

# MILLER

Research Evaluation Consulting



## Upland Regeneration Study

### Pentir Pumlumon

Final Report

July 2017



Cyngor Sir  
**CEREDIGION**  
County Council





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*“Plunlummon is not a sociable country, sir; nothing to be found in it, but here and there a few sheep or a shepherd.”*

George Borrow: “Wild Wales: Its People, Language and Scenery”. 1862

## Executive Summary

This report presents the findings of a tourism-focused study to explore issues around the regeneration of the Uplands area of Ceredigion.

This study was initiated by Pentir Pumlumon with funding from the European Leader Programme, approved by the Cynnal y Cardi Local Action Group and commissioned by Ceredigion County Council. The brief was to undertake a baseline study of the Uplands area, and to research and develop three action plans for culture and heritage, outdoor activities, and countryside and nature respectively. In addition the study considered the infrastructure available to visitors and local people; particularly in terms of transport links.

The research process comprised the following elements:

- A scoping phase, including a desk-based review of available data and documents relating to tourism in the area and a series of telephone interviews with stakeholders.
- A survey, circulated by tourism stakeholders, to secure a better understanding of perceptions of the area amongst visitors and local residents.
- Three community engagement workshops; attended by a total of 75 local stakeholders. These sessions were held in three different locations to encourage the maximum number of people to attend, and each focused on a different theme.

### Baseline Assessment

There is a lack of data specifically relating to the Uplands, but Visit Wales data shows that Ceredigion as a whole attracts almost 6m day visitors per year, with an average spend of slightly less than £25 per day (lower than the Welsh average of £33). The area is most popular with older couples and young families, but less so with families with teenagers or visitors in the 20-35 age group. The literature acknowledges that those who visit the area are loyal and tend to return frequently and that the rich heritage and landscape represent relatively untapped assets with the potential for further development in tourism terms.

### Assets

The tourism offer is laid out in a T shape across the A44/A4190 corridor and on the north south route between Devil's Bridge and Tregaron; the two main settlements, taking in Pontrhydfendigaid and other rural settlements.

The main attractions include:

- Bwlch Nant yr Arian outdoor centre;
- Vale of Rheidol Railway;
- Devil's Bridge and Falls;
- Hafod Estate and Church;
- Strata Florida Abbey;
- The market town of Tregaron.

The hospitality offer is focused on the traditional market, with much of the accommodation provided through caravan sites and bed and breakfasts and with only limited availability of local food and drink. Whilst a good range of agricultural events takes place in the area, there is less provision in terms of arts, sporting or cultural attractions. Overall, there is the potential to upgrade and broaden the offer to appeal to a wider market.

A visitor survey of 206 people was conducted as part of this research. This showed that visitors are most likely to be attracted to the Uplands if they have an existing connection, such as family or friends in the area. Average visitor spend including accommodation was reported to be £46.50 per day and regular short breaks were the most mentioned types of visit. The most commonly visited attractions were those listed above. Positively, more than ninety per cent of those responding to the survey said that they would recommend the area to other people.

Survey respondents suggested a range of areas where the visitor experience in the Uplands could be improved, including:

- Improved facilities for outdoor adrenalin sports;
- Better quality accommodation and customer service;
- Access to the countryside and signage/footpaths;
- Transport links to build connectivity within the area;
- Improved information/interpretation for visitors;
- “Surfacing” of natural and cultural assets to provide a more coherent story for the Uplands.

#### Workshop 1

The first workshop included a journey on the Vale of Rheidol Railway and discussion in the Hafod Hotel in Devil’s Bridge about assets, current visitors and general issues affecting the area. Participants used the journey to experience Devil’s Bridge as first time visitors would and made a number of observations, including:

- The train is a significant asset, but there is a lack of information about the journey and little interpretation of the landscape or cultural / industrial heritage of the area.
- Signposting is poor at Devil’s Bridge, discouraging exploration beyond the station area;
- There are good facilities in terms of the café, toilets and chocolate shop for visitors to enjoy, but it is not clear where the wider food and drink offer is available;
- The walk to the Hotel / Falls / Woodlands area is extremely hazardous, with no pavement and frequent heavy traffic passing;
- Visitors lack access transport to the Hafod Estate or beyond;
- The Hafod Hotel is critical to the offer and current renovation is welcomed.

#### Workshop 2

The second workshop in y Talbot Hotel in Tregaron focused on cultural, heritage and spiritual tourism, including opportunities around investments at Strata Florida Abbey. Participants created visual “mood boards” to describe how the Uplands could be developed, including an overall vision for the area:

*“The community vision for the Uplands area is to focus on the natural unspoilt landscape to attract visitors to the area, utilising the outdoor activities and heritage sites.”*

#### Workshop 3

The third workshop, held at the Bwlch Nant yr Arian visitor centre centred on outdoor activity tourism and nature. The event noted the good range of facilities for outdoor tourism, but also the potential to build on this with longer mountain bike trails, more facilities for walkers and a

greater range of experiential links into the landscape and natural assets. The meeting discussed prospects for developing watersports and mixed outdoor activities around Nant y Moch reservoir and the former Maesnant outdoor pursuits centre.

#### Action Plan for the Uplands

An action plan for the Uplands has been prepared, which builds on the baseline research and engagement activity. At the outset of the study it was highlighted that there is a recognised lack of awareness within the area of the opportunity and potential offered by the tourism sector. The plan responds to this, focusing on two key elements:

1. Increasing demand: growing visitor numbers amongst new, target segments and increasing spend, frequency and length of visits from existing visitors.
2. Building capacity – to respond to demand and to meet the needs of new visitors.

These two themes are expanded below, along with some headline actions under the thematic aspects of the research;

#### Increasing Demand

- Raise awareness of the tourism assets in the Uplands by, for example:
  - Devising an identity and a marketing campaign for the Uplands without introducing confusion of brands with the Cambrian Mountains / Ceredigion / Mid Wales;
  - Harnessing existing loyalties of visitors and businesses through an ambassador scheme;
  - Devising an events programme to draw in fresh audiences;
  - Using the Hinterland brand to attract visitors.

#### Building Capacity

- Raise awareness of the potential for tourism development by:
  - Establishing a working group of engaged businesses, with a view to establishing a collaborative Upland Tourism Group;
  - Actions to improve the range and standards of hospitality, through more visible use of local food, drink and materials and high quality customer service based on telling the story of the Uplands and its heritage;
- Improve infrastructure, by developing themed signage, heritage and nature trails, landscape and heritage interpretation and improved access to landscape;
- Improve the quality of the built environment and streetscape, especially in terms of physical infrastructure improvements in Devil's Bridge, such as creating a safe pavement through the village, improving signage and opening up the views of the Rheidol Valley and across to Plynlimon. Tregaron also suffers many areas of need in terms of visual improvements and general tidiness. With the exception of Llanfihangel y Creuddyn, the majority of the villages in the area are said to be relatively disengaged from tourism at present. For example, Pontrhydygroes was acknowledged in Victorian times for its near alpine setting (referred to as the Engadine of Wales), but offers little to current visitors with several areas appearing uncared for. The water wheel attraction was reported to be lacking in upkeep.



- Improve linkages and transport, through provision of electric bikes, Twizy lease scheme and a pilot programme of shuttle buses from Devil's Bridge.
- Build entrepreneurship and support new tourism businesses to increase engagement with the backstory of the Uplands; linked, for example, to farm enterprises.
- Explore funding to support a part-time tourism project officer to deliver the above actions.

### Culture and Heritage

Increase the visibility and understanding of the culture and heritage in the area through, for example:

- A programme of arts / music events in key locations;
- Establishing a faith tourism trail linked to the Cistercian Way and Peaceful Places;
- Development of a film noir festival, linked to the Hinterland series;
- Creation of a George Borrow trail, to revisit the journey of the iconic author.

### Outdoor Activities

Build on the existing outdoor activity offer through, for example:

- Exploring support for the outdoor activity and water sports around Nant y Moch;
- Developing an iconic cycle race; Tour of the Cambrian Mountains;
- Reviving the Pumlumon Challenge as a Cambrian Mountains fell race;
- Establishment of bike support / rental / signage / marketing / accessories retail facilities in the area is an opportunity to attract new visitors to the area;
- Exploring links to outdoor clothing / equipment brands to promote the area;
- Build the market for equestrian tourism through long distance riding trails.

### Country Life / Nature

Increase visitor numbers based on the quality of the landscape and range of natural experiences in the Uplands;

- Create and market a suite of events around interpretation of the dark skies in the Uplands;
- Support the development of courses and experiences linked to the backstory of agriculture;
- Enable more people to experience the scale of the wilderness through the significant development of walking trails in the area e.g. Cambrian way and Aeron valley and the creation of adequate signage and styles;
- Publicise the excellent range of raptors in the Uplands, through guided tours and photography safaris.

### Summary

The research has demonstrated the great potential of the Uplands to attract a range of visitors with diverse interests, to enjoy what it has to offer. However, the attractions and

hospitality need to be upgraded to reflect the needs of today's visitors and to ensure the sustainability of visitor numbers in future.

This will require continued engagement with businesses, to encourage investment and collaboration; both within the private sector and with Ceredigion County Council and other public sector bodies.

There are a number of key opportunities, such as the current interest in Hinterland and the remaining window for access to EU funding, which imply that this is a critical time for the development of the Uplands. Hence it is essential to act now to boost the tourism economy and build sustainable economic prosperity in the area.

# 1 Introduction

Pentir Pumlumon commissioned Miller Research to carry out a study researching issues around the regeneration of the Uplands. The study was initiated by Pentir Pumlumon with funding from the European Leader Programme, approved by Cynnal y Cardi Local Action Group and commissioned by Ceredigion County Council. This report documents the findings of the study.

## 1.1 Objectives

The objectives of the study were to:

- Undertake a baseline study of the area to include visitor numbers and type, accommodation, attractions, activities, facilities and services
- Explore and develop a cultural / heritage visitor action plan
- Explore and develop an activities / sporting visitor action plan
- Explore and develop country life/nature opportunities for visitors
- Explore public transport issues for community and tourists
- Undertake community engagement events to gather evidence and support for the above.

## 1.2 Report Structure

The report is laid out as follows:

- The remainder of Section 1 describes the approach taken to deliver the study;
- Section 2 provides some background and context to the work;
- Section 3 lays out the community engagement and evidence gathering process;
- Section 4 provides overall recommendations for action;
- Section 5 puts forward a cultural / heritage action plan;
- Section 6 puts forward an outdoor activities / sporting action plan;
- Section 7 puts forward an action plan for country life and natural environment;
- Section 8 reviews available funding streams to support upland regeneration;
- Section 9 highlights some issues around monitoring and evaluation.

In addition to the main report:

- Appendices 1 and 2 expand on the workshop outputs;
- Appendix 3 presents the online survey undertaken;
- Appendix 4 lists stakeholders who were directly interviewed for the project.

## 1.3 Approach

A key objective of the project was to embed community engagement events into the evidence gathering and to support the development of action plans. Community stakeholders from the Uplands area have been central to the adopted approach; participating in three community engagement workshops, stakeholder interviews and an online survey. This approach has allowed for the co-creation of action plans for the overall regeneration of the area, along with the specialist themes outlined above. The approach adopted for the study is outlined in more detail below.

### Background research, asset mapping and data review

A desk-based review was carried out which explored the strategic, policy and background context for tourism in the area. An overview of this is provided in Section 2. The key attractions, activities, accommodation and hospitality providers in the Uplands area<sup>1</sup> have been comprehensively mapped using Google maps. Secondary analysis was carried out on available data; specifically looking at occupancy rates and visitor numbers to key attractions in the Uplands area.

### Stakeholder interviews

Twelve semi-structured telephone interviews were conducted with members of the community having an interest in tourism. These were carried out to gain an insight into what the area offers and the challenges faced in networking the tourism sector in the area to attract greater numbers of visitors and increase dwell times and visitor spend. The interviews also allowed for detailed discussions into specific areas of interest for the action plans (i.e. heritage, culture, nature etc.) and the findings from these are embedded into both the results of the report and the associated action plans.

### Community workshops

Three community workshops were run as part of the project, to embed ideas from the local population and ensure ownership of the action plans. The workshops were run in different parts of the Uplands area, to engage with a range of community interests and to showcase the assets that are available. More than 75 people in total attended the three workshops, which are detailed in Section 3 of this report.

### Online survey

An online survey was developed and circulated to all stakeholders on our contact list, who were asked to share a link with their visitors through social media, newsletters and any other engagement channels. The survey ran from October 2016 to February 2017 and attracted 206 responses.

### Funding review

Finally, a review has been carried out of the available funding streams with relevance to the tourism offer in the Uplands area. An overview of the options is outlined in Section 5.

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<sup>1</sup> For the asset mapping, the Uplands area was defined by SY23 and SY25.

## 2 Background

### 2.1 Literature Review

There is a consensus within the available literature that both the Uplands and the wider Cambrian Mountains area lack recognition amongst potential visitors and there is a need for the area to develop wider awareness of what it has to offer to attract tourists, along with the infrastructure to meet the needs of both guests and local residents. The development of facilities such as a viable, flexible public transport network, good range and standard of accommodation, food and associated support services could create jobs, develop the economy, improve the viability of existing businesses (including farms) and encourage young people to stay in the area.

Some key issues and initiatives/strategies highlighted in existing reports include:

- Enabling a vibrant Uplands<sup>2</sup> by promotion of the area and the products coming from it as part of the Cambrian Mountains - with support from the RDP under the Mountain Areas thematic sub-programme<sup>3</sup>.
- Improving awareness to meet the biggest challenge and opportunity the area has; by targeted marketing and increasing the inland offer in Ceredigion<sup>4</sup>.
- Reducing isolation and strengthening inter-community links.<sup>5</sup>
- Promoting the countryside (rural hinterland, nature and outdoor activities) and the cultural and physical heritage (faith tourism, mining heritage).<sup>6</sup>

The assets of Ceredigion are mostly situated on the coast, although there are key attractions inland such as the Bwlch Nant yr Arian Visitor Centre (and associated mountain bike trails), the Vale of Rheidol Railway, Devil's Bridge Waterfalls and the Hafod Estate. The majority of outdoor attractions in the area are privately owned<sup>7</sup> and there is relatively little provision for wet weather activities.

The accommodation offer in Ceredigion is mostly caravan and camping sites (78%), although in more recent years the self-catering offer has increased to account for 13% of overnights in 2014.<sup>8</sup>

The relative lack of infrastructure, in terms of facilities and accommodations needs to be addressed if the area is to compete adequately with areas such as the Lake District, Cornwall or Pembrokeshire. Literature also suggests that there is a need for agencies on a national, regional and local level to work better together to promote tourism in the area.<sup>9</sup>

### 2.2 Visitor Offer and Current Visitors

This section of the report sets out what is currently on offer to visitors of the Uplands area.

#### Ceredigion

<sup>2</sup> *Unlocking the Potential of the Uplands*

<sup>3</sup> *Tourism and visitor Economy strategy for Ceredigion 2011-2020*

<sup>4</sup> *ibid*

<sup>5</sup> *Unlocking the potential of the Uplands*

<sup>6</sup> *Tourism and visitor Economy strategy for Ceredigion 2011-2020*

<sup>7</sup> *ibid*

<sup>8</sup> *Ceredigion report from Visit Wales*

<sup>9</sup> *Tourism and visitor Economy strategy for Ceredigion 2011-2020*

According to official statistics, visitors to Ceredigion are generally very satisfied with their experience and a high percentage say they will return to the area in future. Visitors are primarily attracted by beaches and outdoor activities on offer in the area. However, current tourists are characterised by low spend and an older age profile, although also appealing to couples or those with younger children.

- Ceredigion had 5.89 million day visitors with an estimated expenditure of £145.02 million.<sup>10</sup> Average visitor spend was £24.62 per day, almost £10 per day less than the Welsh average (£33.28).<sup>12</sup>
- Ceredigion enjoys very high satisfaction ratings amongst visitors (9.5 out of 10).<sup>13</sup> Factors affecting satisfaction included the 'quality of the natural environment' and the 'friendliness of people'.
- 91 per cent of UK staying visitors say they 'definitely will' return, as did 88 per cent of day visitors.<sup>14</sup>
- A third (33%) of visitors report they took part in outdoor activities during their day visit to Ceredigion.<sup>15</sup> Almost half (49%) of visitors specified going to the beach as an activity undertaken during their trip.
- More than two-fifths (43%) of visitors to Ceredigion are couples. Around a quarter (24%) of visitors comprise families with young children and tourism research noted the area is currently less appealing to visitors with older children (11%) or people aged under 35 (9%).<sup>16</sup>

This suggests Ceredigion as a whole enjoys good visitor numbers with high levels of visitor retention, although there is a shortage of data relating specifically to the Uplands area. There may, however, be a need to develop the visitor offer to ensure it appeals to younger visitors and those with a higher spend profile to get the most from the strengths of the area.

### Uplands Area

The Ceredigion Uplands constitutes the largest wilderness area in Southern Britain. With many historic links (such as the writings of George Borrow, the iconic ruins of Strata Florida and the mining heritage of the 19<sup>th</sup> century) and a very high-quality natural landscape, the area provides a highly attractive setting for short breaks or longer holidays. However, there are challenges to the tourism industry, partially arising from the very nature of the landscape, in that there are few points of focus (by contrast, Snowdonia has readily identifiable peaks to climb) and few settlements of sufficient size to provide a critical mass to attract visitors. The hospitality infrastructure is limited and although there are high-quality attractions, the linkages between them are not currently sufficiently developed to present a compelling offer to attract large numbers of new visitors to the area. The absence of National Park status places the area at a disadvantage compared with Snowdonia or the Brecon Beacons and it

<sup>10</sup> GB Day Visitor Survey 2015, [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/gbdvs\\_annual\\_report\\_2015\\_13.06.16.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/gbdvs_annual_report_2015_13.06.16.pdf)

<sup>11</sup> This is based on a 2013-2015 three year average.

<sup>12</sup> This is based on a 2013-2015 three year average.

<sup>13</sup> Wales Visitor Survey 2013, Ceredigion Booster.

<http://www.discoverceredigion.co.uk/SiteCollectionDocuments/Visitor%20Satisfaction%20Surveys/REPORT%20Ceredigion%20Visitor%20Survey%202013.pdf>

<sup>14</sup> *ibid*

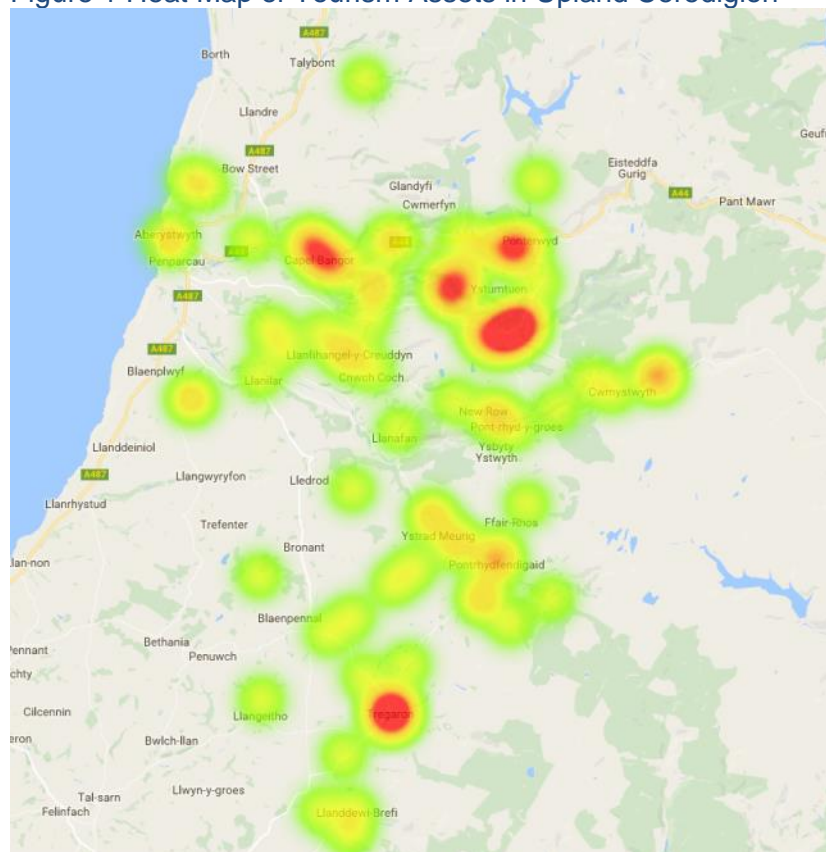
<sup>15</sup> *ibid*

<sup>16</sup> *ibid*

could be argued that in recent years the considerable focus on the Wales Coast Path has taken attention away from inland areas of Wales.

Tourism assets (accommodation, attractions and food and drink venues) are mapped in Figure 1 to illustrate the distribution of the tourism offer in the Uplands. It can be seen that there are effectively two axes to consider; the A44/A4190 corridor in the north (including Devil's Bridge / Pontarfynach) and the north-south axis from Tregaron through Pontrhydfendigaid to Devil's Bridge.

Figure 1 Heat Map of Tourism Assets in Upland Ceredigion



Miller Research (Google Maps)

## Community Areas

The Uplands area has two distinct community areas; Tregaron and the upper Teifi, including Strata Florida and Pontrhydfendigaid; and Pumlumon and the northern valleys, which encompass communities along the Rheidol and Ystwyth rivers such as Devil's Bridge, Llanfihangel y Creuddyn, Ponterwyd, Pontrhydygroes and the A44/A4120 corridor.

### Tregaron and the upper Teifi

Tregaron is a historic market town on the edge of the Cambrian Mountains; providing a gateway to one of the UK's largest wilderness areas. The town has a history of trade with important historical themes forming links within the area – the writings of George Borrow, many centuries of mining heritage and Strata Florida abbey; a huge land owner and sphere of influence in medieval times. There is a historic association with cattle drovers, which continues, with a strong farming sector supporting a vibrant livestock market in the town.<sup>17</sup>

<sup>17</sup> <http://www.discoverceredigion.co.uk/English/where/towns/Pages/Tregaron.aspx>



The area also has several Welsh pony and cob breeders and a festival of harness racing in August.

Tregaron is notorious for its ties to Twm Sion Cati; known as the Welsh Robin Hood, who was a legendary thief, storyteller and master of disguise who eventually became the mayor of Brecon.<sup>18</sup>

Key attractions in or near Tregaron include:

- Cors Caron Nature Reserve; a highly significant upland bog which boasts a wide range of wildlife, including more than 170 species of birds.<sup>19</sup>
- Strata Florida / Ystrad Fflur; a highly important cultural and religious site near Pontrhydfendigaid (“the bridge of the blessed ford”), which is the site of a former Cistercian abbey and subject of current plans for extensive work to establish the site as a visitor destination.
- The Red Kite Centre and local history museum on the outskirts of town, which provides information about red kites and other local wildlife.
- The Talbot Hotel in the centre of Tregaron, which has been recently renovated with a complete hospitality offer to visitors, including accommodation, bars, restaurant and business function rooms.
- The Welsh Gold Centre, which offers designer and bespoke jewellery in silver and Welsh gold.
- The Ystwyth Trail; a 20 miles cycle route and footpath linking Tregaron to Aberystwyth.

The town offers several annual community events drawing large audiences, including the annual Tregaron Races (harness racing) and Tregaroc – an influential Welsh-language contemporary music festival.

Across the area there is a need for the community to understand and see the benefits in investing in the area for tourism. There is a need to continue to develop the services for visitors (i.e. accommodation, food and drink offer, parking, etc.) alongside of the development of attractions. This community buy-in needs to happen to ensure Tregaron can compete with the high quality visitor offer that attracts visitors to other parts of Wales.

### Pumlumon and the Northern Valleys

The northern part of the Uplands area comprises a range of small communities and very rural hamlets. To the north of the A44, the Nant y Moch area is very sparsely populated and offers extensive tracts of open moorland along with the peak of Plynlimon, which is the highest point in Mid Wales (752m) and the source of the rivers Severn, Wye and Rheidol. The Bwlch Nant yr Arian visitor centre offers a range of means of accessing the landscape and wildlife to the west of the area - including extensive mountain bike trails, kite feeding station, woodland walks and fishing lakes. It is a starting point for a range of trails for walkers, mountain bikers, runners and horse riders, as well as daily feeding of red kites. The centre offers a café and Dizzy Heights Play Area for children and a bike wash, but no cycle

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<sup>18</sup> <http://www.visitmidwales.co.uk/Tregaron-Tregaron/details/?dms=3&venue=1020525>

<sup>19</sup> <http://www.visitmidwales.co.uk/Tregaron-Tregaron/details/?dms=3&venue=1020525>



hire or repair facilities such as those located at Coed y Brenin (although repairs are available in Aberystwyth<sup>20</sup>).

Nearby, the Llywernog Silver Mountain Experience allows visitors a choice of interpretation tours and special themed events in the setting of a historic silver and lead mine.

South of Plynlimon, small communities at Capel Bangor and Ponterwyd provide local services, including golf at Capel Bangor. The Rheidol Valley offers the Magic of Life Butterfly House – an all-weather visitor attraction showing tropical butterflies in their native habitat -, the Rheidol Riding Centre and the Vale of Rheidol hydro power station visitor centre. The main focus of tourism in the area, however is at Devil's Bridge, which sits at the head of the Rheidol Valley looking towards Plynlimon. It has long been a tourism destination for its iconic waterfalls and bridges and picturesque narrow gauge Steam Railway.<sup>21</sup>

- The waterfall is a key attraction in the area. The rivers Mynach and Rheidol converge and drop dramatically into a gorge below the village creating one of the largest and most picturesque waterfalls in Wales. Three bridges have been built across the gorge over the years, one on top of the other.
- The Vale of Rheidol Railway is a historic narrow-gauge railway which opened between Aberystwyth and Devil's Bridge in 1902. This tourist attraction is key to the area and has significantly increased its visitor numbers in recent years.
- The Hafod Hotel is an imposing building which is pivotal to the hospitality of the area. It achieved celebrity status after becoming a central location in the S4C/BBC series *Hinterland*. Following a period of decline, there has been a change of ownership and considerable investment is now being put into upgrading and improving the hotel.
- Two Hoots Café is situated next to the railway station and provides visitors with drinks and snacks on arrival or before setting off towards Aberystwyth. It is ideally sited if visitors are not able to walk into Devil's Bridge and/or the waterfalls although the café is only opened when the Rheidol trains are running. Sarah Bunton Chocolates can be found near to the railway station. Handmade chocolates of all kinds are on offer in the shop and visitors can watch chocolatiers create chocolate and fudge through the purpose-built window in the workshop.
- Woodlands Tea Room provides a wide range of drinks and hot food at the eastern end of the village, adjacent to the Woodlands Caravan Park.
- Hafod Uchtryd, perhaps better known as the Hafod Estate, is situated close to Devil's Bridge and is known as an outstanding example of a picturesque landscape<sup>22</sup> and visitors can walk in 200 hectares of the Ystwyth valley. Much of the land is owned by Natural Resources Wales, while the Hafod Trust continues the restoration of the landscape and its day-to-day management. The primary goals of the Trust are the conservation and restoration of the estate, which was laid out by Thomas Johnes (an Eton-educated MP, landscape architect, writer and social benefactor) between 1783 and 1814. In the late 18th century, the estate was regarded as an essential stop on any tour of Wales and its 12 km of free to access, restored walks on historical routes

<sup>20</sup> <http://www.summitcycles.co.uk/>

<sup>21</sup> <http://www.visitmidwales.co.uk/Devil's-Bridge-Devil's-Bridge-Pontarfynach/details/?dms=3&venue=1030425>

<sup>22</sup> The concept of the picturesque was coined by the English clergyman, artist, and writer William Gilpin (1724 - 1804) in his treatise *Essay on Prints* (1768), in which he defined the picturesque as "that kind of beauty which is agreeable in a picture."

make it a popular destination for walkers today, as well as attracting those with wildlife and landscape design interests.

- Hafod Church is adjacent to the Estate, with which it shares a car park. The church contains a display of historical material, and a touch screen facility to assist family history researchers. Communities such as Pontrhydygroes, Frongoch, Cwmystwyth and Llywernog have a strong mining history and heritage which can be seen in the scenery around the old mines and the industrial archaeology across the region. Numerous walks pass through the area and several promote its mining heritage; e.g. the main Borth to Devil's Bridge footpath is an eighteen mile walk through the scenery and Uplands mining heritage. The route passes through the settlements of Talybont and Leri Valley, Cwmsymlog, Nant y Arian, Goginan and Cwm Rheidol and has now been extended beyond Devil's Bridge to Pontrhydfendigaid. Both Devil's Bridge and Tregaron are registered "Walkers are Welcome" destinations and local walks are listed on the Tregaron Walking Club<sup>23</sup> and Pentir Pumlumon<sup>24</sup> sites

Overall, there is a reasonable mix of outdoor and all-weather experiences, although the limited range of indoor activities may be a barrier for some visitors. In addition to fixed attractions, Cambrian Safaris runs a range of interpretation trips for small groups around the area, allowing visitors to experience less accessible areas and understand the history and culture of the region.

The quality of the built environment and streetscape requires improvement, especially in terms of physical infrastructure improvements in Devil's Bridge, such as creating a safe pavement through the village, improving signage and opening up the views of the Rheidol Valley and across to Plynlimon. Tregaron also suffers many areas of need in terms of visual improvements and general tidiness. With the exception of Llanfihangel y Creuddyn, the majority of the villages in the area are said to be relatively disengaged from tourism at present. For example, Pontrhydygroes was acknowledged in Victorian times for its near alpine setting (referred to as the Engadine of Wales), but offers little to current visitors with several areas appearing uncared for and with the water wheel attraction reported to be lacking in upkeep.

### Visitor Numbers

The 2015 Wales Visitor Attractions Survey highlights the visitor numbers of three attractions within the area.<sup>25</sup>

Table 1 Visitor Attraction Numbers in Uplands area

Attraction	2014 Visits	2015 Visits	% Change
<b>Bwlch Nant Yr Arian</b>	94,898	106,426	12%
<b>Hafod Estate</b>	20,932	21,457	3%
<b>Strata Florida Abbey</b>	6,391	5,280	-17%

Source: Wales Visitor Attractions Survey (2015) (Extent of available data)

<sup>23</sup> <http://www.clwbcerddedtregaron.site/>

<sup>24</sup> <http://www.pumlumon.org.uk/walking/>

<sup>25</sup> Wales Visitor Attractions Survey (2015) <http://gov.wales/statistics-and-research/visits-tourist-attractions/?lang=en>

Bwlch Nant yr Arian attracted the largest number of recorded visitors of any attraction in the area in 2015 and visitor numbers increased significantly between 2014 and 2015, building on existing steady growth.

Industry figures for the Vale of Rheidol Railway suggest some 50,000 visitors per year used the service in 2015 and numbers continue to rise annually as a result of continued investment and development of the range of events and attractions. There are no recent figures available for the Devil's Bridge waterfalls<sup>26</sup>, but it is recognised as a significant attraction in the area. Table 1 shows a small increase in visitor numbers to the Hafod Estate to reach 21,457 visitors, whilst Strata Florida Abbey experienced a reported decrease in visitors to 5,280 in 2015.

One of the challenges for the area is to capitalise on the visitors accessing Bwlch Nant yr Arian, the Vale of Rheidol Railway and possibly Devil's Bridge Falls, by extending their dwell times and building spend through an improved offer.

### 2.2.1 Accommodation in the Uplands

Visitor accommodation is distributed fairly evenly across the area, with a focus on bed and breakfasts, self-catering cottages and caravan sites. There are four main hotels: The Talbot, Tregaron; The Hafod, Devil's Bridge; Nanteos Mansion between Devil's Bridge and Aberystwyth and the George Borrow Hotel, Ponterwyd. In addition, there is traditional pub accommodation at the Black Lion and Red Lion Hotels in Pontrhydfendigaid.

Caravan and camping sites include Woodland Caravan Park at Devil's Bridge, (which offers camping pitches, a gypsy pod and a self-catering option, with a convenience store and a large tea room accessible to any visitors); Erwbarfe Farm Caravan Park nearby, (which offers static and touring caravan pitches, camping spaces and eco pods on a farm setting outside the village), a small site at the Capel Bangor Golf Club, and Maes Bangor Caravan Park and the Bryn Gors Holiday Park, to the south of the area, which has a small number of caravans for hire. There is also a rural site at Tyllwyd, Cwmystwyth with basic facilities for independent campers.

For larger groups, Tynrhyd Retreat offers luxurious self-catering accommodation in a converted barn complex near the village of Devil's Bridge. There are four accommodation units on site (for up to a total of 38 people) which can be also used for conferences.

The overall offer is focused on traditional visitors and there is little glamping or individual/boutique accommodation at present. Searches on some of the main brokerage sites in this vein confirm this:

- [Welsh Rarebits](#) features the Talbot, Tregaron as its only entry in the area;
- [Great Little Places](#) has no entries in the Uplands Area;
- [Sawdays](#) features the Talbot and Nanteos Mansion;
- [Under the Thatch](#) features Pwll Pendre on the Hafod Estate;
- [Canopy and Stars](#) features The Yurt Farm, west of Tregaron as its only glamping site in the area. This is also the only accommodation that appears on a Google search for "glamping Ceredigion".

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<sup>26</sup> Devil's bridge waterfalls visitors number 37,773 (2010) source: *Visits to Tourist Attractions in Wales 2010* Welsh Government

Overall, much of the accommodation offer lacks appeal to younger, high spending visitors. The current refurbishment of the Hafod Hotel will be critical to providing a focus for hospitality in the north of the area, complementing the Talbot in the south. There is this central attraction in accommodation of the Talbot, but there is very limited other accommodation or services to attract visitors. For example in Tregaron there is no other bed and breakfast accommodation or campsite in Tregaron. The limited available choice of accommodation and visitor services is something that needs to be addressed to attract more visitors.

Although some investment has been made in “alternative” accommodation, such as the gypsy pod at Woodlands and eco-pods at Erwbarfe Farm, there is a shortage of provision in this sector.

### 2.2.2 Food and Drink

Local food and drink is often seen as a key contributor to attracting independent visitors to a rural area – providing a unique element of the tourism mix for guests to buy into. The Cambrian Mountains are renowned for producing good quality lamb and beef, although the area also offers wild game, fruit, herbs and foraged foods. Cheese making is a significant activity in the South of Ceredigion along the Teifi valley, but not in the Uplands.

Several of the pubs and restaurants in the area feature locally-sourced produce, including The Druid Inn in Goginan, y Ffarmers in Llanfihangel y Creuddyn, the Hafod Hotel, Nanteos Mansion Country House Hotel, Rhydyfelin, and y Talbot in Tregaron.

Although there are farmers’ markets and farm shops in the wider Ceredigion area, it can be challenging to buy local food in the Uplands area and, for example, the Ceredigion Taste Trail only features one producer (Sarah Bunton Chocolates) in the Uplands area. Gellimast Farm outside Devil’s Bridge offers locally produced meats from the farm. The recently opened Riverbank Cafe and Farm Shop in Tregaron have started to address this gap in the market. The recently opened cafe serves local and home cooked brunch, lunch and afternoon tea. It also sells locally produced products.

#### Events

Events can provide an excellent means of drawing people to an area for the first time. Comprehensive information about the available events in Ceredigion is available from the Discover Ceredigion website.<sup>27</sup> This lists events by visitor’s interest i.e. arts & crafts or sporting events. Some key events in the Uplands include:

- Tregaron Festival of Harness Racing (Pontrhydfendigaid)
- Capel Bangor and District Show
- Cneifio Bont Shears (Pontrhydfendigaid)
- Pontrhydfendigaid Show
- Sioe Tregaron Show
- Talybont Show

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<sup>27</sup> <http://www.discoverceredigion.co.uk/English/what/events/Pages/events.aspx>

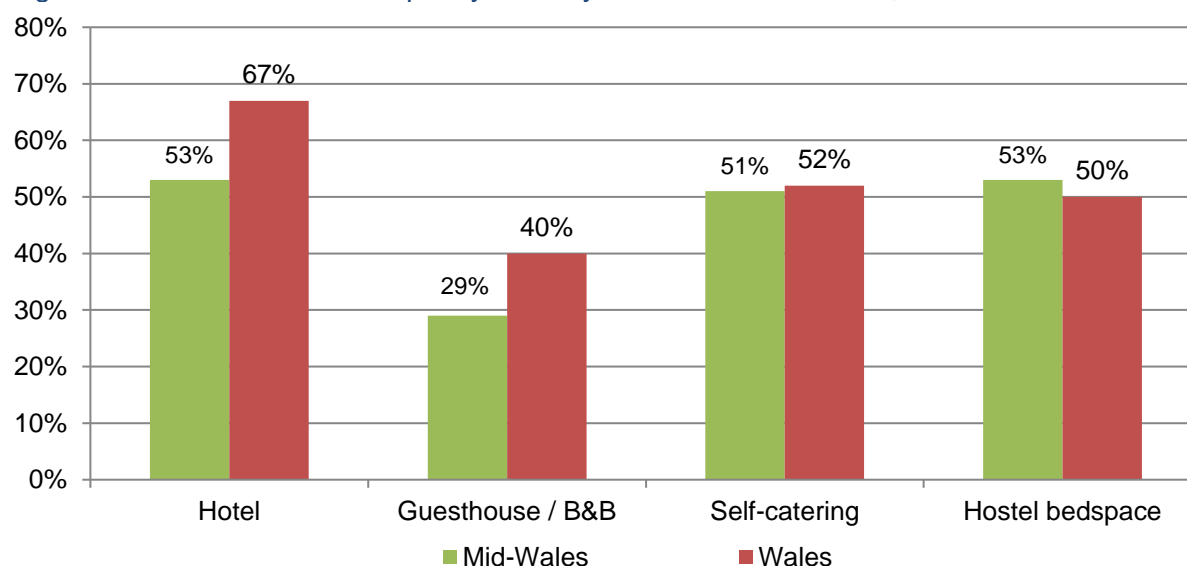
- Vale of Rheidol Railway events (such as Autumn Colours and Sunday Lunches / Music on the train etc)
- Music and community events at Ysgoldy Goch
- Abercyclefest: Aberystwyth Cycling Festival (based Aberystwyth but using roads in the Uplands)
- Cambrian Safaris tours

In addition to these there is the Tregaroc Welsh music festival and the Pavilion at Pontrhydfendigaid runs ad hoc events, although no events are currently publicised as being planned apart from the Eisteddfod. There is a range of events on offer in the wider area, but a limited range available in the Uplands area at present beyond agricultural shows. This presents an opportunity for developing new attractions – perhaps especially around food and drink, arts and culture and outdoor activities.

### Occupancy Rates

The Wales Accommodation Occupancy Survey (2016) looks regionally at trend information about the demand for tourist accommodation in Wales.<sup>28</sup> Mid-Wales generally has lower occupancy rates than Wales as a whole, illustrating the challenges of running a successful tourism business in the area. The hotel occupancy rate is considerably lower in mid-Wales (53 per cent in 2015-2016) than the Welsh average of 66 per cent and similarly amongst guesthouses / B&B's there was a lower rate of occupancy in mid-Wales (29 per cent in 2015-2016) than the Welsh average of 40 per cent.

Figure 2 Accommodation occupancy rates by Mid-Wales and Wales, in 2015-2016.



Source: Wales Accommodation Occupancy Survey (January 2016 to December 2016).

Unsurprisingly, static and touring caravans/camping were said to perform better in coastal regions than in inland locations, with a coastal location occupancy rate of 75 per cent in 2015 to 2016 in comparison to 35 per cent inland. Statistics show a broadening divide, with a decline in occupancy rates over the last two years for inland static caravans/ holiday (8%), in

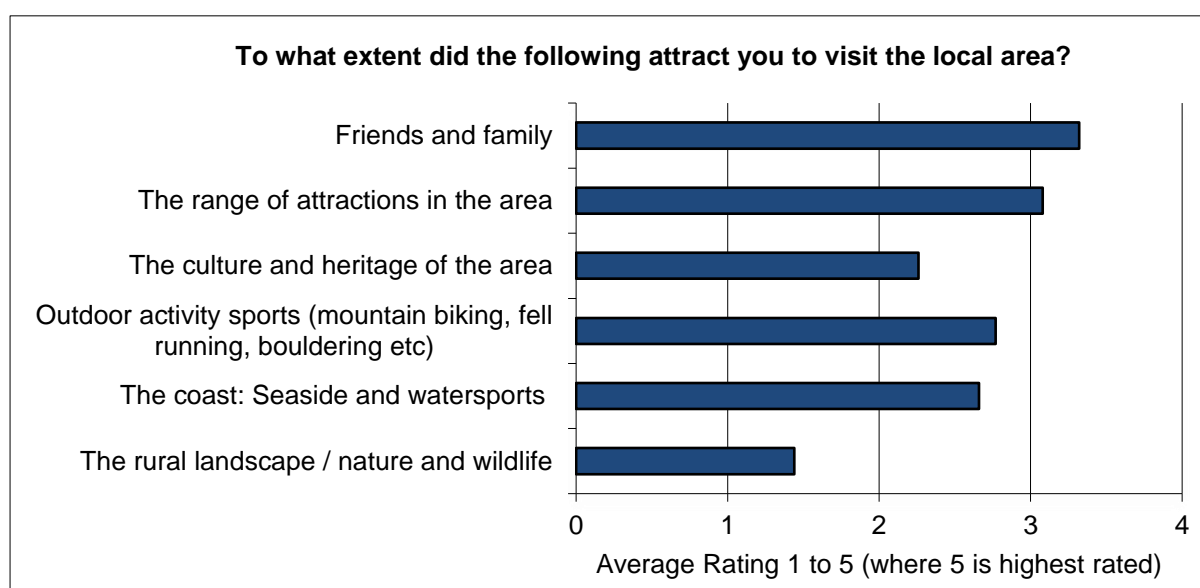
<sup>28</sup> <http://gov.wales/statistics-and-research/wales-tourism-accommodation-occupancy-surveys/?lang=en>

comparison to a 15 per cent increase for coastal locations, although a more complex picture was drawn by operators in the Uplands.

Anecdotally, some caravan park owners in the area agree with the above statistics, with one park owner expressing concern that rising business costs meant that funds were being redirected away from advertising and marketing, and this was having a knock-on effect on occupancy rates. However, other parks have seen a rise in occupancy over the last five years. One put this down to investing a large amount in advertising and marketing, offering targeted discounting and foreign promotions through sites such as Asci<sup>29</sup>.

### Visitor Perspective

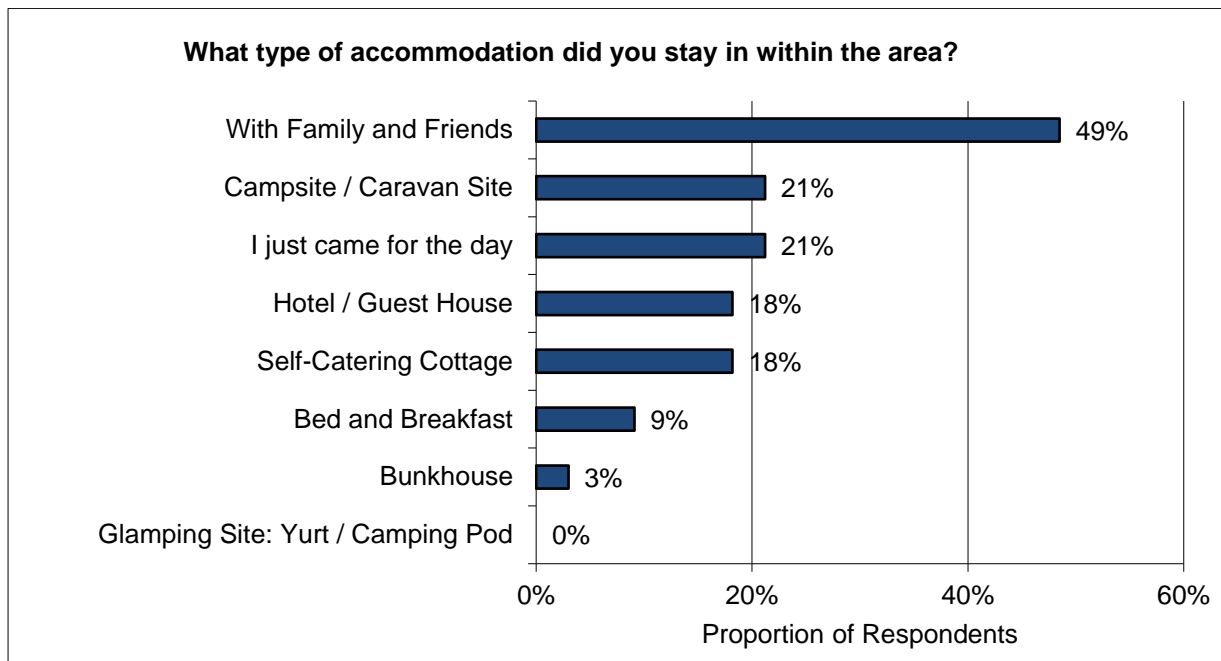
An online survey of tourism attitudes was carried out as part of this research, attracting 206 responses. The results demonstrate the importance of local links in promoting tourism, as “visiting friends and family” was the highest rated attractor to the area amongst respondents, followed by the range of attractions in the area.



Source: Online Survey, n=206.

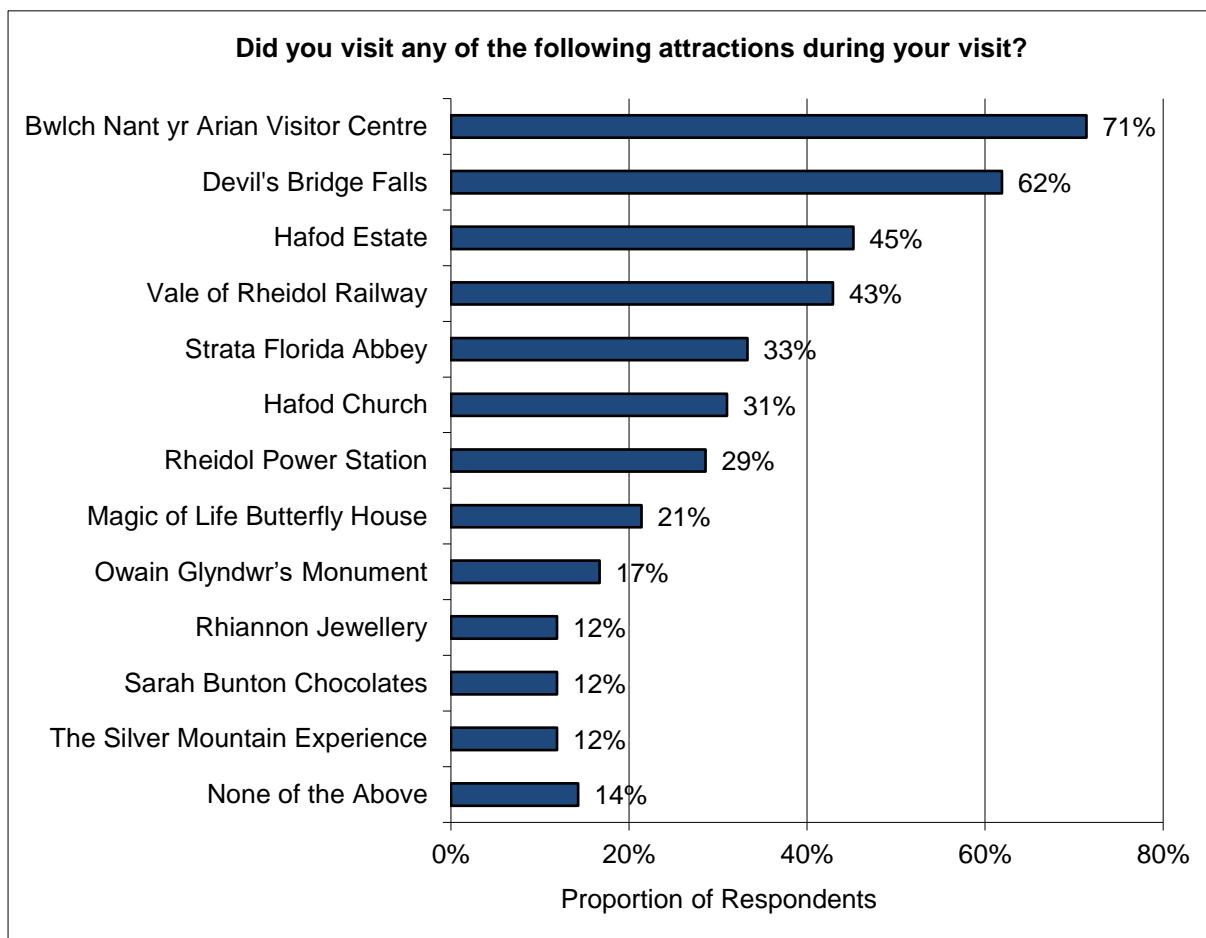
Visitors were also most likely to have stayed with family or friends, followed by camping/caravanning, day trips, hotels and self-catering.

<sup>29</sup> <http://www.acsi.eu/en/home/l2-n144/>



Source: Online Survey, n=206.

Average spend recorded by respondents (including accommodation) was £46.50 per day, which is considerably higher than that recorded for Mid Wales as a whole, although the methodology for assessing this is not necessarily consistent with comparator surveys.



Source: Online Survey, n=206.

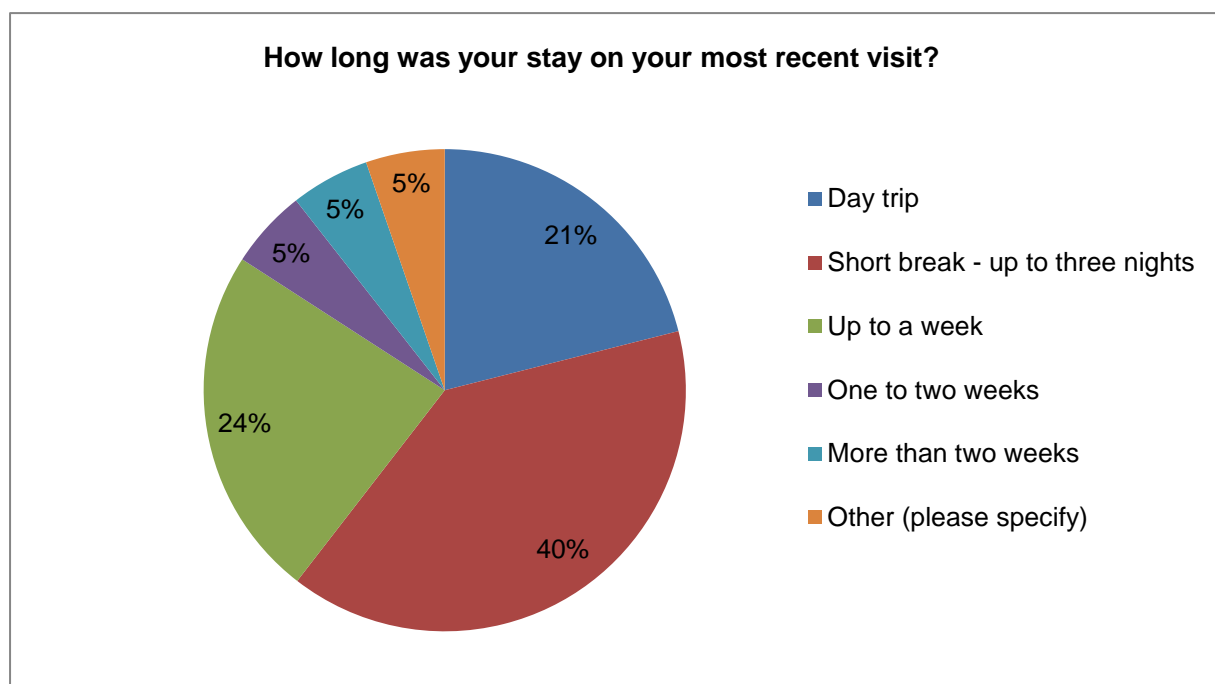


Respondents were asked which attractions they had visited during their stay and Bwlch Nant yr Arian was the most visited, followed by Devil's Bridge Falls, the Hafod Estate and the Vale of Rheidol steam railway.

Respondents were most likely to have visited the area for a short break of up to three nights (40 per cent of responses), followed by stays of up to one week (24 per cent) and day trips (21 per cent).

In terms of frequency of visit, there were two peaks in survey responses; those who visit very regularly (more than six times per year) and those who visited once or twice a year. Only a very small proportion of respondents said that it was the first time they had visited.

More than 90 per cent of those responding said that they would recommend the area to friends and relatives looking for somewhere to visit in future.



Source: Online Survey, n=206.

Survey participants were asked what one thing could be done to improve the visitor experience in the Uplands and a wide range of responses was received. Key themes, however, included:

- Improved facilities for outdoor adrenalin sports (including water sports);
- Better quality accommodation and customer service;
- Access to the countryside and signage/footpaths;
- Transport links to build connectivity within the area;
- Improved information/interpretation for visitors;
- “Surfacing” of natural and cultural assets to provide a more coherent story for the Uplands.

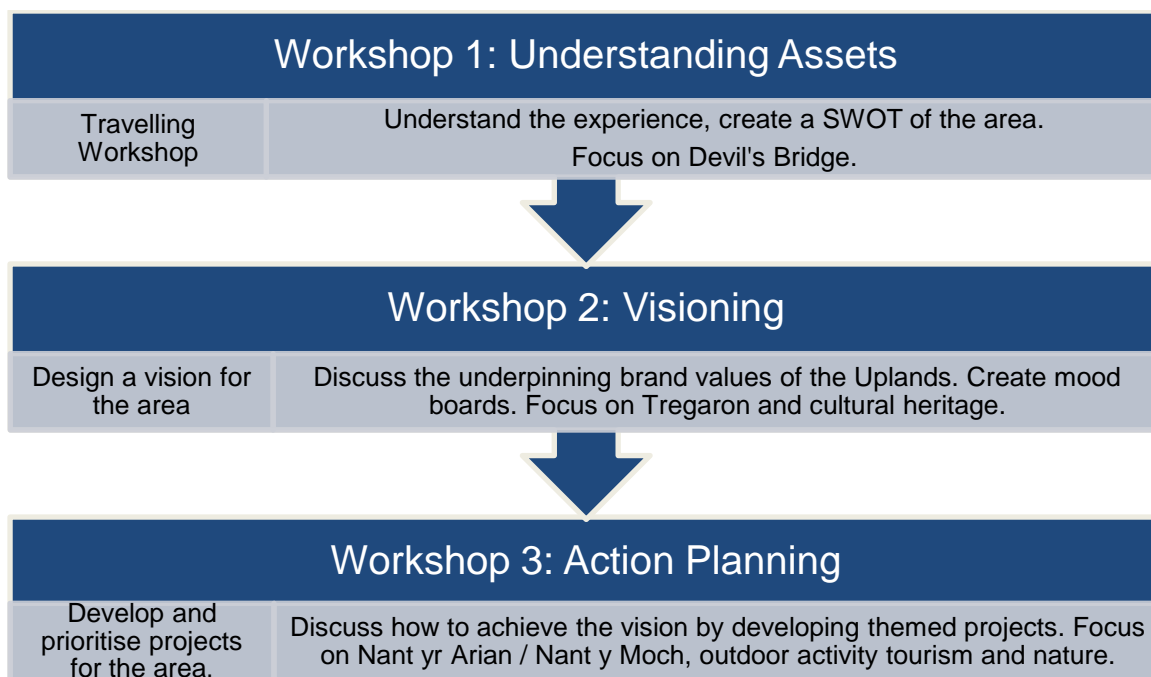


There were, additionally, several responses which emphasised the need to avoid over-development in the area; preserving its wilderness character.

To summarise, the visitor survey suggests that the main motivation for visiting the area was to see friends and family, rather than because of the attractions on offer. However, the majority of visitors are broadly satisfied with their experience and would recommend the area to other people. There is a recognition, however that the overall quality of the experience could benefit from being sensitively updated and upgraded to meet the evolving expectations of consumers. More information, interpretation and networking of attractions would also help to create an overall offer to attract new visitors and to retain existing ones in the area for longer or more frequent visits.

### 3 Community Engagement and Evidence Gathering

Three community workshops were held to complement other aspects of the research, develop collective thinking about the area and build capacity for collaboration in delivering actions to grow the local economy.



#### 3.1 Workshop 1

The first workshop was an innovative half-day travelling workshop on the Vale of Rheidol Railway looking at what the area has to offer visitors and how visitor stay and spend can be increased through meeting expectations better. The event consisted of a group of local stakeholders role-playing different types of potential visitor whilst taking a trip from Aberystwyth to Devil's Bridge. Participants were asked to imagine they were visiting the area for the first time, from the perspective of their assigned character. The process was loosely based on a segmentation model developed for Visit Britain which categorises visitors according to their position on two axes; leaders/followers vs independent/mass market.<sup>30</sup> Four groups were chosen for the process:

- Cosmopolitans - the highest spending group, are innovators who like to out try new things, who seek adventure and expect good quality food and boutique or quirky accommodation to stay in;
- Functionals - are self-reliant and value functionality over style, resisting spending where possible and bringing much of what they need with them;

<sup>30</sup> <http://www.arkleisure.co.uk/explore/> . Details of the customised groups used are listed at Appendix 1.

- Traditionals - hold traditional values and enjoy intellectual challenges, arts and culture. They are willing to pay for good quality and service and have firm views about their expectations.
- Local Residents – looking for somewhere to meet friends and have a day out with their children.

On the journey, the groups were asked to discuss their expectations of their day out in Devil's Bridge; considering what different visitors might expect from the local area and what they might require in terms of different services and



*Stakeholders board the train in Aberystwyth*

activities. On arrival, each group was encouraged to explore their destination for 45 minutes before reconvening to compare their experiences against expectations.

An afternoon session in the Hafod Hotel allowed for further reflection on the train journey experience, compilation of a SWOT<sup>31</sup> analysis and a thematic discussion about what is currently on offer. This first stakeholder workshop was attended by 22 stakeholders from a cross-section of organisations and community groups.

The workshop resulted in extensive lively discussion around the specifics of the train journey experience, impressions of Devil's Bridge and wider issues relating to the local area. Particular issues highlighted in the discussions included:

- Finding the Vale of Rheidol station in Aberystwyth was challenging to some people and the site would benefit from improved signage and links to the mainline station;
- Excellent views and overall experience of taking the train journey, although some groups found it expensive and there was a consensus that more interpretation of the journey would improve visitors' understanding of the landscape and its history;
- Although there are some good quality facilities and places to eat and drink in Devil's Bridge, there is no information on what is available or where to find it and signage is generally poor.
- The lack of pavement and presence of



*The Hafod Hotel*

<sup>31</sup> SWOT analysis is the exploration of the strengths, weaknesses, opportunities and threats.

heavy traffic in Devil's Bridge is a significant barrier to full enjoyment of the destination, especially for the disabled or those with young children.



### Traffic in Devil's Bridge

Devil's Bridge to draw in visitors.

- There are no regular public transport links from Devil's Bridge to the south, allowing visitors to travel through the Uplands area to Tregaron.<sup>32</sup> Ystwyth Transport, however, provides a dial a ride service by arrangement.

Overall the workshop concluded that the area appealed most to those with the lowest expectations (and potential spend) and that more needs to be done to satisfy the needs of younger, more independent and higher spending visitors.

### SWOT Analysis

The SWOT analysis developed in the session (Table 2) clearly highlights some of the key strengths of the area; including the following.

- Unspoilt and undiscovered landscape with waterfalls, forestry and a location which is peaceful and has a strong sense of place;
- A wide range of outdoor activities on offer (e.g. cycling, mountain biking, walking, wild swimming, fishing, etc.);
- Culture and heritage offer with an extensive mining heritage, Rheidol Railway, Strata Florida, Devil's Bridge, Hafod Estate, churches etc.

The weaknesses of the area highlighted by the community were mainly on a lack of connectivity, brand/identity and infrastructure. These themes were discussed during each of the three community workshops.

A wide range of opportunities was identified in the first workshop, including developing the brand / identity of the area and a need to link key attractions in to ensure the area becomes

<sup>32</sup> Google maps claims a public transport journey time of 13hr 26m from Devil's Bridge to Tregaron via Aberystwyth. However, Mid Wales Motorways operates a public service on its school bus from Tregaron to Aberystwyth and back each day during term time weekdays.

a networked destination of choice, with a well-developed hospitality offer available to visitors (i.e. accommodation, food, shopping, public facilities, etc.) and a programme of key events throughout the year.

The community also acknowledged a number of key threats to the Uplands area which included the lack of funding; partially due to the decision to leave the European Union and also a perception that mid-Wales is not a focus area for Welsh Government. An interesting threat identified was from within the community itself, in terms of not having a culture that is either collaborative or ambitious enough to develop a strong tourism offer.

Table 2 SWOT Analysis (Workshop 1)

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Unspoilt landscape               <ul style="list-style-type: none"> <li>- Views / scenery / Waterfalls / Forestry</li> <li>- Unspoilt beauty - undiscovered landscape</li> <li>- Untapped potential at Hafod</li> <li>- Lack of traffic/ big roads</li> <li>- Pumlumon – highest mountain in the area</li> <li>- Source of 3 rivers</li> <li>- Dark skies</li> </ul> </li> <li>• Range of outdoor activities on offer               <ul style="list-style-type: none"> <li>- Wild swimming, fishing, cycling, mountain biking, walking, horse riding</li> </ul> </li> <li>• Nature - wildlife e.g. pine martens / red kites, salmon</li> <li>• Culture / heritage               <ul style="list-style-type: none"> <li>- Mining heritage, Rheidol Railway, Strata Florida, Devil's Bridge, churches, lead mines, Hafod, National library etc</li> </ul> </li> <li>• Shopping – chocolate shop, local crafts</li> <li>• Peaceful / safe</li> <li>• Associations with Hinterland</li> <li>• Agriculture – growing interest of people to visit farms to see where food comes from, lambing and sheep farming.</li> <li>• Accommodation available – self-catering / campsites / etc.</li> <li>• Language – sense of place</li> </ul>	<ul style="list-style-type: none"> <li>• Not enterprising enough</li> <li>• Afraid of selling ourselves – have an abundance of local talent</li> <li>• Lack of clear brand               <ul style="list-style-type: none"> <li>- Ceredigion brand – lack of awareness of what and where Ceredigion is</li> <li>- No unified brand for local businesses to use</li> <li>- Lack of marketing</li> </ul> </li> <li>• Lack of collaboration within the area</li> <li>• Parochialism between North and South of the area</li> <li>• Accessibility               <ul style="list-style-type: none"> <li>- Lack of public transport between places of interest (especially once in Devil's Bridge)</li> <li>- Lack of information and signage</li> <li>- No linking between attractions</li> </ul> </li> <li>• Not recognised by Welsh Government as a discrete area</li> <li>• Areas of untidiness</li> <li>• Lack of engagement from local residents: Undervalued assets</li> <li>• Public toilet provision is variable</li> <li>• Accommodation – Lack of B&amp;B, glamping, hostels and quality hotels</li> <li>• Access to landscape via footpaths etc.</li> <li>• No canoe access on rivers</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• People come with low expectations</li> <li>• Mountains</li> <li>• “Celtic rainforest”</li> <li>• Parc Naturale</li> <li>• Hinterland brand</li> <li>• History – George Borrow / Thomas Johnes / Twm Sion Cati / Owain Glyndwr,</li> <li>• Maximising the views – panoramic views</li> <li>• Increase local stay from within the UK</li> <li>• Link focal points in the area with a trail</li> <li>• Becoming more creative in offers</li> <li>• Creating village pride</li> <li>• Providing bike racks on train</li> <li>• Dark skies – Elan Valley</li> <li>• Develop branded food and drink</li> <li>• Offer the best alfresco / picturesque dining in Wales</li> <li>• Market stalls with local crafts</li> <li>• Develop more public transport/tour by bus</li> <li>• Accommodation – youth hostel for backpackers/bikers</li> <li>• More public toilets</li> <li>• Pavement in Devil’s Bridge</li> <li>• Marketing</li> <li>• Organising events</li> </ul>	<ul style="list-style-type: none"> <li>• “Ourselves”</li> <li>• Worsening lack of infrastructure, dealing with traffic</li> <li>• Populating ageing and young people are moving away from the area instead of starting businesses</li> <li>• Other areas have moved on, but we have gone backwards</li> <li>• WG funding goes to large-scale tourism projects e.g. Ryder Cup</li> <li>• People go to shops when weather is bad rather than visiting outdoor places</li> <li>• Brexit – loss of EU funding</li> <li>• Snowdonia / Pembrokeshire / Brecon Beacons</li> <li>• Development of wind farms in wrong locations</li> </ul>

Those present also took part in thematic discussions around the key themes of outdoor activity tourism, culture and heritage, nature and transport and infrastructure. Outputs from these sessions were taken forward to underpin discussions in Workshop 2.



### 3.2 Workshop 2

The second workshop was held in the Talbot in Tregaron and provided an opportunity to recap the community views from the first workshop, discuss the overall vision for the Uplands area and formulate initial ideas for ways to develop the visitor offer. This workshop had the theme of culture and heritage and included an insightful presentation from Professor David Austin about the development opportunities around Strata Florida. The workshop was well attended, with 28 members of the community present.



*Tregaron Town Square*

Central to Workshop 2 was an exercise to create a design brief for the Uplands, with the idea that participants should reflect on the values and messages that go to make up the Unique Selling Points (USPs) of the area. This was undertaken in an interactive manner, with breakout groups each assembling a “mood board” collage of images and keywords to describe what the Uplands area has to offer visitors. The outputs from this exercise are attached at Appendix 2, although an example is shown below:



The mood boards were focused very strongly on peace and quiet, nature and heritage, with a predominance of green landscapes and links to agriculture.

From these collections of images and messages, workshop participants were asked to compile a vision for the area, and results centred on the unspoilt landscape and scenery that provides a haven for wildlife and people. The culture and heritage of the area were seen as key to what will attract visitors and this included food and drink offer. Another theme was the offer of outdoor recreational activities (e.g. walking, horse riding, cycling and mountain biking).



Strata Florida Abbey

The overall vision arrived at was:

*“The community vision for the Uplands area is to focus on the natural unspoilt landscape to attract visitors to the area, utilising the outdoor activities and heritage sites.”*

This vision was underpinned by a wide range of potential project ideas, many of which related to bringing out the detail of the natural assets and joining them up to provide a networked offer for the area.

This led to a refined SWOT for the area, focusing on key themes, as follows:

Table 3 SWOT Analysis for Workshop 2

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Wilderness</li> <li>• Accessibility</li> <li>• Culture/heritage sites – Rheidol Railway, Strata Florida Abbey, Hafod Estate, mining heritage, miners’ wheel in Pontrhydgroes.</li> <li>• Nature/environment tourism – Pumlumon, walking, nature reserves, bird watching.</li> <li>• Outdoor activities – Nant yr Arian, good roads for cycling, open trails, rallying.</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of infrastructure e.g. parking, toilets</li> <li>• Lack of promotion</li> <li>• Limited food and drink offer</li> <li>• Limited waymarked trails for walkers</li> <li>• Lack of connectivity of attractions</li> <li>• Limited accommodation or hospitality offer</li> <li>• Lack of identity / No USP</li> <li>• Lack of focus and entry points</li> <li>• Lack of collaboration in the area</li> <li>• Not enterprising enough</li> <li>• No bike shops for repair or rental</li> <li>• Limited facilities at Nant yr Arian</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Appeal to the independent traveller</li> <li>• Develop food and drink offer</li> <li>• Connect existing sites to create an overall offer</li> <li>• Links with the Cambrian Mountain brand</li> <li>• Develop a more creative offer</li> <li>• Marketing and branding</li> <li>• Accommodation offer</li> </ul>	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Local culture and attitude to tourism</li> <li>• Lack of collaboration</li> <li>• Damage to ecosystems by visitors</li> <li>• Better developed destinations e.g. Coed y Brenin, Antur Stiniog and Bike Park Wales</li> <li>• Lack of infrastructure</li> <li>• Brexit</li> </ul>



### 3.3 Workshop 3

The third workshop was held in the Nant yr Arian visitor centre, with an opportunity to discuss priorities and projects to take forward within a co-ordinated strategy for the area.



The workshop had the theme of outdoor activities with a presentation about the opportunities to develop the outdoor activity offer in the Nant y Moch area, through the redevelopment of the former Maesnant outdoor pursuits centre and associated infrastructure. This workshop was also well attended with 25 people present.

The session started with a reflection on what the area has to offer and refinement of the vision for the area. It was divided into five themes which came from Workshop 2;

- A. Activities
- B. Landscape
- C. Cultural
- D. Atmosphere
- E. Heritage

Ideas for “projects” making use of the current offer were presented, some which had been mentioned previously. These included;

#### A. Activities:

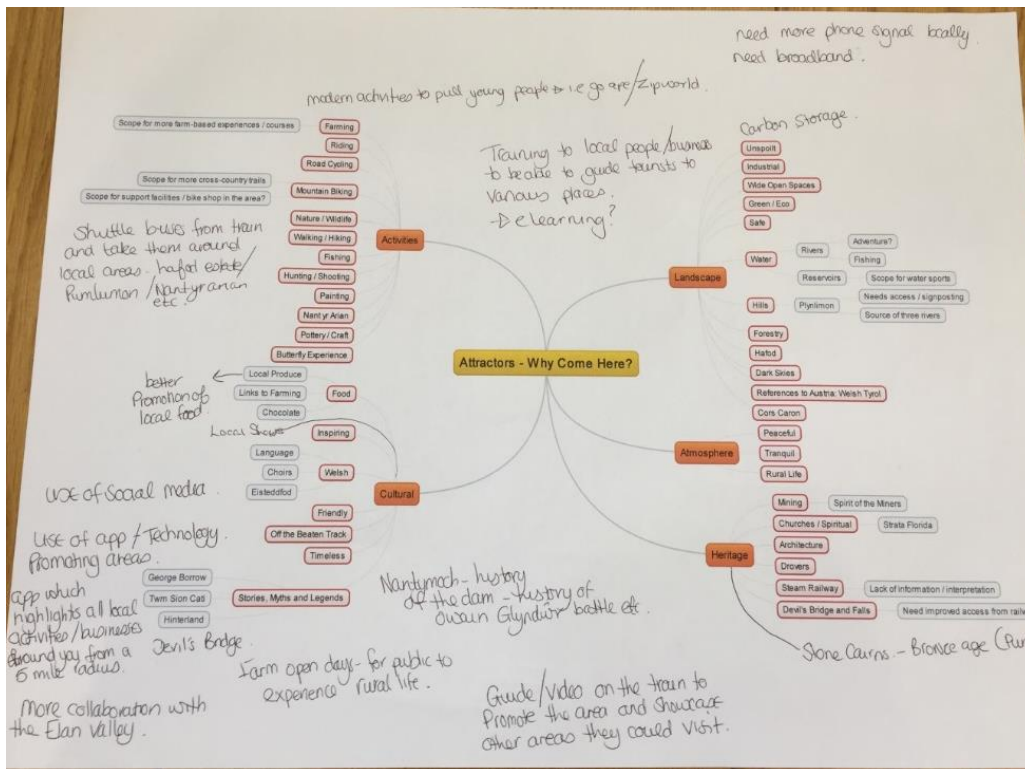
- Investigating the creation of an adventure centre at Maesnant and developing collaboration with Nant y Arian;
- Developing additional facilities for mountain bikers to encourage them to stay more than one day;
- Making electric bikes available to extend the range of less active visitors with minimal impact on the environment;
- Using Sustrans maps to increase the opportunity to cycle either on or off road;
- Development of a group of farmers who want to diversify: Agrisgop-type group;
- Having more B&B and campsites on the cycle paths;
- Improving access to parking, creating circular trails from well-known places, promoting trails, information on paths;
- Marking and maintaining bridleways (led by the County Council); and,
- Using the Year of Legends to create some themed walks.

#### B. Landscape / wildlife:

- More interpretation about what visitors can expect to see would be beneficial in terms of descriptive leaflets, wildlife apps, and guided or self-guided tours and trails;
- Development of a raptor tour to see birds such as the red kite, peregrine falcon, golden eagle, osprey and buzzard.

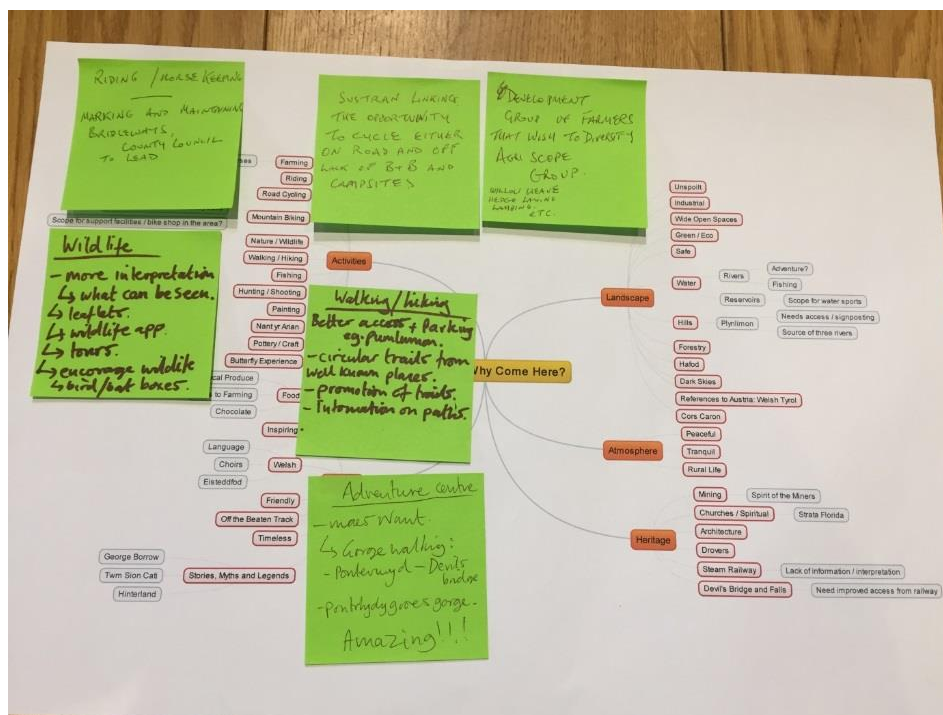
C. Cultural:

- Use the Hinterland buzz to organise tours;
- Organise cultural events (festivals, concerts).



D. Infrastructure:

- Improving signage;
- Having a map of the area and walks available at local shops;
- Creating better linkages between the existing sites (cultural, historic, industrial, nature, landscape);
- Offering affordable accommodation;
- Creating events to promote the area and informing visitors: Exchange with people who run accommodation for them to promote the attractions around them;
- Working better with local people;
- Investing transport whether it is a classic bus, community bus or/and a ride share, electric cars; and,
- Having a billboard with maps of what is available inland set in villages on the coast.



### E. Heritage:

- Make use of the knowledge and skills of local people;
- Use the heritage of the Hafod Estate and Strata Florida as a hook to bring in visitors;
- Increasing Awareness as a priority.

All groups were given the opportunity to express themselves on the best way to promote the area. The main point identified was the need to use all available channels of distribution as well as new ones, including:

- Ceredigion County Council
- Cambrian Mountains Initiative
- Discover Ceredigion
- Ambassadors such as the MP (At the time this was Mark Williams, subsequently Ben Lake)
- Work with local people and use their knowledge and skills

It was suggested that Pentir Pumlumon or a proposed collaborative tourism group could coordinate the marketing aspects, given that small businesses have limits on how much they can spend on promoting the Uplands.

For example the neighbouring Elan Valley area received £1.7M from Heritage Lottery Fund to “to increase tourism and boost jobs through carefully planned conservation and renovation activity.”<sup>33</sup> There is the possibility of similar funding being available to promote the Uplands area.

<sup>33</sup> <https://www.hlf.org.uk/about-us/media-centre/press-releases/%C2%A317million-national-lottery-win-elan-valley>



It was acknowledged that the Uplands need a greater presence on social media; to promote events and seasonal activities. This would require someone to become trained to be able to maintain a consistent presence.

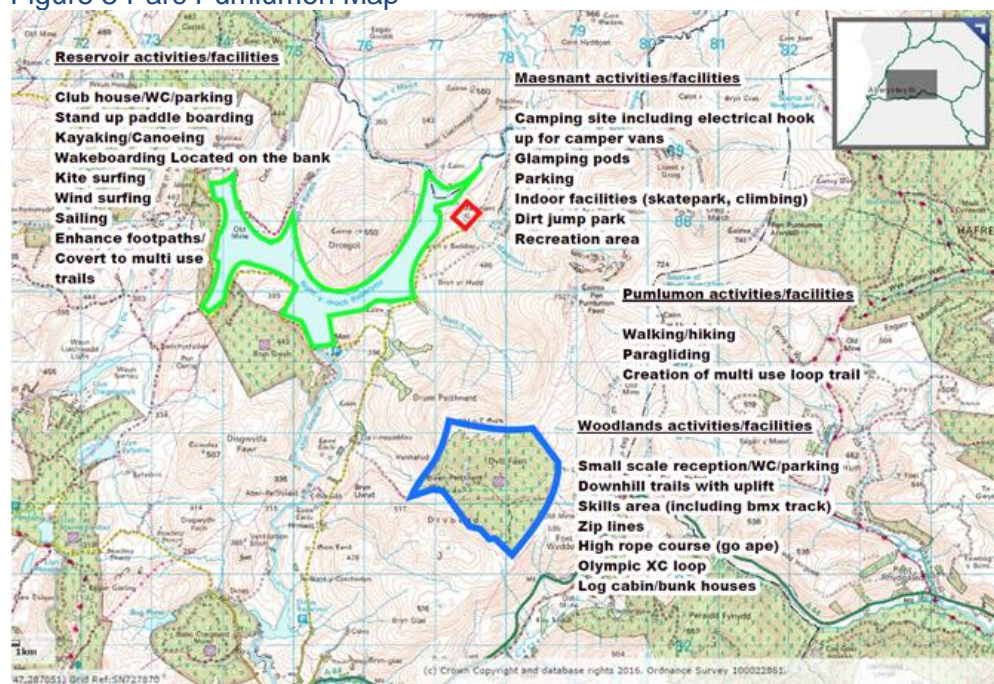
It was agreed that the Cambrian Mountains brand would be most appropriate as an over-arching brand as it is already an established name. Therefore it would be good to have brown signs at strategic points indicating that visitors are entering the Cambrian Mountains.

John Wells presented his vision for the development of Parc Pumlumon; a multi-activities centre on three sites beginning with the former outdoor pursuits centre at Maesnant (owned by Pentir Pumlumon). This was suggested as a means of complementing the Nant yr Arian offer, with different activities such as downhill trails, water sports centre, and woodland activities.



*Mountain Bike Trail at Nant yr Arian*

Figure 3 Parc Pumlumon Map



Such a centre could be used by schools during term time and as a holiday club destination and would create employment and training on issues such as health and safety, maintenance. In addition, the running of a centre could create a number of rural jobs. The development would be deployed in stages and could be built in an environmentally friendly manner.

The group reacted positively to the idea, although there were some concerns over issues of access and hence transport linkages would be crucial to bringing in people spending holidays on the coast.

The need was identified for a more unified approach to promote the area and the activities provided and North Wales<sup>34</sup> and Merthyr Tydfil<sup>35</sup> were highlighted as good examples of what could be achieved (for downhill biking).

### 3.4 Summary

The three workshops provided an excellent opportunity for local stakeholders to review issues affecting tourism in the Uplands and to develop ideas for addressing them. These have formed the basis for the projects described in Section 4 of the report.

Table 4 SWOT analysis of the Uplands Area

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Unspoilt landscape               <ul style="list-style-type: none"> <li>- Waterfalls</li> <li>- Unspoilt beauty - undiscovered landscape and untapped potential at Hafod</li> <li>- Views / scenery</li> <li>- Forestry</li> <li>- Lack of traffic/ big roads</li> <li>- Pumlumon – highest mountain in the area</li> <li>- Source of 3 rivers</li> <li>- Dark skies</li> </ul> </li> <li>• A lot of outdoor activities on offer               <ul style="list-style-type: none"> <li>- Wild swimming, fishing, cycling, mountain biking, walking, surfing, etc</li> </ul> </li> <li>• Nature - wildlife e.g. birds pine martin / red kites, salmon</li> <li>• Culture / heritage               <ul style="list-style-type: none"> <li>- Mining heritage, Rheidol Railway, Owain Glyndwr, Strata Florida, Devil's Bridge, churches, lead mines, Hafod, etc</li> </ul> </li> <li>• Shopping – chocolate shop, local crafts</li> </ul>	<ul style="list-style-type: none"> <li>• Not enterprising enough</li> <li>• Afraid of selling ourselves – have an abundance of local talent</li> <li>• Lack of clear brand               <ul style="list-style-type: none"> <li>- Ceredigion brand – people don't know what and where Ceredigion is</li> <li>- No unified brand for local businesses to use</li> <li>- Lack of marketing any brand</li> </ul> </li> <li>• Lack of collaboration within the area</li> <li>• Tribalism between North and South of the area</li> <li>• Comfort zone 'too small'</li> <li>• Accessibility               <ul style="list-style-type: none"> <li>- Lack of public transport between places of interest (especially once in Devil's Bridge)</li> <li>- Lack of information</li> <li>- No linking between attractions</li> </ul> </li> <li>• Undervalued by locals</li> <li>• Not recognised by Welsh Government</li> </ul>

<sup>34</sup> <http://www.anturstiniog.com/>

<sup>35</sup> <http://www.bikeparkwales.com/trails>

<ul style="list-style-type: none"> <li>• Peaceful/safe</li> <li>• Home of green energy in the UK</li> <li>• Hinterland</li> <li>• Agriculture – growing interest of people to visit farms to see where food comes from, lambing and sheep farming.</li> <li>• National library</li> <li>• Accommodation available – self-catering / campsites / etc.</li> <li>• Language – sense of place</li> </ul>	<ul style="list-style-type: none"> <li>• Area of untidiness</li> <li>• Lack of engagement from local residents</li> <li>• Public toilets</li> <li>• Accommodation – Lack of B&amp;B, hostels and quality hotels</li> <li>• No canoe access on rivers</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• People come with low expectations</li> <li>• Mountains</li> <li>• Parc Naturele</li> <li>• Hinterland brand</li> <li>• History – George Borrow / Thomas Jones</li> <li>• Maximising the views – panoramic views</li> <li>• Increase local stay from the UK</li> <li>• Link focal points in the area with a trail</li> <li>• Becoming more creative in offers</li> <li>• Creating village pride</li> <li>• Providing bike racks on train</li> <li>• Dark skies – Elan Valley</li> <li>• Develop branded food and drink</li> <li>• Offer the best alfresco / picturesque dining in Wales</li> <li>• Market stalls with local crafts</li> <li>• Develop more public transport/tour by bus</li> <li>• Accommodation – youth hostel for backpackers/bikers</li> <li>• More public toilets</li> </ul>	<ul style="list-style-type: none"> <li>• Ourselves</li> <li>• Worsening and lack of infrastructure <ul style="list-style-type: none"> <li>– If growth, too much traffic</li> </ul> </li> <li>• Ageing population and young people are moving away from the area instead of starting businesses</li> <li>• Other areas have moved on, but we have gone backwards</li> <li>• WG funding goes to large scales projects – tourism e.g. Ryder Cup</li> <li>• People go to shops when weather is bad rather than visiting outdoor places</li> <li>• Brexit – loss of EU funding (?)</li> <li>• Snowdonia / Pembrokeshire / Brecon Beacons</li> <li>• Development of wind farms in wrong locations</li> </ul>

<ul style="list-style-type: none"><li>• Pavement in Devil's Bridge</li><li>• Marketing</li><li>• Organising events</li></ul>	
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## 4 Developing the Uplands: Projects and Prioritisation

This section of the report provides a detailed plan of action to develop tourism in the Uplands area, derived from the community consultation events and discussions with stakeholders. This is described initially in terms of an overall approach (including cross-cutting issues) and then across the three distinct themes explored as part of the project; cultural/heritage, activities/sporting and country life/nature opportunities. Project ideas have been laid out under each theme for further development and delivery. This provides the three action plans for the area in support of the overall vision developed in the workshops.

### 4.1 Overall Plan for the Uplands

The overarching aim of the action plans is to increase visitor numbers, dwell time and spend in the Uplands, by providing improvements to the current offer to deliver a marketable destination for visitors that brings out the natural, cultural and heritage assets and provides improved access to the landscape for exploration and activity.

This is in support of the vision:

*“The community vision for the Uplands area is to focus on the natural unspoilt landscape to attract visitors to the area, utilising the outdoor activities and heritage sites.”*

Achieving this implies bringing together the key assets of the natural environment; such as the wilderness, wildlife, natural landscapes, Plynlimon and Cors Caron with the cultural assets, such as Devil’s Bridge, Hafod Estate, Strata Florida and the mining heritage of the area. These are then complemented by the outdoor activity assets such as the mountain bike and walking trails at Bwlch Nant yr Arian and other facilities for walking and horse riding. There is a need to significantly develop the access to walking trails in the area through appropriate signage, styles, services (i.e. camping or drinks facilities) and the creation of new walking routes. There is an opportunity to attract visitors from the coastal path to inland areas through walking routes. There is a clear need to integrate this visitor offer and enhance what is currently available to provide a whole that is greater than the current sum of the parts.

The visitor workshop and existing research showed that tourism in the Uplands area is currently focused on a market which is relatively low spend. The current offer needs to be updated to meet current consumer expectations in terms of what it provides. The plans below aim to address this; bringing new visitors in and encouraging greater spend from those who are regular visitors and loyal ambassadors.

A final aspect of market development, which was raised in the workshops, is that of developing the local entrepreneurial culture to encourage investment in tourism. There is little point in developing demand from visitors if there is an inadequate supply of facilities to meet that demand. The workshops showed that there is a consensus view that people in the area lack an entrepreneurial culture and are afraid to sell themselves (despite a wide range of talent). Collaboration has historically been difficult to achieve and there is a degree of tribalism and parochialism noted across the Uplands. Addressing this will require action to build capacity, encourage collaboration, and demonstrate best practice in tourism development from other areas. It may also require the creation of a revenue post to work with businesses and individuals to achieve this.



Hence, we suggest that development in the area should support two key aims:

1. **Increase demand**; growing visitor numbers to the Uplands amongst target segments whilst building frequency of visits, dwell times and average spend amongst existing visitor groups;
2. **Build capacity** to respond to demand and to meet the needs of new visitor segments.

These are explored further below.

#### 4.1.1 Increasing Demand

Objectives:

- Raise awareness of the tourism assets in the Uplands;
  - Devise an identity and a marketing campaign for the Uplands.
  - Promote lesser known aspects of the Uplands to existing user groups to grow frequency and spend.
- Build a festival and events programme for the area;
- Exploit opportunities presented by the Hinterland brand to attract new visitors to the area

#### 4.1.2 Raising Awareness of the Tourism Assets in the Uplands

##### Development of a marketing campaign

There was widespread agreement in the workshops that the Uplands area is a “best-kept secret”, although addressing this is a challenge in terms of branding. The existing Cambrian Mountains brand covers the area within the wider Discover Ceredigion portfolio and there is a risk that developing a separate brand for Pentir Pumlumon or the Uplands would simply lead to confusion and duplication of resources. There is, nevertheless, scope for raising awareness of the Uplands and its lesser-known assets through a marketing campaign drawing attention to the scale of the wilderness, along the lines of “Get lost in Ceredigion” or “Find yourself in the wilderness”. This could be supported by themed campaigns such as:

- Lose yourself in adrenalin (mountain biking, water sports etc.)
- Lose yourself in heritage (mining, Strata Florida, Hafod, Vale of Rheidol Railway etc.)
- Lose yourself in nature (Cors Caron, Plynlimon, wildlife etc.)

Marketing could be relatively cost efficient; targeted on social media and through selected online magazines or blogs.

**Action: Consider developing a place marketing campaign for the Uplands to appeal to independent travellers.**

##### Ambassadors: Celebrity champions / brands

Given that the area enjoys some loyal supporters in the form of regular visitors, one option to continue to promote and develop the area would be through an ambassador scheme. Ambassadors could also be recruited through celebrity champions or brands that could promote the area through an association with wilderness.

**Action: Devise an ambassador scheme, drawing on businesses, visitors, celebrities and brands with a potential association with the area.**

### Case Study 1. Place Marketing Campaign for N Yorks Moors

The town of Guisborough, located between Teesside and the North Yorks Moors, commissioned a place marketing campaign to attract new users to its high quality landscape. Despite a long history as a walking destination, the area suffered from a lack of identity and an ageing visitor profile with subsequent decline in tourism revenues. Without developing a separate and conflicting brand, the campaign used the moors theme to attract younger adrenalin tourists to its peaks and trails. The campaign was supplemented by development of a major downhill MTB competition, to bring people into the area for the first time.



Moor thrills and spills  
For the moor adventurous  
For those with moor get up and go  
Because there's moor to life



### Festivals and Events

Festivals and events can provide the “hook” to attract visitors to an area for the first time. There is currently a range of events organised in Ceredigion, but there needs to be more specific events developed to attract niche visitors to the Uplands. These could include, for example:

- Tour of Cambrian Mountains (Cycling);
- Cambrian Mountains Challenge (Fell running);
- Food event to showcase local producers;
- Storytelling events – linked to George Borrow and Twm Sion Cati;
- Music events in the cultural and heritage sites, and;
- Festival of film noir – linked to Hinterland (see below).

**Action: Consider developing a suite of events to lengthen the tourism season, attract more visitors and increase visitor spend.**

Case Study 2 The Tumble Cycle Challenge

The infamous Tumble hill between Blaenavon and Abergavenny in SE Wales came to prominence through inclusion in the Cycle Tour of Britain and subsequent Velothon Wales events. As well as drawing large crowds of participants and spectators for these events, the challenge of climbing the iconic hill draws many cyclists to the area as part of a short break or longer tour. The neighbouring World Heritage site encourages cyclists to combine a challenging ride with a visit to one of the industrial archaeology sites in the area.

The critical factor here was the branding of the hill and development of a competitive challenge for cyclists to tackle across the year.

**BLAENAVON**  
WORLD HERITAGE SITE  
SAFLE TREFTADAETH NYD

- Homepage
- Visit Blaenavon
- Places To Visit
- Get Active
- Food & Drink
- Events
- Places To Stay
- Explore Blaenavon Town
- Plan Your Visit
- Blaenavon Digital Passport
- Groups and Meetings
- Tackle the Tumble**
- Keep in Touch
- Image Gallery

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**Tackle the Tumble**  
Could you be the next King or Queen of the Tumble?

**TACKLE THE TUMBLE**

The Tumble climb is one of the most notorious cycling climbs in the South Wales valleys. At 6km in length and with a 10% incline it's all about slow and steady to summit the Blorenge. The famous climb has featured in many an event over the years including the Tour of Britain and is a integral part of Velothon Wales each year.

Tackling the Tumble is a must on any cyclists list. Set off on a personal challenge and explore the area on two wheels and prepare yourself for a climb of a lifetime. And as it's the Year of Adventure here in Wales why not take part in the Tumble Challenge, record your attempts at the Tumble on [Strava](#) and you could be the new King or Queen of the mountain.

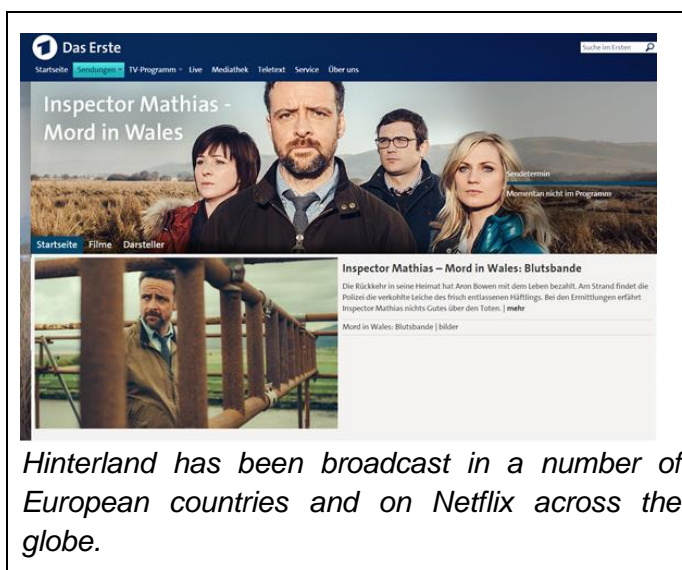
To help you get your trip planned we've put together the perfect cycling weekend away for you, so head out and take part in the Tumble Challenge.

- Day 1 – Arrive in your cyclist friendly accommodation, with facilities for you and your bike. How about a carb loaded home cooked meal to prepare you for the next days cycling?
- Day 2 – Start the day with a full welsh breakfast. Many accommodation providers also offer a packed lunch service, to take with you on the bike. Then head out to tackle the Tumble as part of your day out on the road, and why not try and get yourself on the Tumble leader board, and record your efforts on the Tumble official 100 climbs on Strava. We've pulled together just some ideas of routes of various lengths for you to explore, all of them incorporating the Tumble climb.
  - Route 1 - Abergavenny Circular incorporating the Tumble Distance – 30 miles
  - Route 2 – Iron Mountain 70 Distance – 70 miles (part of the [Abergavenny Festival of Cycling](#))
  - Route 3 – Iron Mountain 100 Distance – 100 miles (part of the [Abergavenny Festival of Cycling](#))

## Hinterland

This TV series has promoted the Uplands as an area of wilderness, beautiful landscape and Welsh-speaking communities to audiences across the UK, EU and Scandinavia. Cambrian Safaris currently offer bespoke excursions around Hinterland locations for visitors, but there remains, however, an opportunity to drive visitor traffic to the area to offer a self-managed Hinterland experience, locations trail or packaged tour.

There are many examples from elsewhere of TV series attracting visitors; Danish thriller “The Killing” was said to have attracted 50,000 additional UK visitors to Copenhagen in its first year<sup>36</sup>. In England, Broadchurch has been used to promote a variety of locations around the Jurassic Coast through links to filming locations. Materials include a trail leaflet<sup>37</sup>, including quotes from leading actors about the beauty of the locations used. There may also be scope for a film festival in the Uplands area, based around the series and the wider theme of “film noir”, which could take place in various iconic venues or featured locations in the area. One example of this approach would be the existing Borderlines film festival<sup>38</sup> in Herefordshire. (See case study below).



*Hinterland has been broadcast in a number of European countries and on Netflix across the globe.*

<sup>36</sup> <https://www.theguardian.com/travel/2011/dec/16/the-killing-uk-travel-denmark>

<sup>37</sup> [https://www.visit-dorset.com/dbimgs/Broadchurch%20Trail%202015%20version\(1\).pdf](https://www.visit-dorset.com/dbimgs/Broadchurch%20Trail%202015%20version(1).pdf)

<sup>38</sup> <https://www.borderlinesfilmfestival.co.uk/>



## Case Study 3 Borderlines Film Festival

The Borderlines Film Festival takes place each year on the English / Welsh border, presenting cutting edge cinema and pre-release content in rural venues, including schools, village halls and small theatres. The event has grown substantially over a 15 year period, attracting many visitors and residents to communities which would they might otherwise not be aware of, with significant consequential economic impact.

#### 4.1.3 Building Capacity: Improving Awareness of Tourism Opportunity and Potential

The specification for the research highlighted a need to build capacity amongst existing businesses in the Upland area (both those engaged and not engaged with tourism at present). The workshops also highlighted a lack of entrepreneurialism amongst businesses and residents, with a perceived aversion to selling the message of the area. In this section we look at improving the offer from engaged businesses, creating a sector network, improving the infrastructure of the area and bringing new businesses into tourism from other sectors.

Objectives:

- Network existing businesses to deliver critical mass for the tourism sector;
- Improve range and standards of accommodation and hospitality to meet the needs of discerning visitors;
- Develop infrastructure to allow improved navigation of the area;
- Deliver new investment in tourism as a means of farm diversification, through building an entrepreneurial culture and demonstrating the benefits that could accrue.

In order to achieve these objectives, we believe that Pentir Pumlumon should also consider creating a revenue post for a project officer for a period of three years.

### Networking Businesses

The engagement workshops have demonstrated the willingness of tourism businesses in the area to collaborate on developing the area. We suggest that this is formalised through the establishment of a working group of Upland businesses to support Pentir Pumlumon in delivery of this action plan. This group would form the nucleus for engaging with entrepreneurs in other sectors (notably agriculture) to build new tourism infrastructure.

**Action: Convene a group of engaged businesses to deliver the action plan and engage additional members.**

### Improving Range and Standards of Accommodation and Hospitality

The audit of tourism assets in the Uplands area has shown that there is a shortage of accommodation and hospitality aimed at younger and higher-spending independent visitors.

There may be scope for a series of training workshops for existing operators, to help build understanding of customer needs, appropriate marketing, use of social media, local sourcing and development of engaging backstories to promote their business over other locations. These could include “speed dating” events for local food producers to meet potential customers.

**Action: Consider an application for support to develop a more distinctive hospitality offer in the area.**



### Case Study 4 Pays Gourmand - France

Agriculture and tourism are the main economic activities in the Pays A3V, Pays Sud and Pays Dignois territories in the South of France. Each has a strong culinary identity, but within Pays A3V, the network of food producers was not being exploited and businesses were not using local produce and suppliers, despite the quality and diversity on offer.

LEADER support created and marketed the 'Pays Gourmand' brand to recognise those who use local produce in their restaurants. The brand aimed to support local restaurants in improving the quality of their services, to develop and promote local food culture and support partnerships between producers and restaurateurs to develop new opportunities in agriculture and handicrafts.

The branding improved the image of local food by ensuring high quality products which met higher customer expectations.

*"People who come here on holiday do not want the same as they could eat anywhere else. So we try to offer them local products... adapted to the season."*

- Bruno Roussey Pays Gourmand restaurant 'Le Mot de la Faim'



The project was so successful that cooperation branding projects have been rolled out to the nearby territories of Pays Sud (2013-14) and Pays Dignois (2014-15). Cross territory collaboration has also developed, further strengthening and enriching the brand. In early 2016, 59 restaurants across the three territories were recognised with the label 'Pays Gourmand'. The brand continues to grow and has expanded to include school canteens and other organisations.

Funding source:

Axis 4, LEADER, EAFRD 69,754 Euros Total budget 126,000 Euros

[https://enrd.ec.europa.eu/projects-practice/label-%E2%80%98pays-gourmand%E2%80%99-%E2%80%93-promoting-french-local-restaurants\\_en](https://enrd.ec.europa.eu/projects-practice/label-%E2%80%98pays-gourmand%E2%80%99-%E2%80%93-promoting-french-local-restaurants_en)

### Developing Infrastructure for Improved Navigation

In the Uplands area, there is a need to develop information, signage and interpretation. Information need to be developed in line with the place marketing campaign to raise awareness about what is available in the area; both before people arrive and during their visit.

It is critical to improve signage and interpretation to make visitors aware of the current offer. Key attractions need to be clearly signposted from the major routes in the area (e.g. to signpost Strata Florida Abbey from Tregaron), along with signposting from one attraction to another. Currently, trails to the summit of Plynlimon are virtually unmarked and there is significant scope for opening up walking routes to the summit from the A44, for example.

There is also the need for interpretation boards to make attractions as accessible and understandable as possible to visitors. This includes improved signage and interpretation at specific visitor attractions (e.g. Hafod Estate, Devil's Bridge waterfalls, Nant y Moch reservoir, Frongoch mine workings) and could be used to cross-promote key attractions.

**Action: Conduct a signage and interpretation audit of key destinations to identify areas for improvement.**

#### Themed trails to link attractions

A strong theme outlined in the stakeholder engagement workshops was the need to develop themed trails to link and integrate the attractions in the area. These would be enhance the current visitor offer and could include faith tourism, cultural sites, natural landscape, mining heritage, Hinterland locations and local stories to create a series of journeys across the Uplands area. The creation of such trails can serve to legitimise journeys across the wilderness area and reduce barriers to exploring. Trails could be devised in partnership with Visit Wales and build upon the development of the Year of Legends app that is already in development.


**Action: To develop a detailed plan that addresses the opportunity of developing themed trails to link key attractions in the Uplands area.**

## Case Study 5 The Wild Atlantic Way

The Wild Atlantic Way is a linked series of road trails covering the whole of the West Coast of Ireland. It aims to encompass several remote areas and brings together information on sights, heritage, accommodation and food into a single brand. In doing this, it provides an easy means of connecting with the landscape and navigating a route through wilderness areas.

WILD ATLANTIC WAY
THE COASTAL ROUTE
STAGES
TRAVEL
GET INSPIRED
THE BOOK
Q

We have compiled some of the most relevant information for your travels in Ireland and your road trip along the Wild Atlantic Way:




**Touring Ireland's Wild Atlantic Way**

Here you can find all the information about the route, the sights and the activities you can engage in, as well as information about the several stages of the Wild Atlantic Way.


> Wild Atlantic Way travel information

### Accommodation




**B&Bs along the Wild Atlantic Way**

> The best B&Bs for the best prices



**Holiday homes Wild Atlantic Way**

Holiday Homes in beautiful landscapes



**Hotels along the Wild Atlantic Way**

<http://www.thewildatlanticway.com/>

### Linkages and transport: Shuttle buses, electric bikes and Twizzies

A central theme from the stakeholder engagement workshops was the need for increased linkages and connectivity in the Uplands area; both physical and digital. It was acknowledged that many visitors want to leave their cars behind when exploring the area, but the scale of the landscape is too great to allow for walking. Renewable energy transport solutions should be explored to offer visitors the freedom to explore different locations. Hubs could be located in key destinations such as Tregaron and Devil's Bridge to pick-up and drop-off rented bikes/vehicles or connect with public transport. Possibilities for supporting green travel around the area include electric bikes<sup>39</sup>, Twizy cars<sup>40</sup> and shuttle buses; all of

<sup>39</sup> See for example: <http://www.ebikehirenorthwales.co.uk/>

which are used in locations elsewhere to promote exploration. Ystwyth Transport could be contracted to extend their offer to provide a pilot shuttle service between attractions in the height of the tourism season.<sup>41</sup>

**Action: Consider piloting the Ystwyth Transport visitor scheme and plan an electric bike/Twizy rental scheme in the area**

### Case Study 6 Weardale Community Transport

In 2011, Durham County Council, in partnership with local tourism businesses, piloted a bus service to link Stanhope heritage steam train station to local heritage attractions in the area. The service was offered during weekends and bank holidays between August and October and the bus linked Stanhope to the Weardale museum, Killhope lead mining museum, Alston Steam Railway and Nenthead Mines.

As a result of the project, several new tourism activities were supported and increased numbers achieved at existing ones. At the end of the period the pilot was judged a success and the service has been running every summer since then, on Sundays and Bank holidays from 1<sup>st</sup> May to 1<sup>st</sup> October. The service is run by appropriately trained volunteers and the bus belongs to Weardale Community Transport, which also provides flexible transport to its members on a dial a ride basis.



### Case Study 7 Drive Less, See More: Lake District



The Go Lakes Travel initiative has as its slogan; “Drive Less, See More”. It was launched in 2012 in Cumbria, in an attempt to reduce the number of visitors using their cars’ as well as allowing them to go deeper into the Lake District if they were not motorised. The project includes an extended bike-friendly bus service as well as the opportunity to rent electric bikes. It also collaborates with Co-wheels to offer low-carbon car hire at railway

stations; hire vehicles are equipped with roof racks and members pay only for what they use for as little 30 minutes.

They also have ten Renault Twizys available through accommodation providers and attractions around the Lake District, which can be hired as and when the visitors need them.

<http://www.co-wheels.org.uk>

<sup>40</sup> See for example <http://www.ecotravelnetwork.co.uk/>

<sup>41</sup> A transport pilot scheme was development in 2014-15 by the Council between Cors Caron and villages in the Tregaron area.



### Building an Entrepreneurial Culture and Awareness of Tourism Opportunities

Although tourism has been seen as a path to building small farm viability for many years, there may be opportunities beyond those currently considered by residents and businesses in the Uplands area. In order to build an awareness of the economic potential of tourism to the area, further engagement work may be required to make this point. Action is needed to demonstrate the potential gains to existing businesses of embracing a more creative approach to applying their assets to the visitor economy. This could take the form of working with existing farming support services, such as Farming Connect or discussion forums such as Agrisgop groups<sup>42</sup>, to discuss approaches to developing farm tourism businesses.

Such actions could include illustrations of examples such as:

Farm holiday packages: To include accommodation, experiential courses on farm and activity visits to neighbouring attractions;

- Development of glamping sites;
- Creation of infrastructure to support all-weather attractions;
- Alignment of food and drink businesses with the needs of visitors.

One approach would be to hold an “inward investment day” in the area, providing outside organisations with an opportunity to understand the potential for working with local businesses and for local businesses to experience examples of how facilities have been developed in other areas. Speakers could include “glamping” agencies, boutique hotel chain representatives and artisan food businesses.

**Action: Work with Farming Connect to identify ways of demonstrating to farmers and other rural businesses the benefits of engaging with the visitor economy.**

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<sup>42</sup> See for example: <https://businesswales.gov.wales/farmingconnect/new-tourism-venture-north-wales>

## Case Study 8 Humble by Nature

When Kate Humble and Ludo Graham bought a small farm in Monmouthshire, they set out to develop it into a showcase for sustainable farming practices and creation of local food and drink. They now run a range of courses including smallholding skills, hedging and dry-stone walling, aquaponics and cookery, all of which fit in with the daily operation of the working farm. Tourism accommodation has been developed in cottages, a shepherd's hut and a converted barn and guests can opt (for a fee) to work with the farm manager on his daily routines of feeding the sheep and general animal husbandry. Whilst Kate's TV profile is clearly beneficial in attracting clients, the uptake demonstrates an appetite amongst visitors for active participation in the countryside.



The screenshot displays the website for 'LOVE HUMBLE BY NATURE LAND'. The header features a navigation menu with links: HOME, ABOUT US, COURSES, CALENDAR, EAT ON THE FARM, STAY ON THE FARM, YOUR EVENTS, ONLINE SHOP, and CONTACT US. The main content area is divided into several sections:

- SMALLHOLDING & ANIMAL HUSBANDRY COURSES:**
  - Smallholding for Beginners
  - Lambing 24: Hands On in the Lambing Shed
  - A Day in the Lambing Shed
  - Sheep for Beginners
  - Learn How to Shear Sheep
  - Sustainable Bee-Keeping
  - Pigs for Beginners
  - Rearing Pigs for Meat
  - Caring for Ex-Batt Hens
  - Raising Chickens for Meat
- FOOD & COOKERY COURSES:**
  - Home Butchery Skills
  - Foraging: A Wild Taste of the Hedgerow
  - Pork Butchery, Curing & Sausage Making
  - Home Charcutier: Inspired by Southern Europe
  - Home Charcutier: Inspired by Britain
  - Bread Making with Hobbs House Bakery
  - Cooking on a Wood-Fired Oven
  - Curing for Christmas: Ham & Bacon
  - Christmas Chocolate Making
- AQUAPONICS:**
  - Aquaponics: One-day Introduction
  - Aquaponics: Five-day Intensive
  - Practical Aquaponics: A Day in the Greenhouse
- CRAFTS & SKILLS COURSES:**
  - Spinning & Plant Dying Yarn
  - Willow Garden Structures: Plant Supports & Frames
  - Photography: Capturing the Natural World
  - Summer Flowers: Hand-tied Bouquet & Vase Arrangement
- RURAL SKILLS COURSES:**
  - Hedge-Laying
  - Learn to Design & Plant an Edible Garden
  - Build a Wood-Fired Clay Pizza Oven
  - Dry Stone Walling: 2 day Fundamentals
  - Dry Stone Walling: 1 day Introduction
  - Cider Making
  - Make a Green Wood Chair
  - Stock Fencing

A featured section on the right highlights the 'NEXT COURSE': **BREAD MAKING WITH HOBBS HOUSE BAKERY**, scheduled for Thursday 11th May 2017, with a 'FIND OUT MORE' button.



### Case Study 9 Cosy Under Canvas - Glamping in Newchurch

In 2008, the Price family established a holiday let business in the woodland in Newchurch near Hay on Wye, starting with two tipis on their four acres of land. The tipis were so popular that they were able to add a further three with support from an RDP grant, along with facilities including wood fired showers, hot tubs and a nature trail around the site.

The investment allowed the family to preserve the viability of their smallholding: “without the funding we wouldn’t have been able to offer our guests an enhanced experience so quickly. The shower facilities in the woods are a lovely eco offering and have made a huge difference to the guests.”

The nature trail has also made a difference to families that holiday there and more guests are spending a longer time on site as their children are entertained and educated through the interpretation boards providing information on flora and fauna in the area.



<https://www.cosyundercanvas.co.uk/>

### Devil’s Bridge Infrastructure Improvements

The development of Devil’s Bridge for visitors and locals. The development would focus on the safety and appeal of the area; this would include:

- Removal of the chain-link fence;
- Establishing a pavement throughout Devil’s Bridge to permit safe pedestrian access to the whole village;
- Open up the vista points from the Hafod Hotel to make the best of the natural landscape;
- Consider the development of a design guide to enhance the visual appeal of the destination and maintain a consistent theme across the village.
- Improve signage and interpretation to build awareness of the range of attractions, hospitality and public services available in Devil’s Bridge, and;
- Increase the visitor offer in terms of shops/galleries selling local crafts.

The development of the infrastructure will aim to attract more visitors to the area, and importantly increase the visitors spend and satisfaction of visiting the area so they will return and tell people about their experience. This requires cooperation between the businesses in the area to work collaboratively to deliver the required change to improve spend for all businesses in the area.

**Action. To establish a working group of Devil’s Bridge businesses and public sector representatives to develop a detailed plan of action to develop the area further. This should incorporate an action plan for financing the necessary infrastructure**

**developments to improve the safety and visitor appeal to the area. To then implement the necessary changes to make the area more attractive to visitors.**

#### Other Infrastructure Improvements

Tregaron also suffers many areas of need in terms of visual improvements and general tidiness. With the exception of Llanfihangel y Creuddyn, the majority of the villages in the area are said to be relatively disengaged from tourism at present. For example, Pontrhydygroes was acknowledged in Victorian times for its near alpine setting (referred to as the Engadine of Wales), but offers little to current visitors with several areas appearing uncared for. The water wheel attraction was reported to be lacking in upkeep.

**Action. To establish a wider working group to address community pride and engagement with tourism more effectively. Consider instigating a Best Upland Village or Pride of Place competition to inspire communities and address neglected parts of villages.**

#### A Tourism Project Officer

In order to deliver on the above actions, we consider that the likelihood of success would be significantly enhanced if a project officer could be funded for three years to support delivery.

Whilst it is important that local businesses and other stakeholders should take ownership of the development of the area, it is not always possible for this group to provide the resources necessary to take things forward as quickly as they would like.

**Action. To explore the possibility of securing funding for a part-time project officer to build the tourism offer and deliver on this action plan.**

## Project Summaries – Plan for the Uplands

<b>Increasing Demand</b>					
ID	Aim	Action	Priority	Cost	Timescale
<b>Up1</b>	<b>Raise awareness of tourism assets in the Uplands</b>				
Up1.1	The development of a place marketing campaign to promote the Uplands area to independent travellers	<p>Commission a themed campaign around the wilderness and what the area has to offer.</p> <p>Develop a strap line such as “Lose yourself in ...” which can be used both for location, feeling and activities.</p> <p>Increase the use and presence on Social Media.</p> <p>The development of a common publicity/PR campaign would put the name Uplands on the map and bring more visitors inland. It would also allow businesses to present a unified offer.</p>	High	£30K	Short to medium term
Up1.2	Ambassador Scheme	<p>Devise an ambassador scheme, drawing on businesses, visitors, celebrities and brands with a potential association with the area.</p> <p>Identify champions for the area – such as Hinterland cast members and prominent local stakeholders.</p> <p>Provide simple materials; cards, flyers etc, to support ambassadorial roles.</p>	Low	£5K	Medium term
Up1.3	Events and Festivals	<p>Consider developing a suite of events to lengthen the tourism season, attract more visitors and increase visitor spend.</p> <p>Provide support to groups wishing to develop new festivals or to brand existing festivals with the upland brand.</p>	High	£25K	Medium term
Up1.4	Hinterland Opportunities	Exploit opportunities presented by the Hinterland brand to attract new visitors to the area:	Medium	£30K	Short term

		<ul style="list-style-type: none"> <li>Marketing to Scandinavian visitors</li> <li>Development of Hinterland location trail</li> <li>Creation of a film noir festival in Hinterland locations</li> </ul>			
<b>Up2</b>	<b>To build capacity to respond to the needs of visitors</b>				
Up2.1	Networking tourism businesses	Network existing businesses to deliver critical mass for the tourism sector, to deliver the action plan and engage new members.	High	£5K	Short term
Up2.2	Improving the offer	<p>Improve the range and standards of accommodation and hospitality to meet the needs of discerning visitors, by:</p> <ul style="list-style-type: none"> <li>Training workshops to understand customer needs and approaches to building a distinctive offer</li> <li>Inward investment day for exemplar businesses</li> </ul>	Medium Low	£10K £5K	Medium term
Up2.3	Develop infrastructure for navigation	Conduct a signage and interpretation audit of key destinations to identify areas for improvement. Develop a signage and interpretation strategy.	Medium	£30K	Medium term
Up2.4	Devise themed trails to link attractions	To develop a detailed plan that addresses the opportunity of developing themed trails to link key attractions in the Uplands area. These could cover food and drink, heritage, natural assets or spiritual / cultural sites.	High	£20K	Short term
Up2.5	Improving green transport linkages	Commission a feasibility study for green vehicle rentals in the area – covering electric bikes, Twizy cars and shuttle buses.	High	£10K	Short term
Up2.6	Building an entrepreneurial culture	Work with Farming Connect to identify ways of demonstrating to farmers and other rural businesses the benefits of engaging with the visitor economy.	Med	£-	Medium term
Up2.7	Devil's Bridge Infrastructure	Feasibility study for the development of Devil's Bridge as a	High	£20K	Medium

	Improvements	unique visitor destination with improved infrastructure and attractions for visitors.			term
Up2.8	Project officer role	Create a revenue post for a part-time project officer for a period of three years to stimulate tourism development in the area and delivery of the action plan.	High	£60K	Short term



## 5 Cultural / Heritage Visitor Action Plan





## 5.1 Introduction

This section of the report sets out the visitor action plan for the theme of culture and heritage for the Uplands area. This summarises the assets in the area that are currently available and sets out a route map to address some of the current challenges to attracting further visitors and increasing visitor spend. Specific project ideas have also been outlined below for this theme and at the end of the section, there is a list of project ideas based on prioritisation and available funding options.

## 5.2 Cultural and heritage assets

There is a wide range of cultural and heritage experiences for visitors to the Uplands area. This is based on key attractions in the area such as the Vale of Rheidol Railway, Strata Florida Abbey, Hafod Estate, miner's wheel in Pontrhydgroes and the Silver Mountain Experience. A wider attraction is the Welsh culture that is dominant in the area, through extensive use of Welsh language and events such as the Eisteddfod. 2017 is the year of the Legends promoted by Visit Wales and this offers an opportunity for the area to promote its legends such as Twm Sion Cati, and famous connections with the area such as George Burrow and Owain Glyndwr.

Whilst there are specific attractions in the area, as a whole it currently lacks a connected identity to provide a unique selling point or to make it stand out from competing locations. There is scope to integrate the existing attractions to provide a networked offer, by developing routes between sites and information sharing across them. This can be seen in Devil's Bridge, where there is a lack of interpretation signage, viewing points and reasons for visitors to stay in the area.

## 5.3 Vision for culture and heritage in the Uplands area

A strategy is needed to develop a connected cultural and heritage offer that integrates the attractions with key facilities and infrastructure for visitors as part of the wider offer across the area.

The ideas outlined below are suggestions of ways to achieve this common vision in the Uplands area through the development and integration of established assets in the area. The project ideas outlined below have been co-created with members of the community.

1. **Cistercian Trail.** Support the Cistercian Trail development in the area to ensure it encompasses the wider offer that is available in the Uplands area. Next steps outlined in autumn 2016 were focused on promoting the routes to join the Cistercian Way and the coastal path and work with the Strata Florida Abbey development. Future development plans include finalising the route, publicity, encouragement of open doors to walkers and providing refreshments. In addition, the potential for cycling and horse riding in parallel with the walking route. There is scope to link the Cistercian Way into the trails developed as part of the Peaceful Places initiative in the Uplands.
2. **Strata Florida Abbey development.** To support the Strata Florida Abbey development in line with current plans for the site. In addition, there is the need to integrate the site developments into the wider offer of the Uplands area, to ensure that the widest range of businesses possible benefit from the investment. Pontrhydfendigaid needs to ready itself to become positioned as the gateway to

Strata Florida and to take advantage of the potential increase in tourism to the area. Visitors that are attracted to the Abbey should be encouraged to visit the other heritage sites available in the area as far as possible, for example through the Peaceful Places project.

3. **Church events** e.g. music. There is the opportunity, especially in the Hafod church, to engage with the wider community and visitors to the area by putting on different events utilising the space of the church. For example, music events such as singing or music in partnership with local choral groups that would have the opportunity to perform to a wider audience and engage with visitors to the area.
4. **Stories of the local people - George Borrow / Thomas Johnes / Twm Sion Cati.** Increase the visitor offer through embedding the stories of local people into the visitor experience when in the Uplands area. This could be delivered through storytelling, enhanced visitor information or signs/leaflets to share this information. This sits well with the Year of the Legends theme for 2017.
5. **Development at the Hafod.** The opportunity to develop the visitor offer at Hafod Estate, in addition to the guided walks of the grounds, the church and the walled gardens. This could be a central attraction with an enhanced visitor experience to continue to attract more visitors to the estate.
6. **Kite Centre and museum development.** There is the potential to develop the Kite Centre to attract more visitors through increased organisation of events, specific attractions, consistent opening hours and potentially a wider remit. The centre could further promote the heritage of the area, as well as the natural environment.
7. **Local arts and crafts sold in the area.** At present, there is a very limited shopping offer outside of Tregaron for visitors that might be looking to purchase local arts and crafts made in the local area. The Gold Centre in Tregaron sells Welsh Gold and hand crafted art.<sup>43</sup>
8. **Build relationships between the Vale of Rheidol Railway and local businesses.** There is scope to develop further the relationship between local businesses in Devil's Bridge and the Vale of Rheidol Railway, especially through combined marketing or cross-promotion. This would allow for a wider offer to be developed to promote and encourage visitors to stay longer in the area, ensuring visitor spend increases for the community as a whole.
9. **Rheidol Railway developments.** The railway has an opportunity to offer an enhanced visitor experience through signs, storytellers during the trip or development of a Bluetooth app for access from a smartphone. This would provide further information about what visitors are experiencing, tie guests into the wider story of the area and promote visits to other local attractions.
10. **Mining heritage.** There is a rich range of historic sites to explore around the mining history of the Uplands area. Although work has been done through earlier initiatives to draw attention to this, there remains scope to devise networked trails with guides or interpretation materials to build an understanding of the industrial history of the Uplands. The Ystwyth Valley was a significant location for silver, lead and zinc mines and there is a potential for guided history walks along the river valley.

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<sup>43</sup> <http://www.rhiannon.co.uk/>

## 5.4 Cultural and heritage: priority projects

Outlined below is a range of culture and heritage project ideas. This includes the suggested project ideas that were developed as part of the community engagement workshops.

### C&H1 Music Events in Cultural and Heritage Sites

Recommendation	Develop a suite of music events in cultural and heritage sites across the Uplands area.	Priority Low	Cost Low	Timescale Short term
Description		Delivery		
To enhance the cultural offer to visitors, a suite of events in the area could be established to offer music in key cultural sites. For example, the Hafod church could host music events from local choirs along with guest musicians. The events would aim to promote the area, attract visitors across the different parts of the Uplands and bring an income to the heritage sites.		<ul style="list-style-type: none"> <li>• Pentir Pumlumon</li> </ul> Additional Organisations <ul style="list-style-type: none"> <li>• Hafod Estate</li> <li>• Talbot / Hafod Hotel</li> <li>• Strata Florida Abbey</li> <li>• Silver Mining Experience</li> </ul>		
Recommendations		Possible Funding Sources		
To develop a small team to plan, set up and deliver a small-scale events programme in the area. This group could work together to bid for funding (if necessary) and engage with the key attractions to put on the different events.		RDP or self-financing model		
		What does Success look like?		
		A range of small-scale music events run in the local area.		

### C&H2 Faith Tourism Trail

Recommendation	To develop the integration of the Cistercian Way in the Uplands area.	Priority Low	Cost Low	Timescale Medium term
Description		Delivery		
To support the development of the Cistercian Way in the Uplands area, in partnership with the University of South Wales and the Peaceful Places project. This will integrate the key attractions in the area with long distance trails to explore the sites in a connected way.		Peaceful Places and Madeleine Gray, the University of South Wales in partnership with Pentir Pumlumon		
Recommendations		What does Success look like?		
To work in partnership with the University of South Wales to develop the Cistercian Way in the Uplands area, integrating into the Peaceful Places project and tying into the development of Strata Florida Abbey.		A connected faith attraction offer in the Uplands area with trails to explore them.		

**C&H3 Film Festival**

Recommendation	Develop a film festival in cultural and heritage sites across the Uplands area.	Priority Low	Cost Low	Timescale ST
Description		Delivery		
To enhance the cultural offer to visitors, a film festival could be established in the area. This could be used to promote film noir, in line with the Hinterland links, Welsh language or other films that have been shot in the area. The festival would aim to promote the area, attract visitors to the area and promote Welsh language.		<ul style="list-style-type: none"> <li>Pentir Pumlumon</li> </ul>		
Recommendations		Possible Funding Sources		
To develop a small team to plan, set up and deliver the small film festival. This group could work together to bid for funding (if necessary) and engage with the key locations that could host different events as part of the film festival.		RDP		
		What does Success look like?		
		A film festival in the Uplands area.		

**C&H4 George Borrow Trail**

Recommendation	To develop an interpreted trail to follow the route taken by George Borrow in his book Wild Wales	Priority Low	Cost Low	Timescale MT
Description		Delivery		
The Upland area is described extensively in George Borrow's book of his travels through Mid Wales in the 1800s <sup>44</sup> . The book provides a rich seam of stories to be retold or interpreted in the landscape and to provide a hook for visiting sites within the area. A George Borrow festival or convention could be added to the events calendar		<ul style="list-style-type: none"> <li>Pentir Pumlumon</li> <li>George Borrow Society</li> </ul>		
Recommendations		Possible Funding Sources		
To work with partners to interpret and embed the works of George Borrow in the area's tourism offer.		RDP		
		Lottery		
		What does Success look like?		
		Increase in visitors with an interest in George Borrow		

<sup>44</sup> <http://www.gutenberg.org/files/648/648-h/648-h.htm>



## 6 Outdoor activities / sporting action plan





## 6.1 Introduction

This section of the report sets out the visitor action plan for the theme of outdoor and sporting activities for the Uplands area. This summarises the available outdoor/sporting assets in the area that are currently available to visitors and members of the community. In addition, it sets out a vision for the area to address some of the current challenges to develop opportunities, to attract further visitors and increase visitor spend. The specific project ideas have also been outlined below for this theme. At the end of the section is a list of recommended project ideas based on priorities identified in the workshops and available funding options.

## 6.2 Outdoor activities / sporting assets

The key activities and sporting assets in the area include Bwlch Nant yr Arian visitor centre and trails for walking and mountain biking, the iconic peak of Plynlimon, good infrastructure for road cycling, and opportunities for sensitive off-roading and rallying. The unspoilt landscape of the Uplands area is a real strength which also allows for multiple activities such as shooting, pony trekking and water sports. Accessibility of the area is a strength for visitors from the English Midlands in particular, aiming to access outdoor activities.

A weakness in the area is the lack of infrastructure and facilities, with only limited parking, toilets or changing facilities available to visitors (except for at Bwlch Nant yr Arian). This needs to be improved to encourage visitors to come to the area and to return in the future. Nant yr Arian is a good starting point facility, but at present, there are no bike repair or rental services in the area, with the nearest bike shop located in Aberystwyth. Such facilities would provide an excellent addition to the current biking/cycling offer and deliver an anchor point for increasing dwell times and spend. In addition, there needs to be an increase in the marketing of the road and mountain biking offer that is available in the area to attract more visitors.

Across the area, signed / way-marked trails are also limited at present and not all areas have open pathways. Perhaps most critically there is no clear signed path to the summit of Plynlimon off the main A44 (such as at Dyffryn Castell car park). There are limited well marked walking trails for visitors so this is an area for development in the Uplands with paths such as Cambrian way and Aeron valley to be considered. In addition, there is the need to develop the infrastructure (i.e. toilets, coffee shops, parking, etc.) at locations to encourage more people to walk in the area.

## 6.3 Vision for outdoor activities / sports in the Uplands area

The area needs to develop an integrated outdoor activities and sporting attractions offer that connects key facilities with infrastructure as part of the wider visitor offer in Ceredigion.

The ideas outlined below are suggestions of ways to deliver this vision in the Uplands area through the development and integration of established assets. The project ideas below have been co-created with members of the community.

1. **Nant y Moch Reservoir outdoor activities.** The area around Nant y Moch and Maes y Nant could be developed to offer a wide range of water sports and other activities. To provide water sports inland could significantly improve the visitor offer and draw visitors' inland from the coast, as well as opening up the northern Upland area.

2. **Develop links between the Uplands and Snowdonia / Brecon Beacons.** Promotion needs to be carried out in partnership with key attractions in north and south Wales. This will integrate the outdoor activity offer available in Wales as a whole. There are currently trade associations for outdoor activity operators in both of these areas, but no organisation for those working in Mid Wales.
3. **Cambrian Mountain Challenge.** To redevelop the former Pumlumon Challenge (fell running) under the Cambrian Mountains brand, but exploring the Uplands area. This will attract visitors to the area interested in outdoor activities and showcase the natural environment available.
4. **Tour of Cambrian Mountains.** To develop a cycle race that will showcase the unique landscape and attractions available in the Cambrian Mountains, especially the Uplands area. The race will aim to attract visitors to the area to stay for the weekend of the event or if promoted appropriately could extend their stay further. Critically, it will draw visitors across the year to experience cycling on the remote lanes of the uplands.
5. **Shuttle bus to locations.** To enhance the availability of transport between different locations, a shuttle bus service (with bike racks) should be piloted to different locations; for example linking Bwlch Nant yr Arian, Devil's Bridge and Aberystwyth.
6. **Kayaking/ canoeing on the Rheidol.** There is the potential to offer kayaking facilities on the River Rheidol to visitors and members of the community. This enhanced visitor offer could attract people from the coastal areas to experience an iconic water- based activity. For example, canoeing on the Rheidol from Pontrhydygroes downriver could be a real attraction, but there is a need to develop access to the river and facilities.
7. **Long distance riding trails.** To mark and develop existing bridleways in the Uplands area to make it more accessible for horse riding.
8. **Caving and mining exploration.** There are opportunities to offer caving and mining exploration visitor experiences.

Developed destinations elsewhere are a key threat to the Uplands area. There is strong competition from more established outdoor activity centres, which are already well known and have good facilities available for visitors. For example, Coed y Brenin, Antur Stiniog and Bike Park Wales all offer highly challenging downhill MTB tracks, whilst the adrenalin hotspots of Bethesda and Blaenau Ffestiniog offer zip wires and underground trampolines.

## 6.4 Outdoor activities / sporting: priority projects

Below are outlined a suggested range of outdoor activities and sporting project ideas, including those developed as part of the community engagement workshops.

### OAS1 Parc Pumlumon

Recommendation	To support the development the outdoor activity offer at Nant y Moch to provide a central attraction of water, land and indoor sports in the	Priority Medium	Cost Medium to High (staged)	Timescale Short to medium term
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	Uplands.			
<p><b>Description</b></p> <p>There is scope to revive the outdoor activity centre at Maesnant for action sports enthusiasts. This could provide water, land and indoor sports that are currently not available in the Uplands area. Activities could include: wakeboarding, kayaking, rowing, sailing, bouldering, mountain boarding, rock climbing and a skate park. This could utilise and enhance the natural environment of Nant y Moch reservoir and surrounding areas. Accommodation could also be available at the Maesnant site along with a range of ancillary facilities for visitors.</p>		<p><b>Delivery</b></p> <p>Pentir Pumlumon and Statkraft</p> <p>Additional Organisations</p>		
<p><b>Recommendations</b></p> <p>Conduct a feasibility study for an outdoor activities centre with the intention to bid for tourism funding to support the initial implementation costs.</p>		<p><b>Possible Funding Sources</b></p> <ul style="list-style-type: none"> <li>• RDCF (feasibility study)</li> <li>• Implementation: RTEF, TPIF and TISS</li> </ul>		
		<p><b>What does Success look like?</b></p> <p>An established visitor offer of water, land and indoor sports in the Uplands at Nant y Moch</p>		

**OAS2 Tour of Cambrian Mountains**

<b>Recommendation</b>	Develop a competitive bike race around the Cambrian Mountains	<b>Priority</b>	<b>Cost</b>	<b>Timescale</b>
		Low	Low to medium	Medium term
<p><b>Description</b></p> <p>The opportunity to develop a competitive bike race around The Cambrian Mountains. This will promote the different areas in the Cambrian Mountains, including the Uplands area. This could go through key areas such as Devil’s Bridge and Tregaron. The route could encompass the mountain roads to provide a scenic cycling competition that is truly unique to the area. This would attract visitors to the area for the weekend or perhaps encourage longer stays in the area if promoted appropriately. This would provide an event to attract outdoor enthusiasts to the area.</p>		<p><b>Delivery</b></p> <p>Pentir Pumlumon in partnership with Nant yr Arian</p>		
<p><b>Recommendations</b></p> <p>To develop a detailed proposal for funding to support the implementation of the bike race in the Cambrian Mountains.</p>		<p><b>Possible Funding Sources</b></p> <p>Cefn Croes, RTEF or sponsorship from key brands/organisations</p>		
		<p><b>What does Success look like?</b></p> <p>Attracting cyclists to the area to compete in a tour of the Cambrian Mountains</p>		

**OAS3 Cambrian Mountains Challenge**

Recommendation	To reinstate the Pumlumon Challenge and develop the race offering to participants	Priority Low	Cost Low	Timescale Short to medium term
Description		Delivery Pentir Pumlumon		
To re-develop the Pumlumon Challenge, to attract visitors to the area and to spend longer in the area. The fell running race would be set in the Plynlimon area and take competitors past the sources of the Severn and the Wye before traversing the Hengwm and Hirant valleys. Then following the edge of Nant y Moch Dam and then the final climb to the finish. The previous race had a total climb of 5,000 feet. This will attract key visitors with other events running in parallel on the same date to attract a wide range of abilities to the area.		Possible Funding Sources Cefn Croes and entrance fees		
Recommendations		What does Success look like? An annual weekend of events to attract fell running and walking in the Cambrian Mountains.		
To redevelop a detailed plan for delivery and funding to deliver the Cambrian Mountains Challenge.				

**OAS4 Rental bike and repair facilities**

Recommendation	Develop a visitor offer of the rental and repair of mountain/road bikes in the Uplands area	Priority Low	Cost Low to medium	Timescale Short term
Description		Delivery Nant yr Arian		
To enhance the current cycling offer available in the Uplands area through rental and repair of different types of bikes. This would provide a more holistic visitor offer and service for the local community. Nant yr Arian could provide these additional services, alongside what they already deliver. This could be achieved on a franchise basis, allowing existing local businesses to expand their activities. The possibility of electric bicycle (and MTB) hire could enhance the appeal of the longer-distance trails in the area.		Possible Funding Sources NRW		
Recommendations				

For Nant yr Arian to enhance their current offer by offering bike rental and repair.

What does Success look like?

A more holistic cycling offer for visitors and members of the community.

### OAS5 Outdoor brands to promote the areas

Recommendation	To build awareness of the Uplands through brand association	Priority	Cost	Timescale
		Med	Low	ST/MT
Description		Delivery		
Association of an area with a well-known brand through sponsorship or use of locations for photoshoots can raise awareness and bring in visitors with an affinity for shared values.		Pentir Pumlumon		
Recommendations		Possible Funding Sources		
Convene demonstration days for representatives of key outdoor or MTB brands with the aim of building collaboration.		RDP		
		What does Success look like?		
		The Uplands become an iconic destination through association with a “cool” brand.		

### OAS6 Long distance riding trails

Recommendation	To mark and maintain bridleways in the Uplands area.	Priority	Cost	Timescale
		Low	Medium	Long term
Description		Delivery		
To mark and maintain bridleway routes in the Uplands area for short and long distance riding trails. This would enhance the current offer of horse riding for locals and visitors to the area.		Coast and Countryside team in the Council		
Recommendations		Possible Funding Sources		
To develop a plan to enhance the bridleways across the Uplands area and implement for the long term development of the bridleways for access to locals and visitors to the area.		Ceredigion Council		
		What does Success look like?		
		A mapped and maintained bridleways across the Uplands area.		



## 7 Country Life / Natural Environment Opportunities for Visitors



## 7.1 Introduction

This section of the report sets out the visitor action plan for the theme of country life and the natural environment in the Uplands area. This summarises the assets in the area that are currently available to visitors and members of the community. In addition, it sets out a vision to address some of the current challenges to developing opportunities; attracting further visitors and increasing visitor spend. Specific project ideas have also been outlined below for this theme. At the end of the section are some clear recommendations for priority projects based on consultation and available funding options.

## 7.2 Country life / natural environment assets

The landscape is one of the biggest assets of the Uplands area: It is an area of outstanding rugged beauty and one of the least populated areas of England and Wales. The Uplands area offers a varied landscape that includes hills, valleys, forest/woodland, rivers and upland bogs. The Nature Reserves such as Cors Caron are a draw for visitors who are interested in experiencing different natural habitats. The area provides a unique opportunity for bird watching; with species such as raptors, red kites, osprey and peregrine falcon. These aspects of the natural environment are a true asset for visitors exploring the area. There are also a number of rewilding projects in the region, which could be tied into to promote the development of a more natural landscape and attract a different group of visitors.

Pumlumon is the highest point of the Cambrian Mountains and in Mid-Wales and is also the source of three rivers. The local rivers provide an alternative way to explore the area and offer wild trout fishing as an activity. In addition, the natural landscape provides an excellent opportunity for walking as there are a number of documented paths and trails in the area.

Dark Skies accreditation can attract people to the area: already seen as a key attraction to the neighbouring Elan Valley Estate, which is accredited as an International Dark Sky Park<sup>45</sup>, the first privately owned but publicly accessible park in the world to do so. The Cambrian Mountains could look to create an extension to this area of recognised Dark Skies to add to its visitor offer.

Despite the outstanding natural landscape, there is a lack of infrastructure for visitors, such as clearly outlined areas of parking, publicly available toilets and way-marked trails to act as guides for walkers. At present, the Wales Coastal Path is a central draw for walkers of all abilities and there is a need to attract walkers inland away from the coast, which will require the best possible facilities and access. The Uplands area is currently only really accessible for more experienced walkers and there is a need to adapt the offer to different levels of walkers to attract more visitors.

## 7.3 Vision for country life / natural environment in the Uplands area

The natural environment needs to be part of an integrated offer that connects the attractions with key facilities and infrastructure for visitors as part of the wider offer of Ceredigion.

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<sup>45</sup> <http://darksky.org/idsp/parks/>

The ideas outlined below are suggestions of ways to achieve this common vision in the Uplands area through the development and integration of established assets in the area. The project ideas outlined below have been co-created with members of the community.

1. **Dark skies.** The Dark Sky success of Elan Valley Estate could be replicated to other areas in the Uplands to provide an attraction to the wider area. Related to local events about the Dark Sky for visitors and members of the local community. This was offered in Monmouthshire with a significant interest and over subscription of events.



2. **Mountain pansy to promote the Cambrian Mountains.** The opportunity to use the mountain pansy as part of the Cambrian Mountains brand. This could be used on information, leaflets or websites developed to be a symbol for the area. The mountain pansy is a rare yellow flower.

3. **Long distance walking trails.** To develop walking trails for long distance walkers that showcase the natural environment. There is a need to define and map out an available route, identify costs, gain local support and source funding. This would provide a key attraction for walkers to come to the area, especially if promoted with the wilderness and providing some provision for visitors (e.g. public toilets, car parking, etc.).

4. **Links to agriculture.** There is the opportunity to integrate the tourism visitor offer with current agriculture production in the Uplands area. This could incorporate farm visits, cookery and rural skills courses in the area. A similar approach to what has been adopted by Humble by Nature in the Wye Valley in Wales. There is also the idea to develop a network of farmers to provide information and support to help with the diversification required for the future of Welsh farmers and part of that into the tourism sector.
5. **Raptor tour.** To showcase the unique wildlife offer that is available, develop a bird tour of what can be seen in the Uplands area. As suggested in the workshop, it would be similar to seeing the 'Big Five' in Africa to see the key birds in the Uplands area.
6. **Painting and photography courses.** To showcase the natural landscape there is the scope to offer painting and/or photography courses in the area. This would provide access points to the natural environment with vista points to view the landscape from unknown access points. This is successful in other areas such as the Cairngorms in Scotland. A wide range of photographers offer day, weekend or longer excursions to photograph the wildlife or the landscape. This could be easily offered in the Uplands area to enhance the current visitor offer.
7. **Courses e.g. foraging / growing / dry stone walling / woodturning.** Courses could be used to enhance the visitor offer of the natural environment. This might attract visitors to the area, encourage them to stay longer for the course or allow visitors to engage with the natural environment during their stay. A wide range of courses could be offering a new skill for visitors around dry stone walling or woodturning. Alternatively, foraging or growing food in through different techniques. The Hafod Estate already offer dry stone walling courses for local people so this

could be promoted further to visitors to the area and offer a diverse range of courses from the estate. For example, the walled garden could be re-developed to its former glory creating a fully planted walled garden with fruit and vegetables growing. This would enhance the current visitor offer of visiting a fully developed walled garden and the space to offer courses.

Agriculture could be seen as a threat to the development of a more established visitor offer. Land owners need to provide access and way-marking on their land to show that walkers are welcome in the area. This is a cultural shift to make sure tourism is seen as part of the integrated solution for everyone within the local communities, which would be a significant step-change from current practice in the area. There is a need to ensure footpaths are maintained and open for visitors, whilst preventing any damage to ecosystems.

Rewilding will have a part to play in the ongoing story of the Uplands in future and there are several initiatives / projects active in this field in the area, including;

- John Muir Trust has been working on a site near top of Artists’ Valley to the north of the study area;
- Cambrian Wildwood has acquired a lease on land at Bwlch Corog near to the above site.
- Montgomeryshire Wildlife Trust has included rewilding in its Pumlumon Project, which takes a holistic approach to radically improving the ecology of a large swathe of area to the north of the A44.

There is scope to attract visitors to sensitively interact with such projects and their associated wildlife.

## 7.4 Country life / natural environment: priority projects

Below is outlined a range of outdoor activities and sporting project ideas, including those developed as part of the community engagement workshops.

NE1 Long Distance Walking Trails				
Recommendation	To map and promote long distance Cambrian walking trail	Priority Low	Cost Low	Timescale Short to medium term
Description		Delivery		
The development of a long distance walking trail across the Cambrian Mountains. This would provide a key draw and attraction for established walkers that are looking to explore a new area of Wales. There is the need to define and map out the walking route and obtain local support from landowners to showcase the benefits of tourism and to develop a detailed outline of the costs associated with the development and maintenance of the trails and explore possible funding options.		Pentir Pumlumon in partnership with Walkers are Welcome (Tregaron and Devil’s Bridge)		
		Possible Funding Sources		

### Recommendations

To develop a group of key stakeholders who are interested in leading the development and management of the trail. To develop a route, which is mapped out appropriately to provide key information to visitors. This group can bid for funding, if necessary, to enhance the trails, signage, public services, etc.

What does Success look like?  
A defined and promoted route for long distance walkers with access to public facilities.

### NE2 Nature Courses

Recommendation	Develop a visitor offer of courses that are based on the exploration of the natural environment.
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Priority	Cost	Timescale
Low	Low	Short term

#### Description

To enhance the visitor offer by offering courses connected to farming and the natural environment. A wide range of courses could be explored including: dry stone walling, wood turning, foraging, and growing and cooking food. This could also create closer ties to the agriculture sector in the area through cider making courses, hedge laying or lambing courses. Alongside this, there is scope for skills development to make the most of the natural environment such as photography and painting courses. These could be developed in partnerships across different sites in the Uplands area to utilise the various cultural and tourist assets in the area already available.

#### Delivery

Partnership between Hafod and local partners

#### Possible Funding Sources

Initial RDP and then self-financing

#### Recommendations

To develop a hub and partnerships to deliver courses in the local area around a wide range of rural, cookery and growing skills.

What does Success look like?  
A delivery of courses to attract visitors to the area

### NE3 Raptor Tour

Recommendation	To develop a raptor tour of the Uplands area.
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Priority	Cost	Timescale
Low	Low	Short to medium





## 8 Funding

This section of the report sets out the available funding streams that could be utilised in the Uplands area. The funding streams have been considered within the context of the three themes explored as part of this study (culture and heritage, outdoor sporting activities and nature opportunities). In addition, the funding review has factored in the needs in the area, which are marketing/promotion, infrastructure and additional activities on offer to visitors.

The available funding streams have been set out in Table 5 below. It explores the various characteristics to be considered for each funding stream. These include:

- Funder: the organisation or funding stream that is managing the funding allocation.
- Amount: the maximum available funding allocation from this organisation.
- Purpose: the overall remit of the funding allocation.
- Type: if the funding can be used for capital or revenue grants.
- Deadline: any key timescales to be aware of for bidding for the funding allocation.
- Further information: sets out where more information about the funding stream can be found.

In summary, there is a wide range of funding streams that could be utilised for the development of specific project ideas in the Uplands area. The funding streams of specific interest are Cefn Croes Windfarm and Rural Community Development Fund (RCDF) (awaiting a new window for applications).

Cefn Croes Windfarm is specifically aimed at the local area within the Uplands to support any activity that involves local people through small community organisations. The project idea will need to provide economic, environmental, educational, social or cultural benefit to the people in the area. Up to £25,000 can be granted per year for a community organisation. Applications for the funding will be considered in spring and autumn each year. Applications for the next round of grant should be sent to the secretary before the end of April or October each year. This funding stream is an opportunity to deliver the project ideas outlined above that are medium sized projects that could bring economic, environmental and social benefit to the Uplands area.

The Rural Community Development Fund (RCDF) will allow for revenue and capital projects with investment in recreational, tourist infrastructure and activities to improve health and quality of life. However, the fund is currently closed and awaiting a new window for applications.

For tourism-specific projects, the tourism funds and schemes that could be explored further include:

Tourism Amenity Investment Support (TAIS). This scheme provides capital support via an annual call programme for development of sustainable tourism facilities. The current round opened on 17<sup>th</sup> May 2017 and closes on 16<sup>th</sup> June. Further rounds will open annually.

The Micro Small Business Fund provides capital funding to the private sector up to 40% of the cost of projects to a maximum of £500,000 to create employment and deliver economic benefits. This fund is on an open call basis to December 2020.

Tourist Investment Support Scheme (TISS). This scheme is aimed at medium to large businesses and provides support in the range of £25,000 to £500,000.

The schemes aim to work with the tourism sector partners across Wales to deliver the 10 per cent growth target set out in the tourism strategy.

Tourism Product Innovation Fund (TPIF) is aimed at improving collaboration to benefit tourism and local communities. The current round is closed, but a further window will become available later in 2017.

Regional Tourism Engagement Fund (RTEF) supports the delivery of destination management plans and alignment with Visit Wales thematic year campaigns. The current round is closed, but a further window will become available later in 2017.

Table 5 Summary of available funding streams

Funder	Amount	Purpose	Type	Deadline	Further information
Millennium Stadium Trust Fund Regional Fund	£7,500	Arts, Community, Environment and Sports.	Revenue/ Capital	Opens 03/04/17 and closes noon 21/07/17	<a href="http://www.millenniumstadiumtrust.org.uk/regional-grant-scheme/">http://www.millenniumstadiumtrust.org.uk/regional-grant-scheme/</a>
People's Postcode Trust	Up to £10,000 for a range of community projects	Community	Revenue/ Capital	August 17(EOI stage)	<a href="http://www.postcodetrust.org.uk/">http://www.postcodetrust.org.uk/</a>
Awards for All Wales	Up to £5,000	Wide range of community, health, educational and environmental projects.	Revenue/ Capital	Rolling Deadline	<a href="https://www.biglotteryfund.org.uk/global-content/programmes/wales/awards-for-all-wales">https://www.biglotteryfund.org.uk/global-content/programmes/wales/awards-for-all-wales</a>
The Prince's Countryside Fund	Up to £50,000	To improve the prospects of viability for family farm businesses, sustain rural communities and drive economic vibrancy and to support aid delivery in emergency and building resilience.		Rounds open every year – 4/9/17 until 5/10/17	<a href="http://www.princescountrysidefund.org.uk/grant-giving-programme/grant-programme">http://www.princescountrysidefund.org.uk/grant-giving-programme/grant-programme</a>
People and Places	Up to £1,000,000	Improving Communities	Revenue/ Capital	Rolling Deadline	<a href="https://www.biglotteryfund.org.uk/prog_people_places">https://www.biglotteryfund.org.uk/prog_people_places</a>
Rural Development Community Fund (RDCF)	Up to £3,000,000	One strand of the RDCF is the investment in recreational, tourist infrastructure and activities to improve health and quality of life	Revenue/ Capital	Window closed at present	<a href="http://gov.wales/topics/environmentcountryside/farmingandcountry/cap/ruraldevelopment/wales-rural-development-programme-2014-2020/?lang=en">http://gov.wales/topics/environmentcountryside/farmingandcountry/cap/ruraldevelopment/wales-rural-development-programme-2014-2020/?lang=en</a>
Cynnal y Cardi	Up to £3,000,000	Support can be provided for the following areas: Project Development, Pilot Projects, Feasibility Studies, Facilitation, Training, Mentoring and Consultation		Open call	<a href="http://www.cynnalycardi.org.uk/english/?page_id=2519">http://www.cynnalycardi.org.uk/english/?page_id=2519</a>
Heritage Lottery Fund (HLF)	£10,000 to £250,000	Grants for Places of Worship - funds urgent structural repairs to Grade I, II* and II listed places of worship in Wales. As part of the repair project, also fund improvements to facilities and work that helps more people get involved with these wonderful buildings.	Revenue/ Capital	Rolling Deadlines (e.g. 05/06/17 for a September 17 decision)	<a href="https://www.hlf.org.uk/looking-funding/our-grant-programmes/grants-places-worship-wales">https://www.hlf.org.uk/looking-funding/our-grant-programmes/grants-places-worship-wales</a>
Buildings and monuments Community heritage Culture and memories Industrial, maritime	£100,000 to £3,000,000	Landscape Partnerships - heritage conservation at the heart of rural and peri-urban regeneration		First round application 12pm 1st June (Oct	<a href="https://www.hlf.org.uk/looking-funding/our-grant-programmes/landscape-">https://www.hlf.org.uk/looking-funding/our-grant-programmes/landscape-</a>

and transport Land and natural heritage Museums, libraries and archives	£100,000 to £5,000,000	Heritage Enterprise - help communities repair derelict historic places	Capital	decision) - assumed 2017 Rolling basis for projects up to £2million	<a href="#">partnerships</a> <a href="https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-enterprise">https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-enterprise</a>
Cefn Croes Windfarm	Max £25,000 per year	Support any type of activity that involves local people, through small community organisations, that benefits their community. The activities must provide some measure of economic, environmental, educational, social or cultural benefit for people living in the area.		Applications will be considered in Spring and Autumn each year. Applications for the next round of grant should be sent to the secretary before the end of April or October	<a href="http://ponterwydcommunity.org.uk/cms/community-groups/cefn-croes-community-trust/">http://ponterwydcommunity.org.uk/cms/community-groups/cefn-croes-community-trust/</a>
Big Lottery Rural Programme: Community Grants	£10,000 - £350,000	Creating solutions to tackle rural poverty in Wales, including Ceredigion.		Round 2 opens in early 2018	<a href="https://www.biglotteryfund.org.uk/global-content/programmes/wales/rural-programme-community-grants">https://www.biglotteryfund.org.uk/global-content/programmes/wales/rural-programme-community-grants</a>
Tourism Amenity Investment Support (TAIS)	£25,000 - £128,000	Investment fund targeting amenity projects in the tourism sector in Wales.	Cap / Revenue	17.5.17 – 16.6.127	<a href="https://businesswales.gov.wales/zones/tourism/finance#tabs-4">https://businesswales.gov.wales/zones/tourism/finance#tabs-4</a>
Regional Tourism Engagement Fund (RTEF)	Up to £150,000 over 2 years with a minimum grant of £20,000 per project.	Support destinations across Wales to promote and develop distinctive, high-quality visitor destinations through the delivery of their destination management plans. Enable destinations to maximise the benefits from aligning with Visit Wales' product-led thematic year approach.	Revenue	A further round will be launched in late 2017.	<a href="https://businesswales.gov.wales/dmwales/support/regional-tourism-engagement-fund-rtef">https://businesswales.gov.wales/dmwales/support/regional-tourism-engagement-fund-rtef</a>
Tourism Product Innovation Fund (TPIF)	Up to £150,000 over 2 years with a minimum grant of £20,000 per project.	The purpose of the TPIF fund is to work with tourism sector partners across Wales to deliver the 10% growth target set out in the tourism strategy. The fund aims to encourage closer joint working between tourism consortia, partnerships and trade groups and to develop and improve the product offer to visitors which will benefit the tourism sector, local communities and critically, help to grow the tourism economy in a sustainable way.	Revenue	A further round will be launched in late 2017.	<a href="https://businesswales.gov.wales/dmwales/support/tourism-product-innovation-fund-tpif">https://businesswales.gov.wales/dmwales/support/tourism-product-innovation-fund-tpif</a>



<p>Tourism Investment Support Scheme (TISS)</p> <p>Interreg</p>	<p>Up to £500,000</p>	<p>TISS is an investment fund comprising a mix of repayable and non-repayable finance, targeting eligible capital investment projects in the Tourism Sector in Wales. It can be used either to upgrade existing or create new high-quality product.</p> <p>The Ireland Wales programme delivers sustainable economic, social and environmental benefits for people, businesses and communities across Ireland and Wales.</p>	<p>Capital</p>	<p>Ongoing</p>	<p><a href="http://gov.wales/topics/culture-tourism-sport/tourism/tourism-investment-support-scheme/?lang=en">http://gov.wales/topics/culture-tourism-sport/tourism/tourism-investment-support-scheme/?lang=en</a></p> <p><a href="http://irelandwales.eu/apply-for-funding">http://irelandwales.eu/apply-for-funding</a></p>
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Source: Miller Research.

## 9 Monitoring and Evaluation

Importantly, the Tourism and Visitor Economy Strategy<sup>46</sup> emphasises the importance of measuring progress and success going forward via setting key performance indicators. This will be important to consider as part of the development of any detailed proposals or any future projects going forward. In each of the project ideas, we've explored what success would look like for each idea. It is important to explore potential Key Performance Indicators that would be measured.

Overall for the Uplands area / Cambrian Mountains, it is important to measure the number of current visitors, average spend per visitor, average length of stay and visitor satisfaction with visiting the area. These are all important areas to be monitored over time to assess if there has been any growth in the number of visitors or the visitor spend in the area.

Outlined below are the suggestions for ways to monitor the progress of the specific ideas drafted above. The suggestions are based on the project idea and detailed consideration would be recommended for the monitoring and evaluation of both these projects.

**Table 6 Monitoring and Evaluation Measures**

<b>Theme</b>	<b>Project Ideas</b>	<b>Monitoring (potential KPIs)</b>
Cross-cutting	Devil's Bridge Infrastructure Development	<ul style="list-style-type: none"> <li>• Visitor satisfaction with Devil's Bridge</li> <li>• Level of signage/information available</li> </ul>
	Ystwyth Transport Tourism Trial and electric bike / Twizy rental scheme	<ul style="list-style-type: none"> <li>• Number of users of trialled scheme</li> <li>• Usage mileage</li> </ul>
	Food and Drink Offer	<ul style="list-style-type: none"> <li>• Local food available</li> <li>• New food and drink establishments</li> <li>• Awareness of local food</li> </ul>
	Train and support local accommodation providers	<ul style="list-style-type: none"> <li>• Training events run</li> <li>• Visits to other accommodation/areas</li> <li>• Network of providers established</li> </ul>
	Develop a year-round events strategy for the Cambrian Mountains	<ul style="list-style-type: none"> <li>• Events strategy developed</li> <li>• Increased number of events (from 2017 baseline)</li> <li>• New events delivered in Uplands / Cambrian Mountains</li> </ul>
Culture / heritage	Music Events in Cultural and Heritage Sites	<ul style="list-style-type: none"> <li>• Number of events established</li> <li>• Number of attendees</li> </ul>
	Faith Tourism Trail	<ul style="list-style-type: none"> <li>• Trails established</li> </ul>

<sup>46</sup> <http://www.ceredigion.gov.uk/public-it/tourism/stats/certwg/CEREDIGION%20TOURISM%20STRATEGY%202011-2020.pdf>

	Film Festival	<ul style="list-style-type: none"> <li>• Number of films</li> <li>• Number of attendees</li> <li>• Awareness of the festival</li> </ul>
Outdoor activities / sporting	Parc Pumlumon	<ul style="list-style-type: none"> <li>• Availability of new activities</li> <li>• Engagement with the</li> </ul>
	Tour of Cambrian Mountains	<ul style="list-style-type: none"> <li>• Number of participants</li> <li>• Number of races</li> </ul>
	Cambrian Mountains Challenge	<ul style="list-style-type: none"> <li>• Number of participants</li> <li>• Awareness of the event</li> </ul>
	Rental bike and repair facilities	<ul style="list-style-type: none"> <li>• Number of rentals/repairs</li> <li>• Satisfaction with rentals</li> </ul>
	Outdoor brands to promote the areas	<ul style="list-style-type: none"> <li>• Brands promoted the area</li> </ul>
	Long distance riding trails	<ul style="list-style-type: none"> <li>• Development of bridleways</li> <li>• Maintenance of bridleways</li> </ul>
Country Life / Natural Environment	Long Distance Walking Trails	<ul style="list-style-type: none"> <li>• Development of new trails</li> <li>• Number of users of the trails</li> </ul>
	Nature Courses	<ul style="list-style-type: none"> <li>• Number of courses offered</li> <li>• Number of attendees on courses</li> <li>• New skills learnt</li> </ul>
	Raptor Tour	<ul style="list-style-type: none"> <li>• Development of a new tour</li> <li>• New information on wildlife in the area</li> </ul>

All projects developed should have a comprehensive plan to evaluate the success and lessons learnt. This should be embedded as part of the idea development for the projects. This will be unique to the specific project ideas, but with key performance indicators outlined above considered for measurement.

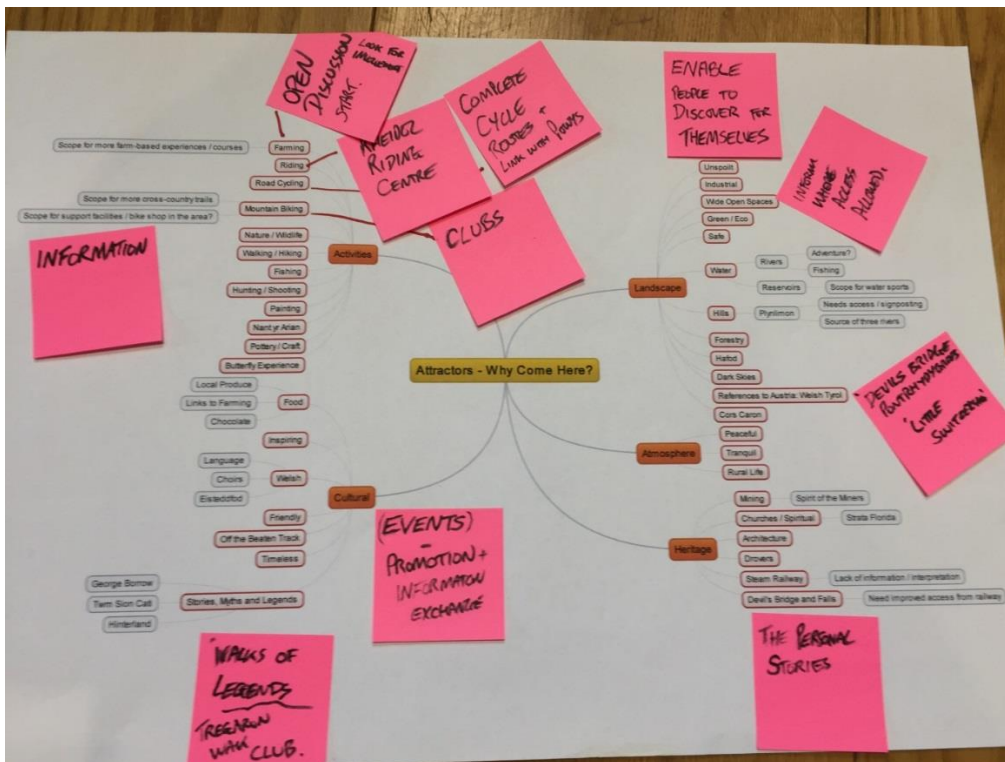
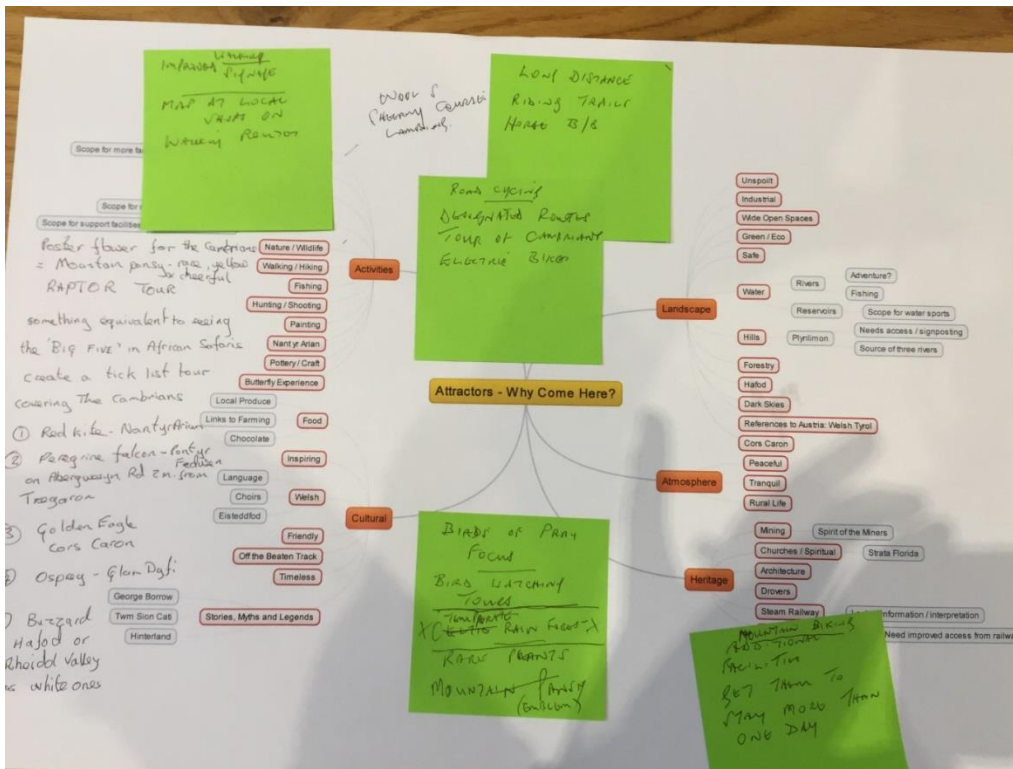
Appendix 1: Workshop 2 Visions for the area

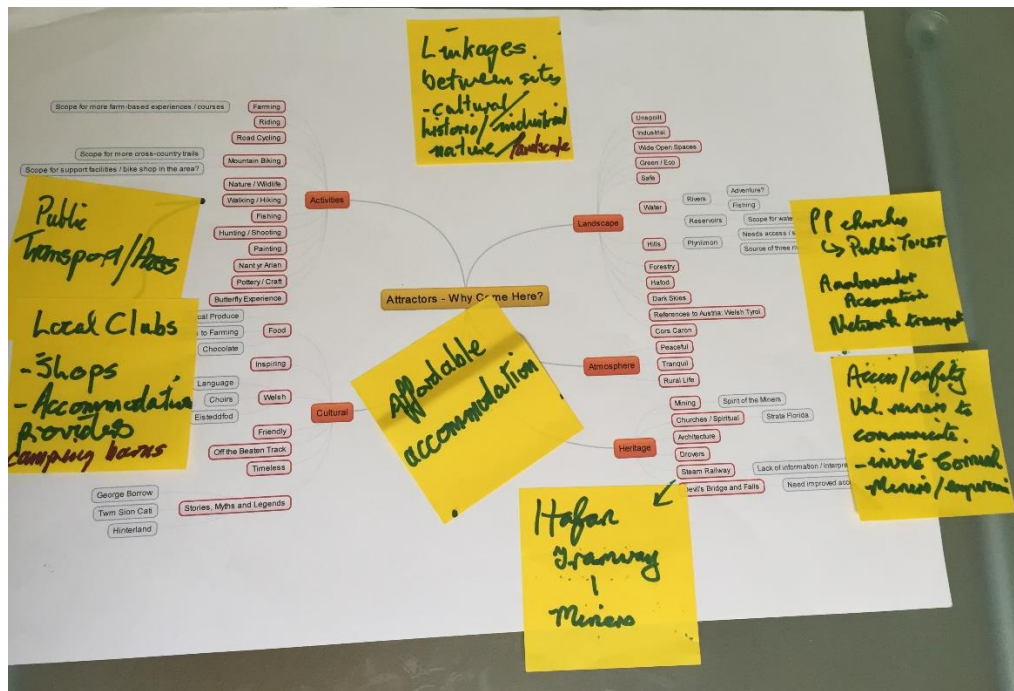
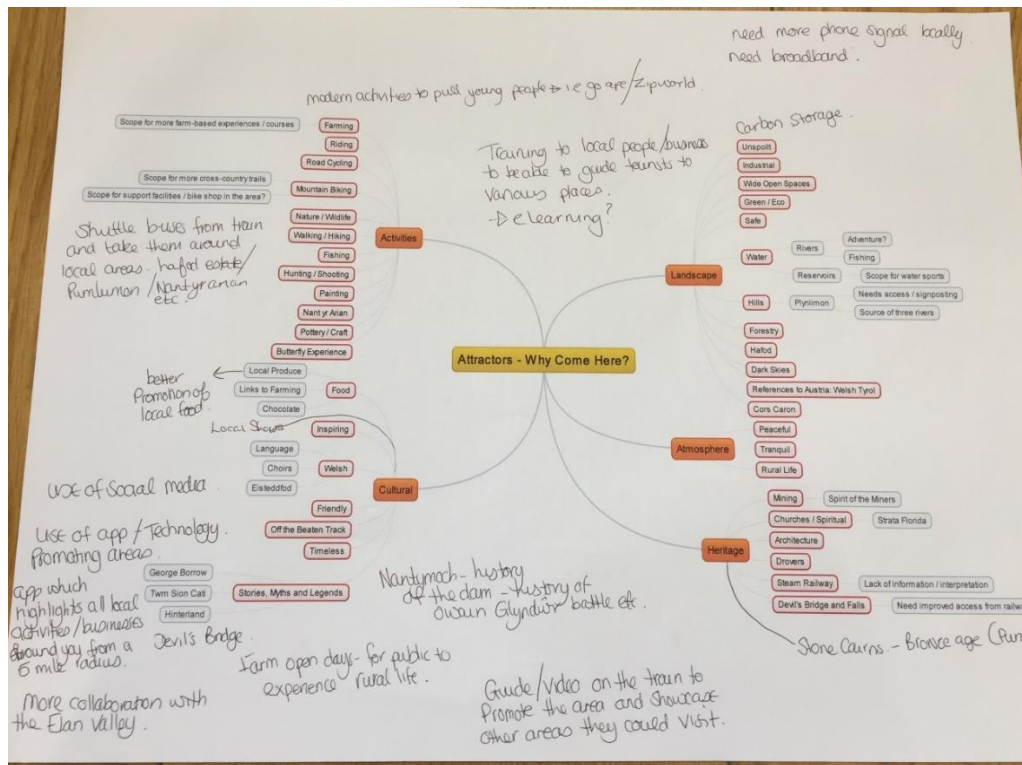






Appendix 2: Workshop 3 what is on offer in the Uplands?





## Appendix 3 Online questionnaire

English	Welsh
Upland Ceredigion Tourism Research	Ymchwil Twristiaeth Ucheldir Ceredigion
<p><b>Introduction</b></p> <p>Please complete this short survey to be entered into our prize draw for the chance to win a £100 voucher to be spent on outdoor activities or goods.</p> <p>Miller Research has been commissioned by Pentir Pumlumon to undertake research into tourism in the Ceredigion Uplands - that is the area inland from Aberystwyth, from Tregaron in the South, through Devil's Bridge to Ponterwyd and Nant y Moch in the north.</p> <p>We'd like to ask you about your views and experiences of the area.</p> <p>We conduct all our research according to the Market Research Society guidelines. We will not pass the data on to any third parties and will destroy your details once the evaluation is complete.</p> <p>If you would like to view and complete the survey in Welsh then please use the following link:</p>	<p><b>Cyflwyniad</b></p> <p>Cwblhewch yr arolwg byr hwn i gael cyfle i ennill taleb gwerth £100 i'w wario ar weithgareddau neu nwyddau awyr agored.</p> <p>Comisiynwyd Miller Research gan Pentir Pumlumon i wneud ymchwil i dwristiaeth yn Ucheldir Ceredigion - dyna'r ardal fewndirol o Aberystwyth, o Dregaron yn y De, drwy Pontarfynach i Bonterwyd a Nant y Moch yn y gogledd.</p> <p>Dymunwn ofyn i chi am eich barn a'ch profiadau o'r ardal.</p> <p>Rydym yn cynnal ein holl ymchwil yn unol â chanllawiau'r Gymdeithas Ymchwil i'r Farchnad. Ni fyddwn yn rhoi data i unrhyw drydydd parti a byddwn yn dinistrio eich manylion unwaith y bydd y gwerthusiad yn gyflawn.</p> <p>Os dymunwch weld a chwblhau'r arolwg yn Gymraeg, yna defnyddiwch y ddolen ganlynol:</p>
<p>1. Please select the statement(s) which best applies to you.</p> <p><input type="radio"/> I have recently visited the area as a tourist</p> <p><input type="radio"/> I live / work in the area</p> <p><input type="radio"/> Other (please specify)</p>	<p>1. Dewiswch y datganiad (au) sy'n fwyaf cymwys i chi.</p> <p>Rwyf wedi ymweld â'r ardal fel ymwelwr yn ddiweddar</p> <p>Rwy'n byw / gweithio yn yr ardal</p> <p>Arall (rhowch fanylion)</p>
<p>2. To what extent did the following attract you to visit the local area?</p> <p>5. (Most)</p> <p>1. (Least)</p> <p>Not at all</p>	<p>2. I ba raddau y llwyddodd y canlynol eich denu i ymweld â'r ardal leol?</p> <p>5. (Y rhan fwyaf)</p> <p>1. (Y lleiaf)</p> <p>Dim o gwbl</p>

<ul style="list-style-type: none"> <li>• The rural landscape / nature and wildlife</li> <li>• The coast: Seaside and watersports</li> <li>• Outdoor activity sports (mountain biking, fell running, bouldering etc)</li> <li>• The culture and heritage of the area</li> <li>• The range of attractions in the area</li> <li>• Friends and family</li> <li>• Other (please specify)</li> </ul>	<ul style="list-style-type: none"> <li>• Y dirwedd wledig / natur a bywyd gwyllt</li> <li>• Yr arfordir: Glan y môr a chwaraeon dŵr</li> <li>• Gweithgareddau awyr agored (beicio mynydd, rhedeg mynydd-dir, clogfeinio etc)</li> <li>• Diwylliant a threftadaeth yr ardal</li> <li>• Yr amrywiaeth o atyniadau yn yr ardal</li> <li>• Cyfeillion a theulu</li> <li>• Arall (nodwch)</li> </ul>
<p>3. Did you visit any of the following attractions during your visit?</p> <p><input type="checkbox"/> Bwlch Nant yr Arian Visitor Centre</p> <p><input type="checkbox"/> Devil's Bridge Falls</p> <p><input type="checkbox"/> Hafod Church</p> <p><input type="checkbox"/> Hafod Estate</p> <p><input type="checkbox"/> Magic of Life Butterfly House</p> <p><input type="checkbox"/> Owain Glyndwr's Monument</p> <p><input type="checkbox"/> Rheidol Power Station</p> <p><input type="checkbox"/> Rhiannon Jewellery</p> <p><input type="checkbox"/> Sarah Bunton Chocolates</p> <p><input type="checkbox"/> Strata Florida Abbey</p> <p><input type="checkbox"/> The Silver Mountain Experience</p> <p><input type="checkbox"/> Vale of Rheidol Railway</p> <p><input type="checkbox"/> None of the Above</p>	<p>3. Wnaethoch chi ymweld ag unrhyw un o'r atyniadau canlynol yn ystod eich ymweliad?</p> <p>Canolfan Bwlch Nant yr Arian</p> <p>Rhaeadrau Pontarfynach</p> <p>Eglwys yr Hafod</p> <p>Ystad yr Hafod</p> <p>Tŷ Glöynnod Byw Magic of Life</p> <p>Cofeb Owain Glyndwr</p> <p>Gorsaf Bŵer y Rheidol</p> <p>Gemwaith Rhiannon</p> <p>Siocled Sarah Bunton</p> <p>Abaty Ystrad Fflur</p> <p>Profiad y Mynydd Arian</p> <p>Rheilffordd Cwm Rheidol</p> <p>Dim un o'r uchod</p>
<p>4. What other attractions or activities would you like to see in the area?</p>	<p>4. Pa atyniadau neu weithgareddau eraill yr hoffech eu gweld yn yr ardal?</p>
<p>5. What type of accommodation did you stay in within the area?</p> <p><input type="checkbox"/> Bunkhouse</p> <p><input type="checkbox"/> Bed and Breakfast</p> <p><input type="checkbox"/> With Family and Friends</p> <p><input type="checkbox"/> Hotel / Guest House</p> <p><input type="checkbox"/> Campsite / Caravan Site</p> <p><input type="checkbox"/> Self-Catering Cottage</p> <p><input type="checkbox"/> Glamping Site: Yurt / Camping Pod / Gypsy Caravan</p> <p><input type="checkbox"/> I just came for the day</p>	<p>5. Ym mha fath o lety oeddech chi'n aros ynddo yn yr ardal?</p> <p>Byncws</p> <p>Gwely a Brechwast</p> <p>Gyda Theulu a Chyfeillion</p> <p>Gwesty / Tŷ Llety</p> <p>Safle Gwersylla / Carafán</p> <p>Bwthyn Hunanarlwyo</p> <p>Safle Glampio: Iwrt / Pod Gwersylla / Carafán Sipsiwn</p> <p>Ymweld am y diwrnod yn unig wnes i Arall (rhowch fanylion)</p>



Other (please specify)	
<p>6. Approximately how much did you spend per person, per day, on accommodation and other things during your visit? (i.e. activities, food &amp; drink, travel within the area)</p> <p><input type="radio"/> Nothing</p> <p><input type="radio"/> £1-10</p> <p><input type="radio"/> £11-20</p> <p><input type="radio"/> £21-50</p> <p><input type="radio"/> £51-100</p> <p><input type="radio"/> £101-£250</p> <p><input type="radio"/> £251-£500</p> <p><input type="radio"/> £501+</p> <p><input type="radio"/> Other (please specify)</p>	<p>6. Tua faint wnaethoch chi ei wario y pen, fesul diwrnod, ar lety a phethau eraill yn ystod eich ymweliad? (h.y. gweithgareddau, bwyd a diod, teithio yn yr ardal)</p> <p>Dim</p> <p>Arall (rhowch fanylion)</p>
<p>7. How long was your stay on your most recent visit?</p> <p><input type="radio"/> Day trip</p> <p><input type="radio"/> Short break - up to three nights</p> <p><input type="radio"/> Up to a week</p> <p><input type="radio"/> One to two weeks</p> <p><input type="radio"/> More than two weeks</p> <p><input type="radio"/> Other (please specify)</p>	<p>7. Pa mor hir oedd eich arhosiad ar eich ymweliad mwyaf diweddar?</p> <p>Trip am ddiwrnod</p> <p>Gwyliau byr - hyd at dair noson</p> <p>Hyd at wythnos</p> <p>Un i ddwy wythnos</p> <p>Mwy na phythefnos</p> <p>Arall (rhowch fanylion)</p>
<p>8. How frequently do you visit the area?</p> <p><input type="radio"/> This is the first time I/we have visited</p> <p><input type="radio"/> Once every few years</p> <p><input type="radio"/> Once or twice a year</p> <p><input type="radio"/> Three or four times a year</p> <p><input type="radio"/> Five or six times a year</p> <p><input type="radio"/> More than six times a year</p> <p>Other (please specify)</p>	<p>8. Pa mor aml ydych chi'n ymweld â'r ardal?</p> <p>Dyma'r tro cyntaf i mi / i ni ymweld</p> <p>Unwaith bob ychydig flynyddoedd</p> <p>Unwaith neu ddwywaith y flwyddyn</p> <p>Tair neu bedair gwaith y flwyddyn</p> <p>Pump neu chwe gwaith y flwyddyn</p> <p>Mwy na chwe gwaith y flwyddyn</p> <p>Arall (rhowch fanylion)</p>
<p>9. Would you recommend this area to a friend or relative looking for somewhere to visit?</p> <p>Yes</p> <p>Maybe</p> <p>No</p>	<p>9. Fyddech chi'n argymhell yr ardal hon i gyfaill neu berthynas sy'n chwilio am rywle i ymweld?</p> <p>Byddwn</p>



<p>Don't know</p> <p>Other (please specify)</p>	<p>Efallai</p> <p>Na</p> <p>Ddim yn gwybod</p> <p>Arall (rhowch fanylion)</p>
<p>10. What one thing could be done to improve the visitor experience in this area?</p>	<p>10. Pa un peth y gellid ei wneud i wella profiad ymwelwyr yn yr ardal hon?</p>
<p>About you</p> <p>Would you mind telling us a little about yourself? This information will not be passed onto any other organisation and will be used by Pentir Pumlumon solely for the purpose of understanding its market.</p> <p>11. Which age group do you fall into?</p> <p><input type="radio"/> 16 and under</p> <p><input type="radio"/> 17-25</p> <p><input type="radio"/> 26-44</p> <p><input type="radio"/> 45-64</p> <p><input type="radio"/> 65 and over</p>	<p>Amdanoch chi</p> <p>A fyddai wahaniaeth gennych ddweud ychydig wrthym amdanoch eich hun? Ni fydd y wybodaeth yn cael ei throsglwyddo i unrhyw sefydliad arall a bydd yn cael ei ddefnyddio gan Pentir Pumlumon yn unig ar gyfer y diben o ddeall ei farchnad.</p> <p>11. I ba grŵp oedran ydych chi'n perthyn?</p> <p>16 ac iau</p> <p>17-25</p> <p>26-44</p> <p>45-64</p> <p>65 a throsodd</p>
<p>12. What is the first half of your postcode? (If outside UK please state country)</p>	<p>12. Beth yw hanner cyntaf eich cod post? (Os y tu allan i'r Deyrnas Unedig, nodwch y wlad)</p>
<p>Thank you</p> <p>Thank you for completing the survey. Your views are greatly appreciated and will help to inform the research into improving services for tourism in the Ceredigion Uplands.</p> <p>If you would like to know more about the project, please contact <a href="mailto:astrid@miller-research.co.uk">astrid@miller-research.co.uk</a>.</p> <p>If you wish to be entered the prize draw, please leave your name and e-mail address in the boxes below, if not, please press done to complete the survey.</p> <p>13. If you would like to be entered into a prize draw to win a £100 outdoor activity voucher, please enter your name and e-mail address in</p>	<p>Diolch</p> <p>Diolch am gwblhau'r arolwg. Mae eich barn yn cael ei werthfawrogi'n fawr a bydd yn helpu i lywio'r ymchwil i wella gwasanaethau ar gyfer twristiaeth yn Ucheldir Ceredigion.</p> <p>Os hoffech wybod mwy am y prosiect, cysylltwch ag <a href="mailto:astrid@miller-research.co.uk">astrid@miller-research.co.uk</a>.</p> <p>Os dymunwch gael eich cynnwys yn y raffl, gadewch eich enw a'ch cyfeiriad e-bost yn y blychau isod. Os nad ydych, pwyswch wedi gorffen (done) i gwblhau'r arolwg.</p> <p>13. Os hoffech gael eich cynnwys yn y raffl i ennill taleb gweithgareddau awyr</p>

the boxes provided below.	agored gwerth £100, rhowch eich enw a'ch cyfeiriad e-bost yn y blychau a ddarperir isod.
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#### Appendix 4 List of interviewees

<b>Name</b>	<b>Organisation</b>
David Austin	Strata Florida Trust
Helen Jones	Visit Wales
Angie Polkey	Local resident / Nature reserve in Cors Caron
Ieuan Joyce	Cambrian Mountains
Ellen ap Gwynn	Ceredigion County Council
Gwenfair Owen	Ceredigion County Council
Helen Harrison	Local resident - response to newspaper
Llyr ap Iolo	Vale of Rheidol Railway
Dafydd Wyn Morgan	Twm Treks
Val Hawkins	Mid Wales Tourism
Nicol Gwynn	Hafod Hotel
Nia Taylor	y Talbot
Gareth Owens	Nant yr Arian