy and Denbighshire Councils through North Wales Cycling and the Rights of Way Improvement Plan. It provides a range of information on routes and facilities in the area.
- 5.2 The project was set up to enhance the tourism offering in the area and was developed at a time of constrained funding. The business plan states that without funding, none of the proposed works would be possible as neither of the local authorities or private sector partners had sufficient capital to take these projects forward alone in the foreseeable future. For many projects, such as the natural trail network, there is a clear market failure from the provision of public goods, where there is no financial benefit to the market of delivering and maintaining these improvements where there may be social benefits in terms of health and well-being.
- 5.3 The Denbighshire Cycling Centre of Excellence Feasibility Study (Nov 2009) outlined the existing tourism infrastructure and cycling activity in the area, and points to a range of survey evidence on the factors influencing mountain biking destination choices, such as reputation of destination, variety/ difficulty of terrain and the number of trails. The Feasibility Study outlines its vision to become an area that is 'acknowledged nationally as an outstanding, sustainable, all year road and off-road cycling for all in outstanding and contrasting scenery which has primary hubs of cycling activity at Llandegla and Llyn Brenig...' and details its objectives, which include creating hubs of cycling activity, developing off-road cycling routes and promoting the area as a cycling destination.
- 5.4 The project objectives strongly support local policy aspirations, for example the Denbighshire County Council Local Development Plan states the aspiration to 'increase levels of walking and cycling both through the promotion and provision of facilities.'

Project Description

- 5.5 The North Wales Cycling Centre of Excellence aims to create an area nationally renowned as an outstanding, all year round destination for cycling and outdoor activities, building on the existing activity in the area.
- 5.6 The overall aim of the project was to build on and extend the existing cycling activity within the local tourism industry, to increase public participation and create a hub for cycling in the area. The business plans set out a target to deliver eight key components of the North Wales Cycling initiative across the Denbighshire and Conwy area. A total of five of these have been delivered.

Location

- 5.7 The Centre of Excellence is located within the counties of Denbighshire and Conwy, and provides a cluster of cycling activity that adds to the existing offering in the area to create a hub of cycling activity. The table below outlines the locations of the key projects delivered.

Table 5.1: Location of Projects

Project	Project lead	Town and postcode	Local Authority District
Iconic trails & natural routes	Denbighshire and Conwy CC	LL21 9TT, LL11 3AA, CH7 5LH	Conwy & Denbighshire
Natural Trail Network	Denbighshire and Conwy CC	Various locations	Conwy & Denbighshire
Llyn Brenig Visitor Facilities	Welsh Water	Llyn Brenig, LL21 9TT	Conwy
Marsh tracks, Rhyl	Denbighshire CC	Rhyl, LL18 2AD	Denbighshire
Mass Participation Events	Denbighshire CC	Various	Conwy & Denbighshire

- 5.8 Denbighshire and Conwy contain some of the most deprived neighbourhoods in Wales, with 11 of its neighbourhoods ranked amongst the 10 per cent most deprived areas in Wales according to the 2014 Wales Index of Multiple Deprivation. Rhyl in particular is one of the most deprived areas, with one of its neighbourhoods, which is adjacent to the Marsh Tracks investment, ranked as the 2nd most deprived neighbourhood in Wales.

Development

- 5.9 Denbighshire and Conwy County Councils were originally developing a number of projects for separate bids, however WEFO were looking for larger sized projects so they came together to jointly bid to become the North Wales Cycling Centre of Excellence. Denbighshire County Council acted as the project lead, and led the application process. The other partners included Conwy County Borough Council, Forestry Commission Wales, UPM Tillhill and Welsh Water.
- 5.10 Grant funding of up to £944,951 was awarded subject to terms and conditions of the agreement for the period 3rd June 2010 to December 2014⁶.

Goals for the Project

- 5.11 The Business Plan sets out a number of key goals for the project which are largely centred on raising the tourism profile and consequently visitors to the area by building on and extending existing activity in the area in a way that supports the sustainability of local communities. The key goals set out in the business plan include the following:
- Encourage visitors to take part in physical exercise whilst preserving the natural and built environment, experience local culture, consume local produce and more frequently staying overnight.
 - Increase levels of tourism through creating a compact destination that provides a wide variety of cycling options for all ages and abilities.
 - Clustering of tourism activity to attract more visits from further afield (and overnight stays).
 - Support the local economy to prosper and enhance the sustainability of the surrounding local communities.
 - Sustain existing employment and lead to job creation.
- 5.12 The Business Plan also outlines a number of wider ambitions for:
- Engagement: The project will contribute to the healthier lifestyles of both visitors and community members alike, through the development of managed cycle routes. Local groups, such as the Disability Forum, will be part of the development process of the project as they understand central issues of their environment and general needs of inhabitants within the community.

⁶ The delivery profile was extended from 30th June 2013 to Dec 2014 in the Contract Variation Letter to Denbighshire County Council dated 14th January 2015.

- Equality: It is imperative that the project is accessible to all individuals, through being DDA compliant, and also through all signage and publicity being accessible to all. This will include making sure that all information is bilingual in English and Welsh, and uses characters e.g. Braille where appropriate.
- Equal Opportunities: Denbighshire CC and Conwy CBC have equal opportunities policies which will be implemented in both the development and delivery of the project.
- Environmental Sustainability: Denbighshire County Council has adopted the Green Dragon Standard to ensure that the project has positive environmental credentials. A number of other actions will also work towards environmental sustainability such as a site Environmental Management Plan in place.

Inputs

Financial Inputs

5.13 The claim data up to June 2015 reveals around £1.8m has been claimed to date, of this £757,583 is ERDF funding, around 42.7 per cent of the total. Overall the project has underspent. This was a result of a number of partners/ match funders pulling out and challenges in delivery. Although some partners did end up over spending, this did not make up for the significant underspend as a result re-profiling and changes in delivery.

Table 5.2 Funding Profile and Outturn

Funding source	Business Plan 2010 (£m)	Offer Letter 2010 (£m)	Claims June 2015 (£m)
ERDF	£1.69	£0.94	£0.76
Own funds (cash)	£0.68		
Own funds (in-kind)	£0.04		
Public sector (cash)	£0.05		
Public sector funds (in-kind)	£0.03		
Private sector (cash)	£0.27		£0.33
Private sector (in-kind)	£0.02		
Income generated			
Total	£2.78	£2.22	£1.77

Source: North Wales Cycling. Business Plan and Final Claims

- 5.14 The table below outlines the latest spend figures across each investment strand. The largest investments were for the Llyn Brenig Visitor Centre and Marsh Tracks projects, making up over half of the total project costs. Llyn Brenig Visitor Centre and Marsh Tracks also received the bulk of ERDF funding at 58 per cent of the total ERDF grant.
- 5.15 The majority of investments were capital works, focusing on the development and improvement of cycling trails and facilities. A small 12 per cent of the total ERDF grant was allocated to marketing, branding and evaluation work.
- 5.16 Both Llyn Brenig Visitor and Marsh Tracks overran in costs compared to what was planned. In some cases this was due to unrealistic original cost estimates or savings in costs at the expense of quality. For example, the additional spending on the Llyn Brenig Visitor Centre project was able to improve the overall quality of the centre.

Table 5.3 Expenditure and Funding Outturn by Investment Strand, 2015

	ERDF Grant (£m)	% of total ERDF Grant	Total project cost (£m)
Llyn Brenig Visitor Centre	£0.26	34%	£0.60
Marsh Tracks, Rhyl	£0.18	24%	£0.42
Iconic Trail	£0.06	8%	£0.13
Trail Network	£0.06	8%	£0.14
Conwy Trails	£0.11	14%	£0.25
Marketing & Branding	£0.02	2%	£0.44
Evaluation	£0.01	1%	£0.01
Marketing Costs	£0.07	9%	£0.17
Total	£0.77	100%	£2.16

Source: Denbighshire County Council data, 2015

- 5.17 A small proportion of match funding has been claimed to date. Denbighshire and Conwy County Council provided around £800k in match funding, around 18 per cent (£215k) has been claimed to date. Dwr Cymru Welsh Water provided a further £301k for the Llyn Brenig visitor centre, 33 per cent of which has been claimed to date.

Table 5.4 Match funding profile (£ millions)

Name	Total Match	Claimed (Match funding June 2015)	% claimed to date
Denbighshire County Council	£0.53	£0.12	22%
Dwr Cymru (Welsh water)	£0.30	£0.10	33%
Conwy County Borough Council	£0.21	£0.02	9%

Source: Final Claims

5.18 The project re-profiling resulted in the project overall under spending. However as part of the project re-profile Dwr Cymru Welsh Water reviewed the costs of Llyn Brenig and found that delivery costs were going to be around £100,000 more than originally planned. As a result Dwr Cymru Welsh Water committed additional funds to the scheme.

Resources

5.19 In total there were around 12 individuals in the project steering group who were involved in the delivery and management of the projects.

5.20 Around £40K was devoted to marketing which included setting up a website for information and marketing purposes, a cycling navigation app, video clips for promotional purposes, magazine articles and familiarisation trips for businesses.

Activities and processes

Delivering of the Investments

5.21 Originally eight components comprised the North Wales Cycling centre, but following the withdrawal of two key match funders and external challenges a number of changes were made in delivering the investments. In total, five of the eight key project components set out in the business plan (2010) have been delivered through the North Wales Cycling Centre of Excellence and one additional project has been delivered (Marsh Tracks).

5.22 The challenges included the loss of partners/ match funding and the time taken for re-profiling of activities and finances. This had an impact upon a substantial element of the scheme being withdrawn. A private high ropes company was due to provide substantial match funding for a mountain bike centre at Coed Llandegala, however by the first year of delivery the high ropes market had become saturated and dormant and the business made the decision to withdraw from the scheme.

- 5.23 The challenges also included difficulties in gaining planning permission at the proposed site at Hafod Y Llan for the Clocaenog Forest Activity Business centre. The Forestry Commission were the match funding body for this site, but early in the delivery period became aware that land near the proposed building fell under a Planning 'Technical Government Advice Note 8' classification due to a wind farm application near the site, meaning any development that might jeopardise this would be illegal and thus funding was withdrawn by the Forestry Commission in mid-2011.
- 5.24 There were however some benefits generated from the spare funds raised by match funders pulling out as it allowed them to deliver Marsh Tracks as an additional project and left more leeway for other projects. Llyn Brenig spent around £1k more than originally planned which allowed them to enhance the overall quality of the project.
- 5.25 The table below provides a summary of the projects and activities delivered through the funding programme and highlights any variance in activities against what was originally set out. Any variances to what was originally proposed across each project are also outlined.

Table 5.5: Delivering of Investments

Project	Description of Activities Delivered
Llyn Brenig Visitor Centre	<ul style="list-style-type: none"> The Llyn Brenig Visitor extension included an extension of the café and provision of bike hire facilities The aim of the project was to increase the number of visitors by adding to existing cycling facilities aimed at families and intermediate users.
Iconic and Natural Trails	<p>A number of natural trails were delivered across Conwy and Denbighshire, including:</p> <ul style="list-style-type: none"> A circular route trail around Llyn Brenig New permissive bridleway at Moel Famau Country Park (just under 10k long) Upgrading existing path made accessible to all at Corwen Cutting A trail linking Llangollen, Llandegla, Corwen and the Dee Valley as well as activity hubs in Betws y Coed was originally planned. This was not delivered due to land permission challenges.
Marsh Tracks	<ul style="list-style-type: none"> This project was not part of the original business plan. Following the withdrawal of a number of projects, the business plan was changed to include Marsh Tracks. Marsh Tracks consists of a new 1.3km closed circuit road cycling track and a national standard BMX race track. Purpose built changing and shower facilities have also been built on site. Material excavated from the Rhyl Cut was used to construct the Marsh Tracks bike track which had a saving of £437,624 to Denbighshire Council in tipping fees.
Betws Y Coed Tourism Hub	<ul style="list-style-type: none"> This project was not delivered. A tourism hub in Betws y Coed to provide information and a facility for tourists to book outdoor activities was originally planned. This project was not delivered as the existing local sports club that was due to be the dedicated centre changed their mind on giving the lease.
Coed Llandegla Mountain Bike Centre	<ul style="list-style-type: none"> This project was not delivered. An upgrade of the existing mountain bike visitor centre to include new decking area, new office space and increased café and retail space, plus expansion of the kitchen was originally planned. A private high ropes company (Tree Top Adventure Wales) was due to provide substantial match funding. They later pulled out as the high ropes market had become saturated and dormant so they made the decision to withdraw.
Clocaenog Forest Activity Business centre	<ul style="list-style-type: none"> This project was not delivered. Restoration of Hafod Y Llan to host equipment hire, activity training, mentoring and accommodation to support employment for service providers was originally planned. The Forestry Commission was the match funding body for the site, but they later became aware of a planning 'Technical Government Advice Note 8' classification due to a wind farm application near the site meaning they were unable to continue with the development.
Mass participation events	<ul style="list-style-type: none"> There is no evidence of mass participation events that have been delivered to date, however the World Rally will finish the Welsh stages at Brenig this year.

- 5.26 The marketing strand delivered a number of platforms and activities for marketing the area as an outstanding tourist destination, these included:
- Development of the Ride North Wales website which is the key site for information on cycling activities, facilities and routes in the area.
 - A navigational app was produced to guide cyclists in finding the best routes in the area
 - Video clips to promote the mountain biking trails
- 5.27 The Ride North Wales Tourism site is focused specifically at cycling activity in the area. Although Ride North Wales also provides a range of information on tourist attractions, events and other facilities in the area with around 30 businesses already listed on the Ride North Wales site, there is limited evidence of joint working with the wider tourism sector to strengthen and join up the tourism offer in the area.
- 5.28 The video clips made to promote the mountain biking trails will be made available to be displayed on screens in Tourist Information Centres and other tourism businesses in the area. All of the COEs relating to cycling are working together to have coverage in MBR magazine.

Strategic and Operational Management

- 5.29 Denbighshire County Council were the lead delivery body, overseeing the overall strategic and operational management of the project. They worked closely with the other partners, Conwy County Borough Council, Forestry Commission Wales, UPM Tillhill and Dwr Cymru Welsh Water throughout the programme.
- 5.30 Denbighshire County Council reported that the overall management of individual projects was challenging and it would have been simpler if individual projects were reporting directly to Visit Wales.
- 5.31 A project steering group with partners across the project met every six months to discuss the progress of the individual investments and the project overall. The bringing together of various partners in the area was reported to have been very beneficial, however concerns were raised about the structures in place for continuing these partnerships in the future.
- 5.32 The project experienced a number of delays in delivery due to two substantial elements of the scheme being withdrawn. Revising and re-profiling the projects and finances was extremely time consuming and diverted resources and attention away from the main programme. There was also added pressure to deliver and spend

funding in time as a result. Despite the challenges in delivering and the diverted resources due to scheme revisions, the team was able to adapt their original plan to include Marsh Tracks in Rhyl.

Outputs

Original Output Targets

5.33 The 2010 Business Plan (phase 2 detailed application) set out expected targets of:

- Creation of one initiative developing the natural environment
- Nine initiatives improving or developing new visitor attractions or visitor facilities;
- 308 km of managed access to the countryside
- One marketing campaign designed to improve the awareness of the targeted region as a destination;
- Five enterprises assisted

Achieved Outputs

5.34 The table below presents the quantified output targets as set out in the original business plan and revised contract variation letter, against claims to date (June 2015). The revised targets set out in the contract variation letter led to a lower number of initiatives developing the natural environment from 5 to 1, and an increase in enterprises assisted from 3 to 11 enterprises.

Table 5.6 Achievement of Overall Output Targets

Outputs Targets:	Business Plan 2010	Revised Target: Contract Variation Letter	Achieved June 2015	% Achievement of Target (Revised target)
Initiatives developing natural environment	5	1	1	100%
Managed access to countryside (km)	308	308	270	88%
Enterprises assisted	3	11	13	118%

Source: Business Plan, Updated offer letter and June 2015 claims

5.35 Most project targets have been met, with the exception of managed access to countryside (km) which achieved 88 per cent of its target. This is the result of a number of projects dropping out through the course of the programme (i.e. the impacts of lost match funding and planning application difficulties as outlined above.

5.36 The breakdown of outputs achieved for each investment project is illustrated below. The business plan did not outline targets across individual investments. All 13 businesses that were assisted through the project were as a result of the marketing and branding activities.

Table 5.7 Achievement of Output Targets by Investment Projects

	Initiatives developing the natural environment	Managed access to countryside (km)	Enterprises assisted
	Achieved June 2015	Achieved June 2015	Achieved June 2015
Marsh Tracks	0	2.5	0
Iconic Trail	0	189	0
Trail Network	0	30.5	0
Llyn Brenig	1	0	0
Conwy Trails	0	48	0
Marketing and Branding	0	0	13
Total	1	270	13

Source: Claims to date, June 2015

Outcomes

Original and Achieved Outcomes

- 5.37 The outcome targets set out in the original business plan (2010) were later revised in the contract variation letter (January 2015), following changes in the investments delivered due to the withdrawal of a number of key projects. This led to a fall in the job creation target from 15 gross jobs to 9 gross jobs.
- 5.38 North Wales Cycling claims that it exceeded its visitor numbers target but did not deliver on its target jobs outcome. This was largely a consequence of a number of private match funders pulling out, which changed the nature of the projects that were delivered. The table below outlines the overall project outcome targets and the extent to which these have been achieved to date according to June 2015 progress data.

Table 5.8: Achievement of Overall Outcome Targets

Outcome Targets:	Original Offer Letter 2010	Revised Targets: Contract Variation Letter	Achieved June 2015	% Achievement of Revised Target
Job Created (gross)	15	9	2	22%
Visits (Additional)	40,000	41,000	66,346	148%
Visitor Expenditure	£990,000	NA	NA	NA

Source: Business Plan, Contract variation letter and June 2015 claims

5.39 Denbighshire County Council reported that all jobs created are gross (additionality measures have not been applied) and all visitor numbers are net additional. With the exception of Llyn Brenig all investments made through the North Cycling Centre of Excellence were new projects therefore an assumed baseline of 0 has been applied. The business plan stated that Llyn Brenig had a visitor base of around 200,000 per annum at the time of applying (2010). It is unclear whether full additionality measures have been applied to take into account factors such as potential displacement of activity elsewhere in the area, which is contrary to the ERDF claims of a 66,000 increase.

5.40 The breakdown of outcomes achieved for each investment project is illustrated below. The business plan did not outline targets across individual investments. Very few projects were able to deliver any new jobs through the investments and for those projects that did there was only 1 gross job as a result of the investments made.

Table 5.9: Achievement of Outcome Targets by Investment Projects

	Jobs Created: Achieved June 2015	Visits (per annum): Achieved June 2015
Llyn Brenig	1	17,940
Marsh Tracks, Rhyl	1	11,661*
Iconic Trail Network	0	16,468
Conwy Trails	0	NA (Counter flood damaged)
Marketing & Branding	0	3,809
Total	2	66,346

Source: Claim Figures, June 2015

*Note: Data is only for 3 months as the Marsh Tracks Counter was stolen.

5.41 Llyn Brenig Visitor Centre was reported to be the biggest pull in terms of attracting visitor numbers attracting 17,940 visits, followed by the iconic trail and trail network investments.

5.42 Visit Wales conducts an annual Survey of Visits to Tourist Attractions. This captures visitor numbers for some attractions where it is feasible to charge admission for the purpose of sightseeing. It therefore only includes information for Llyn Brenig Visitor Centre. There is no data available for 2010-12 (the survey publication does not give reasons why data is only available for some years), however the survey results suggest there has been a decline in visitor numbers to Llyn Brenig Visitor Centre by around 10,000 per annum since 2009.

Table 5.10 Visit Wales Visitor Survey numbers

	2008	2009	2010	2011	2012	2013
Llyn Brenig Visitor Centre*	157,029	186,242	NA	NA	NA	175,000

Source: Visit Wales Survey of Visits to Tourist Attractions, 2007 to 2013 editions

5.43 Comprehensive information on visitor spending for each attraction is difficult to obtain. Some of the sites charge for admission and/or parking, whilst others are free. The Forestry Commission collects data using counters for projects located on Forestry Commission Land. There is likely to be a number of limitations in analysing additional annual visitors using the data, such as double counting. The latest figures suggest there were 70,313 visitors to Llyn Brenig Café in 2014, up from 42,344 in 2013. Although pre-2011 data is not available the findings suggest there has been an increase in visitors in recent years, with the number of bikes at Brenig increasing by around 5,000 since 2011 and the number of cars increasing by around 23,000 between 2013 and 2014.

Table 5.11: Visitor Numbers at Brenig Forest Attractions

Type of attraction	2011	2012	2013	2014
Llyn Brenig Cafe	NA	NA	42,344	70,313
Brenig Bikes	2,194	2,263	2,752*	7,179
Brenig Cars	NA	NA	30,305	53,287

Source: LineTop Ltd, Forestry Commission Land Projects, June 2015

Note: Numbers cannot not be aggregated to form a total visitor number due to double counting

*Note: The Brenig bike counter did not run from Jan-May 2013 due to reconstruction of the lakeside path

5.44 The Cardiff University / WERU assessment of the economic impact of the E4G programme did not undertake a visitor survey of the North Wales Cycling so has estimated annual visitor numbers from taking an average from similar sites that had been surveyed. The study estimates that the annual visitor numbers to the North Wales Cycling COE over 2012/13 is 32,427. This estimate is also much lower than the ERDF claim figures.

Impacts

Economic and Visitor Impacts

5.45 The Cardiff University/ WERU assessment provides rough headline estimates of gross GVA resulting from the estimated total visitor spending impact of the COE. The economic impacts have been derived by taking average spend and economic impact details across similar sites. They estimate that the estimated total visitor spending impact of the North Wales Cycling Centre of Excellence was £0.3m of gross value added per year, supporting around 13 FTE jobs.

5.46 There were a number of economic impacts that have not been estimated but are significant in supporting the local tourism economy and community:

- **Improving visitor perceptions:** A number of interventions were used to unlock potential and increase visibility and accessibility to tourists. For example, the Ride North Wales Marketing Site seeks to promote cycling in the area and, alongside the app, to encourage visitors to make use of local facilities and other visitor attractions. A number of investments such as the trail networks and Marsh Tracks seemed to be more targeted at the local communities rather than tourists in the area.
- **Refreshing and strengthening offer:** The project added to the existing hub of cycling activity in the area and in all cases, strengthened the tourist offer. The Llyn Brenig extension and improvements in particular were geared towards encouraging people to the area and enhancing the tourism draw.
- **Sustaining the local economy:** The job creation figures as a result of the project were small (two jobs) however the project outcome figures suggest the investments (largely Llyn Brenig) enhanced the number of visitors to the area.

Sustainability and Social Impacts

5.47 Our consultations with officials and stakeholders highlighted perceptions of sustainability and social impacts, such as:

- **Environmental conservation:** A number of projects renovated environmental assets and many of these would have otherwise deteriorated. For example Marsh Tracks was developed on existing marsh lands and a number of footpaths along the natural and iconic trails were no longer useable.
- **Sustainable measures:** Some projects were able to install pollution prevention measures and use recycled material. For example, material excavated from the Rhyl Cut was used to construct the Marsh Tracks bike track which had a saving of £437,624 to Denbighshire Council in tipping fees. Rhyl Cut has now been stocked with fish, with fishing pegs and new pathways installed by another project. This project could not have been taken forward without the North Wales Cycling COE work.
- **Social Impacts:** A number of projects have a strong community focus. Marsh Tracks in particular appears to be a strong community asset, located in one of the most deprived areas in Wales, it offers excellent facilities free of charge or at a small cost to local members. It is also home to the Dragon Riders BMX/ MTB Club who compete and meet regularly at the centre.

Legacy and Long Term Sustainability

5.48 The consultations with project officials stakeholders explored the legacy and long-term sustainability of the North Wales Cycling initiative. This is to identify the extent to which the investments' benefits will be sustained or constrained over time. This brought out messages of:

- **Lasting Impact:** A number of the projects delivered will have a lasting difference in terms of where new rights of way have been established, which tourists and the local community can continue to make use of free of charge.
- **Securing further funding:** Denbighshire County Council has since been awarded £47,220 in funds to do further marketing work relating to mountain biking in partnership with others in the area.
- **Sustainability of the investments:** Llyn Brenig Visitor Centre is self-sustaining and further marketing investments in the area may help to continue the boost in its visitor numbers and stimulate further development. The sustainability of Marsh

Tracks is not clear as its community focus and low prices mean it only has a very small revenue stream.

Conclusions and Lessons

5.49 Our conclusions from our analysis and consultations and the North Wales Cycling projects are that:

- The project achieved most of its output/ outcome targets, however due to challenges in delivery and match funders pulling out it failed to deliver its managed access to countryside target (km) and its jobs created target was revised to only two jobs. The project achieved an increase in visitor numbers as a result of the investments made, although reliability of data impacts upon the validity of this achievement.
- Many of the investments had more impact in terms of enhancing the local area as a place to live and generating social value to the local community, rather than strengthening the visitor economy. A number of footpaths are geared towards local residents and Marsh Tracks has a strong community focus. Located in one of the most deprived areas in Wales, it encourages participation amongst the community with low cost memberships, training courses and other events.
- In a broad sense, the project has shown to provide value for public sector investment, through providing investment to save public assets from disrepair or regenerating areas that were neglected. However there is limited evidence that the investments made have stimulated further investments in the area and the long term sustainability of some projects is a challenge.
- There were a number of changes from the original business plan/ applications throughout the delivery stages as a result of a number of match funders withdrawing and challenges in land permissions and ownership of sites. In cases where challenges arose, projects were flexible and able to strategically modify activities to meet overall objectives.
- The changes made to the delivery plan were extremely time consuming and added a lot of pressure to the successful and timely delivery of projects. More thorough planning and advancement of projects prior to the business plan/ at early stages may have avoided some of the challenges that came about at a later stage in the delivery time frame. Including formal agreements of match funding and project finances at an earlier stage.

- Overall more time needs to be dedicated to monitoring and evidencing the work for later evaluation purposes, however resources were limited which made this difficult.
- The bringing together of various partners in the area was reported to have been very beneficial, however there is limited evidence of any actions or structures in place to continue these partnerships in the future.

6. Sustainable: The Eryri Centre of Excellence

Project Background and Description

Rationale

6.1 The Eryri Centre of Excellence (COE) built upon the opportunity to develop outdoor activities in Southern Snowdonia. In particular:

- The Central Wales Spatial Plan, through the Inland Tourism Strategy, noted that, in Meirionnydd, there is a need to fund training projects as a result of the decommissioning of the Trawsfynydd power station. The Centre of Excellence will be a platform to develop skills in the Outdoor sector in line with the Spatial Plan's vision for the area of a "leisure destination of international standard."
- The Spatial Plan for Central Wales identified the need to ensure a "high quality visitor experience throughout Central Wales by enhancing the attractiveness of the natural and man-made assets and ensuring high quality facilities."

6.2 The Cycling Tourism Strategy for Wales published by Visit Wales in April 2009 outlined:

- The growing industry of angling tourism, which is recognised as the 'main reason for around 65,000 overnight trips in Wales annually.
- The strategy recognises the potential of the Antur Stiniog and the Coed y Brenin projects in contributing to the sector in Wales.
- The case for more provision for entry-level mountain biking by inexperienced users.
- The case for more demanding and technical trails/courses for experienced and niche markets.

Project Description

6.3 The Eryri Centre of Excellence, branded "Snowdonia- One Big Adventure", was developed with the overall vision of offering an unique tourism product that will capitalise upon the area's outstanding natural beauty, for the benefit of the local community and economy. The project set out to extend the current offer of outdoor activities across Southern Eryri (from Bala to Blaenau Ffestiniog) and increase the value of activity tourism to the local area.

6.4 The scheme was co-funded by the Welsh European Funding Office – EU Convergence Funding, Nuclear Decommissioning Agency, Tourism Partnership Mid

Wales, Snowdonia National Park Agency and Welsh Government / Visit Wales. The project involved capital development schemes across four important leisure tourism centres in Snowdonia. These were outlined in the business plan as the following four key components:

- **Coed Y Brenin- Mountain Biking ‘Cross Country’ Trails:** Work to include development of new trails for a wider range of ages and abilities and improved visitor facilities. Doubling in size of existing visitor centre, larger bike hire retail unit, promotion of use for conferences and weddings. The visitor centre extension set to open in 2013.
- **Gwersyll Glan-Ilyn Outdoor Centre:** To improve their facilities and improve upon the general quality of visitors’ experience by developing new, additional accommodation on site. The development includes a classroom, kitchen and living room to accommodate learning and socialising. The kitchen would also be improved to meet with the additional needs at the Gwersyll. The business plan was later updated to include the development of a key cycle link along the iconic Llyn Tegid into Llanuwchllyn.
- **Blaenau Ffestiniog, Antur ‘Stiniog:** Work to include development of additional mountain bike routes (additional downhill trails, family trail and trail into Blaenau Ffestiniog town) and a new visitor centre with café, conference and cycling facilities.
- **Prysor Angling (Llyn Trawsfynydd):** Developing the fishing provision on Trawsfynydd reservoir by improving access to the lake and providing new facilities for fishermen. This will include a new facility for users of the lake, to include toilets, changing areas, kitchen, secure storage and housing for the hatchery.

6.5 Other proposed activities included developing new opportunities for interpretation of local culture and heritage, through collaboration, skills and marketing.

Location

- 6.6 The Centre of Excellence is located in Gwynedd, in the National Park with sites in Ffestiniog, Coed y Brenin, Trawsfynydd and Bala. The four projects, as illustrated below, are geographically clustered to create a strong hub for tourism in the area.

Figure 6.1 Eryri Centre of Excellence



Source: One Big Adventure Website

- 6.7 The area is partly post-industrial with problems of high unemployment and deprivation. The Welsh Index of Multiple Deprivation⁷ shows that income in a number of wards relevant to this scheme are within the lowest 25 per cent in Wales. The business plan also highlights the declining local population at a rate of 2.5 per cent per annum. The Bowydd a Rhiw ward in Blaenau Ffestiniog has been designated as a Communities First area, which is a programme set up to tackle poverty in some of the most deprived areas in Wales. The Communities First partnership in Bowydd a Rhiw are ultimately responsible for the development of the Antur 'Stiniog project.
- 6.8 The Eryri Centre of Excellence complements a number of existing tourism activities in the area and supports the area in developing a nationally recognised tourism hub for visitors. Enhancing the provision and quality of tourism in the area could play a significant role in tackling local unemployment and deprivation.

⁷ Welsh Index of Multiple Deprivation, 2015

Table 6.1: Location of Investment Projects

Project	Town and postcode	Local Authority District
Coed Y Brenin	Coed-y-Brenin Forest Park, Dolgellau, LL40 2HY	Gwynedd
Blaenau Ffestiniog	Antur 'Stiniog, Blaenau, Ffestiniog, LL41 3NB	Gwynedd
Prysor Angling	Prysor Angling, Trawsfyndd, LL41 4DT	Gwynedd
Gwersyll Glan-Ilyn	Gwersyll yr Urdd Glan-Ilyn, Bala, LL23 7ST	Gwynedd

Development

6.9 As the lead partner in the Eryri COE, Gwynedd County Council led the planning and coordination of the plan and brought together the partners. Antur Stiniog had previously developed their idea for a mountain bike centre and joined with Gwynedd County Council as part of a larger project to gain the funding. Along with Conwy County Council they also played a key role in the planning and bid writing. The delivery partners were The Forestry Commission, Urdd Gobaith Cymru, Prysor Angling and Antur 'Stiniog.

Goals for the project

6.10 The overarching vision for the Eryri Centre of Excellence was to work in partnership to offer a unique tourist product that will capitalise upon the area's outstanding natural beauty, for the benefit of the local community and the economy. The Business Plan sets out the key aims of the centre as follows:

- To harness South Eryri's outstanding natural resources to establish a co-ordinated and integrated activity hub as a catalyst for the development of the associated tourist product.
- To facilitate community involvement in the development of the outdoor activity sector in Southern Eryri and to ensure that associated developments results in tangible economic benefits for the local population.
- Provide high quality year round experiences and opportunities for visitors and residents.
- Support the development of the Outdoor Sector to maintain and develop Snowdonia as a world class destination of choice for outdoor activities.
- To place sustainability at the core of its activities with emphasis on sustaining the areas communities.

6.11 The Business Plan outlines that through establishing a sustainable outdoor activities sector the project will be key to the ‘renaissance of this peripheral, deprived, partly post-industrial area.’ The Plan also sets out a number of wider goals which include:

- New cycling trails suitable for use on adaptive bike by physically and visually impaired riders
- Improved access to the lake to enable less able users to boat on the lake by upgrading the pontoon facilities.
- The promotion of equal opportunities is outlined as a key requirement for the Eryri Centre of Excellence through ensuring that all will have equal and fair access to the projects outputs wherever possible.

Project Inputs

Financial Inputs

6.12 The scheme was co-funded by the Welsh European Funding Office – EU Convergence Funding, Nuclear Decommissioning Agency, Tourism Partnership Mid Wales, Snowdonia National Park Agency and Welsh Government / Visit Wales. The funding profile and Outturn of what was originally planned and actually claims to date (June 2015) is outlined below.

Table 6.2 Funding Profile and Outturn

Funding source	Updated Business Plan (£m)	Claims June 2015 (£m)
ERDF	£2.06	£2.06
Own funds (cash)	£0.10	NA
Public sector capital (cash)	£1.40	£1.91
Private sector capital (cash)	£0.53	NA
Private sector revenue (cash)	£0.02	NA
Other capital (cash)	£0.49	NA
Total	£4.6	£3.97

6.13 Despite a number of projects over or under spending, total spending was largely in line with the original proposal included in the business plan, at around £4.6m.

6.14 The table below outlines the total project costs claimed to date (as of June 2015), broken down by individual projects. It is evident that ERDF funding as a proportion of total project costs is significantly higher across a number of projects and makes up as high as 85 per cent of total project costs for the Prysor Angling investment.

Table 6.3 Expenditure and Funding Outturn by Investment Strand, June 2015

Project	ERDF Grant (£m)	% of ERDF Grant	Total project cost (£)	ERDF intervention rate (%)
Prysor Angling	0.25	12%	0.30	83%
Glan-Ilyn (Yr Urdd)	0.31	15%	0.90	34%
<i>Cycle trail from Glan-Ilyn (Gwynedd Council)*</i>	<i>0.12</i>	<i>6%</i>	<i>0.25</i>	<i>48%</i>
Coed Y Brenin (Forestry Commission Wales)	0.73	35%	1.77	41%
Blaenau Ffestiniog (Antur Stiniog)	0.66	32%	1.29	51%
Total	2.07	100%	4.51	46%

Source: E4G Financial Overview, June 2015

*This was an additional project commissioned by Gwynedd Council under the Yr Urdd project

- 6.15 A number of projects were able to access additional public funding alongside investment from Gwynedd County Council, Visit Wales and ERDF. On top of the funding detailed above, Prysor Angling also secured additional funding through the Welsh Government Tourism Infrastructure Investment Support scheme towards the building contract (£31,191) which formed part of the main build contract⁸.
- 6.16 Whilst not a definitive part of the Urdd project, an additional project was commissioned by Gwynedd County Council to develop the Llwybr Tegid project which involved the creation of a cycling and walking route between the Urdd Camp and the village of Llanuwchllyn. Due to a lack of funding, only phase 1 of the project was undertaken as part of the Eryri Centre of Excellence project. The total project cost for phase 1 was £247,000. Gwynedd County Council have since succeeded in gaining Regional Transport Plan funding in order to complete the second phase of the project.
- 6.17 There were no major changes in expenditure from what was originally set out in the Businesses Plan. The only real variation was the additional spending at Coed y Brenin, but this was due to the additional funds provided for the project rather than over-spend.

⁸ However this is not included in the Eryri Centre of Excellence profile

Resources

- 6.18 Given the nature of the programme the majority of funds were dedicated to capital works. Management, marketing (advertising and promotion) and other overheads made up around 5 per cent of the total cost of the scheme. See Table 6.4 below.

Table 6.4: Overheads, June 2015

	(£000s)
Marketing	104
Legal & Professional	56
Staff	112
Travel & transport	1
Administration	10

Source: Sustainable tourism Project Profile, June 2015

- 6.19 The marketing strand (around £104,000) attempted to provide a joint marketing strategy under the Snowdonia- One Big Adventure brand to reach the key markets across all four key projects.

Activities and processes

Delivering of the Investments

- 6.20 The work was undertaken over a period of around 36 months (March 2011-14) and involved the delivery of four key outdoor activity sites. All four key investments are now complete.
- 6.21 The table below provides a more detailed description of each investment project and activities delivered, highlighting any variance in activities against what was originally set out. Any variances to what was originally proposed across each project are also highlighted.

Table 6.5: Activities delivered and variations

Projects	Description of Activities Delivered
Coed y Brenin	<ul style="list-style-type: none"> • Construction of a new blue grade mountain trail • Creation of a new skills area and pump track • Construction of an extension to the existing visitor centre to provide conference space and cycle hire shop • Due to difficulties in getting land permissions and funding challenges, Antur Stiniog were unable to deliver the Llwybr Llyn Tanygrisiau trail into Blaenau Ffestiniog town as originally planned https://visitsnowdonia.wordpress.com/2012/03/29/eryri-centre-of-excellence-coed-y-brenin-forest-park/
Antur Stiniog	<p>Antur Stiniog was opened in June 2012, the following activities were delivered:</p> <ul style="list-style-type: none"> • Development of downhill mountain biking trails on the former Llechwedd slate quarry • Construction of an uplift road for minibuses and trailers to carry riders to the start of the trails • Construction of a jump site and skills area • Construction of a new visitor centre at Llechwedd to cater for the bikers to include showers, toilets, reception area and office space, and a café • Signposting a designated route between Llechwedd and the town of Blaenau Ffestiniog.
Glan-llyn (Urdd)	<ul style="list-style-type: none"> • Refurbishing the existing dining room and kitchen, creating new office space and a meeting room, and reception area • Construction of a new accommodation block • Gwynedd County Council commissioned an additional project to develop the Llwybr Tegid project which involved the creation of a cycling and walking route between the Urdd Camp and the village of Llanuwchllyn. Only phase 1 of the project was complete as part of the Eryri COE project.
Prysor Angling	<ul style="list-style-type: none"> • The design and installation of an accessible jetty on the lake shore • Construction of a new boat store to include facilities for anglers • The refurbishment of the former power station social club to include a café, space for a new enterprise, reception area, meeting room and office space • Prysor Angling also secured additional funding through the Tourism Investment Support scheme towards the building contract

6.22 Overall the project delivered almost exactly what it had outlined to do in its original business plan. Some slight variations in delivery are explored in more detail below:

- Despite making prior agreements with landowners, there were some challenges in gaining land permission for a number of footpaths such as Antur Stiniog’s trail

into Blaenau Ffestiniog. Gwynedd County Council reported that greater pre-project consultations and information flow could have avoided some of these issues.

- An additional project was commissioned by Gwynedd County Council to develop the Llwybr Tegid project which involved the creation of a cycling and walking route between Urdd and Llanuwchllyn village. However, lack of funding meant that only phase 1 of the project was undertaken as part of the Eryri Centre of Excellence project.
- The marketing campaign was aimed at establishing a new brand, Snowdonia-One Big Adventure, through a joint marketing strategy across the four key projects. The diversity of the four key projects and the different market segments they attract/ serve meant that it was difficult to develop a marketing approach that had a lasting impact across each investment. It was suggested that a more targeted marketing approach across individual projects or through establishing a market consortium of similar projects/ facilities would have been beneficial.
- Glan-Ilyn (yr Urdd) felt that they did not fit into the joint marketing strategy and the Snowdonia- One Big Adventure brand was not relevant to their marketing needs. This points to limited future potential in continuing the joint marketing and promotional activities in an impactful way, hence the marketing strategy seems not to have had a lasting impact.
- There was concern that the marketing strategy was too short-term and that it was coming to an end as the projects were finally being completed which is when the biggest marketing drive was needed. Overall, there seemed to be limited lasting impact from the marketing strategy and a perception that a more segmented approach would have been more effective if coordinated by the individual project leads.

6.23 The project has delivered across the cross cutting themes through the following:

- **Access:** All the Centres have been developed to conform with the requirements of the Disability Discrimination Act.
- **Training and Education:** There is limited evidence of this, however marketing efforts instigated some training activities in school about the opportunities in the leisure sector.
- **Staff and Employment Policies:** All the centres are Equal Opportunities employers and all the centre personnel are Welsh speaking, in line with a key focus of the project to promote the Welsh language.

- **Environmental Considerations:** Environmental sustainability was reported to be at the heart of the Centre of Excellence, with the basis of the work centred on non-invasive outdoor pursuits.

Strategic and Operational Management

- 6.24 The project was led by Gwynedd County Council with the four partners responsible for delivery. A service level agreement was established with all four partners that details the requirements for the individual partners. The Centre of Excellence Development Officer, was employed by Gwynedd County Council as part of the overall project budget, to ensure that partners delivered the project in accordance with European guidance and ensured that firm governance, monitoring and evaluation procedures were in place for the project.
- 6.25 Gwynedd County Council provided support throughout the process on areas such as procurement and tendering.. The consultations with project official and stakeholders raised the following issues with regards to the strategic and operational management:
- The evaluation by JOP Consulting was positive about Gwynedd County Council and the commissioning of the Eryri Centre of Excellence. The JOP Consulting evaluation reported that a number of partners felt that the project would not have been possible without the advice and support from Gwynedd County Council.
 - Partnership working across the Centre of Excellence enabled Prysor Angling to establish an agreement with Antur Stiniog to manage the café and old social club. Prysor Angling Association stated that the partnership with Antur Stiniog will be pivotal in enabling a sustainable future for the angling club.
 - The role of Visit Wales assisting the project development and delivery was reported to have been fairly limited, and the support was restricted to attending meetings and some general advice.
 - There were some challenges around a lack of continuity within the Council's personnel due to changing staff members during the delivery phase. It is not clear what impact this has or how it was mitigated.

Outputs

Original and Achieved Output Targets

- 6.26 The table below presents the quantified output targets as set out in the updated business plan against the outputs actually achieved on completion in June 2015. The business plan was updated in June 2012 to take account of programme changes which led to a revised managed access to countryside (km) target of 33km from 37km originally.

Table 6.6: Achievement of Overall Output Targets

Outputs Targets:	Revised Target: Updated business plan	Achieved June 2015	% Achievement of Revised Target
Initiatives developing natural environment	4	4	100%
Managed access to countryside (km)	33	27	82%
Enterprises assisted	4	6	150%

Source: Updated offer letter and June 2015 claims

- 6.27 Most overall project targets have been met, with the exception of managed access to countryside which achieved 82 per cent of its original target. This is a result of challenges in getting land permissions for a number of footpaths, including Antur Stiniog's trail into Blaenau Ffestiniog town which was 6km short of their target. The project exceeded its enterprises assisted target by two.
- 6.28 The breakdown of outputs achieved and targets for each investment project is illustrated below. Coed Y Brenin and Antur Stiniog (the two largest investments) overall contributed the largest amount to the outputs achievements of the Eryri Centre of Excellence. Antur Stiniog was unable to reach its managed access to countryside (km).

Table 6.7 Achievement of Output Targets by Investment Projects

Investment	Initiatives developing attractions		Managed access to countryside (km)		Enterprises assisted	
	Target (Offer variation letter)	Achieved June 2015	Target (Offer variation letter)	Achieved June 2015	Target (Offer variation letter)	Achieved June 2015
Coed Y Brenin	1	1	11	11	1	3
Antur Stiniog	1	1	20	13	1	2
Glan-Ilyn	1	1	2	2	1	0
Prysor Angling	1	1	0	0	1	1
Total	4	4	33	26	4	6

Source: Offer Variation Offer (2010-12), Achievements to date, June 2015

Outcomes

Original and Achieved Outcomes

6.29 The updated business plan sets out a number of outcome targets across the Centre of Excellence and for individual investment strands. The business plan was updated in June 2012 to take account of programme changes, lowering the visitor number target from 82,639 originally to 74,149. The table below outlines the overall project outcome targets, as set out in the updated business plan⁹ and the extent to which these have been achieved, according to June 2015 progress data.

Table 6.8 Achievement of Overall Outcome Targets

Outcome Targets:	Target (Updated business plan)	Achieved June 2015	% Achievement of Target
Jobs Created (gross)	16	29	181%
Visits	74,149	394,886	533%
Induced Investment	£2,079,000	Est. £2 - £3m	100%+

Source: Achievements to date, June 2015

⁹ Business Plan was updated 21.06.12

- 6.30 Visit numbers for the Eyri Centre of Excellence were measured through ticket sales, car parking figures, bookings or trail counters of new investments at the sites. However, additional visit numbers are difficult to assess due to the absence of baseline data. The extent to which the claim reports show an exceeded target (almost 400,000 visits compared to 74,000 expected) raises uncertainties about how this was counted.
- 6.31 Table 6.9 illustrates the estimated jobs and visitor number outcomes against the original target for each of the individual investments. It appears that Coed Y Brenin, and in particular its visitor centre and car park, is the key component of visit numbers – and it is likely that this was not included as part of the original target which may have focused specifically on visits to the bike trail.

Table 6.9 Achievement of Outcome Targets by Investment Projects

Investment	Jobs Created		Additional visits (per annum)	
	Target (source: Updated business plan)	Achieved 2015	Target (source: Updated Business Plan)	Achieved 2015
Coed Y Brenin	5	11	45,000	357,593
Antur Stiniog	4	9	20,781	21,028
Glan-llyn	6	7	4,368	7,784
Prysor Angling	1	1	4,000	6,076
Total	16	29	74,149	395,000

Source: Business Application Plan, Gwynedd Council, Gwynedd Council final figures, 2015

- 6.32 The absence of a thorough baseline assessment may have overestimated the net additional visitors at each site. This is due to the existing activity and visitor attractions across a number of sites that appear to not have been fully accounted for. Therefore caution needs to be taken in interpreting the figures.
- 6.33 Comprehensive information on visitor spending for each attraction is difficult to obtain. Some of the sites charge for admission and/or parking, whilst others are free. The Forestry Commission collects data using counters for projects located on Forestry Commission Land. There are likely to be a number of limitations in analysing additional annual visitors using the data, such as double counting. The latest figures suggest there were around 172,000 visits to the visitor facility in 2014. This is down from the visitor numbers in 2010 prior to the investment and lower than in 2012 during the first opening of the new visitor centre.

Table 6.10 Visitor Numbers by Attraction

Measure	2008	2009	2010	2011	2012	2013	2014
Coed Y Brenin: Total Bikes	37,490-	47,543	40,684	67,368	73,455	71,928	76,022
Coed Y Brenin: Car Park	53,245	56,177	61,681	62,127	64,328	69,329	65,586
Coed Y Brenin: Visitor Centre	171,596	169,996	184,278	207,670	209,087	174,530	172,128

Source: LineTop Ltd, Forestry Commission Land Projects, June 2015

Note: Numbers cannot not be aggregated to form a total visitor number due to double counting

Cardiff University/ WERU Assessment

6.34 The Cardiff University / WERU assessment of the economic impact of the E4G programme did not undertake a visitor survey of the Eryri COE so has estimated annual visitor numbers from taking an average from similar sites that had been surveyed. The study estimates that the annual visitor numbers to the Eryri COE over 2012/13 is 198,509, which is less than the ERDF claims.

Gwynedd County Council Evaluation

6.35 Gwynedd County Council commissioned JOP Consulting Ltd to undertake an evaluation of the emerging impacts of the ONE Big Adventure- Eryri Centre of Excellence project. The work was undertaken over a period of some 36 months between March 2011 and 2014. The evaluation report provides a fairly thorough analysis of the activities that were delivered and has estimated the following baseline, targets and resulting outcomes.

6.36 Although the evaluation attempts to measure additionality through surveys filled out by the four centres, the limitations of such methods are recognised. Lack of established baseline data may have meant that the impact of existing activity may not have been fully considered and therefore additional visitor numbers may have been overstated.

6.37 A number of projects went on to secure further financial inputs through funding streams such as the Welsh Government Tourism Infrastructure Investment Support scheme. The investment of this funding is likely to have been spent on different activities and outputs, however the impact on outcomes on visitor numbers and spending will not be possible to separate.

Impacts

Economic and Visitor Impacts

6.38 The Welsh Economy Research Unit assessment provides rough headline estimates of GVA resulting from the estimated total visitor spending impact of the COE. The economic impacts have been derived by taking average expenditure and economic impact details across similar sites. They estimate that the total visitor spending impact of the Eryri Centre of Excellence was £1.8m of gross value added per year, supporting around 81 FTE jobs.

6.39 The JOP Consulting evaluation of the Eryri Centre of Excellence (commissioned by Gwynedd County Council) is not published but was shared to inform this evaluation. The consultants provided an estimate of GVA and job impacts using appraisal type assumptions around multipliers, deadweight and displacement. The findings reported by JOP Consulting cannot be verified as part of this evaluation but included headlines that:

- The direct aggregate GVA contribution of the Eryri COE is over £0.56m per annum at the North Wales level (only a further 1.3 per cent is added by taking account of the rest of Wales and the UK); with most of this value flowing into the local economy. The bulk of this value is being created through wages associated with 31 FTE net jobs (up to 90 per cent are estimated to have been taken up by local residents and all are Welsh speaking).
- The impact of additional visitor spending is assumed to be secondary. It is estimated that the impact of the net additional visitors from the development of the Eryri Centre of Excellence amounts to an additional £3.5m of additional spending, translating into an estimated increase in GVA of £1.24m in South Gwynedd.

Wider Impacts

6.40 The business plan set out the following broader objectives of the Eryri COE investment programme:

- To harness South Eryri's outstanding natural resources to establish a co-ordinated and integrated activity hub as a catalyst for the development of the associated tourism product.

- To facilitate community involvement in the development of the outdoor activity sector in Southern Eryri and to ensure that associated developments result in tangible economic benefits for the local population.
- Provide high quality year round experiences and opportunities for visitors and residents.
- Support the development of the Outdoor Sector to maintain and develop Snowdonia as a world class destination of choice for outdoor activities.
- To place sustainability at the core of its activities with emphasis on sustaining the area's communities.

6.41 The investments have supported the project in achieving the objectives outlined above in the following ways:

- **Strengthening the tourism offer:** There is insufficient baseline or monitoring data to demonstrate an increase in visitors as a result of the investments but the consultations with project officials suggested that the quality of the investments have a role in strengthening tourism in the area.
- **Extending the tourism season:** The investment activities were designed with aims to stimulate increased visitor numbers throughout the year. The evaluation by JOP Consulting suggested the investments have helped stretch the tourism season from 8 to 11 months although this cannot be verified.
- **Sustaining the area's communities:** It is perceived that investments have supported the creation of a number of additional jobs in the area. There have been a number of marketing initiatives that involved local schools, businesses and the community. However, a number of local consultees felt that there had been inadequate planning of the longer term post project funding arrangements and that the partnerships which had been established had suffered as a consequence.
- **Leveraging new investments:** The ERDF appears to have helped leverage for additional investments in the area; for example:
 - As a result of the ERDF funding, Antur Stiniog have since secured funding from the Cyfenter project and a loan from the Wales Council for Voluntary Action (WCVA) to purchase and establish an outdoor activity shop and base in Bala town (Siop Antur Stiniog).
 - Gwynedd County Council have also since secured further funding to develop a cycle track around Llyn Trawsfynydd alongside the Prysor Angling project, and as a result of the initial ERDF investment, have secured Regional Transport Plan

funding to complete the second phase of the Llwybr Tegid project (phase 1 of the project was developed by Yr Urdd as part of the COE).

- The ERDF investment was also key to leveraging a number of private sector investments in the area, including Zip World Titan (zip lines and trampoline activity centre in Blaenau Ffestiniog).
- Yr Urdd reported that securing the ERDF funding had been a factor in enabling them to fund several projects to improve their accommodation and services funding.
- **Promoting the Welsh Language:** A key objective of the project was sustaining the area's communities. Protecting and promoting Welsh heritage, including the Welsh language is important for local communities in the area and is outlined as a key focus of the Welsh Government. During the building phase, the JOP Consulting evaluation found that 75 per cent of the workforce were Welsh speakers and all the centre personnel are Welsh speaking making this an inherently Welsh language project.

Conclusions and Lessons

6.42 The main conclusions from our review of the evidence and consultations are that:

- The Eryri Centre of Excellence appeared to have achieved most of its output/ outcome targets, with the exception of a small shortfall in its managed access to countryside target (km) due to challenges in gaining land permission. An independent evaluation report was commissioned which is a helpful attempt to enhance the evidence base for this Centre of Excellence; but this was unable to address the challenges of collecting robust primary data on visitor numbers and depended on assumed estimates.
- The project has demonstrated some evidence of providing additional benefits above a more fragmented approach and has facilitated joint working and partnerships between delivery partners and some tourism businesses in the area. But the sustainability of these partnerships is not clear.
- There was lack of collaboration in marketing and little evidence of an effective strategy for a long lasting brand and impact. The lead partners may have been better placed in developing and implementing a market strategy.
- The closure of the project was reported to have been abrupt with no longer term plans in place for continuing the partnerships and overall sustainability of the projects. A phasing out of the project post completion and a longer term

sustainability plan may have better supported the lasting impact of the investments.

- The project appears to have achieved its objectives in terms of adding to the tourism economy. Individual projects were able to use small scale investments to commercialise assets, support enterprise and strengthen volunteer groups.

7. Coastal: Watersports - Swansea Bay

Project Background and Description

Rationale

- 7.1 The centre focuses on the natural resources of the coastal environment of the Swansea Bay area, by investing in complementary facilities at strategic points along the coast which, taken together, build the profile of the area as a centre of excellence for watersports and other marine activity. The overall aims were to:
- Provide a critical mass of attractions that would enable the region to become recognised as a centre of watersports excellence.
 - Develop a clearly defined tourism identity which enhances the coastal character of the region.
- 7.2 The project has had a focus on improving facilities for a range of different water users, playing to the strengths of different locations along Swansea Bay. For this centre, the term 'Swansea Bay' reflects the sub-region identified for the purposes of the Wales Spatial Plan 2008. 'Swansea Bay – Waterfront and Western Valleys'. Key priorities for this region included:
- Implementing the Waterfront Masterplan to maximise opportunities along the coastline;
 - Developing a strong leisure and activity based tourism industry;
 - Ensuring that environmental protection and enhancement are fully integrated.
- 7.3 In the early stages of bid development, four authorities (Carmarthenshire County Council, City and County of Swansea, Neath Port Talbot CBC, Bridgend CBC) were involved in a regional partnership. Ultimately, the bid was taken forward by City and County of Swansea and Bridgend CBC.
- 7.4 The individual investments that make up the Centre of Excellence have their own rationale:
- Investments in Swansea have been part of an overall strategy on the part of the City and County of Swansea, set out in the Swansea Bay Strategy 2008, to position the city as a Waterfront City, making the most of the natural assets of its coastal location, spectacular beach and maritime heritage to underpin regeneration.

- Investments in Bridgend have been part of an overall strategy on the part of Bridgend CBC. This includes goals to make the most of easy access to marine and watersports facilities at Porthcawl Harbour/Rest Bay, with a plan for residential, commercial and leisure development to revitalise the town, and regenerate the harbour and waterfront.
- Infrastructure investments were to be backed up by a dedicated marketing campaign and events programme.

7.5 Proposals taken forward were designed to contribute to the key tourism objectives of the Wales Coastal Tourism Strategy, including:

- Creating an all-year destination;
- Concentrating on 'place making', creating attractive and distinctive urban and rural environments people will wish to visit;
- Developing centres of excellence for sport, recreation and activity holidays;
- Strengthening conservation and interpretation of culture and heritage in its own right while also providing a leisure and tourism resource.

Project Description

7.6 The Swansea Bay 4 Watersports Centre of Excellence has the following investment projects:

- Replacing an existing building with a purpose built Knab Rock Watersports Centre in Mumbles, plus improvements to sea access;
- The new 360° Beach and Watersports Centre at St Helens;
- A new pontoon on the River Tawe giving access to SA1;
- A refit of the historic Bristol Channel pilot cutter Olga ;
- Redevelopment of Porthcawl Harbour, including new harbour gate and pontoon moorings;
- Slipway extension and outside showers at Rest Bay.

Locations

7.7 This Centre of Excellence spans six locations, as follows:

Table 7.1 Location of investment projects

Investment	Town and postcode	Local Authority District
Knab Rock Watersports Centre	Swansea, SA3 4EL	City and County of Swansea
360° Beach and Watersports Centre	Swansea, SA2 0AY	City and County of Swansea
Olga pilot cutter, Swansea Museum	Swansea, SA1 1WG	City and County of Swansea
Pontoon, Swansea Marina	Swansea, SA1 1WG	City and County of Swansea
Porthcawl Harbour	Porthcawl, CF36 3YR	Bridgend County Borough Council
Rest Bay improvements	Porthcawl, CF36 3UP	Bridgend County Borough Council

7.8 The first four projects are within the City and County of Swansea, spread along nine kilometres of the wide and sweeping Swansea Bay from Mumbles Head in the west, to the Maritime Quarter and River Tawe in the east. The last two projects are located in Porthcawl and neighbouring Rest Bay, within the area covered by Bridgend County Borough Council.

Development

7.9 The total project cost was £4,200,397 with an ERDF contribution of £2,167,200.

7.10 A regional partnership consisting of Bridgend CBC, Neath Port Talbot CBC, City and County of Swansea, and Carmarthenshire County Council met together for over 12 months to develop a Watersports Centre of Excellence bid. The final bid submission included projects in City and County of Swansea and Bridgend CBC.

7.11 Under a single contract let by City and County of Swansea, construction work was underway in early 2012 to build new facilities at Knab Rock Watersports Centre and 360° Beach and Watersports Centre. A tender process resulted in the appointment of an operator for 360° Beach and Watersports Centre early in 2012. The Centre was officially opened in October 2012, and operational from May 2013. The refurbishment and refitting of Olga was completed in 2012, when she went on public display and became available to offer opportunities to educational and excluded

groups to put to sea. Olga was not fully MCA coded to carry commercial passengers until late 2015.

- 7.12 A two stage contract to develop Porthcawl Harbour was let in 2011, Marine and Listed Building Consents were approved in October 2012 and work started on site in January 2013. Following a number of delays, the new facilities were operational in December 2013 with an official opening in April 2014. Improvements in Rest Bay were completed in 2013, although unfortunately the newly extended slipway suffered subsequent damage in the storms of January 2014.
- 7.13 The lead applicant and project co-ordinator was City and County of Swansea, who also led on delivery of the four projects along the foreshore of Swansea Bay in Swansea.
- 7.14 Each of the sites or, in the case of the Olga, the vessel, identified for capital works was in the ownership of the relevant local authority and at the time the bid was made each had received approval to be allocated for the project. A development appraisal or specialist survey/specification had been prepared for each individual project. The Porthcawl Harbour development was undertaken utilising Bridgend County Borough Council powers as Harbour Authority under the Mid Glamorgan County Council Act 1987. The built structures of the harbour lie within the Porthcawl Conservation Area.

Goals for the Project

- 7.15 The suite of projects was designed to take advantage of the natural resources of Swansea Bay. The over-riding aim of the Swansea Bay 4 Watersports Centre of Excellence, as set out in the Business Plan, was to develop the region as a tourist destination for water sports through a range of capital schemes, supported by an integrated events programme and marketing campaign. Outcomes anticipated from the investments are referred to at various places in the Business Plan. Broadly, these can be summarised as follows:
- Reinforce Swansea's image as Wales's maritime city region;
 - Develop Swansea Bay's unique sense of place and enhance the character and identity of the area;
 - Offer more diverse tourism opportunities and attractions, encouraging new and repeat visits;
 - Improve visitor management while minimising environmental impact;

- Extend the season by stimulating demand for off peak visitors;
- Provide the infrastructure to attract and support specialist events which draw participants and spectators from around the UK;
- Increase access to water sports facilities for local residents, including disadvantaged groups, and encourage groups who traditionally participate less in sporting activities.

Project Inputs

Financial Inputs

7.16 Table 7.2 shows the financial breakdown in the original application of 2009/10 and in the final claim in 2015. The various figures given in Visit Wales Profile documents are inconsistent. The known breakdown of project costs is shown in Table 7.3, and the costs for the different components of the project are shown in Table 7.4.

Table 7.2 Funding Profile and Outturn (£m)

Funding Source	Business Plan 2009/10	Final Claim July 2015
ERDF	2.556	2.167
CoE Lead (Swansea) (cash)	0.21	0.823
CoE Lead (in kind)	0.25	0.155
CoE partner (Bridgend) (cash)	0.8	1.009
CoE partners (revenue)	0.104	0.109
Other public sector (various)	0.34	0,392
Total	4.26	4.655*

Source: Application Report and Project Profile (*various figures given in Visit Wales Profile documents are inconsistent – this column cannot be reconciled – Visit Wales will need to review and amend)

Table 7.3 Expenditure and Funding Outturn by Investment Strand, June 2015

Investment	Total project cost (£m)
Capital expenditure (Estate)	3.975
Marketing and promotion	0.2
Legal and professional	0.25
Total	4.425

Source: Project Profile

Table 7.4 Cost Breakdown

	Total cost (£m)	ERDF Grant (£)	Share of grant (%)
Knab Rock Watersports Centre	0.485	0.250	12.8
360° Beach and Watersports Centre	0.930	0.481	24.7
Olga pilot cutter, Swansea Museum	0.242	0.125	6.4
Pontoon, Swansea Marina	0.040	0.021	1.1
Porthcawl Harbour	2.045	1.055	54.0
Rest Bay improvements	0.040	0.021	1.1
Newton Bay improvements			
Total	3.782	1.953	100

Source: Project profile

7.17 The largest investment by some margin was made in Porthcawl Harbour. The actual construction cost was in fact much higher than that shown but a ceiling was set on the maximum costs that would be supported by ERDF funding through the centre.

7.18 Comparing these figures with those in the early business plan, of the four CCS projects, three came in below the indicated costs. Only Olga cost more than originally anticipated. This suggests that project costs may have been eventually determined by the amount of match funding that had been put in place to bid for the Centre of Excellence.

Resources

7.19 City and County of Swansea identified a number of sources of public sector funding to complement the authority's own contribution from core funds. These included: Swansea Strategic Regeneration Area; Museums, Libraries and Archives Council – PRISM; SPLASH (the water recreation challenge fund for Wales); and Mumbles Community Council.

Activities and Processes

Delivery of the Investments

7.20 The activities involved in delivering the individual components of the Swansea Bay 4 Watersports centre are described below.

Table 7.5: Activities Delivered

Project	Description of Activities Delivered
Knab Rock Watersports Centre, Mumbles	New purpose-built facility supporting watersports in Mumbles. The Knab Rock Watersports Centre includes a tourist information distribution point, changing facilities, improvements to existing toilet facilities and provision of accessible toilets, external showers and boat storage rationalisation.
360° Beach and Watersports Centre, St Helen's, Swansea	<p>Purpose-built centre provides infrastructure to facilitate a wide range of beach and water based activities and sports, plus opportunities for community based groups. The Centre is owned by City and County of Swansea and operated under a management agreement with Bay Sports Ltd, a not-for-profit company. Facilities include:</p> <ul style="list-style-type: none"> • Changing / shower facilities • Multi-functional space with catering facility • Indoor and outdoor secure storage • Office • Public toilets and Changing Places facility for use by people with disabilities.
Refurbished Olga, Swansea Marina	Restoration on historic ship Olga. Refit included a new toilet facility, eleven berths, seating areas, a galley complete with woodburning stove plus current health and safety requirements were incorporated, along with a new engine. Olga forms part of Swansea Museum's maritime collection and can be visited in peak season at Swansea Museum's pontoon in the Marina.
Floating pontoon, Swansea Marina	Floating pontoon on the River Tawe, outside the Tawe Barrage Lock which provides access to the marina during published hours. The pontoon is available at all times and all states of tide and provides an additional facility for those waiting to access the Blue Flag Marina with 550 fully serviced pontoon berths.
Porthcawl Marina	<p>Refurbishment of the existing harbour, incorporating:</p> <ul style="list-style-type: none"> • Extension of the eastern breakwater to protect the harbour • Dredging the harbour and stabilising the harbour walls • New harbour gate with pedestrian footbridge • Impounding water to create a permanent water body • Pontoon moorings for mix of 70 leisure, commercial and visiting craft • Quayside improvements: refurbishment of fencing and artefacts • Harbourside security and accommodation of harbour management. <p>The pontoon berths replaced 25-30 swing moorings, so that as well as increasing capacity, boats can now be accessed at all times. Access to/from the sea has increased: the Marina now operates three hours either side of high water between the hours of 07.00-22.00.</p>
Rest Bay improvements	Slipway extension and outside showers at this Blue Flag beach, popular with surfers. Expanded Adrenaline Festival/Splash Up in 2013.

7.21 There has been some variation between these activities and the original activities outlined in the business plan. These include:

- Budget limitations reduced the 360° Beach and Watersports Centre to a single storey building when originally it was envisaged as a two storey building.
- Activities offered at 360° Beach and Watersports Centre have been expanded beyond watersports, to include a significant offer of beach sports and activities, making full use of the extensive beach area available at low water, when watersports are less appealing as the sea retreats a considerable distance, and extending activities into the winter months.
- The pontoon that was installed to increase access to Swansea Marina was originally intended to be fully accessible, whereas the floating pontoon that has been installed is accessed via a flight of steps.
- The cost of redeveloping Porthcawl Harbour increased during the life of the project. A ceiling was set by Visit Wales on the maximum eligible grant, with any overspend at the risk of Bridgend CBC. In order to maintain the capacity and quality of the new marina, Bridgend CBC were required to identify additional capital funds to put into the project.
- A new building originally envisaged as a lookout/office for the Harbour Master was required to house the machinery to operate the harbour gate. The Harbour Master and toilet/shower facilities for marina users are temporarily located in a two storey portacabin.
- The new slipway proposed to improve beach access at Newton Bay was not included as part of the programme.

Marketing and Communication

7.22 A marketing plan was put in place for Swansea and Bridgend, including a dedicated website <http://www.swanseabay4watersports.com/>, social media and a free mobile app, the 'SB4W Watersports Buddy'. This is all standalone and, while useful for a short period of time, it has not been kept up to date. The app is now redundant as mobile friendly websites have become more popular. New photography and video footage was also commissioned, which continues to form part of a media bank which is used for promotional activity.

7.23 The tourism team at City and County of Swansea were closely involved in development and delivery of elements of the marketing plan, and retain an ambition to migrate some of the content to Visit Swansea Bay.

7.24 At a local level, development of all of the investments have involved consultation within the respective local communities and engagement with local councils, trade associations, civic bodies and user groups.

Environmental Management

7.25 Careful consideration was given to the environmental management of the centre in Swansea Bay. The location of a new watersports centre, linked as it was to encourage new and existing activity into an environmentally sensitive area. While the Bay was seen to be an underused resource, many see it as a wildlife haven and concerns were expressed about the suitability of the Bay due to its bathing water quality. Therefore consideration included:

- The southern section of Swansea Beach between Blackpill and Mumbles is a Site of Special Scientific Interest (SSSI), designated for its high population of over-wintering birds. Swansea Bay SINC (Site of Importance for Nature Conservation) stretches across the whole bay. Rigorous assessment of a number of site options for a new watersports centre led to the ultimate location of the 360° Beach and Watersports Centre above the beach at St Helen's, outside the SSSI and well away from the sensitive area. A buffer zone was put in place to avoid disturbance to bird populations.
- 2015 is the first year of a new directive that aims to improve bathing waters and designated bathing waters in Wales now have strict water quality targets to achieve. Bathing water at the sampling location at the east of Swansea Bay is subject to short term pollution and reduced water quality after periods of heavy rainfall. A unique model has been developed by the Smart Coasts Sustainable Communities Project that predicts water quality at the designated bathing water in Swansea.
- Newton Beach, to the east of Porthcawl in Bridgend, is backed by the Newton Burrows and Merthyr Mawr sand dunes, a designated Site of Special Scientific Interest. A new slipway at Newton Beach was not included amongst the projects finally taken forward for delivery.
- Engineering challenges involved with the redevelopment of Porthcawl Harbour included management of 11,000 cubic metres of harbour material that needed excavation and disposal. Natural Resources Wales required material dredged from the harbour to be tested, and if necessary treated, for contaminants.

- Sustainable transport options, including bus, cycle and foot, are available to reach each of the sites. Five of the six sites are located on the Wales Coast Path, while a short detour around the marina is required to access Olga. The five mile stretch along Swansea Bay between the Maritime Quarter and the Knab Rock near Mumbles is backed by a promenade/cycle track (National Cycle Route 4).
- Rest Bay is one of two Blue Flag beaches in Bridgend CBC, with bathing water quality consistently achieving 'Excellent' standard, while Swansea Marina is the only marina in Wales to hold a Blue Flag.

Strategic and Operational Management

- 7.26 The consultation indicated that overall project management worked relatively well, and no significant problems were reported. No special team or unit was set up by City and County of Swansea to meet their responsibilities as lead partner. Only two local authorities were involved in the overall centre and there were no external delivery partners. Each felt that their experience of delivering complex capital projects put them in a good position to manage the process.
- 7.27 Bridgend CBC felt that the claim process was relatively straightforward for them, being handled primarily by City and County of Swansea. When Porthcawl Harbour was taking longer than anticipated, and claims were slipping, the project was re-profiled.
- 7.28 Relationships with Visit Wales appear to have been positive. The project leads commented that Visit Wales were not micromanagers but had a high level vision and were prepared to sit down and discuss any changes that were needed. They did not ask for anything that could not be delivered. In some ways, partners felt that it might have been better to deal direct with WEFO, but they recognised that they have benefitted from being part of a larger package.
- 7.29 The majority of project delivery management was carried out in house. City and County of Swansea and Bridgend CBC identified teams included a project manager, architect and quantity surveyor. Project management systems were based on Prince 2 methodology. Bridgend CBC brought in a part time project manager to act on behalf of the authority. Marketing was carried out by a sub-regional team while co-ordination of events was carried out in house by the individual authority concerned.

- 7.30 The contract to rebuild Porthcawl Harbour was let as one integrated contract but with a two stage approach; with an Early Contractor Involvement (ECI) design stage in advance of the construction stage. The ECI process involved development of the design and obtaining statutory consents to deliver the works. It also required client agreement of the construction cost, which meant that the design solution had to meet BCBC's operational requirements and budget.
- 7.31 Tidal conditions presented a major challenge to construction work on Porthcawl Harbour, which had to be very carefully timed to get a lot of work done in short windows allowed by the tides. A very large temporary structure had to be created to hold out the tide while construction work was taking place within the harbour itself.
- 7.32 Bay Leisure Ltd is an independent not for profit company set up in September 2007 to manage Swansea' leisure complex The LC on behalf of the City and County of Swansea under a 10 year lease. Bay Leisure Ltd now owns and operates several additional leisure facilities in Swansea. Bay Sports Ltd, a partnership between Swansea University and Bay Leisure Ltd, was awarded the contract to operate 360° Beach and Watersports Centre with an overall vision "to continually increase participation levels in beach and water sports by being the best beach front destination in Wales".

Outputs

Original and Achieved Output Targets

- 7.33 The table below presents the quantified outputs, as original targets and as reported as achieved in June 2015.

Table 7.6 Achievement of Overall Output Targets

Output Targets:	Business Plan	Achieved June 2015	% Achievement of Target
Initiatives developing natural, historic environment	2 (4*)	4	200% (100%)
Managed access to countryside or coast (km)	2km (*4km)	10km	500% (250%)
Enterprises assisted - directly	6	6	100%

Source: Business Plan and Project Profile (*numbers in undated Business Plan provided at variance with those in Project Profile; offer letter refers reader to Business Plan dated 22/4/2010 for Outputs)

7.34 The majority of the 33 jobs reported as created are likely to have arisen at 360° Beach and Watersports Centre, whose staff include a full-time manager, activity managers/instructors, year round café personnel, and cleaning staff. Swansea Museum has appointed a full-time skipper, whose responsibilities include Olga. Porthcawl Harbour has a full-time harbour master and four staff on sessional contracts.

7.35 Events supported as part of the Centre of Excellence included:

- Baefest 2013, one of Wales's largest free beach festivals, which took place in Swansea Bay in September. The programme had a special focus on Natural Environment, including discovering how Natural Resources Wales are beginning to predict the quality of the water around the coast and support for the Marine Conservation Society's Blue Mile appeal; Culture and Heritage, including creating artwork with Sculpture by the Sea from material found along the strandline; and Sport and Leisure, encouraging visitors towards a healthier, more sustainable lifestyle with free beach volleyball coaching sessions and stand up paddle boarding and kayaking sessions.
- The Elusive Welsh Open 2013 Surf Competition held at Rest Bay in April 2013
- Splashup 2013, held in October, including night surf and junior surf championships organised by the Welsh Surfing Federation, Have-a-Go Watersports offering a range of activities for beginners and a pop-up outdoor venue to stage two nights of music.

Outcomes

General Outcomes - Intended and Achieved

7.36 The business plan set out a number of outcomes (results) that the project was expected to deliver. These are summarised in the table below, together with a comment on the extent which they have been achieved, based on consultation with the lead body (City and County of Swansea), Bridgend County Borough Council and local stakeholders

Table 7.7 Achievement of General Outcomes

Outcome intended	Level of Achievement
Reinforce Swansea's image as Wales's maritime city region	All four of the investment activities made within Swansea itself have been strongly based on building the connection between the City and the sea. Being a completely new facility, 360° Beach and Watersports Centre has made a particular contribution to changing perceptions of Swansea and making the most of the unused asset of the beach. Collectively they have provided new and improved opportunities for a wide range of maritime users.
Enhance the character and identity of the area	Each investment activity has enhanced the maritime character of Swansea Bay. Care has been taken with the design of new buildings (Knab Rock Watersports Centre; 360° Beach and Watersports Centre) to ensure that they enhance their respective locations. Knab Rock Watersports Centre replaced a previous building considered to be in a poor state of repair. Both Olga and the new pontoon contribute to the overall amenity of Swansea's Maritime Quarter. Olga strengthens the identity of the area through maritime heritage. Work on Porthcawl Harbour has improved the amenity of the area.
More diverse tourism opportunities and attractions	Each of the six locations of the investments has a different strength for maritime activity. In Swansea, Knab Rock is important for sailing; 360° Beach and Watersports Centre focuses particularly on kayaking and SUP; Olga can be enjoyed by the general public in the marina but is also available to take groups out to sea. The floating pontoon extends access for incoming and visiting craft, mostly powerboats. In Bridgend, Porthcawl Marina is capable of handling increased numbers and larger powercraft, while Rest Bay is one of the most popular surfing destinations in South Wales.
Strengthen interpretation of culture and heritage	Two projects in particular have strengthened interpretation of the maritime culture and heritage of the area. Swansea Museum has been able to place the refitted Bristol Channel pilot cutter Olga in the context of the wider maritime heritage, through public visits and group trips at sea supported by forty trained volunteers. The refurbishment of Porthcawl Harbour has secured a future for this focal point of Porthcawl's heritage.
Minimise environmental impact	Environmental impact was minimised by the choice of location for 360° Beach and Watersports Centre, which lies outside Black Pill SSSI. A buffer zone has been established to ensure that bird populations are not disturbed by beach and watersports activity.
Extend the season	The season is extended by offering facilities, attractions and events outside the summer period. This has happened in the

	<p>following ways:</p> <ul style="list-style-type: none"> • 360° Beach and Watersports Centre is open daily throughout the year, except Christmas Day. • 360° offered SUP and kayaking sessions through to the end of October. The programme of beach activities runs right through the winter. • Over half of all activity bookings in the first two years of trading at 360° Beach and Watersports Centre are concentrated in July/August/September, over one quarter of bookings were taken between October and March. Total visitor numbers are slightly more evenly distributed, with 40 per cent of general visits taking place in July/August/September and 24 per cent in Apr/May/June. • Holding events and festivals in the shoulder months e.g. Elusive Welsh Open Surfing Championships in April 2013, Baefest in September 2013, Porthcawl Splashup October 2012 and 2013. • The floating pontoon has added a new dimension to Swansea Marina as a 'safe haven'. Commercial and charter boats caught out in rough weather fishing at night are guaranteed a safe haven in the river. <p>However, some facilities are available only in high season.</p> <ul style="list-style-type: none"> • Swansea Bay beach is patrolled by RNLI Lifeguards from 11 July to 6 Sept. • The Knab Rock Watersports Centre is open seasonally, from 1st April to end September. • General access to Olga in the marina, through Swansea Museum, is limited to the months of June, July and August, and trips to sea are determined by weather and sea conditions.
<p>Attract and support specialist events</p>	<p>CoE revenue funding provided marketing behind the investment at Rest Bay for two years, bringing the UK Pro Surf Tour in 2012 and Splashup 2013, as above. In addition:</p> <ul style="list-style-type: none"> • Events organised by City and County of Swansea make use of the infrastructure at 360° Beach and Watersports Centre, including the Wales National Airshow. • 360 Beach & Watersports hosted the only Welsh stage of the RYA National ThunderCat Racing Tour in August 2015. This weekend of powerboat racing was a free spectator event. • Knab Rock Watersports Centre has provided an HQ and infrastructure for events such as Mumbles Triathlon. Staff work closely with Mumbles Yacht Club, which runs an extensive racing programme the whole year round. The Club hosted a number of National and European championships.
<p>Increase access</p>	<p>The Olympic beach volleyball court which featured prominently during</p>

<p>to beach and water sports for local and disadvantaged residents</p>	<p>the London Olympics was donated to 360° via Volleyball Wales as part of the London 2012 legacy programme and is now available for hire throughout the year by families, groups and budding Olympians.</p> <p>As part of Baefest 2013, 360° Beach and Water Sports Centre offered free beach volleyball coaching sessions and stand up paddle boarding and kayaking sessions plus free use of the beach soccer, rugby and tennis courts.</p> <p>Olga has carried groups of school children for day trips and overnight to achieve their DOE awards, provided training and team building exercise for disadvantaged young people and their families. The number of participants is not recorded.</p>
--	---

Source: City and County of Swansea; 360° Beach and Watersports Centre

Outcome Targets – Original and Achieved

- 7.37 Quantified targets for visits are shown in the original business plan, which are reflected in the offer letter, and in the Project Profile. The business plan showed a target of 100,000 visitors which appears to be largely based on estimates relating to Porthcawl Harbour. The Project Profile shows a target of 80,000. As these figures are inconsistent and the basis for them is unclear, and possibly related to only part of the project, they are not helpful to the evaluation. The Project Profile gives a figure of 340,464 achieved visits as of June 2015. The total is not broken down between the components of the project.
- 7.38 Cardiff Business School provided visitor numbers of the 2013 from the four facilities in City and County of Swansea, as follows: Knab Rock (299,055); 360° Beach and Watersports Centre (146,612); Olga (15,774); Pontoon (3,100). 2013 was the first year of operation for these facilities, but gives some idea of their relative contribution. The above four figures together total 464,541, although some visits may be duplicated. The figures do not include Porthcawl and Rest Bay, which is a popular beach. Therefore, it can be said that the total numbers visiting the sites covered by the project is probably in excess of the 340,464 in the Project Profile.
- 7.39 It is important to understand the differences between the sites in terms of the meaning of the figures given. Knab Rock is a popular coastal car park in Mumbles and the visits there will certainly not have been generated by the visitor centre there which offers only limited activities for visitors. The figures for the 360° Centre, Olga and the Pontoon will be more directly associated with the project.
- 7.40 Visits to the 360° Centre can be further verified by the record of user numbers that has been provided by the centre, broken down between total visitor numbers and

session bookings by activity type. The figures are presented in Table 7.8. These performance figures have exceeded the internal management targets set by the operator. They also show growth beyond the 2013 figures used by Cardiff Business School.

Table 7.8 User Numbers for 360° Beach and Watersports Centre

	2013/14	2014/15	2015/16 to end September
Total visitor numbers	154,214	206,599	161,176
Activity visitor numbers	5,702	12,518	12,187

Source: City and County of Swansea; 360° Beach and Watersports Centre

- 7.41 Usage figures are also available for Porthcawl Marina. The pontoon hammerheads are kept available for visiting boats, which accommodate four vessels or two larger vessels. Since opening in April 2014, 56 different visiting boats booked into Porthcawl Marina in the first year of operation and approximately 50 in 2015 to end November. Some of these vessels visited on more than one occasion. This performance is some way short of the assumption in the original Business Plan that there would be six visitor berths with 80 per cent occupancy from May until October.
- 7.42 The vast majority of the berths created or improved in Porthcawl Marina are not for visiting boats. 65 of the 70 berths are permanently let and there is a waiting list. No details have been provided of the main residence of those occupying the permanent berths or on the waiting list.

Impacts

- 7.43 This section considers long term impacts of the project and its legacy.

Economic Impacts

- 7.44 The Welsh Economy Research Unit research on economic impacts reported that no visitor surveys were administered in Swansea Bay and so an estimate was made based on average spend and economic impact details obtained at other sites. The WERU study estimated annual visitor numbers of 394,540 for the Centre of Excellence would lead to an estimated GVA of £1,488,000 arising from visitor spending, supporting around 69 FTE jobs.
- 7.45 Economic impact could also arise from future investment by businesses encouraged or stimulated as a result of the improved facilities brought about by the

project and by related further improvements to the visitor environment. This includes a number of initiatives which are referred to below in the section on legacy, including regeneration around Porthcawl Harbour, the developing activity of watersports operators, and an expanding programme of events.

Environmental and Social Impacts

7.46 It is believed that the investment activities have led to a higher quality, better managed and better maintained environment:

- The 360° Beach and Watersports Centre has played a part in raising awareness of the continuing importance of the marine environment in Swansea Bay through three recent (2015) City and County of Swansea initiatives (Voluntary Marine Wildlife Code of Conduct; Guide to the Seashore and Coastal Wildlife of Swansea Bay; Seashore Safaris).
- The 360° Beach and Watersports Centre operators were tasked as part of the tender process to encourage use by the Swansea's community and visitors; promote and provide opportunities to participate in grassroots, recreational, performance and elite watersports; and offer a pricing policy that includes subsidised rates for low income individuals and families. A number of beach activities are offered free of charge and one-off taster sessions for watersports are offered below market price to encourage access.

7.47 Examples of other social benefits relating to a wide range of users can be seen from:

- The 360° Beach and Watersports Centre is fully accessible. Changing Places facilities at the 360° Beach and Watersports Centre are the only ones on any beach in Wales. They go beyond standard accessible toilets (or "disabled toilets") in providing extra features and more space to meet the needs of people with profound or multiple disabilities. There is no hire charge for Landeez Wheelchairs which can be booked at the centre.
- Knab Rock Watersports Centre has one large changing room with disabled facilities.
- Customer satisfaction with 360° Beach and Watersports Centre, which has been measured since opening, has averaged 89 per cent.
- Approximately forty volunteers are registered with Swansea Museum to provide Olga with crew members. Since the refit, she has been available to carry groups

of school children for day and overnight trips in support of participation in the Duke of Edinburgh Award scheme. She has provided training and team building exercises for disadvantaged young people and their families and taken young people as part of the crew to race meetings in the Bristol Channel and Cornwall.

- Through a Sustainable Procurement Strategy and Policy, Bridgend County Borough Council have sought to develop opportunities to include community benefit clauses in contracts to encourage the creation of local employment and training opportunities. A 400 hour community benefit clause was included in their contract with BAM Nuttall, the contractor for the Porthcawl Harbour development. Efforts were made during project delivery to minimise the impacts of the works to the local community.
- Eight weeks before starting work on the ground, BAM Nuttall brought a mobile information unit on site to enable the community to understand what was about to happen, what the marina would look like on completion and how long it was going to take.
- More ambitious than previous years, Splashup 2013 included night surf and junior surf competitions organised by the Welsh Surfing Federation (WSF). The event was spread to both Coney Beach and Rest Bay and the Esplanade was set up to hold night surf competitions on Friday and Saturday. With the agreement of BAM Nuttall, the contractors working on the harbour, a pop-up venue made use of the construction compound to house two nights of live music. The contractors helped with setting up of the venue, including bringing in a digger to surface the ground.
- Harbour facilities at Porthcawl are used by the Porthcawl Sea Cadets for in-harbour training.

Legacy and Long Term Sustainability

- 7.48 This project has been mainly about investment in new infrastructure which will continue to underpin tourism growth in the future. Involvement of tourism officers in the development process has led to high awareness of the new facilities, inclusion in tourism marketing and an even greater recognition of maritime activities as a driver of tourism to Swansea Bay.
- 7.49 Neither the website nor the app that were set up for the project have been maintained, although the photo bank and video footage remain a useful resource.

City and County of Swansea have an aspiration to migrate some of the content to the Visit Swansea Bay website.

- 7.50 The involvement of the local authorities together with a well-established public-private partnership model should help to ensure long term sustainability of all of the new facilities. Each is owned by one of the two local authorities and, with one exception, they are also the operational managers going forward. The exception is 360° Beach and Watersports Centre, where Bay Sports Ltd have been appointed to manage the facility under a management agreement with City and County of Swansea. The management agreement has been through a number of drafts and negotiations are ongoing. In the absence of a signed agreement, a good working relationship has been established. Bay Sports Ltd report on KPIs on a regular basis, and are regularly exceeding their targets for total visitor numbers and activity bookers.
- 7.51 Knab Rock Watersports Centre has been operating successfully as a CCS facility but it is felt that there may be scope to obtain further benefit from these new facilities in such a key location, perhaps through some adjustment to the current operational model.
- 7.52 It is to be expected that investment in new infrastructure will continue to support success in securing a number of national, and occasional international, events to Swansea Bay. Early events organised by each of the two local authorities met with success, but failed to secure the hoped for commitment from the private sector, including watersports operators and local community. Mumbles Yacht Club has been regularly attracting national competitive events and the infrastructure provided at 360° Beach and Watersports Centre will continue to be an important asset in securing major waterfront events such as the Wales Air Show.
- 7.53 Bathing water quality on Swansea Bay Beach continues to present a challenge. Increasing use of the Bay for watersports will continue to win public support for improving water quality and the development of water quality improvement schemes.
- 7.54 Actions have been taken to secure the future of Olga. The Museum has completed requirements to enable Olga to be registered with the Maritime Coastguard Agency to carry passengers for corporate team building trips or tourism excursions and, in 2015, a member of staff of Swansea Museum has undergone training to qualify as a commercial skipper. Marketing has commenced for these commercial opportunities

to start in Spring 2016, providing the Museum with a new revenue stream to support Olga and her future activities.

- 7.55 In Porthcawl, the project was seen as the first step and driver for the regeneration of the wider harbourside area. Following completion of the marina, Porthcawl has been successful in attracting two allocations of money from Round 3 of the Coastal Communities Fund. Porthcawl Harbourside Community Interest Company was awarded money in January 2015 to help develop plans for a new maritime centre, including boat rack with storage for 36 vessels. The second allocation, in July 2015, will enable Bridgend County Borough Council to establish the existing four-kilometre Wales Coastal Path as a cycle route between Trecco and Rest Bay, via the Marina and along the Eastern Promenade. The money will also be used to create a smartphone app.
- 7.56 Delayed for some years, restoration of the adjacent Jennings Building is now set to proceed. This forms an important part of ongoing regeneration plans for Porthcawl, so that the town can develop and flourish as a first-class 21st century coastal resort that retains the character which has made it such a popular place to visit over so many years.
- 7.57 In an effort to secure a long term future for watersports events supported through the Centre of Excellence, Bridgend CBC offered watersports operators a six week course in social media and videos were made of competitions held which are available to support ongoing promotion. These activities were designed to put operators in a good position to manage future events when funding was no longer available. Despite this succession planning, no-one came forward and Splashup has not taken place since 2013.

Conclusions and Lessons

- 7.58 The main conclusions to be drawn from the above analysis are that:
- The Swansea Bay Watersports Centre of Excellence project has largely delivered against its original business plan. One small element, a slipway on a beach near Porthcawl, was dropped.
 - The four sites in Swansea relate to one another and bring complementary strengths and experiences that help to enhance the overall water-based tourism offer in Swansea. The Porthcawl components of the project are separate and the concept of a 'centre of excellence' for the whole of Swansea Bay has not been

fulfilled. The fact that Neath Port Talbot were unable to proceed with the bid left a gap.

- The project appears to have led to short term economic gains. A number of economic, environmental and social spin-offs have arisen from the project, which have also led to benefits out of season.

7.59 Lessons for the design, delivery and management of interventions include:

- Ensure that tourism and leisure services teams are fully involved with the investment projects in order to integrate them with wider destination activity, provide marketing support and generate spin off benefits. This was well addressed in Swansea.
- Use of public-private partnerships effectively. The partnership between Swansea City and County and the operator of the 360° Centre has been successful in delivering against the original business plan.
- Ensure that appropriate baseline targets and indicators are chosen, that a clear basis for monitoring is agreed and implemented, and that outcomes are defined and measurable, ideally using a theory of change model.

8. Coastal: Aberdaron – National Trust

Project Background and Description

Rationale

- 8.1 The far end of the Llŷn Peninsula is a remote area with a coastal rural environment and a historic and religious heritage. Tourism is an important component of the local economy but the area is less visited than other parts of Gwynedd and demand is seasonal. The area offers opportunities for outdoor recreation and for exploration, but its sensitive nature means that there is a need for careful visitor management.
- 8.2 In this context, the project focussed on establishing a visitor hub in Aberdaron, the area's main village. This would serve as a specific visitor attraction, capable of drawing more visitors to the area year round, and used as a central point from which visitors would be encouraged to discover and enjoy other places on the Llŷn. The investment would enhance the visitor facilities in the area and access to the village and the coast.
- 8.3 The National Trust, as proponents and deliverers of the project, also saw the project as a way of adding value to its significant presence on the Llŷn – The Trust protects nearly 20 miles of the peninsula's coastline, about one third of the total. By creating a more visible presence and strengthening contact with visitors, the project would enable the Trust to strengthen its ability to deliver benefit to the area and further achieve their organisational purpose.
- 8.4 An additional rationale was the relatively poor quality of the existing visitor facilities in the village, notably the car park whose opening times and amenities did not serve local traders and visitors well. Although Aberdaron beach was of a recognised Blue Flag standard, the project also provided direct access to the beach from the car park, which did not exist previously, and improved links to the coastal path.
- 8.5 The project was designed to meet the aims and objectives of the Coastal Tourism Strategy for Wales and of the relevant section of the ERDF Programme Document, in terms of improving year round coastal tourism, supporting local economies, protecting the environment, improving access and developing watersports and other activities linked to the natural environment. The project is also in line with the North West Wales Spatial Plan, furthering its five key priorities of building sustainable communities, promoting a sustainable economy, valuing the environment, and respecting local distinctiveness.

Project Description

8.6 The Aberdaron Centre of Excellence has involved the provision of a new visitor hub on a single site near the centre of the village of Aberdaron, which involved the following developments:

- Acquisition of the site by the National Trust from a private landowner;
- Construction of the Porth y Swnt Visitor Centre (new building);
- Redevelopment and new management of the main village car park;
- Improvements to beach access and public facilities;
- Refurbishment of an existing building (formerly a guest house), acquired as part of the site purchase, to provide self-catering holiday accommodation (Henfaes apartments);
- Provision of a watersports (sea kayaking) facility in a caravan placed on site.

Locations

8.7 This Centre of Excellence is provided entirely on the one site in Aberdaron. The car park, Visitor Centre and accommodation are situated just off the main road on entering the centre of the village.

8.8 Aberdaron is in the county of Gwynedd and is the most westerly village in the Llŷn Peninsula, a designated Area of Outstanding Natural Beauty (AONB). Aberdaron is 21 km from the railhead at Pwllheli. Road access is via B roads and much of the area is served by narrow rural lanes.

Table 8.1: Location of Investment Projects

Investment	Town and Postcode	Local Authority District
Porth y Swnt Visitor Centre	Aberdaron LL53 8BE	Gwynedd Council
Visitor car park, access and toilets	Aberdaron LL53 8BE	Gwynedd Council
Henfaes self-catering accommodation	Aberdaron LL53 8BE	Gwynedd Council
Llŷn Adventures kayaking	Aberdaron LL53 8BE	Gwynedd Council

Development

- 8.9 The funding agreement for an ERDF grant of up to £1,525,000 was initially awarded for the period 6th April 2010 to 30th September 2012. The Henfaes self-catering apartments were refurbished in 2011 and the car park improvements were undertaken in 2012. Planning approval for the Visitor Centre was granted on 17th December 2012 and work was completed in 2013. The Centre opened on 1st March 2014.
- 8.10 The project has been led and executed by the National Trust as the lead applicant. There were no other formal partners in the project.

Goals for the Project

- 8.11 The Business Plan¹⁰ set out the following goals for the project:
- Create economic benefit and job opportunities, both directly and indirectly, for the Llŷn Peninsula
 - Encourage more visitors to the Llŷn and increase dwell time
 - Extend the visitor season and create 'wet weather' tourism alternatives
 - Improve the quality of the visitor experience by developing an attraction that will act as a 'hub' to direct visitors to other tourism destinations in the area
 - Create an eco-building to house interpretative and audio-visual displays, accommodating up to 50 people at any one time
 - Raise the profile of Llŷn as a tourism destination and support tourism in the area in a sympathetic way
 - Reflect the special quality of Aberdaron – a step back in time, unhurried, charming – with the infrastructure that is proposed
 - With the support of the local community, help create a thriving and growth-related project
 - Encourage healthy living through supporting the many aspects of activity-tourism that the Llŷn can offer, e.g. cycling, boat trips, bird watching, surfing, kayaking, walking, or just enjoying the beach
 - Ensure a sustainable future for the Llŷn Peninsula, where there is a strong sense of entrepreneurship with a higher than average percentage of the working population in Gwynedd being self-employed (18 per cent)

¹⁰ Application Form: Trust in Aberdaron – A Coastal Centre of Excellence for Wales

- Meet the aspirations of the Welsh Government of supporting deeply rural areas to ensure that opportunities exist to support local communities and avoid out-migration.

8.12 The National Trust supported the economic argument behind the project with reference to its own study on the Economic Impact of the Coastal and Marine Environment of Wales, which estimated that the richness and diversity of this environment supports 92,600 jobs and produces a total income of £6.8 billion.

Project Inputs

Financial Inputs

8.13 The original project costing as specified in the application and business plan was £3,387,550. The final project outturn cost was slightly more - £3,428,457. The total final claim to ERDF was £1,545,000, making an intervention rate of 45.1 per cent.

Table 8.2 Funding Profile and Outturn (£ millions)

Funding Source	Business Plan 2010	Final Claim July 2015
ERDF	1.53	1.55
CoE Lead (cash)	1.86	1.88
Total	3.39	3.43

Source: Application Report and Project Profile

8.14 Limited information is provided on how the final costs and funding are broken down between elements of the project. The distribution between capital and management/marketing components is shown below.

Table 8.3 Expenditure and Funding Outturn by Investment Strand, June 2015

Investment	Total Project Cost
Capital expenditure (Estate)	£3,313,450
Advertising and promotion	£26,063
Legal and professional	£3,203
Project managers	£57,316
Project workers	£13,055
Travel and transport	£2,483
Administration – other	£349
Total	3,415,919

Source: Project Profile

8.15 Further information on the anticipated distribution of costs is contained in the business plan.

Table 8.4 Anticipated Cost Breakdown as Shown in Business Plan

	Preliminary cost
Acquisition cost (site)	£1,862,550
New visitor centre building	£897,500
AV and interpretation	£107,200
Self-catering refurbishment	£134,090
Services and kitting out	£155,400
Outbuildings and kiosks	£59,610
Car park, footpaths, signage etc.	£46,500
Minibus (in partnership with local businesses)	£24,700
Project manager for 3 years	£100,000
Total	£3,387,550

Source: Business Plan

8.16 The co-funding for this project has been provided entirely by the National Trust. The project does also have a relationship to other activity concerning landscape enhancement and tourism that has been supported by further external funding, including:

- Llŷn Landscape Partnership. £1.7m project with contributions from Heritage Lottery, Countryside Council for Wales, Gwynedd County Council as well as the National Trust. The project activities include protection of landscapes and assets, improving access and engaging the local community. The project provided the basis for the Llŷn Partnership which has continued as a framework for stakeholder engagement in landscape and tourism initiatives.
- Work on destination management with community stakeholders in Aberdaron, which relates to the above partnership and has been additionally supported by Visit Wales funding for small marketing initiatives.

8.17 The main changes in expenditure compared with the original business plan include two elements that did not go ahead (funding for retail units, kiosks and minibus) and one additional element (refurbishment of public toilets). This did not result in a significant change in overall costs.

Resources

8.18 A large majority of the funding was allocated to capital works. In addition, £26,063 (0.76 per cent of the total project cost and commensurate funding) was provided for marketing (advertising and promotion) and £76,406 (2.2 per cent) was provided for management. See Table 10.3 above.

8.19 The 'own resources', provided by the National Trust, have been divided between Capital (£1,820,277) and Revenue (£63,180). Income is obtained by the Trust from car park charges, admissions to the visitor centre, lease rentals and holiday lets. Fifty per cent of income is retained for use by the Trust locally.

Activities and Processes

8.20 The initial activity involved the acquisition of the site by the National Trust from a private landowner. A sequence of investments was subsequently made to provide a visitor focus and facilities in Aberdaron, including a visitor attraction and related infrastructure, as described below.

Table 8.5: Activities Delivered

Project	Description of Activities Delivered
Porth y Swnt Visitor Centre	Constructed as a new building close to the centre of Aberdaron, with an attractive modern design. The centre houses a permanent multi-themed attraction which interprets the historic, natural and cultural heritage of the Llŷn through creative tableaux and an audio guide. The centre is open 10.00 – 16.00 all year and the admission price is £2 for adults and £1 for children. The building contains toilets and a gift shop leased to a local operator.
Redeveloped car park	The main village car park, located next to the visitor centre, was redeveloped to improve its amenity, surfacing and visitor management arrangements. The car park used to be closed from 7pm, which reduced its value for visitors and local businesses, but is now open 24 hours a day all year. Nine car parking spaces were lost in the main car park as a result of the visitor centre and other works but a new overflow area contains 15 spaces – a net gain of 6, resulting in a total capacity of 129. Car parking charges apply, with manned ticketing (providing a further source of welcome and information) at certain times.
Improved visitor access and facilities	A range of investment has been made to improve visitor access and facilities. These include: direct access to the beach from the car park (previously not possible); a re-located boat launching slipway; a link from the site to the Wales Coastal path including improvements to a 500 metre section of the path to facilitate use at high tide; refurbishment of public toilets; provision of electric vehicle charging points; provision of a bus stop for the coastal bus service.
Henfaes holiday accommodation	A building formerly used as guest accommodation was included in the overall site acquisition. Located next to the new visitor centre, this has been refurbished to provide self-catering holiday accommodation, in the form of three apartments sleeping between four and seven people.
Watersports facility	A new watersports facility has been provided as a partnership initiative between the National Trust and a private operator, Llŷn Adventures, already active elsewhere in the area. This is housed in a National Trust branded caravan located between the car park and the beach. The Trust provides the site, caravan and some financial support and the operator delivers the visitor service. The facility is open three days per week in season and offers sea kayaking in two-hour sessions at three specific times each day. It is available on spec as well as pre-booked and is open to novices.

8.21 The project has varied slightly from the original application and business plan in the following ways:

- The proposal to convert some small unused buildings by the car park to provide three retail outlets was not pursued. This reason given was that the project was already quite complex and multifaceted and this element was considered unnecessary. The National Trust has remained concerned that its activities should not bring unwanted competition to the detriment of local traders.
- The proposal to provide three kiosks to be used by activity operators was dropped and a single caravan was provided instead. Reasons for this are similar to the above, and also include issues of space and location.
- Support for a minibus was not included as part of this project.
- Unspent funding was used to refurbish the public toilets, including provision of showers, which were not included in the original scheme.

8.22 The National Trust promotes Porth y Swnt through a website and social media activity. The approach has been to encourage understanding and a desire to explore the area through the interpretative treatment of themes. A dedicated map-based brochure on Porth y Swnt and the surrounding area has been produced by the National Trust, together with brochures on wildlife, walking, cycling and other transport options. The self-catering property is marketed as part of the National Trust portfolio of accommodation. The kayaking is promoted through a joint leaflet between the operator and the Trust and more active marketing is proposed for next year including discounts and promotions aimed at other Trust facilities and visitors.

8.23 The National Trust has sought to work closely with the local community in Aberdaron from the outset. The project proposal was based on considerable local consultation, including an open day in July 2012 to consider design options and an exercise with the local schools to choose a name for the visitor centre. The project was also subject to full planning approval. The Trust are active members of the local trade association Aberdaron Tourism Link. Joint initiatives have been pursued and supported, such as a new Aberdaron Seafood Festival held in June and run in conjunction with local businesses. A regular guided cycling event is supported and the local school has been involved in various activities. The staff employed at Porth y Swnt have been particularly involved in community engagement.

8.24 The project has helped to underpin the work of the National Trust in pursuing other tourism related initiatives in the area in partnership with others. They are actively

involved with Gwynedd Economic Partnership and the implementation of the Gwynedd Destination Management Plan 2013-2020, and more locally with the Llŷn Partnership which has various proposals to build on the experience of Porth y Swnt and link it to other tourism and heritage initiatives (see Impacts section later).

- 8.25 The environmental impact of the project has been addressed in a number of ways, including:
- The new visitor centre building has been built to BREEAM 'excellent' standards;
 - Ground source heating has been used for the visitor centre and will be extended to the holiday apartments;
 - Particular attention has paid to the use of local and sustainable materials;
 - Sustainable transport has been supported, including electric vehicle re-charge points, support for the visitor minibus (the Trust is on the steering committee for this), promotion of cycling trails and walking (including production of trail leaflets). Parts of this were funded as an E4G Sustainable Tourism and Transport Initiative;
 - Strong promotion of conservation messages throughout the visitor centre and communication activity.

Strategic and Operational Management

- 8.26 The project was steered by a Project Team meeting monthly and consisting of:
- Internal staff of the National Trust, concerned with property, buildings, education, interpretation and membership;
 - Two external representatives of the local community in the form of the local county councillor and the chair of the local tourism trade association (Aberdaron Tourism Link).
- 8.27 The development was overseen by a full time project manager, with input from local and wider National Trust staff. A greater amount of human resource input was required than had been anticipated, but this was due to the local complexity of the project rather than to the requirements of the funding programme and processes.
- 8.28 The level of budget was sufficient and matched closely the requirements of the project. The experience of the Trust with other projects was important in enabling them to establish accurate cost estimates.
- 8.29 The Trust feels that the relationship established with the local community has been a positive aspect of the development and ongoing management process. The

consultation with project officials and stakeholders as part of this evaluation revealed that there was some initial scepticism about the overall value of the project. It appears that there was uncertainty about what the purpose and likely benefits of the visitor centre. Internally, the Trust faced some challenges in agreeing on the new ways of working that the project required, but this was successfully addressed.

8.30 The Trust has indicated that the procurement processes required by the project were quite burdensome. However, support from Visit Wales was deemed sufficient and positive. One criticism made is the absence of national marketing support provided by Visit Wales to the Coastal tourism initiatives, individually and collectively. The Trust was not aware of national marketing activity that reflected the Coastal projects.

Outputs

Original and Achieved Output Targets

8.31 The table below presents the quantified output targets as set out in the original offer letter and compares them with the outputs achieved on completion in June 2015. Further information about the achievement of outputs against targets is provided below.

Table 8.6 Achievement of Overall Output Targets

Output Targets:	Original Offer Letter 2010	Achieved June 2015	% Achievement of Target
Initiatives developing natural, historic environment	1	1	100%
Managed access to countryside or coast (km)	1	1	100%
Enterprises assisted - directly	3	2	66%

Source: Offer letter and Project Profile

8.32 The overall hub at Aberdaron adds up to one comprehensive development initiative relating to the natural and historic environment and this has been delivered. The individual components of the project have been described in the previous section, and outcomes resulting from them are further discussed in the next section.

8.33 The managed access is in the form of new access to the beach and a length of footpath enabling access between the site and the Wales Coast Path and route

improvements to enable use at all states of the tide. This has been achieved, with the total improved access amounting to approximately 1km, as targeted.

- 8.34 The number of enterprises directly assisted includes the gift shop within Port y Swnt and the watersports activity provider, Llŷn Adventures. Both are independent small enterprises operating under formal agreements with the National Trust. This amounts to two enterprises in total. The fact that the higher target of enterprises assisted has not been reached reflects the fact that provision of additional space for retailers and activity operators, contained in the original proposal, was not pursued.

Outcomes

General Outcomes - Intended and Achieved

- 8.35 The business plan and offer letter set out a number of outcomes (results) that the project should deliver. These are summarised in the table below, together with a comment on the extent which they have been achieved, based on consultation with the lead body (National Trust) and local stakeholders.

Table 8.7 Achievement of General Outcomes

Outcome Intended	Level of Achievement
A Centre of Excellence that interprets the natural environment of the Llŷn and directs people to visitor attractions in the area	Porth y Swnt is now well established as a visitor attraction and interpretation centre using up to date and creative techniques to interpret the coastal and marine environment and heritage of the area. While the interpretation stimulates visitor interest in the area, the level of print information directing visitors where to go is relatively limited, although local businesses report that their visitors do find it useful in this respect.
A carbon-neutral visitor centre building; conversion other buildings to 3 small retail outlets; upgrading of accommodation to market expectations.	The building has followed environmental standards although more information would be needed to determine carbon neutrality. Conversion of other buildings was not fully carried out as initially envisaged. The accommodation has reached good standards and is trading well.
Aberdaron to become a key location attracting visitors west of Pwllheli	Aberdaron was already a main centre in the far west of Llŷn which did attract visitors. However, the project has strengthened its position and will have led to more visitors coming west of Pwllheli. The project has met the increasing market interest in heritage and wildlife and has helped to position Aberdaron as more than just a beach destination.
The hub to be of	Porth y Swnt was carefully designed to be an attraction in its

sufficient interest to attract visitors in its own right and be a wet weather year-round attraction	own right. It is mainly indoors and well suited to wet weather. A key policy of the Trust was to ensure it is open all year and to support out of season activity. Visitor feedback collected from the Trust shows a positive reaction to the Centre. It is seen as a positive generative asset by the local tourism association, although some local businesses believe its purpose and what it offers to visitors is not well defined and could be more clearly put across in advance. The watersports facility does attract visitors to come to Aberdaron specifically for the kayaking, but it is seasonal.
Creation of direct access to beach	This has been achieved. It is reported that the direct access to the beach from the car park is increasingly well used, with the open area either side of the access being used for picnics and general enjoyment by visitors.
Creation of a launch site for boats, accessible directly from the car park	This has been created but it is not well used. There is a specific problem with the new boat access as the location has proved to be unsuitable partly owing to the presence of rocks, and the boards used for the facility get washed up. This has caused problems notably with the local community, with a feeling that insufficient investment has been made.
Provision of beach huts as locations for activity providers	The beach hut element was not pursued, but the single caravan-based watersports facility is well established. The operator has developed a good relationship with the National Trust, with proposals for enhanced services and promotion in the future.
Improvement of coastal path	The sections of coast path are completed to a good standard and are being used.
Importance of the marine environment emphasised in novel and interesting ways	This has been a particularly strong outcome of the project. The visitor centre has a particular focus on the marine environment (in the thematic area called The Deep) which cleverly relates biodiversity, historic and cultural/spiritual elements of this.

Source: Offer letter and observation/consultation

Outcome Targets – Original and Achieved

8.36 The business plan and offer letter identify a small number of quantified outcome targets in terms of visitor numbers and total jobs created.

Table 8.8 Achievement of Outcome Targets

Outcome Targets:	Original Offer Letter 2010	Achieved June 2015	% Achievement of Target
Visits (net additional)	65,000	158,657	Basis needs clarification
Job Created (total including indirect)	128 FTE	Not estimated	

Source: Business plan/offer letter and Project Profile

8.37 The target for number of visits is taken from the application/business plan. This indicated that prior to the project the car park was receiving on average 30,000 cars per annum. Using a coefficient of 3.5 people per car this led to an estimate of 105,000 visitors. The business plan set a target for 170,000 visitors per annum after completion of the project, an uplift of 65,000, equivalent to a 62 per cent increase.

8.38 The National Trust has stated that the 65,000 target was hit from year two. A figure of 158,657 visits is given in the final project profile report. However, the basis for this figure and the extent to which it is a gross or net addition is unclear. Most recent figures provided show a total of 38,303 cars using the car park in 2014 (March onwards). Based on the average size of 3.0 identified by the Welsh Economy Research Unit for a coastal party, this suggests in excess of 128,000 visits will have been made to Aberdaron in 2015, representing an uplift of at least 23,000 compared with the annual baseline figure included in the business plan.

8.39 These figures lend some support to local scepticism about the target uplift of 65,000 which, based on business feedback and observation of visitors in the village, has been thought to be unrealistic and doubted by some to have been achieved. However, while falling short of the target, the uplift of 23,000 per annum still represents a significant number of visitors who have enjoyed the benefits of the new investment and spent time and money in Aberdaron.

8.40 Figures for Porth y Swnt visitor centre totalled 15428 in 2014 (March onwards) and 13618 in 2015 (year to date). These visits have all been made to a completely new attraction. Those, included within the total, who have paid admission to explore the interpretation are quite likely to have extended their length of stay in Aberdaron.

The extent to which the experience may have influenced the remainder of their visit to the Llŷn Peninsula is not known.

8.41 The watersports operation, providing timed sea kayaking sessions, commenced in 2014 but was not fully operational until the 2015 season. It received around 600 participants in 2015. These included individuals, families and a few groups, many of whom were new to the area and to the activity. Advertised price was £25 per person, with a 20 per cent discount to NT members, suggesting a take of £12,000 - £15,000 before outgoings. The National Trust has been contributing 50 per cent of the instructor fee, without which the operation would not be profitable. The Trust has agreed to continue with this support at least for 2016.

8.42 The following direct jobs have been enumerated by the National Trust, and approximate to the seven FTE jobs targeted in the proposal/offer:

- 2 full time management staff – supervisor and overseer;
- 4 seasonal part time staff (car park attendants and centre staff);
- 1 part time activity provider with Llŷn Adventures;
- 1 gift shop operator (as lessee), plus assistants;
- 1 part time input from National Trust Llŷn Operations Manager.

Impacts

8.43 This section considers long term impacts of the project and its legacy drawing from consultations with officials and stakeholders and part of this evaluation.

Economic Impacts

8.44 The direct jobs created figure of 7–7.5 FTE was reported above as an output. The target outcome in terms of overall jobs created, including indirect jobs, was given in the business plan as 128 FTEs. This was based on the 65,000 visits uplift total which was estimated to generate a total economic benefit of £5,174,100.

Assumptions behind this figure include: two thirds day visitors spending on average £25/head, 20 per cent UK staying visitors spending £148/head, and 13 per cent overseas staying visitors spending £250/head. The 128 FTE figure is obtained by using a ratio of £40,450 required to support 1 FTE¹¹.

8.45 It is probable that this figure may significantly overstate the net economic benefit achieved in terms of jobs created, as the number of visits and spend that can be

¹¹ All coefficients used are taken from *Welsh Tourism Economy – First Results from the Tourism Satellite Account 2000*, Cardiff University, 2004.

directly attributed to the project, as additional value added is open to question. Data on visitor numbers, origin and spend have not been provided to enable the actual outcome to be estimated against this target. Moreover, the attribution to the project of the levels of spend per head identified above is not justifiable as visitors will be motivated by, and spend money across a wide range of products and services in any one day of their visit.

- 8.46 The Welsh Economy Research Unit assessment of the economic impact of the E4G programme does not provide any separate data or information on the economic performance and impact of the Aberdaron CoE. A level of economic impact may be felt as a result of the increased visits, length of stay and spend generated and consolidated by the investment in the project. This should be felt in businesses in and around Aberdaron. Local businesses have reported growth in performance in 2015 but there is no firm evidence to attribute this directly to the Aberdaron project.
- 8.47 A specific objective of the project was to increase economic benefit to the locality out of season. It is perceived this has happened to some extent with the new facility at Porth y Swnt open all year and presenting themes (wildlife and heritage) that are of interest to a less seasonal market. This includes specific events supported by the National Trust such as a seafood festival in June.
- 8.48 Consultations also point to increased confidence in tourism in Aberdaron with a number of new businesses opening in the last two years and others being refurbished or extended. These include new or improved food outlets, a cycle hire business, and improvements to accommodation. Awareness of the investment being pursued by the National Trust appears to have played a part in this. At least one local business has reported that they rebuilt their premises specifically because of the confidence instilled by the National Trust activities enabled by the project.

Environmental and Social Impacts

- 8.49 The project has reflected the two cross-cutting themes of the programme – environmental sensitivity and reducing negative environmental impacts and equal opportunities . It is also possible to identify wider environmental and social impacts from the project.
- 8.50 The project has taken various measures to minimise the negative environmental impact of the development and operation of Porth y Swnt and related investments, as specified earlier. In terms of future environmental impact, positive benefits should

increasingly be seen from engagement with visitors and influencing their behaviour, especially in two aspects:

- Increasing the visiting public's understanding of, and interest in, the natural environment and conservation;
- Promoting the use of alternative transport options, including walking, cycling and public transport to visitors.

8.51 The National Trust has a clear policy on equal opportunities and gender equality. Public areas of the Porth y Swnt centre are at ground floor level and comply with normal accessibility requirements. It was not possible to make the holiday apartments fully accessible. Positive social benefits should be seen in two main areas:

- Providing social benefits to the local community. The location of Porth y Swnt at the centre of the village is a considerable advantage. The car park provides an important amenity and there is free parking for local people for a certain period. The staff and volunteers have been actively involved with the community, including work with the local school.
- Providing well-being and health benefits to visitors. The sea kayaking offer is particularly directed to new participants who have not experienced this activity before.

Legacy and Long Term Sustainability

8.52 The Porth y Swnt centre, self-catering apartments, car park and access provide a physical legacy which should continue to be used by visitors.

8.53 A key aspect of this project in terms of legacy is the role of the National Trust as an established body fully capable of delivering the project and building on it into the future. A primary purpose of the project was to consolidate the presence of the Trust in the Llŷn. This has been achieved. This on-going and consolidated presence should ensure the project's legacy.

8.54 The Trust maintains a strong relationship with the local community and with other partners in the area. Through the Llŷn Partnership, the Trust is developing links between the Aberdaron CoE and other locations of heritage and visitor interest throughout the area. They are pursuing the establishment of an Eco-Musée, based on a French model, as a multi-centred linked attraction whose impact is greater than

the sum of its parts. They are also looking to work further with the Bardsey Island Trust to make a more tangible connection to the island and its heritage.

Conclusions and Lessons

8.55 The main conclusions to be drawn from the above analysis are that:

- The Aberdaron CoE has achieved its financial targets. Output targets, including direct jobs created, have largely been reached, although a small component of the project was not pursued. Outcome targets in terms of new visits generated may have been unrealistic and it is unclear whether this uplift in visits has been achieved. The calculation of the target for total jobs created (including indirect jobs) was based on figures that could not be clearly attributable to the project and this target should not be considered.
- The project has clearly been in line with overall objectives of the programme relating to gaining economic benefit from the natural and marine environment and to improving access to it. It has also addressed the cross-cutting themes.
- The Aberdaron project is different from some others in that it is a single site CoE. This appears to have worked well as it has enabled more local focus, while still allowing the CoE to pursue future links and partnerships with other initiatives in the area.

8.56 Lessons for the design, delivery and management of interventions include:

- The advantage of dealing with one main applicant and deliverer reduced the numbers of coordination challenges relative to some of the other Centres of Excellence; for example there were risks around securing match-funding from a wider range of partners.
- The opportunity presented by well-established third-sector bodies such as the National Trust, who have experience of project design, costing and management.
- The need to fully research and follow up on technical delivery problems – as in the case of the unsuccessful boat launch facility.

9. Coastal: Pembrokeshire Coastal

Rationale

- 9.1 This project is based on a clear recognition that Pembrokeshire's main strength in tourism rests with the exceptional quality of its coastline. The project has sought to enhance the visitor experience of the coast by improving access, visitor environments and the range and quality of facilities and access. The overall aims were to:
- Increase the value of tourism to Pembrokeshire
 - Address poor quality environments and facilities in certain locations
 - Make more of existing assets.
- 9.2 The original proposal included in its rationale the fact that visitors are increasingly looking to enjoy the coast from the water. This led to the inclusion of a number of elements in the project which supported investment in boat access, some of which were subsequently dropped for planning and technical reasons, which are discussed later. This aspect of the rationale, while still in place, has been consequently somewhat downplayed.
- 9.3 Each of the individual investments that make up the CoE have their own rationale and context within the overall project. These include:
- Recognition of Tenby as a key destination for Pembrokeshire and centre for business activity and visitor spending, pointing to a need to continue to improve the quality of the visitor environment and visitor management in the historic town and harbour.
 - A study by Pembrokeshire Coast National Park of visitor car parks and associated facilities around the whole coast, leading to the identification of Solva and Porthgain as two key locations needing improvements in visitor experience, management and safety.
 - The location of Coppet Hall estate and beach. This location is close to Saundersfoot and has space to extend capacity and amenity for visitors to the village. In parallel, the landowner, Hean Castle Estate, saw the coastal site as underperforming, with poor quality existing accommodation and facilities, and had been considering closing the car park owing to misuse and management challenges.

- A plan for Milford Haven Harbour which saw the use of the harbour moving more towards leisure activities, requiring an adjustment in infrastructure and an opportunity to enable access at all states of the tide.

9.4 The project was designed to be in line with the Coastal Tourism strategy for Wales, the South West Wales Regional Tourism Strategy, and Wales Spatial Plan priorities for Pembrokeshire Haven.

Project Description

9.5 The Pembrokeshire Coastal Tourism Centre of Excellence had the following investment projects:

- Public realm improvements at Tenby harbour
- Public realm improvements at Tudor Square, Tenby
- New visitor facilities at Coppet Hall, Saundersfoot
- New dock lock for leisure craft at Milford Haven
- Improved car park and visitor infrastructure at Solva
- Improved visitor infrastructure at Porthgain

Locations

9.6 This Centre of Excellence spans six locations. All of the locations, except for Milford dock, lie within Pembrokeshire Coast National Park.

Table 9.1 Location of Investment Projects

Investment	Town and postcode	Local Authority
Tenby harbour	Tenby SA70 8BY	Pembrokeshire Council
Tudor Square	Tenby SA70 7AJ	Pembrokeshire Council
Coppet Hall	Saundersfoot SA69 9AJ	Pembrokeshire Council
Milford Haven dock lock	Milford Haven SA73 3AF	Pembrokeshire Council
Solva car park	Solva SA62 6UT	Pembrokeshire Council
Porthgain village	Porthgain SA62 5BN	Pembrokeshire Council

Development

- 9.7 The total project cost was £4,042,500 with an ERDF contribution of £1,909,500.
- 9.8 The improvements to the car park and visitor infrastructure in Solva and Porthgain were completed in 2013. Work in Tenby was undertaken in 2013 and finished in the spring of 2014. The development at Coppet Hall was completed in March 2014 and the centre opened in May of that year. The Milford Haven dock lock was completed in December 2014 and fully functioning by June 2015.
- 9.9 The lead applicant and project coordinator was Pembrokeshire County Council. The County Council also led on the delivery of the work in Tenby (Tudor Square and the harbour). The work in Solva and Porthgain was led by Pembrokeshire Coast National Park. The Coppet Hall project was led by the landowner, Hean Castle Estate. Milford Haven Port Authority was responsible for the work on the dock lock.

Goals for the Project

- 9.10 The Business Plan identified how the project intended to contribute to coastal tourism objectives. These can be summarised as follows:
- **Extending the visitor season.** This was seen as an essential requirement for increasing economic benefit from tourism. The selection of locations and themes was made partly on the basis of their potential year round appeal and relevance to non-seasonal markets.
 - **Improving visitor management and minimising environmental impact of visitors.** Most of the investments included improvements of visitor access and infrastructure, including visitor flows, and also taking account of environmental impact.
 - Improving the quality of the coastal environment as a key resource for coastal tourism. This was central to the project and all the components related to it.
 - **Contributing to wider benefits and regeneration.** Economic objectives were seen more in terms of regeneration leading to longer term benefit rather than short term uplift in visitor spend. The business plan underlined that the investments form just one part of a wider programme of investment and activity to regenerate the coastal destinations.
 - **Building on Pembrokeshire's unique sense of place.** This related to the importance of the coastal landscapes as central to the Pembrokeshire brand, but

also had implications for design, reflection of heritage and use of local produce and materials.

- **Supporting local communities.** The business plan recognised the importance of community engagement and delivering local benefit.

9.11 The business plan set out the following objectives for percentage change in visitors and spend, but the baseline this is based upon:

- To increase the number of visitors to the supported sites by 5 per cent by December 2015.
- To increase average spend per visitor to Pembrokeshire by 8 per cent by December 2015.
- To increase the proportion of visitors expressing satisfaction with visitor facilities by 10 per cent by December 2015.

Project Inputs

Financial Inputs

9.12 The financial breakdown in the original application of 2010, in the finally approved business plan in 2013 and in the final claim in 2015 is shown in Table 9.2 below. The variation between 2010 and 2013 is in the respective amounts from Pembrokeshire County Council and Milford Haven Port Authority due to technical reasons causing a change in activities, as explained later.

Table 9.2 Funding Profile and Outturn (£ millions)

Funding Source	Business Plan 2010	Business Plan 2013	Final Claim July 2015
ERDF	1.91	1.91	1.55
CoE Lead - Pembrokeshire County Council (Public sector)	0.53	0.38	0.38
Pembrokeshire Coast National Park (Public sector)	0.15	0.15	0.15
Milford Haven Port Authority (Not for Profit - Trust)	1.05	1.2	1.20
Hean Castle Estate (private sector)	0.4	0.4	0.40
Total	4.04	4.04	3.68

Source: Business Plans and Project Profile

9.13 The breakdown project costs is shown below in Table 9.3.

Table 9.3: Expenditure and Funding Outturn by Investment Strand, June 2015

Investment	Total Project Cost
Capital expenditure (Estate)	£3,942,000
Project managers	£91,739
Travel and transport	£1,188
Administration – other	£7,673
Total	4,042,600

Source: Project Profile

9.14 The costs and funding for the different components of the project are shown in Table 9.4. The totals given are at a slight variance from the outturn figures shown earlier owing to discrepancies in the available data. However, the relative costs and funding of the different investments is clear in the table. The largest investment by some way is the Milford Haven dock lock, followed by the investment at Coppet Hall and in Tenby (with Tenby harbour seeing the highest intervention rate). Solva and Porthgain received smaller investments.

Table 9.4 Anticipated Cost Breakdown as Shown in Business Plan

	Total cost (£)	Intervention rate	ERDF Grant (£)	Share of grant
Tenby Tudor Square	430,000	21.2%	91,160	4.88%
Tenby harbour improvements	418,000	89.3%	373,274	19.99%
Milford Haven dock lock	2,100,000	40%	840,000	44.99%
Coppet Hall visitor facilities	800,000	50%	400,000	21.43%
Solva car park improvements	190,000	50%	95,000	5.09%
Porthgain improvements	135,000	50%	67,500	3.62%
Total	4,073,000	45.84%	1,866,934	100%

Source: Calculated from data in the final Project Profile; intervention rate is calculated the level of ERDF grant as a proportion of total costs

9.15 The investments in the different components of the Pembrokeshire CoE complement, and are complemented by, a range of other investments, some of which have received a degree of external funding. These include:

- Various projects to conserve and improve the public realm, historic townscape and harbour in Tenby and to provide visitor facilities and services, including a recently opened multi-storey car park and tourist information centre.
- Significant additional works and cost associated with Milford Haven dock lock beyond the element part funded by this programme. This is part of the wider implementation of the Master Plan for Milford Haven Dock, which includes infrastructure projects and support for business development.
- Investment in the car park at Coppet Hall, as a key additional component of the visitor facilities there, fully privately funded by the Hean Castle Estate. The new restaurant has also received grant funding from Visit Wales via the Tourism Infrastructure Support Scheme (TISS) programme.
- Investment in other access points and car parks around the Pembrokeshire coast, including support for work at Poppit Sands under the Green Seas project which is another part of the ERDF E4G programme.

Activities and Processes

Delivering of the Investments

9.16 The activities involved in delivering the individual components of the Pembrokeshire CoE are described in Table 9.5

Table 9.5 Activities Delivered

Project	Description of Activities Delivered
Tenby Tudor Square	Tudor Square is in the centre of the historic old town of Tenby and in a strategic location for visitor flows through the town to the harbour and beaches. It contains many visitor related shops and catering outlets. Activities involved: repaving and partial pedestrianisation, amenity improvements, restoration of heritage features, and provision of new lighting, signing and street furniture.
Tenby harbour improvements	A number of actions have been taken to improve appearance, access and safety in the harbour. These have included: improved paving and work on Castle Square above the harbour, work on access and bridge over inner sluice, new railings, replacement of lighting, new seating, and tidying and replacement of signage. The existing slipway has been extended slightly to improve access to and from the water for small craft at low tide.
Milford Haven dock lock	A new lock, designed to meet the needs of leisure craft, has been created within the existing lock. This has involved significant engineering work, including extensive piling and installation of new lock gates. A manned control centre has been created. The new lock now enables access to the 328 berth marina from the sea at all states of the tide, other than the lowest spring tides.
Coppet Hall visitor facility	The project has involved the building of a very high quality, strikingly designed multi-use two storey building set slightly back from the beach with good links to Saundersfoot. The building houses a restaurant on the upper floor, kiosk selling snacks, retail/hire unit for beach/activity equipment, toilets, showers, family changing facilities and heritage interpretation panels. The award-winning Coast restaurant is of exceptionally high quality and open all year, with 65 inside and 50 outside covers. It is leased to an experienced operator who also runs the kiosk. The shop has a separate lease.
Solva car park improvement	The strategically located car park in the village has been resurfaced and changes made to improve layout and vehicle flows. Designated parking has been provided for people with special access needs. Pedestrian access, which is part of the Wales Coast Path, has been reconstructed to improve amenity and safety (with new alignment and protection from the river bank). A new interpretation panel has been provided.
Porthgain improvements	Safety and amenity has been improved in the village, through replacement of street lighting, road surfacing, improved boat access, improvements to seating/ picnic area and interpretation.

Variance from Original Concept

9.17 There has been some significant variance between the planned activities outlined in the business plan in 2010 and the activities that have been delivered. These include:

- Dropping the proposal to provide the infrastructure required to operate a passenger ferry service across the Milford Haven waterway between Angle and Dale, owing to technical difficulties identified upon further investigation. This link would have provided a very useful service for walkers on the Wales Coastal Path enabling them to avoid a significant inland detour around the estuary, including industrial areas near Milford Haven.
- Abandoning the scheme to provide a new low water pontoon for boat access near Castle Hill in Tenby capable of taking boat trips and specifically as a facility for services to Caldey Island. The main reason related to obtaining planning permission for the proposal as it was opposed by Pembrokeshire Coast National Park Authority on account of its visual intrusion in an environmentally sensitive location.
- Not including the car park at Coppet Hall within the funding. This was however fully funded by the estate, enabling the grant element to be focused on delivering a major new building.

9.18 All the above changes were addressed during the first phase of the project and a revised business plan was prepared and agreed in 2013. In each case the level of investment and funding was maintained and used on alternative projects in the same area, delivered by the same partners.

9.19 The marine access components of the alternative projects undertaken by Milford Haven Port Authority (the dock lock) and Pembrokeshire Council (harbour improvements) are now related to the smaller and more specialist market of individual boat users rather than providing strategic access links for general tourists. However, both these projects have enhanced the public realm in the area. The 2013 business plan indicated that the dock lock could possibly be used as a base for a water taxi service to Pembroke dock at some future time.

Marketing and Communication

9.20 The Pembrokeshire CoE has its own dedicated website www.pembrokeshire-coastal-tourism.co.uk. This is consumer-facing and contains separate pages on

each of the five locations covered in the project (Tenby, Milford Haven, Coppet Hall, Solva and Porthgain). The website has a home page with some general text about Pembrokeshire as a destination. The location pages provide general visitor information about each place and a short description of the investment project. Although still accessible on the web it has not been kept up to date and suggests that the projects have not been completed, which therefore misinforms and confuses current users.

- 9.21 There has been little engagement with Pembrokeshire Tourism, the Destination Management Organisation for Pembrokeshire. They have been aware of the Centre of Excellence but there has been no integration of it in their activity or marketing and the reasons for this are not clear.
- 9.22 The individual projects have been the subject of press releases and media work from time to time, including upon their completion. Significant media coverage has been achieved for the Coast Restaurant at Coppet Hall owing to its outstanding quality, enabling it to win many awards, including “AA Restaurant of the Year” and “Best Restaurant in Wales”.
- 9.23 All the investments have involved local consultation within the respective local communities and engagement with local councils, trade associations, other civic bodies and user groups.

Environmental Management

- 9.24 Each of the investments has paid specific attention to the environmental impact of the project, seeking to reduce negative impact and resource use through design and management practice. This has included:
- Design of the building at Coppet Hall to BREEAM Excellent standard – the highest rating.
 - Restoration of heritage features in Tenby Tudor Square and harbour and use of materials and finishes in keeping with the heritage environment.
 - Improvements in amenity at Solva and Porthgain, including visual impacts such as replacement of harsh yellow lighting in Porthgain with more appropriate softer lights, while also improving visibility.
- 9.25 Action to address cross-cutting environmental objectives included work with tourism business related to the coastal CoE in Pembrokeshire. The main activity was the holding of a training day in Stackpole (it was to be held at Coppet Hall but the facility

was not completed). This included presentations on waste management, promoting the use of the coastal visitor bus service, and practical issues of directing visitors to relevant information. A resource efficiency review was undertaken by WRAP Cymru.

Strategic and Operational Management

- 9.26 The project was led and managed by the European Contract Management Team within the European Unit of Pembrokeshire County Council. This team already had a significant track record of managing projects with European funding. The team coordinated the administration and liaison with Visit Wales on behalf of all the partners. A full time manager was involved in administering three of the four Visit Wales E4G programmes in Pembrokeshire (Pembrokeshire Coastal Tourism Centre of Excellence, One Historic Garden and Green Sea Programme South).
- 9.27 The work in Tenby, Milford Haven, and Solva and Porthgain was handled by technical staff and contractors (including engineers and highways teams) working respectively for Pembrokeshire County Council, Milford Haven Port Authority and Pembrokeshire Coast National Park. All had relevant project experience.
- 9.28 Hean Castle Estate was responsible for the investment at Coppet Hall. While they were able to provide considerable project management and business planning experience they had little previous knowledge of the administrative requirements of European funding. They relied heavily on Pembrokeshire County Council in handling this aspect and they have made it clear that they would not have entered into the project without this engagement from the Council.
- 9.29 The overall project management, including relationship with the partners and Visit Wales, worked well and no significant problems have been reported. However, Pembrokeshire County Council felt that some of the associated activity, including marketing support and the environmental training, would have benefited from more advanced planning.
- 9.30 Some of the investments (Coppet Hall and Milford Haven dock lock) exceeded the original estimates and budgets. However, this was managed by adjusting the proportion of the overall investment that was covered by the ERDF funding, with any overspend met by the lead partners.

Outputs

Original and Achieved Output Targets

9.31 The table below presents the quantified outputs, as original targets and as reported as achieved in June 2015.

Table 9.6 Achievement of Overall Output Targets

Outputs targets	Original target	Achieved June 2015	% Achievement of Target
Initiatives developing natural/historic environment	8	8	100%
Managed access to countryside or coast (km)	0.8	0.93	116%
Enterprises assisted - directly	N/A	N/A	-

Source: Project Profile with modified data from PCC

- 9.32 The number of initiatives developing the natural/historic environment is an arbitrary figure. The original target of eight appears to take the investments in Milford Haven, Coppet Hall, Solva and Porthgain each as one investment, making four in total, and then taking the work in Tenby as four further separate investments – Tudor Square, Castle Square enhancement, inner sluice improvements, and harbour seating/railings etc. In fact the last three of these have been more commonly taken as all part of the Tenby harbour improvement. Therefore it would be more consistent to consider this as six targeted and achieved initiatives.
- 9.33 The managed access to countryside and coast is made up of very small stretches of improved pedestrian access in four of the investments – Tenby harbour, Coppet Hall, Solva and Porthgain. This has not been a major aspect of this project. The largest component is 0.36 km of improved access at Coppet Hall. Perhaps the most significant in terms of safety has been the improvement to the Wales Coastal Part access in relation to the car park in Solva.
- 9.34 ‘Enterprises assisted’ appears not to have been included in the quantified targets for this CoE. In fact, it could be said that at least three enterprises at Coppet Hall – Hean Castle Estate, Coast Restaurant, and the outdoor shop/hire – have been directly assisted by the project.
- 9.35 The sixteen jobs in the original target include six at Milford Haven and ten at Coppet Hall. The target of six at Milford Haven are largely jobs related to the control and

operation of the dock lock. The target of ten at Coppet Hall has been exceeded. Feedback from the Hean Castle Estate and the Coast restaurant points to a figure of 15 FTEs in winter and over 25 FTEs in summer.

Outcomes

General Outcomes - Intended and Achieved

9.36 The business plan set out a number of objectives. These are summarised in the table below, together with a comment on the extent which they have been achieved, based on observation and consultation with the lead body (Pembrokeshire County Council), partners and other local stakeholders.

Table 9.7 Achievement of General Outcomes

Objectives – desired outcomes	Level of Achievement
Extending the visitor season	All the investments have created or improved facilities that are available to be used year round. However, increased visits out of season have not been particularly targeted or achieved. Milford Haven dock lock has enabled continuation of a full locking programme well beyond the time of year when previously they would have moved to a more limited schedule, with boat movements in October reported as ‘outstanding’. The strongest outcome in this regard may be the attraction of a new clientele of food lovers to Saundersfoot which is not an inherently seasonal market segment. However, the Coast restaurant still sees far less footfall away from the summer months.
Improving visitor management and minimising environmental impact of visitors	All the investments have contributed to improving visitor flows through better infrastructure, access and signing. New facilities have sought to minimise carbon/resource use. However, reducing existing negative environmental impact has been relatively marginal to the projects and to the outcomes.
Improving the quality of the coastal environment as a key resource for coastal tourism	This has been a strong result overall across the CoE. Amenity improvements have been clear and tangible, with consequent benefits for the visitor experience in the short and long term.
Contributing to wider benefits and regeneration	Most of the investments have been seen as an important part of wider regeneration activity, notably in Milford Haven, Tenby and Saundersfoot. The investments have been broadly recognised and welcomed as such. Coppet Hall, for example, has been welcomed by a local hotelier as “an important contribution to the long term strategy for the

	village”.
Building on Pembrokeshire’s unique sense of place	The focus on coastal themes has served to underpin Pembrokeshire’s brand and sense of place. This has been helped by focusing on locations of significant historic and industrial coastal heritage. The food dimension adds a contemporary twist to this.
Supporting local communities	While there has been appropriate local consultation during design and development of the projects, the level of community engagement and participation appears to have been relatively limited. In Solva and Porthgain, local feedback suggests that some local businesses have been uncertain about the benefits of the investments.

Source: Business plan and observation/consultation

Outcome Targets – Original and Achieved

9.37 The Project Profile for the Pembrokeshire CoE quotes a target figure for ‘visits’ and an achieved figure. The target is given as 92,914 and the achieved figure as of June 2015 is given as 354,242. Consideration of the basis for these figures reveals that they are incomparable. The target figure contains figures for Tenby while the total does not. The latter figure is largely made up of estimated total visitor numbers for Solva and Porthgain, which appear to have been quoted on a different basis to the figures in the target. There is confusion between estimated actual visitor numbers and estimated uplift in visitors due to the investment.

9.38 The business plan in 2013 gave a target of 244,145 visits. This appears to have been an estimate of the potential uplift in visits as a result of the project. It was arrived at by:

- Estimating baseline visitor numbers at the five CoE locations, by taking the total estimate of visits to Pembrokeshire in 2008 (STEAM) and using results from the Pembrokeshire Visitor Survey to estimate the number of visitors going to each location. This is a very crude process as visitor recall is often flawed.
- Adjusting the Tenby figures by the proportion of visitors known to take boat trips there.
- Discounting the total by 90 per cent to estimate a target number of additional tourists that could be attributed to the CoE project. This figure, suggesting that the project would result in a 10 per cent growth in visitor numbers, is entirely arbitrary.

- 9.39 The result is that there is no robust baseline estimate of visitor numbers nor any ex-post measurement to compare with this. There is also no basis for estimating the uplift in visitors, i.e. the response to investment actions, directly.
- 9.40 Some information is available for total visitor numbers at the locations that have been the subject of the investments. In their analysis of the E4G programme, Cardiff University estimate the annual visitors to Solva (2012/13) to be 96,300 and to Porthgain to be 120,800, with seasonal visitors to Coppet Hall (May – Sep 2013) as 11,530. For the period April to October 2014, 31,752 ticket purchases were reported for Solva car park. Based on an average party of 2.8 (from the Welsh Economy Research Unit), this represents an annual seasonal total of 88,910 visits to Solva. Boat movement figures for Milford Haven dock lock indicate a total of 3784 boat movements over the five months since opening, an increase of 3.2 per cent on a comparable period in 2014, despite a summer that has been quite challenging weather wise. This included 2104 visiting boats.
- 9.41 The consultations with project officials and stakeholders as part of this evaluation point to consideration of the actions taken suggest that the 244,145 target for new visits was unrealistic and is unlikely to have been met. Most of the investments were not focused on generating new visits but rather on better management of existing visitors and improving overall experience. The work in Solva, Porthgain and Tenby, for example, has been based on improving amenities not on increasing capacity or providing new attractions.
- 9.42 The 2013 business plan included a number of SMART objectives. It can be concluded that:
- The target to increase in the number of visitors to the supported sites by 5 per cent by December 2015 is unlikely to have been achieved based solely on the activities of the project.
 - The target to increase average spend per visitor to Pembrokeshire by 8 per cent by December 2015 was highly unrealistic as an outcome that could be attributed to this project and a poor indicator and target to have selected.
 - The target to increase the proportion of visitors expressing satisfaction with visitor facilities by 10 per cent by December 2015 has not been measured. An increase in satisfaction should be expected, but a general uplift of 10 per cent is unlikely, partly because visitor surveys tend to show overall visitor satisfaction in the UK

as already high. Measurements of satisfaction would need to focus on the actual facilities improved to give meaningful results.

Impacts

9.43 This section considers long term impacts of the project and its legacy.

Economic Impacts

9.44 The Welsh Economy Research Unit have estimated Gross Value Added and jobs (FTEs) attributable to visits to the sites in Solva, Porthgain and Coppet Hall, based on the visitor numbers (provided above). These results are shown in Table 9.8. These figures show the level of economic impact attributable to this amount of overall site visits. In Solva and Porthgain they can be taken as an indication of the economic impact that the investment in the car parks and visitor amenities has helped to underpin (the overall impact at Coppet Hall is not fully covered here). This does not show the level of new or uplifted GVA or jobs, if any, that was created by the investments.

Table 9.8 Outcomes Attributable to Site – 2013

	Porthgain	Solva	Coppet Hall
Visits	120,800	96,300	11,530 (part year)
Gross Value Added (£m)	£1.566	£0.669	£0.175
Employment FTEs	89	37	9

Source: Cardiff University WERU

9.45 In Solva and Porthgain the purpose of the investments made by the PCNP was not to increase visitor numbers in the short term nor to increase capacity. Enterprises in both villages have indicated that they have not seen an increase in levels of business since the investment was made. In Solva, the presence of car park attendants has been seen as beneficial in that they provide a welcome and information for visitors, but there is concern that visitor numbers and spend could go down as a result of car park charges. In Porthgain, businesses have reported some benefit from the improved lighting but otherwise no change. The economic benefits from the investment in better infrastructure could simply come from good management and maintenance, enabling the villages to continue to receive visitors safely over time.

- 9.46 In Tenby, short term economic impacts from the improvements in Tudor Square and the harbour have not been measured or reported and were not the main purpose of the investments. Economic benefits are anticipated over time from improvement of the public realm and consequent quality of the visitor experience. The improvements appear to have been welcomed by representatives of the tourism sector as contributing to the quality of Tenby as a destination.
- 9.47 In Coppet Hall there has been a direct effect from the development of the new building with the Coast restaurant, shop and kiosk creating up to 25 FTEs. Hean Castle Estate confirm that this development would not have happened without the ERDF funding and the Coast restaurant has indicated that the operation would not have been viable as a fully commercially funded development. The quality of the restaurant and, in particular, the chef acquired was not planned for but has led to a significant but unmeasured benefit to the area through the publicity that the restaurant has generated and the ability to attract a new market. The beach front location and creative design of the restaurant has been a strong positive factor in this¹², enabled through the financial assistance. Feedback from the tourism trade suggests that the impact has been positive in Saundersfoot and elsewhere in Pembrokeshire, strengthening the perception of the destination brand and its reputation for quality and food. The facilities at Coppet Hall beach are also seen as beneficial to Saundersfoot, extending the village's capacity and the quality of the offer, with a consequent change in the profile of visitors to the area. These impacts have not been quantified.
- 9.48 In Milford Haven the dock lock has enabled more boats to be moved in and out of the marina more easily, with a quicker locking process and frequent access times throughout the day and for a greater part of the year, this increases the appeal of the marina for permanent moorings and to visiting boats. In the short term it appears that local shore-based businesses alongside the marina have yet to see an increase in footfall and performance, although an increase in the number of visiting boats and visitors coming ashore has been observed over the summer. With significant further investment to be made, a general economic uplift in the area can be expected over time.

¹² An example of the attention to detail is the introduction of a curve in the shape of the façade facing the beach which has led to a much more striking and appealing design but in itself added significantly to the cost.

Environmental and Social Impacts

9.49 A number of positive environmental and social impacts can be identified from the project:

- The requirements of the fund and the financial support it provided meant that Hean Castle Estate was able to include a higher level of insulation and other environmental measures in the building at Coppet Hall than would otherwise have been the case, at considerable additional cost.
- All projects have led to a tidier and cleaner local environment, benefitting residents as well as visitors. Separation of people and cars in Tenby Tudor Square has added significantly to the appeal of this central space.
- Attendance at the environmental management training day for businesses at Stackpole was good (over 50) and response to the practical advice given was positive. However, this appears not to have been measured or followed up.
- There has been a strong emphasis on visitor safety in the improvements in Solva, Porthgain and Tenby.
- Access and car parking for people with disabilities has been improved. Aspects of the public realm improvement have been sensitive to different needs, such as use of paving materials in Tenby that assist people with visual impairment. Coppet Hall Visitor Centre is fully accessible, with a lift to the upper floor.

Legacy and Long Term Sustainability

9.50 This project has been mainly about creating improvements to the coastal environment and facilities to enable the tourism industry to continue to deliver benefits in the long term. The investments and improvements undertaken at all the sites will leave a lasting physical legacy.

9.51 The most significant effects appear to be:

- The considerable engineering work on the Milford Haven dock lock, which should enable this location to benefit from the marine tourism market which is likely to grow.
- The high quality building at Coppet Hall also leaves a physical legacy; and the restaurant should remain as a sustainable business. The restaurant operators at both Coppet Hall and also alongside Milford Marina have drawn attention to the continuing challenge of running a profitable enterprise in such a seasonal destination as Pembrokeshire.

Conclusions and Lessons

9.52 The main conclusions to be drawn from our analysis are that:

- Following necessary changes from the original concept, the project has delivered all aspects of the intended activities and outputs.
- The six investments across five sites are individually unrelated and do not really hang together as a single coherent 'centre of excellence'.
- The project has been fully in line with objectives to improve the quality of the coastal environment as a resource for tourism.
- The overall benefit is seen in the long term legacy of physical infrastructure and amenity improvement, which has been substantial.
- Targets and measurement relating to visits and spend have been confusing and poorly conceived and delivered.
- Short term economic uplift from increases in visits appears to have been limited but was not the main purpose of the investments.
- Particular and unforeseen benefits have arisen from the high quality of delivery at Coppet Hall, influencing perceptions of the destination as a whole.
- While there has been local consultation relating to each investment, engagement with the Pembrokeshire DMO and tourism trade in general has been limited and marketing activity has not been coordinated.

9.53 Lessons for the design, delivery and management of interventions include:

- Be fully aware at the outset of circumstances that could affect delivery (e.g. technical and planning issues which may cause aspects of the project to be amended). This suggests a need for stronger project management and risk management processes.
- Be prepared to address cash flow problems in the case of delays in payment of grant.
- Select targets and indicators that capture the outcomes of the investments and activities and ensure that they are clear and properly measured.
- Ensure ancillary management and project support activity, such as marketing and environmental training, is properly planned, timed and integrated.
- Pay attention to small details, such as the possible impact of car park charging patterns on visitor spend.

10. Coastal: Saundersfoot

Project Background and Description

Rationale

- 10.1 The seaside village of Saundersfoot is located in the south east of Pembrokeshire Coast National Park, facing onto Carmarthen Bay, on one of the most popular stretches of coastline in Pembrokeshire. Now a holiday resort, Saundersfoot developed in the 19th century as an export point for locally-mined coal. With its large sandy Blue Flag beach and shallow water, Saundersfoot is ideal for safe bathing and popular with families. The harbour, adjacent to the beach, is home to a range of small commercial and leisure craft.
- 10.2 It was not possible for improvements to Saundersfoot Harbour to be included within the original funding agreement between WEFO and Visit Wales to support a programme of investment in Coastal Tourism Centres of Excellence. It was not put forward as a bid in response to Visit Wales's initial invitation issued in July 2009, but was included as a much later addition. A separate project in Saundersfoot, at Coppet Hall beach, was included as part of the Pembrokeshire Coast Centre of Excellence.
- 10.3 In 2005, the Harbour Commissioners were encouraged by Welsh Government to modernise their management structure. This eventually led to the passing of The New Harbour Order 2011 and creation of the Trust Port of Saundersfoot, clarifying land ownership and opening up the possibility of borrowing money and applying for funding.
- 10.4 The new Board of Commissioners was able to consider transforming a traditional commercial harbour into one that encompasses the requirements of the modern leisure, professional and sporting marine sectors, ensuring the sustainability of the Trust Port. As a Trust Port, all revenue generated is re-invested back into the harbour to continually improve facilities and operation.
- 10.5 A five year strategy document, *Sailing Ahead*, was signed off by the Harbour Commissioners in April 2012, with the following Mission Statement:
- To create and maintain a nationally recognised 'Safe Haven' for local and visiting yachtsmen which will be a centre for excellence in terms of management, welcome and stakeholder communication.

- To encourage growth through commercial development, watersports, in-house marine facilities, training and sustainable tourism to the benefit of the wider business and social community.

- 10.6 Saundersfoot Harbour has been operating successfully, with its 208 moorings fully occupied each year. Recent patterns suggest that, without a change in capacity, it will not satisfy demand. It was also a stated aim of 'Sailing Ahead' to maximise the time that berth holders are able to spend on the water, extending opportunities from two hours either side of high tide to all states of the tide. Finally, Sailing Ahead also stated an ambition to enhance and modernise facilities for the community as a whole.
- 10.7 The structural changes that had been introduced enabled the Trust Port of Saundersfoot to put forward a business case to Visit Wales in 2014 for inclusion as a Coastal Tourism Centre of Excellence. The document 'Trust Port of Saundersfoot Phase 1 Development 2014 v6' refers to inclusion of Saundersfoot into the Centre of Excellence scheme "facilitating the Trust Port to realise its full potential and increase the quality of offer to current and future visitors".
- 10.8 Saundersfoot Regeneration Strategy (2008) provides the overall strategic context for development, aspiring to link all attractions including the beach, harbour, foreshore, heritage, natural environment, car parking, retail and entertainment, as a co-ordinated network of opportunities. This Phase 1 development is seen as the catalyst for two further phases of development, Phase 2 Marine Centre of Excellence and Phase 3 Ocean Square.

Project Description

- 10.9 The Saundersfoot Harbour Centre of Excellence comprises six elements designed to increase water access times for boat users, enable the harbour to extend its boat operation from 200 to 300+ boats and to extend the season of operational activity for boat and shore-based users. The suite of projects is providing the following new facilities:
- Outer harbour visitor pontoons
 - Outer harbour late tide moorings
 - Inner harbour landing pontoon
 - Dry boat racking system
 - Outer harbour slipway, providing early tidal access for racked boats

- Decking over sluice as a public/events venue

10.10 In addition, the project was designed to create a new walkway around the perimeter of the harbour, connecting the sluice decking through to the inner harbour landing pontoon and the new slipway.

Locations

10.11 This Centre of Excellence is provided on one site in Saundersfoot. All new facilities are in the immediate environs of Saundersfoot Harbour which, although situated towards the southern end of the village, provides an important focal point for the village. Road access is via the B4316, with a pay and display car park offering 387 spaces situated on the harbour, fronting directly onto the beach. Saundersfoot is a request stop on the branch railway line to Pembroke Dock, although the station is one mile from the centre of the village. Saundersfoot is also accessible by bike, with Celtic Trail West (NCN4) passing through the village.

10.12 Saundersfoot is in the county of Pembrokeshire and within the Pembrokeshire Coast National Park.

Table 10.1 Location of Investment Projects

Investment	Town and Postcode	Local Authority District
Outer Harbour visitor pontoons and moorings	Saundersfoot, SA69 9HE (at sea)	Pembrokeshire County Council
Inner Harbour landing pontoon	Saundersfoot, SA69 9HE	Pembrokeshire County Council
Dry boat racking system	Saundersfoot, SA69 9HE	Pembrokeshire County Council
Outer Harbour slipway	Saundersfoot, SA69 9HE	Pembrokeshire County Council
Decking over sluice	Saundersfoot, SA69 9HE	Pembrokeshire County Council

Source: Business Plan

Development

10.13 Planning permission for the development, including demolition of disused buildings at the far end of the harbour, was granted by Pembrokeshire Coast National Park Authority. The funding agreement for £463,500 of European Regional Development Funding (ERDF), based on a total project cost of £927,000, was announced by First Minister Carwyn Jones during a visit to Saundersfoot Harbour in January 2015. It

was also announced that additional funding of £235,000 had been secured from the Tourism Infrastructure Support Scheme.

- 10.14 Phase 1 was officially opened by the Deputy Minister for Culture, Sport and Tourism in July 2015, at which point decking over the harbour sluice decking and Inner Harbour visitor pontoon were complete, swing moorings were in position and the sinkers which secure the outer harbour pontoons had been dropped and were being allowed to settle. Remaining facilities were in various stages of completion. By the end of August, the visitor pontoons were in operation, and the dry boat racking and slipway were undergoing testing.
- 10.15 The project has been led by the Port Trust as lead applicant. There were no other formal partners to the project.

Goals for the Project

- 10.16 The Business Plan set out the following goals for the project:
- To establish a reputation for Saundersfoot Harbour as a high quality international destination for marine tourism.
 - To realise the full potential of Saundersfoot Harbour and increase the quality of its offer to current and future visitors, throughout the year.
 - To improve opportunities to access the water.
 - To create new skilled job opportunities.

Project Inputs

Financial Inputs

- 10.17 The original project costing as specified in the 2014 Business Plan was £927,000, with ERDF funding of £463,500. A separate grant of £235,000 was made available by Visit Wales in 2014/15 to Saundersfoot Harbour Commissioners through the Tourism Investment Support Scheme.
- 10.18 By June 2015, total project costs had risen to £949,117, an increase of £22,117. The claim to ERDF remained the same, at £463,500. The TISS claim was reported as £199,330. The main difference in the funding profile appears to have been an increase in private capital made available by the Port Trust.

Table 10.2 Funding Profile and Outturn

Funding Source	Business Plan 2014	Claim to June 2015
ERDF	£463,500 (50%)*	£463,500
CoE Lead (cash)	£185,400 (20%)*	£264,170
Visit Wales Tourism Investment Support Scheme	£235,000	£199,330

Source: Business Plan and Project Profile. *The Business Plan refers to these two sums combined as 80% **There is a funding shortfall which is not explained in the Business Plan (Appendices not provided)

10.19 Information has not been provided on how the final costs and funding are broken down between elements of the project, such as project management and marketing. Information on the anticipated distribution of costs amongst the various elements of the project is contained in the business plan, as follows. Although it is known that there was an increase in the final total, no information has been provided on how the preliminary costs of each individual element relates to the final outturn.

Table 10.3 Anticipated Cost Breakdown as Shown in Business Plan (2014)

	Preliminary cost
Outer harbour visitor pontoons	£167,000
Outer harbour visitor swinging/late tide moorings	£20,000
Inner Harbour landing pontoon	£90,000
Dry boat racking system	£85,000
Outer Harbour slipway	£180,000
Decking over sluice as a public/events venue	£385,000
Total	£927,000

Source: Business Plan

Resources

10.20 The Port Trust arranged funding for this project through a bridging loan facility agreed with its bank. Early cash flow projections took account of the need to pay for works upfront, grant being claimed retrospectively, with an arrangement to draw down funds as and when required. A loan to provide the balance of the match funding was arranged to be repaid over ten years, with a facility to make early repayments.

- 10.21 By far the majority of the funding was allocated to capital works. It is known that Roger Casey Associates provided Civil and Structural Engineering Design and Project Management services to Saundersfoot Harbour for Phase 1 of their development, but separate costs have not been identified.
- 10.22 Income is obtained by the Port Trust through harbour charges such as mooring fees, visiting boats, charges for racking and commercial licences. The Port Trust is also responsible for managing the pay and display car park.

Activities and Processes

- 10.23 The Saundersfoot Harbour Empowerment Order 2011 clarified a number of issues surrounding land ownership. Maps accompanying the Order showed the land that may be acquired compulsorily by the Saundersfoot Harbour Commissioners and the limits of Saundersfoot Harbour. This paved the way for site acquisition and demolition of the derelict Jones and Teague buildings at the far end of the harbour and the relocation of a number of commercial kiosks to a more prominent position on the harbour front. This opened up a new area of land on which new harbour facilities could be positioned, and a new access route. At the same time, an investigation took place into the historical operation of the sluice, designed to prevent the build-up of silt in the harbour entrance. This provided reassurance that new decking could be installed over the sluice without interfering with its operation.

Table 10.4 Activities Delivered

Project	Description of Activities Delivered
Outer harbour visitor pontoons	Installation of a pontoon mooring facility that is afloat at all states of the tide to meet a growing demand from boats transiting the Bristol Channel. The modular pontoons, which are anchored to the sea bed, have been designed with fin keel yachts in mind and have capacity to support in excess of 3000 boat movements a year.
Outer harbour visitor swinging/late tide moorings	Installation of ten visitor swing moorings in 2015, with a planned increase to 15 in 2016 and 20 in 2017 as demand increases as expected. Bookable in advance for up to two weeks, these moorings are available at all states of the tide and enable holidaying families to have their boat permanently on the water during their stay. They also reduce car and trailer movements and vehicle congestion at peak times.
Inner Harbour landing pontoon	Installation of an access ramp onto a new pontoon structure, to replace a flight of worn and slippery harbour steps. The new facility enables safe access to moored leisure vessels and to the popular commercial boats trips operating out of Saundersfoot. The new arrangement is of benefit to all users but especially to those who are less mobile.
Dry Boat racking system	Installation of a modular two to three tier racking system against the stabilised cliff face at the far side of the harbour. Up to 80 boats of <8m in length can be stored out of the water, with a further 20 longer boats stored at ground level. Racking is supported by a launch and recovery service delivered by a specialist harbour team using a forklift and hydraulic unit. The system is designed to lessen wear and tear and reduce the need to use antifouling paints. This is expected to have a significant impact on the current waiting list for harbour moorings.
Outer Harbour slipway	Construction of a new slipway located on the site of the former Jones and Teague site at the eastern end of the harbour, giving uninterrupted access to the water line. Access to the water is increased from two hours either side of high tide to four hours either side of high tide. The slipway provides the launch point for boats retrieved from the dry racking system, as well as to other vessels.
Decking over sluice as a public/events venue	The sluice is vital to the operation of Saundersfoot Harbour, impounding 900,000 gallons of seawater each tide movement which, when released, removes sand deposits that gather within the harbour mouth channel. When empty of seawater, the sluice is an eyesore. The modular decking, which does not interfere with operation of the sluice, creates a valuable and versatile open space which will be an asset to the Harbour and the community of Saundersfoot.

Variance from Original Concept

- 10.24 The project has varied from its original business plan in one regard. The budget did not allow for the sluice to be fully decked, as originally planned. Piling the area to support the decking proved to be more demanding than anticipated. However, the half decking has still provided a significant and spacious open area. One side has also retained open access to the water, allowing continuation of the traditional activity of crabbing for which Saundersfoot is well known. A new safety rail has in fact improved conditions for this activity and won round some of those who expressed alarm at the original proposal to deck the area.

Marketing and Communication

- 10.25 Saundersfoot Harbour Commissioners promote the new facilities through their website, supported by a Facebook page. A new leaflet 'Welcome to Saundersfoot Harbour' was produced in time to take to the Southampton Boat Show in September 2015, and distribution will continue to harbours around the Bristol Channel, Republic of Ireland and further afield. An automated booking system will be introduced to the website for 2016, allowing visiting boats to make advance bookings for pontoons, moorings and the five existing visitor berths in the Inner Harbour.
- 10.26 Harbour Commissioners have sought to work closely with the local community in Saundersfoot. Saundersfoot Chamber for Tourism endorsed the funding application, on behalf of the 52 established voluntary groups and associations keen to support the village and the harbour. A series of stakeholder meetings about plans for development in the harbour area took place in December 2013, July 2014 and June 2015 to engage people in the local community.

Environmental Management

- 10.27 The original Business Plan made little reference to environmental management issues. Attention is drawn to the fact that the dry boat racking system will reduce the need to use antifouling paints, often considered a source of marine pollution. The Plan also highlights that certain components can be sourced from Welsh and/or UK suppliers/manufacturers and the availability of Pembrokeshire/Welsh contractors to undertake construction work.

- 10.28 Environmental management has been a consideration. Saundersfoot Beach and Harbour are located within Carmarthen Bay Special Area of Conservation, requiring special care and attention to be made to environmental impacts and disturbance to wildlife.
- 10.29 A Marine Licence Application was made to Natural Resources Wales in April 2015 for 'pontoon construction' in connection with the Outer Harbour Visitor Pontoons which are located beyond Mean High Water, and determined in July 2015. This covers matters such as the design and materials of the structure and other impacts on the environment. The pontoons are removed from the water in the winter months, thus avoiding interference with patterns of winter migration.
- 10.30 Construction of the new slipway has been carried out concurrently with improvements to the sea defence wall. Harbour Commissioners worked with Natural Resources Wales to reduce the impact of the slipway itself, which was reconfigured to avoid encroaching onto sand. The start of the slipway was pulled back within the compound, enabling the entire drop to be achieved above the Mean High Water line. Additional costs were incurred due to changes required in the design of the sea wall. Natural Resources Wales were also required to sign off on the new lock gates. In addition, submerged debris was cleared away from the beach and harbour.
- 10.31 Harbour Commissioners promote the Pembrokeshire Coastal Forum's voluntary Code of Conduct for the use of boats in marine environments, including avoiding excessive speed and adhering to recommended behaviour when approaching wildlife.

Strategic and Operational Management

- 10.32 The project has been overseen by the Board of Harbour Commissioners, led by the Chief Executive Officer. A new board of eight Harbour Commissioners was appointed in 2011, each chosen for their relevant experience, skills and contacts. The CEO joined the Port Trust in April 2013, bringing experience of project management.
- 10.33 An advisory group acting as a 'sounding board' for Saundersfoot Harbour and consists of representatives from Pembrokeshire Coast National Park Authority, Pembrokeshire County Council, commercial fishing and trip boat operators, Saundersfoot Yacht Club, the Community Council and local residents.

10.34 Harbour Commissioners dealt directly with Visit Wales in navigating the programme of Coastal Centres of Excellence. Design and delivery of the project involved working directly with Welsh Government, British Ports Association and Pembrokeshire Coast National Park.

10.35 The level of budget was sufficient. The budget matched closely the requirements of the project. Accurate costings were helped by the fact that many budget items were modular units that could be bought 'off the peg'. Harbour Commissioners navigated the requirements of E4G funding to deliver a complex project within a remarkably short space of time (from 2014) and acknowledge the support that they have received from Visit Wales.

Outputs

Original and Achieved Output Targets

10.36 The table below presents the quantified output targets as set out in the Business Plan and compares them with the outputs achieved to June 2015.

Table 10.5 Achievement of Overall Output Targets

Output Targets:	Business Plan 2014	Achieved June 2015	% Achievement of Target
Initiatives developing natural, historic environment	n/a	n/a	
Managed access to countryside or coast (km)	0.40	0.40	100%
Enterprises assisted – directly	n/a	n/a	

Source: Project Profile

10.37 New managed access to the coast is in the form of a walkway around the perimeter of the harbour, connecting the new slipway and access to the inner harbour pontoon through to the sluice decking, with new safety rails on exposed edges.

10.38 The direct jobs created have been enumerated by the Harbour Commissioners. This amounts to 5 of the anticipated 9 FTEs:

- One Deputy Harbourmaster
- Three Harbour operative staff
- Seasonal staff working contracted hours

10.39 The remaining jobs are expected to come from the introduction of a commercial amphibious RIB designed to carry ten persons, including crew, which will operate out of the harbour using the new slipway, offering trips to Tenby and sea safaris. Launch has been delayed due to a delay in delivering the vessel, which is a new design to the UK.

Outcomes

General Outcomes - Intended and Achieved

10.40 The business plan set out a number of outcomes (results) that the project should deliver. These are summarised in the table below, together with a comment on the extent which they have been achieved, based on consultation with the lead body and local stakeholders.

Table 10.6 Achievement of General Outcomes

Outcome Intended	Level of Achievement
To establish a reputation for Saundersfoot Harbour as a high quality international destination for marine tourism.	There is a strong feeling that the Phase 1 investments mark a significant change in the facilities offered by Saundersfoot Harbour, with a consequent impact on its reputation for marine tourism. Saundersfoot is proud of its offer, both on and off shore, and this has been captured in the new promotional leaflet which is selling the excellent facilities for boat users combined with a special holiday location. "Find us by sea or road. We will be delighted to meet you whichever way you find us". The opportunity has been grasped to take this message to audiences such as those visiting Southampton Boat Show. A steady build in market awareness is under way, with a carefully planned programme of promotion, first to more local harbours around the Bristol Channel. This is to be followed by targeting those whose voyages can be supported by a safe haven and quality stopover at Saundersfoot, including those making for the Republic of Ireland, Cornwall and eventually further afield.
To realise the full potential of Saundersfoot Harbour and increase the quality of its offer to current and future visitors, throughout the year	The new facilities on offer have not only increased the capacity of Saundersfoot Harbour to welcome and handle additional boats, but also to handle boats of an increased size and quality. Dry racking will reduce wear and tear on boats, and additional facilities will enable visiting boats to keep their boats in permanent water.

To improve opportunities to access the water	Access to the water has been significantly improved in a number of ways. The new visitor pontoon in the Inner Harbour is suitable commercial passenger boats, including those offering fishing trips. It has given extra mooring space to load passengers, easily and safely, and additional time as loading can begin before the pontoon is even floating. The access ramp and stability of the pontoon has made boat trips accessible and appealing to a much wider group of users, and business has grown as a result. In calm conditions, the Outer Harbour pontoons have also enabled commercial passengers to be transferred safely and efficiently to tenders when working from the beach at low tide. Visiting boats now have facilities to moor at all states of the tide. The dedicated handling facility will enable boats from the dry boat racking system to be launched from the new slipway over a much wider range of the tide. Facilities have been retained to continue the tradition of crabbing in safer conditions than before.
To create new skilled job opportunities.	A senior member of staff is needed to be on duty throughout daylight hours to oversee the safe and efficient operation of the harbour, including boat movements and handling. Skilled operatives and seasonal casual staff have been taken on to provide a well-managed service to harbour users.

Source: Business Plan and observation/consultation – OFFER LETTER NOT SEEN

Outcome Targets – Original and Achieved

10.41 The business plan and offer letter identify a small number of quantified outcome targets in terms of visitor numbers and total jobs created.

Table 10.7 Achievement of Outcome Targets

Outcome Targets:	Original	Achieved June 2015	% Achievement of Target
Visits (net additional)	15,280	TBC	
Jobs Created (total including indirect)	n/a	n/a	

Source: Project Profile

10.42 It is not clear how the original target of 15,280 visits was to be measured. The initial signs for visits resulting from the new facilities (as of October 2015), are that the Outer Harbour visitor pontoons have received 37 overnight bookings and 600 daytime users for which no charge has been made. Thirty spaces have been made available in the dry boat racking system for next year, and all have been taken. The decking, which has created a new open air events space at the heart of the village,

hosted a number of successful events in August, and a 'Big Bang' weekend at the end of October. Anecdotally, car parking over October half term generated an additional £3000 revenue. The value of the decking will come in its ability to support events designed to extend the season into the shoulder months, once all harbour works are completed. A laser counter will be installed to aid future monitoring.

Impacts

Economic Impacts

- 10.43 Visit Wales's investment in Saundersfoot Harbour took place too late for inclusion in the economic impact assessment exercise undertaken by the Welsh Economy Research Unit. At this stage, little evidence is available other than that reported in the Outcomes section above.

Environmental and Social Impacts

- 10.44 A number of positive environmental and social impacts can already be identified from the project:
- High quality new facilities have added significantly to the amenity of Saundersfoot and to its attractiveness as a place to visit.
 - Two eyesores have been removed from the harbour area: the former Jones and Teague site has been cleared and the decking has covered over the sluice.
 - Harbourside kiosks have been moved to a more prominent location and given new facilities.
 - The consultees as part of this evaluation anecdotally reported a positive feeling in the village associated with this investment and that returning visitors are delighted to see the changes that have been made.
 - The improvements in access created with the installation of the Inner Harbour pontoon has made it possible for the less mobile to join boat trips in a way which was previously not possible. Plans to install a hoist on the pontoon will further extend these opportunities.

Legacy and Long Term Sustainability

- 10.45 Consultees reported that there is acknowledgement that Saundersfoot is fortunate to have seen this investment and that "This means everything to Saundersfoot". Money is being spent in Saundersfoot and 'people are taking notice'. There is a

strong belief that taking the harbour upmarket will have a spin-off effect in the wider village.

- 10.46 The quality of the visitor offer has been increasing, not just at the Harbour but also at Coppet Hall Beach, through Pembrokeshire Coastal Tourism Centre of Excellence, backed up by further investment by the Hean Castle Estate. Saundersfoot Chamber for Tourism is already aware that the village needs to be thinking ahead and be preparing for these new customers. Saundersfoot Harbour Commissioners have continued to move towards introduction of Phase 2 of their plans, including a Marine Centre of Excellence.

Conclusions and Lessons

- 10.47 The main conclusions to be drawn from the above analysis are that:
- The project has delivered all aspects of the intended activities and achieved this within a very tight timescale.
 - An experienced project manager, backed up by a committed Board of Harbour Commissioners, has been successful in steering the project.
 - Innovation and ambition have been features of this project, and the risk taken by funders in backing it at such a late stage has paid off.
 - Being focused on a single site has helped to achieve real operational and visual impact.
 - There has been a clear strategy behind the design of the different elements of the project, which have come together as a coherent whole.
 - The project has been fully in line with objectives to improve the quality of the coastal environment as a resource for tourism.
 - Parallel investment at neighbouring Coppet Hall and elsewhere appears to have had a complementary effect.
- 10.48 Lessons for the design, delivery and management of the interventions include:
- The advantage of dealing with one main applicant and deliverer was beneficial for the project. The developments at Saundersfoot were able to proceed rapidly.
 - The need to work closely with the community throughout the process. Again this appears to have enabled the developments at Saundersfoot to proceed rapidly.

11. The Green Sea Programme

Project Background and Description

Rationale

- 11.1 The Green Sea Improvement Programme is related to the Coastal tourism project which seeks to realise economic potential by providing coastal enhancement and protecting and improving coastal infrastructure. The rationale relates to the significance of the coast of Wales to the visitor economy. The original documents relating to the Green Sea programme refer to data from 2006 which showed spending associated with visits to the coast amounted to some £648 million, nearly 40 per cent of the total tourism spending in Wales. In order to retain and grow this economic contribution, the programme was designed to enhance the quality of the visitor experience at Welsh beaches.
- 11.2 A further elaboration of the rationale states that by improving quality on the Welsh coast the project will assist in extending the tourism season and sustaining more jobs. It will also assist in the number of beach awards maintained and increased as a result of improved facilities, environmental quality, access and interpretation which has a direct impact on visitor satisfaction levels and visitor numbers.
- 11.3 Results of the Visit Wales Environment Awareness Survey (Beaufort Research, 2001) were quoted, which showed that for 78 per cent of visitors a high quality beach was important in influencing a decision to holiday in Wales. The research showed clean beaches, toilets, car parking and water quality are important requirements for over 90 per cent of those seeking beaches. The Blue Flag Award Scheme was well recognised by visitors and for 70 per cent of visitors the Blue Flag designation was an important consideration in choosing a holiday destination.
- 11.4 The Green Sea Programme supports the objectives outlined in a number of strategic documents. These include the Visit Wales Strategy, Achieving our Potential, which called for improvement in quality, recognising that poor quality on the coast will critically damage Wales's offer and its reputation to visitors. More specifically, the programme supports the Green Sea Development Plan 2006-2015.
- 11.5 The programme builds in the work of the cross-sector Green Sea Partnership which was established in 1996 and brings together Visit Wales and other tourism, management and conservation bodies committed to safeguarding and enhancing the coastal environment of Wales.

11.6 A particular objective of the programme was to assist beaches in obtaining or retaining the Blue Flag award, which is assessed and awarded annually and covers 33 criteria relating to four topics: environmental education and information; water quality; environmental management and safety and services. While the focus and target was on Blue Flag, the programme is also relevant to the less demanding Seaside Awards and Green Coast Awards.

Project Description

11.7 The Green Sea Programme was divided into two for administrative purposes, with a number of individual local projects in each part involving improvements to access, facilities and information. The two parts of the Programme were called Green Sea North and North West Wales and Green Sea South and South West Wales. Hereafter they are referred to respectively as Green Sea North and Green Sea South.

Table 11.1 Components of the Green Sea Programme

Green Sea North	Green Sea South
Rhyl beach wheelchair access Penmaenmawr slipway improvements Llanfairfechan slipway improvements Abersoch trailer park Morfa Bychan beach toilets Fairbourne beach footway	Poppit Sands car park Newgale car park and access Saundersfoot Harbour toilets Pendine promenade Cefn Sidan beach toilets Aberavon promenade gardens and play area Port Eynon boat park, slipway, interpretation Pembrokeshire beaches litter recycling scheme Pembrokeshire Blue Flag award infrastructure Pembrokeshire Blue Flag information unit

Locations

11.8 The location of the projects is shown in Table 11.2 below.

Table 11.2: Location of Investment Projects

Project	Town and postcode	Local Authority area
North:		
Rhyl beach wheelchair access	Rhyl LL18 3AY	Denbighshire
Penmaenmawr slipway improvements	Penmaenmawr LL34 6NJ	Conwy
Llanfairfechan slipway improvements	Llanfairfechan LL33 0BY	Conwy
Abersoch trailer park	Abersoch LL53 7EY	Gwynedd
Morfa Bychan beach toilets	Porthmadog LL49 9YH	Gwynedd
Fairbourne footway	Fairbourne LL38 2PZ	Gwynedd
South:		
Poppit Sands car park	St Dogmaels SA43 3LN	Pembrokeshire
Newgale car park and access	Newgale SA62 6AS	Pembrokeshire
Saundersfoot Harbour toilets	Saundersfoot SA69 9HE	Pembrokeshire
Pendine promenade	Pendine SA33 4PB	Carmarthenshire
Cefan Sidan beach toilets	Pembrey SA16 0EJ	Carmarthenshire
Aberavon promenade gardens and play area	Aberavon SA12 6QW	Neath Port Talbot
Port Eynon slipway and interpretation	Port Eynon SA3 1NN	Swansea
Pembrokeshire beaches recycling scheme	County wide	Pembrokeshire
Pembrokeshire Blue Flag award infrastructure	Various locations	Pembrokeshire
Pembrokeshire Blue Flag award info unit	County wide	Pembrokeshire

11.9 The projects in Penmaenmawr, Llanfairfechan and Fairbourne are on the edge of Snowdonia National Park. The projects in Pembrokeshire are in Pembrokeshire Coast National Park. The project on Abersoch is on the edge of the Llyn Peninsula AONB and the project in Port Eynon is in Gower AONB.

11.10 The beaches recycling scheme in Pembrokeshire was enacted in 14 beach sites throughout the county. The provision of infrastructure, such as boardwalks and signage specifically relating to the Blue Flag award, occurred on Tenby South

Beach and Newgale (boardwalks) and at a number of other beaches. The information project was peripatetic, involving a specially converted towable unit.

Development

- 11.11 The total project cost was £925,931 for Green Sea North and £1,919,657 for Green Sea South, within which the ERDF contribution was respectively £438,213 and £959,820.
- 11.12 The Llanfairfechan and Penmaenmawr slipways were completed in 2012 and the other Green Sea North projects were completed in 2013. The Green Sea South projects were largely completed in 2013.

Goals for the Project

Formal goals for the programme were not set but the purposes were set out in the following statement. The Green Sea programme is designed to enhance the quality of the visitor experience at

- Developing the natural environment through improved access and enjoyment opportunities;

- Effective beach management addressing visitor management and conservation issues;
- The provision/improvement of appropriate infrastructure, facilities, access (i.e. car parking, access paths, visitor information, interpretation, toilets and environmental facilities etc.);
- Activities to improve resort management;
- Encouragement of 'sense of place';
- Enhancing the facilities and overall quality of Wales's coastal offer and addressing seasonality;
- Interpretation, sustainable visitor management plans and a sense of place supported by an improvement in the provision of information and interpretation.

Project Inputs

Financial Inputs

11.13 The breakdown of funding for the two parts of the Green Sea Programme is shown on Table 11.3.

Table 11.3 Funding Profile (£m)

Funding Source	Green Sea North	Green Sea South
ERDF	0.438	0.960
Other public sector	0.196	0.871
Private sector	0.148	-
Total	0.782	1.831

Source: Project Profile

11.14 The ERDF grant rate shown in the table relates to the overall programme including administration and revenue costs. The Other Public Sector sources budget line includes inputs from the five non-lead local authorities and from Pembrokeshire Coast National Park. The private sector capital relates to the contribution from Denbighshire County Council for the Rhyl project, as the source of their funds was RWE Innogy, developers of the Gwynt y Môr Offshore Wind Farm, which is located near the coast at Rhyl. There are some small discrepancies in the totals compared with other figures provided for total project costs.

11.15 The breakdown of project costs is shown in Table 11.4.

Table 11.4: Expenditure and Funding Outturn by Investment Strand, June 2015 (£s)

Investment	Green Sea North	Green Sea South
Capital expenditure (Estate)	845,509	1,810,216
Advertising and promotion	1,250	4,340
Project managers/staff	72,004	100,035
Travel and transport	806	
Administration – other	6,362	5,066
Total	925,931	1,919,657

Source: Project Profile

11.16 The total costs and ERDF grant contributions for the different projects/investments in the programme are shown in Table 11.5. The figures and percentages relate to spend on individual projects, mainly capital spend on infrastructure and facilities, and excludes central administration and marketing etc.

Table 11.5 Breakdown of Project Cost and Grant Contribution (£s)

Project	Total Cost	ERDF grant	Share of N/S grant	Share of Total Grant
Rhyl beach wheelchair access	217,500	91,785	27.0%	9%
Penmaenmawr slipway	96,000	40,512	11.9%	4%
Llanfairfechan slipway	154,000	64,988	19.1%	6.4%
Abersoch trailer park	56,126	16,926	7%	2.3%
Morfa Bychan beach toilets	236,837	99,945	29.3%	9.8%
Fairbourne footway	46,865	19,777	5.8%	1.9%
North total (excl central costs)	807,328	333,933	100%	33.4%
Poppit Sands car park	137,000	57,000	8.6%	5.7%
Newgale car park and access	48,325	20,339	3%	2%
Saundersfoot Harbour toilets	144,899	63,900	9.1%	6%
Pendine promenade	591,259	249,461	37%	24.6%
Cefan Sidan beach toilets	50,000	21,100	3.1%	2.1%
Aberavon promenade gardens/play area	385,000	135,368	24.1%	16%
Port Eynon slipway	83,007	34,015	5.2%	3.5%
Pembrokeshire beaches recycling	121,216	51,153	7.6%	5%
Pembs Blue Flag infrastructure/signage	24,655	10,404	1.5%	1.0%
Pembs Blue Flag information unit	12,000	5,040	0.8%	0.5%
South total (excl central costs)	1,597,361	647,810	100%	66.4%
Programme total (excl central costs)	2,404,689	981,713		100%

Source: Project Profile

11.17 The table shows that:

- Green Sea North had received about one third and Green Sea South two thirds of the grant assistance.
- The grant rate has been very consistent, with just two projects receiving a lower rate, one in the north and one in the south.
- The distribution of the grant between projects has been rather uneven. One project, the resurfacing and improvement of the promenade at Pendine has received almost one quarter of the total grant fund, which might be considered disproportionate in terms of seeking a geographical spread of benefit.

11.18 The Programme should be seen in the context of other work on beach management and bathing water quality coordinated by the Green Sea Partnership over the years which has received external funding. As with the Green Sea Programme, some of this work and funding has also helped beaches and coastal sites in Wales achieve recognition and awards, including the Blue Flag and other beach awards.

11.19 An earlier EU funding programme, under Objective 1, has assisted an initial round of infrastructure and management projects on Welsh beaches. The Coastal Communities Fund, Lottery and other funding programmes have also assisted past, current and future initiatives that are related to the projects in the Green Sea Programme.

11.20 The Green Sea Programme is related to the four Coastal Tourism Centres of Excellence (Aberdaron, Pembrokeshire, Swansea Bay and Saundersfoot) within the overall Coastal Tourism Project of Visit Wales receiving Environment for Growth (E4G) ERDF funding. Coastal and beach access, infrastructure, management and information work was also funded within the Centres of Excellence.

Activities and Processes

11.21 The Green Sea Programme has involved 16 individual projects as identified above. Some of these have had different components or stages within them. The main activities covered by each project are described briefly in Table 11.6 below.

Table 11.6 Activities delivered

Project	Description of Activities Delivered
Rhyl beach wheelchair access	A sizeable, gently graded ramp has been created that links the promenade and car park to the main beach, together with related surface improvements and new railings. In addition a small number of wheelchairs that are specially engineered for use on the sand (wide soft tyres) have been provided and are housed in the lifeguard station. The location was chosen in a safe swimming area. The facility also assists beach access for buggies and recreational equipment. The project complements a wide upgrading and regeneration scheme for Rhyl seafront.
Penmaenmawr slipway improvements	An existing slipway has been completely redeveloped including extension and resurfacing, providing improved and safer access for launching and receiving small boats and windsurfers. The approach to the beach has also been improved, including access for families and less mobile visitors.
Llanfairfechan slipway improvements	An existing slipway has been completely redeveloped including extension and resurfacing, providing improved and safer access for launching and receiving small boats and windsurfers. The approach to the beach has also been improved, including access for families and less mobile visitors.
Abersoch trailer park	A parking area for watercraft users to store their trailers has been provided at the back of the beach in the centre of the popular small resort of Abersoch, in order to remove trailers from the beach and so increase amenity and available space, especially at high tide.
Morfa Bychan beach toilets	Morfa Bychan (Black Rock beach) is one of the busiest beaches in Gwynedd. A new toilet block has been provided, replacing an existing facility that was in a poor state of repair.
Fairbourne footway	A new footway has been provided along the southern half of the beach foreshore, which has improved access for all visitors.
Poppit Sands car park	The existing large car park was resurfaced and upgraded, with a clearer access route, new boundary walls, planting and environmental enhancement. Provision of new interpretation for Wales Coast Path, seating and bike racks. The link to the neighbouring café has been improved in collaboration with the owners.
Newgale car park and access	The main car park has been resurfaced and improved and an overflow area integrated with it. The toilets have been improved and a new shower facility added, together with picnic benches and cycle parking. Access to the beach has also been improved.
Saundersfoot Harbour toilets	The toilet block has been refurbished with improved fixtures and fittings, new secure lockers and a shower facility.

Pendine promenade	The entire length of the promenade has been redeveloped, with complete resurfacing, feature seating, new railings and beach access, using high quality materials. This has created a new flat surface for users of all abilities along the whole seafront, together with an increased space for events. The project was in three phases and has led to further regeneration activity in the village.
Cefn Sidan beach toilets	The existing toilets have been upgraded, using energy and water saving technology, and a new parent and toddler unit has been provided.
Aberavon promenade gardens and play area	The sizeable green space behind the promenade has been redeveloped, with a new sunken garden incorporating shelters and seating, together with provision of a play area and other environmental improvements. Disabled access and related facilities have been incorporated in the scheme.
Port Eynon slipway and interpretation	A new slipway for boat launching has been provided in the context of a plan to improve management and safety on the beach and separate different uses. A range of new interpretation panels tell the story of the history and heritage of Port Eynon.
Pembrokeshire beaches recycling scheme	'Sea, Sand and Sort' is a comprehensive recycling scheme for beach litter across Pembrokeshire. It has involved the provision of a set of separated bins on hard standings at 31 beaches, together with a dedicated vehicle and collection scheme. Prominent location of the bins at beach entrances, together with clear branding and a marketing campaign with posters, website etc. has helped to promote the scheme to visitors.
Pembrokeshire Blue Flag award infrastructure	Seasonal boardwalks to facilitate beach access, especially over pebbles, have been provided at Tenby South and Newgale beaches. Ten further beaches have received new signage (finger posts) and notice boards promoting the Blue Flag award and providing other information.
Pembrokeshire Blue Flag information unit	A towable information unit has been provided, kitted out with display boards, leaflets and video covering the beach award programme, the awarded beaches, coastal wildlife, environmental messages etc. It is sometimes manned but also simply supervised by, for example, nearby lifeguards. It is used at different beaches, leisure centres, events etc. throughout the county.

11.22 All the above schemes have included some information provision for visitors in the form of notices and signage. This has included information about the Green Sea Programme funding together with varying amounts of information on beach awards, bathing water quality, visitor safety, beach zoning and uses, visitor facilities and the local environment.

Variance from Original Activities

- 11.23 There has been relatively little variance in the projects and activities carried out compared to the original activities. A few examples of minor difference include:
- Additional expenditure required on projects in Abersoch and Rhyl to cope with local conditions relating to sand encroachment
 - Rejection of an application for a project in Neath Port Talbot owing to an objection by CCW on environmental grounds
 - Removal of lighting from the work funded at Pendine, owing to an over-run on the first phase of the scheme as a result of an issue with the contractor

Marketing and Communications

- 11.24 For the Green Sea South programme, Pembrokeshire County Council established a dedicated website. This contains pages for each of the beaches assisted, providing general visitor information and also referring to the specific project and investments underway. The site is attractive and user friendly but is now outdated and has essentially served its purpose.
- 11.25 There was no equivalent website for Green Sea North. Here, some budget was spent on 'advertorial' features in local press.
- 11.26 Most of the projects have achieved media coverage, assisted by press releases, launch events and other media activity. No evidence was made available on any impact of this coverage.
- 11.27 There has been little integration with the overall marketing of the destinations.
- 11.28 Some specific marketing activity has been undertaken for individual projects. The Sea, Sand and Sort scheme in Pembrokeshire has its own marketing budget, branding and campaign. The provision of the mobile information unit in Pembrokeshire was, in itself, a communication project.
- 11.29 Communication with the local community was undertaken to varying degrees for all projects. The projects in Pendine and Aberavon involved a programme of community consultation at the outset.

Environmental Management and Equal Opportunities

- 11.30 Sustainability reports were prepared for Green Sea North and Green Sea South. These show how the required compliance with environmental and equality

standards have been met by each of the individual projects. In addition, a number of the actions taken were specifically aimed at reducing environmental impacts and at addressing equality through improving access for all people. These include:

- Use of carefully sourced materials and equipment, such as local wood for the board walks at Newgale and Tenby. The mobile information unit was converted from a disused Lifeguard trailer;
- Introduction of energy and water saving technology in the toilets in Cefn Sidan;
- Careful assessment of possible ecological impact on sensitive terrestrial and maritime habitats, especially at Morfa Bychan, Poppit Sands and Pendine;
- Provision of information and infrastructure to encourage visitors to protect the environment through their own activities, notably through the Sea, Sand and Sort recycling scheme and the information unit in Pembrokeshire;
- Investment and initiatives to encourage the use of environmentally friendly transport. Cycle racks were provided at some sites and a new bus stop was created at Poppit Sands. Part of the Green Sea South programme included training sessions for tourism businesses on providing information for visitors on green transport (run in October 2012 and February 2013). The Green Sea North programme did not include this as Conwy County Council did not have the capacity to handle it;
- Specific improvements in access for people with limited mobility. Wheelchair access to the beach was the main element of the Rhyl project. Improved access was a key part of the work on Pendine promenade and was also a feature of a number of other projects. In Aberavon, the Disability Access Group advised on the design of seats and other equipment.

Strategic and Operational Management

- 11.31 The Green Sea South and North programmes were managed, respectively, by the European Units of Pembrokeshire County Council and Conwy County Council. The individual projects were largely the responsibility of the respective authorities in which they were located, including Pembrokeshire Coast National Park Authority (for Poppit Sands).
- 11.32 A budget allocation was made by Visit Wales and two Invitations to Tender were issued, one for the north and one for the south. These were assessed by panels for the two parts of the programme, involving representatives of Visit Wales,

Countryside Council for Wales (now NRW), Keep Wales Tidy (responsible for Blue Flag and other beach awards) and Spatial Plan officers from Welsh Government.

- 11.33 The initial level of interest was high but in the end considerably fewer applications were actually received. It was felt that the relatively significant amount of match funding required (58 per cent) might have been one factor in this. The timetable may also have been off-putting. In the end, in both the south and the north, the level of applications matched well with the available budget. A second round enabled additional funding to be provided to some projects (Pendine and Aberavon).
- 11.34 Although the original Coastal Tourism Strategy lies behind the programme, the identification and selection of projects was not strategically driven. However, a number of the larger individual projects related to local plans or were part of wider regeneration programmes. Examples include:
- A sizeable regeneration plan and investment programme for Rhyl, including a focus on the seafront and the visitor economy;
 - A sea front development plan for Aberavon, which had already led to a complete regeneration of the previously run down coastal area with significant investment in the public realm. A Seafront Managers Group, involving the local authority and local businesses, has helped to manage this;
 - A scoping study of four villages in Carmarthenshire to identify needs and opportunities, leading to the Pendine Master Plan which has guided an economic regeneration programme in the village;
 - A comprehensive research study of the state of car parks in Pembrokeshire Coast National Park, which led to prioritisation of a number of them, including Poppit Sands (with two others supported through the Pembrokeshire Coastal CoE).
- 11.35 Overall, there appears to have been relatively few problems with the administration of the Programme. There was regular liaison between Visit Wales and Pembrokeshire and Conwy County Councils, who felt sufficiently supported. Individual project managers have also been positive about the help they had received from the administrators. In one case this was highly praised. However, there was a widespread feeling, in both the south and the north, that the requirements of the Programme were more bureaucratic and demanding than they needed to be, given the nature of the investments.

- 11.36 A further criticism was the amount of time available to complete the process, with respect to tenders and selection and also to implementation and completion. There was considerable pressure to ensure that the funding was spent. While it was not possible to point to very clear and specific problems arising from this, or opportunities missed, it was generally felt that the timetable had been a barrier to fuller consideration of strategic opportunities, assessment of projects and monitoring of outputs.
- 11.37 In the main, planning permission was not required given the types of investment involved. However, there were some exceptions. The fact that the hard-standings for the recycling bins in the Sea, Sand and Sort project required planning permission led to delays and it was felt that this could have been treated in a more streamlined way.
- 11.38 Progress with implementing the individual projects was mainly smooth. There was a particular hold-up with the Abersoch trailer park, owing to difficulties in negotiation with a private landowner. Projects were largely delivered within budget although consultations revealed that the Poppit Sands project overran.

Outputs

Original and Achieved Output Targets

- 11.39 The table below presents the quantified outputs, as original targets and as reported as being achieved by June 2015.

Table 11.7 Achievement of Overall Output Targets

Output Targets:	Target	Achieved June 2015	% Achievement of Target
<i>North:</i>			
Initiatives developing natural, historic environment	6	6	100%
Managed access to countryside or coast (km)	2.55	2.55	100%
Enterprises assisted – directly	0	0	-
<i>South:</i>			
Initiatives developing natural, historic environment	14	14	100%
Managed access to countryside or coast (km)	12.97	12.97	100%
Enterprises assisted – directly	12	9	75%

Source: Project Profile

- 11.40 The number of initiatives enumerated in the north equates to the six separate projects identified in this report (Rhyl, Penmaenmawr, Llanfairfechan, Abersoch, Morfa Bychan, Fairbourne). In the south, the fact that there are 14 reflects separate counting of the different phases in Aberavon and Pendine. A figure of 10 targeted and achieved initiatives would give a more accurate picture of the investment.
- 11.41 The lengths of managed access have been met as targeted. Evidence has been provided in reporting information submitted by the respective local authorities, supported by photographic evidence. The largest length of access was 5km of footpaths improved at Aberavon.
- 11.42 Providing direct assistance to enterprises was not a primary purpose of the Green Sea Programme. The figures shown in the table for enterprises supported simply refer to the number of enterprises that attended the training workshops on promoting green travel and transport options. These workshops were only run in the south. Numbers attending from the different project areas were: Cefn Sidan (2), Pendine (5), Port Eynon (2). While more attended from Pendine than anticipated, the total from Cefn Sidan was below target and the three businesses targeted from Poppit Sands did not attend.

11.43 Direct job creation was not an objective of the Programme. Only one of the projects set a target for the creation of direct jobs. This was Rhyl, where a post was identified for the provision of wheelchairs for beach users. This was provided, but it is only a seasonal part time position related to the lifeguard service.

11.44 It is also instructive to consider outputs in relation to the criteria for the Blue Flag award. The most relevant of these criteria are set out in the table below, together with an indication of which projects delivered outputs that particularly related to the criterion in question.

Table 11.8 Blue Flag Beach Criteria addressed

CRITERION	EXAMPLE PROJECTS FROM GREEN SEA PROGRAMME
ENVIRONMENTAL EDUCATION AND INFORMATION	
1. Information about the Blue Flag programme and other FEE eco-label must be displayed.	Pembrokeshire Mobile Information Unit and Blue Flag Infrastructure
4. Information relating to local eco-systems and environmental phenomena must be displayed.	Pembrokeshire Mobile Information Unit; Port Eynon; Morfa Bychan
ENVIRONMENTAL MANAGEMENT	
14. Sensitive area management.	Water management plan during construction of Pendine promenade; Pembrokeshire Mobile Information Unit
18. Facilities for the separation of recyclable waste materials should be available at the beach.	Sea, Sand and Sort (Pembrokeshire)
19. An adequate number of toilet or restroom facilities must be provided.	Morfa Bychan, Saundersfoot, Cefn Sidan
26. A sustainable means of transportation should be promoted in the beach area.	Enterprises assisted through Sustainable Travel workshop; Poppit Sands bus stop; cycle racks
SAFETY AND SERVICES	
30. There must be management of different users and uses of the beach so as to prevent conflicts and accidents.	Abersoch trailer park, Port Eynon slipway
33. At least one Blue Flag beach in each municipality must have access and facilities provided for the physically disabled.	Access improvements at Rhyl and Aberavon, boardwalks at Fairbourne, Tenby and Newgale, surface levelled on Pendine promenade, improved access to beach via slipways at Penmaenmawr, Llanfairfechan, Port Eynon

Outcomes

General Outcomes - Intended and Achieved

11.45 The purposes of the Green Sea Programme as described in the original documentation provides an indication of the intended outcomes. These are summarised in the table below, together with a comment on the extent which they have been achieved, based on written evidence, consultation with bodies responsible for projects and with local stakeholders, and observation at a sample of projects.

Table 11.9 Achievement of general outcomes

Purpose/Outcome intended	Level of achievement
Developing the natural environment through improved access and enjoyment opportunities	This has broadly been achieved. Out of the 16 projects, 10 have included physical investment in improved access to the beach or seafront, including a range of mobility needs. Four of these have also improved boat access to the water. Only one (Rhyl) has introduced entirely new opportunities for enjoyment (through the beach wheelchairs) while the rest of the projects have improved existing provision.
Effective beach management addressing visitor management and conservation issues	In two projects (Abersoch and Port Eynon) there has been a very noticeable improvement in beach management by separating boats and trailers from other users. To some extent this applies also to Penmaenmawr and Llanfairfechan. In many other projects there has been a general improvement in visitor management from improved access.
The provision/improvement of infrastructure and facilities (i.e. car parking, access paths, visitor information, interpretation, toilets etc.)	This purpose underlies the whole Green Sea Programme and has been achieved. All of the projects have contributed to this, with different projects focusing on different types of infrastructure and facilities according to the needs and priorities of the individual beach.
Monitoring and evaluation	The level and nature of monitoring undertaken before, during and after the project has been limited, delivering inconsistent and insufficient data for effective evaluation. It has not been maintained. This is covered further below.
Activities to improve resort management	The wording of this objective/outcome is unclear. None of the projects have addressed wider 'resort management' (which normally means provision of accommodation, events, marketing etc.) as distinct from visitor management.
Encouragement of a 'sense	This does not appear to have been a significant outcome of the

of place'	programme, but has been enhanced to some extent by the provision of information and interpretation (see below).
Enhancing the facilities and overall quality of Wales's coastal offer and addressing seasonality	Enhancing overall quality has been a clear outcome achieved by all the projects individually and collectively across the whole programme. Seasonality may have been reduced by the fact that aspects of the programme related to activities and not just to passive use of beaches. Some of the investments may have improved the quality of visits in poor weather, which might have a bearing on seasonality (e.g. the sunken garden and shelters at Aberavon were designed to combat wind/rain; new surfaces on Pendine promenade and on car-parks and access routes provided by a number of the projects are safer and drain better). However seasonality has not been addressed in a focused way and the programme has not proactively provided specific opportunities or events out of season.
Interpretation, sustainable visitor management plans and a 'sense of place' supported by an improvement in the provision of information and interpretation.	The interpretation panels at Port Eynon improve visitor awareness of the village's historic and natural heritage and have been popular locally. The individual interpretation and information panels at some other projects (e.g. Morfa Bychan) will also have contributed to this outcome. The Mobile Information Unit will have helped to increase visitor awareness of the marine environment and conservation issues.

11.46 An important element of the rationale for the Green Sea Programme was to assist beaches in obtaining or retaining the Blue Flag award. Of the 14 individual beaches covered in the programme:

- Eight held the Blue Flag award in 2015
- Six of the above eight already had the award at the start of the programme and have retained it
- Two of the above eight gained their award between 2013 and 2015
- Four further beaches had a Blue Flag in 2011 but then lost it, largely on account of the introduction of new water quality requirements rather than facilities
- One further beach gained the Blue Flag in 2012 but then lost it, again on account of water quality.

- 11.47 The above results suggest that the outcome of the programme in terms of the Blue Flag has been rather mixed. Changes in water quality have had a major effect, but this lies outside the scope of the programme. A consultation with Keep Wales Tidy, who are responsible for the Blue Flag award, suggests that the Green Sea Programme has played an important role in enabling the respective beaches to retain or gain the award. Whereas the poor quality of the facilities that were improved through the programme would not have been a 'deal breaker', the need for investment would have been raised in the assessment and would have counted against them. More generally, the engagement of the beaches in the programme was seen as a positive sign of a commitment to quality, which is an important factor in Blue Flag recognition.
- 11.48 Those beaches that do not have a Blue Flag in 2015 have all received the less demanding Seaside Award.

Outcome Targets – Original and Achieved

- 11.49 Data on numbers of visits has been provided in the Project Profile, showing both target and achieved to date (June 2015) figures. The visit figures used by the Welsh Economy Research Unit as the basis for their calculation of economic impact have also been made available. The data is shown in Table 11.10. For Green Sea North, data is only available for the whole programme. For Green Sea South, data has been provided for individual sites as well as the programme as a whole. The basis for these figures is unclear but it is apparent that the main source is data on car parking. The data was supplied to Visit Wales from the projects via the programme leads.

Table 11.10 Data on Number of Visits

	Target	“Achieved to date” October 2015	WERU data used 2013
Pendine	24,830	58,897	19,059
Poppit Sands	50,000	26,853	27,738
Aberavon	18,000	30,887	37,917
Cefn Sidan	11,000		394,776
Newgale	800	54,295	44,614
Saundersfoot toilets	7,076		14,562
Port Eynon			
Recycling: Sea, Sand, Sort			
Blue flag infrastructure and unit	12,000	44,629	16,857
Green Sea South	123,706	215,561	555,523
Green Sea North	44,760	85,324	85,324

Source: Project Profile and Welsh Economy Research Unit

11.50 Lack of clarity about the basis for the figures together with the considerable inconsistency between them means that they provide an inadequate and potentially misleading source of evidence for evaluation of the programme. However, with this proviso, it appears that the number of visits in the project areas is greater than the target identified for the programme.

11.51 It must be underlined that the above figures simply give some kind of indication of site use. Their size and apparent change over time should not be taken as an outcome from the programme. An understanding of outcomes requires a more direct assessment based on local feedback.

11.52 Unfortunately, very little quantified usage data is available relating to the actual investments and infrastructure involved in the individual projects. However, it has been possible to build up a broad picture from discussions with the lead bodies and those responsible for the projects, together with feedback from local business and other stakeholders at the local sites. From this, the following points can be made:

- In Rhyl the wheelchair ramp and the wheelchairs themselves are reported to be popular and well-used but no figures are available.
- In Penmaenmawr use of the improved slipway by visiting boats is limited to ten launches per day. It is primarily used by the local sailing club, for which it is an

important facility, on certain days of the week. In addition a sea rowing club was started in 2012 based on the slipway, using two boats and with a membership of 38 people, with launches on three days per week in summer and two days per week in winter. Llanfairfechan slipway is used less often.

- In Abersoch, 104 licences were issued locally to powerboats and 94 to personal watercraft (jet skis) in 2014, but this underestimates the amount of activity as some licenses are issued at a county level. Some of the craft use the trailer park but usage figures are not available.
- In Pendine the resurfaced promenade is reported to be well used. It is felt that the improved environment will encourage visitors to return more often but local businesses have not reported an upturn in visitors in the short term.
- In Aberavon the project (sunken garden and play area) is just a small part of the significant investment in the promenade and public realm over the past five years. Businesses report that the regeneration project as a whole has led to more visits, especially from locals and day visitors, but the effect of the Green Sea Programme element cannot be isolated.
- In Newgale and Poppit Sands there is no evidence of an increased number of visitors as a result of the improved car parks. In the latter, parking capacity was slightly reduced as a result of the project.
- The Blue Flag Mobile Information Unit in Pembrokeshire recorded 8,041 visitors in 2013 and 4,020 in 2014. This was a new facility but inevitably a large majority of the users will have been passers-by who were in the area anyway.

11.53 A further quantified outcome was the amount of recyclable material collected by the Sea, Sand and Sort scheme. In 2013 this totalled 25 tons, including 21 tons of glass.

Impacts

11.54 This section considers impacts of the programme and its legacy.

Economic Impacts

11.55 The Welsh Economy Research Unit estimated economic impacts of the Green Sea Programme as part of their research for the E4G programme. The results are shown in Table 11.11. The calculations were based on data from a survey of visitors. The extent to which these are meaningful figures can be questioned. For example, the Green Sea South calculations are distorted by an estimated 394,000 visitors to Cefn Sidan beach, where the actual project simply involved an upgrade of toilet equipment and parent-toddler changing facilities which is unlikely to have generated this number of visits.

Table 11.11 Calculations on economic impact

	Green Sea North	Green Sea South
Annual visitors	85,234	555,523
% staying away from home	39.2%	17.9%
Total trip – GVA	£3,150,000	£11,265,800
Total trip – employment supported (FTE)	140	500
Directly attributable to site – GVA	£453,000	£1,859,100
Directly attributable to site – employment supported (FTE)	21	85

Source: The Welsh Economy Research Unit

11.56 In order to understand the potential relevance of different types of investment within the Green Sea Programme in supporting the coastal visitor economy of Wales it is necessary to consider the relative importance placed by visitors on different types of facility that may be present on beaches. Cardiff Business School addressed this by adding a set of questions on visitor expectations to their surveys on beaches. The results are shown in Table 11.12.

Table 11.12 Factors Affecting Choice of Beaches to Visit

	% visitors indicating 'very important'	
	Green Sea North	Green Sea South
Cleanliness	71.3	78.7
Toilets	72.0	77.2
Car parking	69.3	74.0
Access to beach	58.6	70.4
Provision of bins	51.1	73.7
Local amenities	40.2	65.6
Lifeguard service	30.3	70.3
Proximity to home	31.6	68.9
Blue Flag/Green Coast Award	32.0	68.7
Disabled access	28.3	69.0
Safety information	30.1	67.3
Beach information and signage	32.0	64.5
Provision of recycling	29.7	61.6

Source: Cardiff Business School

- 11.57 The results from the survey show that the provision of facilities can have a significant influence on the visit. Cleanliness, toilets and car parking were the most important aspects, followed by beach access. These are aspects addressed by many of the Green Sea activities. Provision of more specific facilities such as disabled access, recycling and safety, and other information, were also considered to be important. It is also interesting to note the level of awareness on the Blue Flag/Green Coast Award which supports the rationale behind the Green Sea Programme. These results confirm the relevance of the type of investments made in the programme in maintaining the ability of beaches to attract tourists, so acting as key drivers of the visitor economy in Wales.
- 11.58 Although the survey was carried out on the beaches in the Green Sea Programme, its timing meant that it was not able to track changes in visitor satisfaction before and after the investment. Rather, it mainly served to identify what the visitors looked for in beaches in general. In retrospect, more time could have been spent in undertaking this kind of research at the outset, to assist in planning and prioritising

the investments, and after completion to assess the impact of the actual changes made.

11.59 Consultation with local stakeholders, including local businesses located near the beaches concerned, revealed a largely consistent view. This can be summarised as follows:

- The investments in themselves have made hardly any discernible difference to the level of business received in the short term.
- Some small amounts of additional activity have been enabled by the investments, such as the slipway use in Penmaenmawr which may have resulted in a small amount of additional local spend.
- Local businesses have been largely positive about the improvement in amenities brought about by the projects and believe that this has resulted in the beach and seafront becoming a more attractive place. They believe that this is important for the future. Where the investment has been part of a larger regeneration project, notably in Rhyl, Aberavon and Pendine, this effect is more pronounced.
- There are a few examples of local businesses making their own new investments as a result of the generally improved amenity for tourism, which has given them more confidence in the area. Again, this has been mainly where there have been more significant regeneration projects. Examples include a fish bar in Aberavon, which has invested in a new building, and a watersports operator in Rhyl which has opened a facility close to the new beach access ramp.

Environmental and Social Impacts

11.60 Environmental and social effects have been a key part of the benefits arising from the Green Sea Programme. The effects have been mainly in the form of:

- Visual impact from better landscaping and amenities, including less cluttered beaches and improved appearance of facilities such as car parks as well as more specific infrastructure such as the Pendine promenade and Aberavon sunken garden.
- Some reduction in energy and water use, mainly through the technology applied to the toilets at Morfa Bychan, Cefn Sidan and Saundersfoot. The Sea, Sand and Sort scheme is understood to have contributed to an increase in recycling. It is possible that visitors will have been encouraged to use more public transport as a result of the information provided, but take up has not been monitored.

- Improvements in visitor safety as a result of improved access, more even surfaces, and removal of obstacles from some beaches. The benefit is apparent from observation but has not been objectively measured.
- Improved access and opportunities for people with impaired mobility with relevant investment in nine of the investment activities. This has been taken further in some areas, such as provision for disabled participants by the Sea Rowing Club in Penmaenmawr.

Legacy and Long Term Sustainability

- 11.61 The main legacy is in the form of the physical improvements made to the beaches, access and seafronts. This is largely in the form of durable facilities that are low-maintenance. At less durable sites, attention has been paid to ease of maintenance – for example, the choice of plants in Aberavon has been based on their ability to withstand a harsh maritime climate.
- 11.62 The amenity and facility improvements should lead to improved visitor satisfaction which in turn may lead to repeat visits. Local stakeholders should be able to build on this over time. In Penmaenmawr, for example, the rowing club has a waiting list which is longer than its current membership and is looking to invest in more boats. Securing a legacy of increased employment will depend on local businesses making investments. The Sea, Sand and Sort scheme has continued since the end of the programme. It has been expanded to include on-street recycling in Pembrokeshire.

Conclusions and Lessons

- 11.63 The main conclusions to be drawn from the above analysis are that:
- The Green Sea Programme has been completed in line with its original business plan and objectives, with only minor deviations in the delivery of the projects.
 - The programme has been made up of sixteen small activities. While the selection of them may be justified individually, there has been little attempt to link them in the context of an overall strategy to deliver more than the sum of the parts.
 - The programme has the goal of improving facilities and quality of Welsh beaches. It has also demonstrated the importance of access, amenity and facilities to visitors to these beaches.
 - A number of positive environmental and social impacts have arisen from the programme, including improvements in safety and access for people with impaired mobility.

- The delivery of short term increases in spending and employment was not an objective of the programme and has not been apparent as an outcome. However, economic benefits from the improved beach and seafront environment may occur in the longer term from increased repeat visits and from future investment by local businesses.

11.64 Lessons for the design, delivery and management of interventions include:

- Allow sufficient time for project planning, implementation and monitoring. The timescale of the programme was considered to be too short.
- Identify indicators, targets and measurement processes that are relevant to the type and scale of programmes and projects. The economic impact assessment undertaken was inappropriate for the programme and insufficient baseline information is available.
- Ensure that administrative and reporting requirements are suited to the size of the programme, using clustering and streamlining between smaller projects. The programme was considered to be cumbersome, given its size and timetable.

12. Conclusions, Recommendations and Lessons

12.1 In commissioning an evaluation of the Sustainable and Coastal tourism projects, Visit Wales and The Welsh Government set out a series of essential questions and specific objectives for the study to address.

Responses to Essential Questions

12.2 The essential questions that this study set out to respond to were:

- How and to what extent did project activity reflect the commitments set out in the business plan?
- What are the perceived outcomes of the project from the perspective of beneficiaries?
- How and to what extent are project outcomes making a difference compared to if the improvements had not been implemented?
- Based on evidence, what would be the outcome, and potential long term impacts, of withdrawal of project funding for beneficiaries of the project?
- Which aspects of project delivery have led to positive outcomes, or could be viewed as 'good practice'?
- What barriers and constraints has the project faced? What are the 'lessons learnt' from dealing with such barriers and constraints?

12.3 Our evaluation has covered nine work-streams. The volume and quality of evidence available has varied across each. The successful implementation and impact also varies across projects. It is therefore understandably a challenge to present overall conclusions that fairly represent each project. But there are headline messages from which we can draw overall conclusions and address directly the initial questions.

How and to what extent did project activity reflect the commitments set out in the business plan?

12.4 A reasonably clear message emerged that the original business plans and applications remained largely intact. Some of the projects were arguably developed insufficiently at the business planning stage and this meant that much project development took place during the programme. But projects were flexible around changes in funding and partners – when changes were made or initiatives dropped, there were understandable and justifiable reasons for this.

- 12.5 This varies a little across the centres. Those that appear well-conceived at the start were less likely to change commitments than those projects which were comparatively diffuse and difficult to coordinate.

What are the perceived outcomes of the project from the perspective of beneficiaries?

- 12.6 The story from the consultations is that those who were meant to be beneficiaries perceived that they have benefited from investments undertaken and delivered. There was little indication of any dissatisfaction. But there was a strong sense that across the programmes the different centres and investment activities did not link together as a whole. The wide array of projects within the Sustainable and Coastal programmes were largely disconnected from each other.
- 12.7 On marketing, project officials were aware that a significant share of the programme's funds were top-sliced by Visit Wales for marketing and advertising. The reasons for this were understood – but it was suggested that the marketing while promoting Wales was generic and did not link to or promote the specific ERDF supported projects.
- 12.8 There was also uncertainty around outcomes related to the environment and transport. Consultees said that these sometimes appeared to be late-additions and piece-meal as the projects developed.

How and to what extent are project outcomes making a difference compared to if the improvements had not been implemented?

- 12.9 Most of the projects produced physical tangible outputs such as visitor facilities. Therefore there is reasonable evidence on 'outputs'. It is likely that without the investment from the programme then these improvements would not have occurred or would have been delayed while alternative funding was sourced. The investments in these improvements supported jobs and enterprises who delivered them.
- 12.10 But the evidence on 'outcomes' and 'results' is less clear. Visitor numbers and spending were not monitored sufficiently. The individual investment activities were relatively small. So with little sign of significant increases in visitor numbers, it is challenging to demonstrate positive outcomes for visits.

- 12.11 Similarly, there is little evidence on the experience of visitors and whether investment in improved facilities resulted in higher satisfaction or more positive perceptions. Information about visitor perceptions was not recorded in a systematic way.
- 12.12 From the consultations there is a clear belief that the investments have had value in enhancing the reputation of particular attractions and areas. The investments must have helped in providing opportunities to compete in the tourism market place. This however, is difficult to demonstrate, as much of the investment was modest and incremental. It is where there were more concentrated investments (such as Bike Park Wales in Cognition) that a clearer story about outcomes can be explored.

Based on evidence, what would be the outcome, and potential long term impacts, of withdrawal of project funding for beneficiaries of the project?

- 12.13 The project funding sits in a wider context of a difficult economic and funding environment, in particular with cuts to budgets of local authorities which may otherwise have supported investments in visitor facilities. As the ERDF funding comes to an end, the context remains challenging for the different projects in attracting future investment.
- 12.14 Many of the centres anticipated this and made investments with goals of becoming self-sustaining in raising their own revenues, for example through ticketing and car parking fees, or through shops and café facilities. This picture naturally differs across centres with those that are privately-led (or Trust-led) and more commercially focused, than those that are public sector led and providing local public amenities. Some projects (such as parts of Swansea Watersports) began as public sector initiatives and have moved towards a more commercial footing.

Which aspects of project delivery have led to positive outcomes, or could be viewed as 'good practice'?

- 12.15 There were different experiences across centres. The overarching strategic concepts of 'sustainable' and 'coastal' appear to have offered an initial vision that helped shape early ideas and choices. But the large number of centres and investment activities that were subsequently supported with relatively modest sums indicates that resources and efforts were spread widely and therefore thinly.

- 12.16 As a result, we assess that much of the early strategic focus diminished. The different centres developed largely independently with little binding them together. Meanwhile, match-funding was almost wholly dependent on public sector financing from local authorities or government agencies. The leveraging of private sector funding was limited and confined to only a few investment activities.
- 12.17 A key role is that of project leads within local authorities and their commitments to projects. There were generally positive views of the role of Visit Wales. In particular, that Visit Wales did not get too involved in projects and was not interfering; but could offer support and advice when needed. Some less positive views were expressed around record-keeping requests for information to be submitted multiple times.

What barriers and constraints has the project faced? What are the 'lessons learnt' from dealing with such barriers and constraints?

- 12.18 The consultations brought out some key messages about lessons learned; in particular the need for stronger upfront coordination – this could have anticipated changes through the programme through better management of risks, and ensured clearer planning on the longer term legacy of the projects.
- 12.19 There was also a strong indication that the “Centres of Excellence” branding was not helpful; whether in terms of marketing to tourists (the “Centre of Excellence” term means little to visitors) or to local communities; or structurally in terms of linking the wide range of projects together.
- 12.20 The delivery of the programme through European funding mechanisms may also have walled-off the programme from other activities being undertaken by local authorities or by Visit Wales. There is a sense that the project did not link in with other parts of local authorities or wider tourism plans, as operations were channelled through officials responsible for European funds rather than those responsible for wider economic development or tourism.

Meeting specific objectives

- 12.21 The specific objectives that this study set out to meet were:
- To provide an independent evidenced based understanding of the performance indicators and targets of the two EU Sustainable and Coastal Tourism projects delivered by Visit Wales

- To review the delivery and partnership project management of the four Sustainable Centres of Excellence, three Coastal Centres of Excellence (with the subsequent addition of Saundersfoot as a fourth) and the Green Sea Joint Sponsor partnership arrangements and delivery mechanism
- Address the project's delivery and achievement against the cross cutting themes (CCT) aims, objectives and CCT-related indicators outlined in their business plan
- To review the progress against the social impacts assessment framework issued in 2012 and provide a qualitative evidence case study based report on the achievements within the project period
- To review Visit Wales's match funding support programme offered to all the partners in relation to transport, marketing, wildlife, waste and energy
- To review the external collaborative monitoring and evaluation contract with Cardiff Business School for the two Visit Wales projects
- To consider legacy impacts, including the extent to which the project has contributed to structural and sustained impact on the targeted sectors, products and businesses;
- To review the marketing programme for each project, namely the Autumn/Winter 2013 and Spring Summer 2014 campaigns in delivering results for the Visit Wales projects.

12.22 Our approach to evaluation across all the projects, centres of excellence, and investment activities sought to meet with each of these objectives.

Evidenced based understanding of performance indicators and targets

12.23 The ERDF claim forms reported performance indicators at only the aggregated level of the Sustainable and Coastal projects. These performance indicators in this aggregated format proved difficult to interpret. The wide variation between the outputs and results that were expected in 2010 with what the claim forms reported in 2015 suggests that through the duration of the projects there was some evolution, or misunderstanding, about how indicators were defined and interpreted.

12.24 The findings from this research indicate that there is some ambiguity, for example, about how outputs such as "Initiatives developing the natural and/or historic environment" were defined and counted. This difficulty becomes more acute with outcomes/results for "gross jobs created" in which it is not clear what jobs have been accounted for (such as if input construction jobs are counted, if jobs are direct or indirect, and if part-time and full-time roles are counted equally).

- 12.25 The difficulty becomes most acute with “visits” in which there appears to be much uncertainty about what is being counted and how this has been counted (from actual ticket sales through to assumption-based estimates); and some confusion about whether what is reported is total visits or an estimate of ‘additional’ visits. The extent of ambiguity means that the reported aggregate performance indicators must be approached with some caution.

Delivery and Partnership Project Management

- 12.26 A message from this research is that in the case of many of the investments, there was insufficient pre-planning. This could have helped to avoid some of the issues which arose during delivery, for example around practical issues such as planning permissions, site constraints and costs. Changes made to delivery plans were often time consuming and added pressure to the delivery of projects. Better planning and development of projects prior to submitting business plans and funding agreements may have avoided challenges and delays that came later.
- 12.27 There are positive perceptions of overall project management, including relationships with Visit Wales and other partners which worked well. The administrative requirements of European funding were a potential barrier and the engagement of Visit Wales and local authorities helped to address this. However, some of the associated activity, including marketing support and the environmental training, would have benefited from much more advanced planning and better integration.

Cross Cutting Themes and Social Impacts

- 12.28 The ERDF funded activities over 2007-2013 were expected to incorporate the cross-cutting themes of environmental sustainability and equal opportunities as themes for a more balanced, sustainable and innovative economy. Each of the business plans for centres under the project umbrella of ‘Sustainable’, ‘Coastal’ and ‘Green Sea’ projects had ambitions around environmental goals; and each set ambitions around equality – in particular with physical access for people with disabilities and leisure and educational opportunities for people in low income groups as a theme across the projects.
- 12.29 The consultations largely brought out positive qualitative perceptions that the projects had set out to achieve these goals and made progress. There are understandable challenges in monitoring progress and value in these kind of

environmental and social goals – these are not financial or physical outcomes.

There is however little indication of a systematic and consistent approach to doing so being applied within or across all the different centres. No clear set of indicators has been used and these have not been reported alongside the more established ERDF performance indicators. The concept of a “social impacts assessment framework” is not something that appears to have been adopted and our study has not identified examples of where such a framework has been developed or adopted as a formal method of reporting impacts.

Support Programme

- 12.30 Little reference was made by consultees to a match funding support programme for topics such as transport, marketing, wildlife, waste and energy. As reported in the earlier mid-term review, project leads were on the whole, positive about the performance of Visit Wales in helping the delivery of the projects and providing advice, information and guidance when appropriate.
- 12.31 The perception of the support in terms of marketing aspects of the projects is that funding was ‘top-sliced’ to support overall Visit Wales marketing for the country as a whole rather than to differentiate the centres of excellence supported by the Sustainable and Coastal projects. There is little indication that the supported investments and attractions received any additional ‘hand-holding’ around how to market and advertise. The approach to marketing was left largely to individual centres and project managers – in some instances this was very active, for example in using marketing agencies (as with One Historic Garden), but there is no evaluation of how effective these approaches to marketing were.
- 12.32 Although a significant amount of the overall budget was used to support marketing activity to be centrally led by Visit Wales, several managers from the Centres of Excellence commented on the perceived absence of national marketing support provided by Visit Wales. They failed to make a connection between their individual products and generic campaign content.

Monitoring and Evaluation Contract

- 12.33 The study has referenced and, where relevant, reported data from the impact assessment of Cardiff Business School / The Welsh Economy Research Unit. The impact assessment used estimates of construction spending (inputs into the projects) and survey estimates of visitor spending (gross but not net outcomes of the projects) and applied these to an economic model of Wales to provide estimates of economic output and jobs associated with these projects. The assessment therefore provides a helpful appraisal of the scale of economic activity related to the projects.
- 12.34 The impact assessment is limited as a tool of monitoring and evaluation. The report does not claim to be a document of monitoring and evaluation. It highlights the lack of baseline data on visitor numbers which would be essential for an effective evaluation; and does not set out to provide any comparators or control group that would support an economic evaluation of net effects.

Legacy Impacts

- 12.35 The extent to which the different centres and investment activities will continue beyond the end of ERDF funding is likely to be mixed. The range of capital investments in harbours and marinas, paths and bike trails, buildings and facilities provides a clear physical infrastructural legacy enhances the offer to visitors and residents. What is less clear is how this improvement will translate into new sources of income and long-term investment to maintain and further enhance the offer.
- 12.36 Our research found concerns about the availability of future resources and recognised the competitive environment within which to attract visitors and secure any further public investment. Others were more optimistic about activities becoming self-sustaining and generating revenues from visitors without further public assistance. In short, the legacy impacts and the sustained effect on targeted sectors, products and businesses is not clear. There is scope to assess the legacy in the years ahead.

Marketing

- 12.37 The main concern of most managers of each of Centres of Excellence was to deliver a set of projects, on time and within budget. Insufficient attention may have been paid to the support required when bringing a new product to the market place.

This was especially true where those responsible for delivery were based within a European Funding team.

- 12.38 There was considerable variation in the extent to which marketing formed a significant or prominent part of the original bid and subsequent allocation of funding; for example marketing was a significant share funds for One Historic Garden but negligible for Aberdaron, and some were designed to form a cluster with a common branding, such as Cognation and One Historic Garden. Only One Historic Garden appears to have directed significant resources to employing an external marketing team to deliver a campaign.
- 12.39 There was also variation in the extent to which different Centres of Excellence were suitable for standalone marketing campaigns and co-ordination in joint marketing was lacking. The diversity of projects, for example in Snowdonia's One Big Adventure, with their different target audiences presents a marketing challenge. In some cases, dedicated standalone websites were established but it is not clear how traffic was driven to these websites. Commercial or semi-commercial partners (e.g. Saundersfoot Harbour and National Trust) have an ongoing commitment to marketing their facilities. This is different to the situation in which local authorities have found themselves, especially at a time of reducing budgets.

Recommendations and Lessons

- 12.40 The evaluation points to a number of recommendations and lessons which will help to guide the development of future tourism centres of excellence or specific tourism infrastructure and facilities investments:
- At the level of the Centres of Excellence. There are clear benefits in tourism development and economic impact in terms of achieving a greater concentration of resources rather than spreading resources more thinly across large numbers of tourism priorities, spatially and thematically. This lesson is relevant to Visit Wales and delivery bodies involved in designing centres of excellence.
 - The importance of delivery bodies undertaking more thorough early development for the proposed investment activities within the Centres of Excellence, which will help to avoid or at least better manage the delivery risks. As there may be a limit on how much development delivery bodies are willing or able to undertake prior to grant approval, this can be overcome by building in a mobilisation and development phase into delivery schedules. This lesson is relevant to WEFO in

particular, but should also be borne in mind by Visit Wales and delivery bodies involved in designing centres of excellence.

- The provision of support and guidance from Visit Wales to the Centres of Excellence and delivery partners to develop appropriate marketing activities and to ensure integration with the overarching national marketing campaigns as well as local efforts. Where appropriate, this can be achieved by Visit Wales providing guidance and support to the Centres of Excellence and the delivery partners, to enable them to develop their own strategies and to integrate this with the national marketing campaigns.
- The development by the Centres of Excellence and their delivery partners of a clear monitoring and evaluation framework built upon a clear theory of change to enable data collection before, during and at the final stages of an investment; the inclusion of CCT targets at the investment levels; providing clarity about the baseline against which change is measured, ensuring monitoring requirements understood by all management and delivery partners. Whilst all of these will ultimately be the responsibility of the Centres of Excellence and their delivery partners, Visit Wales needs to provide the guidance to enable them to do this effectively and in a coordinated manner.
- It is particularly important that this framework establishes the approach to and underpinning data requirements for assessing overall counterfactual impact of the investments (i.e. what could be expected to be incurred in the absence of the ERDF backed investments). Whilst this will always be challenging for smaller and spatially dispersed investments, it is more achievable for larger, spatially focused and more impactful investments. Visit Wales should take a lead in investigating and developing the feasibility of these approaches and providing guidance to delivery partners as appropriate.
- In the case of projects like the Centres of Excellence, which have multiple layers of management and delivery, providing clear guidance on the responsibilities of partners at all levels for accurate monitoring, reporting and record keeping. The approach has clearly worked well for ensuring that data can be aggregated for the purposes of overall reporting to WEFO, however it also needs to provide the scope for disaggregation to individual investments for evaluation purposes (and make clear to Centre of Excellence managers that the data needs to be made available to evaluators on this basis).

- Earlier engagement with delivery partners on how to promote the cross-cutting principles of sustainability, equality and social impact into their projects. This also applies to planning for the long-term sustainability and legacy of the investments themselves, providing clarity on how new visitor infrastructure and facilities will be maintained, reinvested in and marketed.
- Ensure that all delivery partners are clear about the basis on which they are monitoring visits and visitors, how these relate to their original targets and whether they are on a gross or net additional basis. It is clear that there has been confusion amongst some partners and changes in the measures used over time and in different reports.

Annex A - Tourism Business Survey

Aims and Objectives

The survey intended to capture the views of visitor economy organisations and businesses which may have had knowledge of the Centres of Excellence and their investments.

Possible partners envisaged include:

- Industry/sector representative and marketing bodies
- Tourism group operators and agents operating locally
- Local hotels, visitor attractions and events facilities
- Local event organisers and associations, etc.

The survey aimed to explore the perceptions of:

- Performance and trends in the local visitor economy and relevant priority themes
- Awareness of the Centre of Excellence and the associated investments
- Any engagement with the Centre of Excellence and views on the appropriateness and merit of these investments and related support and marketing activities.
- Views on the impacts of the projects' external marketing and promotional activities.
- Impacts of these investments on the performance and prospects of the visitor economy (offer, awareness, visitor volumes and spend, duration of seasons, etc).
- Perspectives on future priorities related to the CoE and their underlying themes.

Issues

Getting a poor response from the survey was identified as a high risk from the outset, given that businesses were not direct beneficiaries.

Before the survey was launched there were a number of issues impacting upon the potential quantity, quality and representativeness of responses.

Unrepresentative Survey Sample

It took some time to secure access to a Visit Wales database of businesses to use as a sample frame for a survey. The database provided by Visit Wales was useful in providing a large quantity of Welsh businesses (nearly 3,000) with addresses, contact details and designated type of use. This provided a basis for a survey to be trialled as it provided a direct name and email address necessary to contact businesses, and an address to identify which investment the beneficiary was most likely to provide a useful insight.

However, the database was largely unsatisfactory as a basis for a sample for the survey. The large majority of businesses provided were accommodation businesses, not representative of the full spectrum of organisations within the tourism economy (e.g. food and drink, history and heritage, sports & recreation, entertainment and nightlife). There was also a challenges of selection bias in that the businesses that had registered with Visit Wales are not necessarily representative of the tourism economy as a whole.

Small Business Sample in Close Proximity to Investments

Close proximity to projects was important in targeting organisations who were most likely to have been impacted by investment (given businesses were not direct beneficiaries). Using address details provided, businesses and investments were mapped using an in house geographical information system. In order to capture beneficiaries most likely to have been impacted by investments, proximity radiuses or 'impact zones' were defined around each investment. These areas took into account the type of settlement surrounding Centres of Excellence (i.e. urban, semi-rural and sparse-rural) and drive times. A range of radiuses were used, the smallest for urban and the largest for sparse-rural (in order to compensate for a low density of businesses in these areas).

Around 20 businesses were captured for each Centre of Excellence using this proximity method. This number is relatively small, especially considering the response rate of non-direct beneficiaries is likely to be low.

Nature of Investments

The small piece meal nature of investments further weakened the capability of receiving a significant quantity of responses. Most interventions were small-scale and investment was spread thinly. This limited the exposure of investments to nearby businesses, impacting negatively on the likelihood of chosen beneficiaries engaging with the survey.

Pilot

A pilot was launched to test the effectiveness of the survey in light of the concerns raised above. The response rate was most important to test the effectiveness of the survey, in addition to the quality of responses and breadth of business types.

The Cognation project was chosen as the pilot and achieved an inadequate response rate (amounting to 3 respondents). Given the aims of the survey to explore perceptions of the visitor economy, a larger sample size is required to capture reliable trends. Therefore, the pilot survey indicated that the survey, if launched, would not be able to deliver against the original goals.

Annex B - Consultations

Consultations with a wide range of partners were carried out via telephone and face to face meets. These helped to build an understanding of the role of Visit Wales and other key delivery partners, their specific aims and objectives for each project, the process of delivering interventions and any particular sensitivities that needed to be considered.

Completed consultations are outlined below.

Table B.1: Consultations

Sustainable Projects			
CoE	Investment Activity	Contact	Contact Responsibility
North Wales Cycling	<ul style="list-style-type: none"> Rural cycling product, marketing, wildlife, transport Marsh tracks mountain biking trail 	Helen Mrowiec	Denbingshire council - Day to day project management
	<ul style="list-style-type: none"> Iconic trails and natural routes 	Caroline Jones	Conwy council lead
	<ul style="list-style-type: none"> Llyn Brenig - Visitor centre extension/ bike hire 	Nick Kite	Welsh Water (Dwr Cymru) - lead
Eryri	<ul style="list-style-type: none"> Rural cycling, marketing, wildlife, transport. Gwynedd lead on developing the path from Glan Llyn to Llanuwchllyn village 	Hannah Joyce	Gwynedd council- management
	<ul style="list-style-type: none"> Rural cycling, marketing, wildlife, transport 	Llyr Jones	Gwynedd council - day to day project management
	<ul style="list-style-type: none"> Glan-llyn is an outdoor centre: work includes improvement to kitchen facilities and canteen plus new accommodation block 	Huw Antur	Urdd Gobaith Cymru
	<ul style="list-style-type: none"> Antur Stiniog, Bleanau Ffestiniog- Mountain bike routes and new visitor centre 	Ceri Cunnington	Antur Stiniog
	<ul style="list-style-type: none"> Coed-Y-Brenin Forest Park, Dolgellau- development of new trails, extension of visitor centre 	Kim Burnham	Forestry Commission (now natural resources Wales)
	<ul style="list-style-type: none"> Pembrokeshire project Marketing 	Claire Staley	Leader partner responsible for leading and delivering overall OHG project
One Historic Garden	<ul style="list-style-type: none"> Aberglasney project 	Roger Evans	Chief Executive of Aberglasney Restoration Trust
	<ul style="list-style-type: none"> Bryngarw project 	Richard Hughes	Lead organisation – owned and operated house and country park
		Nicola Wilkes	Own of Cedars Tea Room business on site

	<ul style="list-style-type: none"> Margam Park project 	Michael Wynne	Project manager
		Lucy Holden	Volunteer group operating in the park
	<ul style="list-style-type: none"> Scolton Manor project 	Mark Thomas	Pembrokeshire County Council – Manager of Scolton Manor
	<ul style="list-style-type: none"> Cwmdonkin project 	Ian Batements	Project sponsor – part of internal project team
	<ul style="list-style-type: none"> Marketing 	Lorna Easton	Direct at Blue Sail – the marketing company used for the project
Coastal Projects			
CoE	Investment Activity	Contact	Contact Responsibility
Watersports, Swansea Bay	<ul style="list-style-type: none"> Porthcawl Harbour Rest Bay improvements, Bridgend 	Delyth Webb	Bridgend council - Team Ledaer Regeneration Proects & Approaches
Aberdaron – National Trust	<ul style="list-style-type: none"> New Henfaes accommodation Aberdaron Centre of Excellence Visitor Centre (Porth y Swnt) Retail units Improved access, interpretation and parking to beach/coast in Aberdaron. 	Andy Godber	National Trust – Lyn Operations Manager
Pembrokeshire Coastal Centre of Excellence	<ul style="list-style-type: none"> Centre of Excellence Public realm improvements, Tenby Harbour Enhancements in Tudor Square, Tenby 	Rob Hamer	Senior Highways Engineer
	<ul style="list-style-type: none"> New development at Coppet Hall 	David Lewis	The Estate Office, Hean Castle Estate
Saundersfoot	<ul style="list-style-type: none"> Outer harbour visitor pontoon, Outer harbour swing visitor/late tide moorings. Slipway and sea wall dry boat racking Inner harbour landing pontoon and sluice decking 	Mike Davies	Chief Executive Officer, Saundersfoot Harbour

Green Seas			
Green Sea North	<ul style="list-style-type: none"> Rhyl Beach Improvements, Denbigshire 	Mark Dixon	Denbigshire County Council – Economic and Business Development Officer
Green Sea South		Gwyn Evans	Pembrokeshire County Council – European Manager
		Claire Staley	European Contract Management Team – European Contract Officer
	<ul style="list-style-type: none"> Pendine Promenade, Carmarthenshire Phase 1 	Sam Palmer	Carmarthenshire County Council – Physical Regeneration Officer
	<ul style="list-style-type: none"> Pendine Promenade, Carmarthenshire Phase 2 		
	<ul style="list-style-type: none"> Pendine Promenade, Carmarthenshire Phase 3 		

Source: Regeneris Consulting and Tourism Company, 2016