MID WALES REGIONAL TOURISM STUDY AND ACTION PLAN

STAGE 2 REPORT – OCTOBER 2022

Contents

This project has received funding through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development and the Welsh Government.

STRATEGIC VISION

"To maximise the positive impacts of tourism in a sustainable way for the benefit of the community of Mid Wales. We will do this by investing in meaningful experiences and opportunities rooted in the distinctive places and culture of the region."

VALUES	Authentic	Unique	Curious	Responsible	Equitable	Welcoming	Quality
OBJECTIVES	Sustainable growth	Visit dispersal	Clustered offerings	Visitor infrastructure	Public private partnerships	Meaningful employment	Environmental protection
PRODUCT	Outdoor and landscape based	Indoor and year-round	Event tourism	Food and produce	Arts and culture	Town centres	Heddwch

INVESTMENT ACTION PLAN

The Action Plan aims to build Mid Wales' visitor economy through enhancing and expanding upon existing assets and improving the sector's support structures. The investment recommendations and next steps to achieving them are grouped into the following categories.

Accommodation	Arts, culture, and spiritualism	Outdoors and environment	Events and vibrancy	Corporate tourism
Basic facilities	Transport	Resourcing	Marketing and promotion	Organisation and structure

1 Introduction

Mid Wales, comprising the counties of Powys and Ceredigion, includes a remarkable range of landscapes, human settlements, and cultures. Simultaneously home to unique traditions, significant history and heritage, and cutting edge innovation, technology, and business, it is like nowhere else in Wales, or indeed in the United Kingdom.

In fact, its size and variety means that even within Mid Wales there is so much to explore, from unspoilt beaches and wind-swept mountains, to bustling market towns, contemporary art and crafts, world-class events and festivals, and Michelin star restaurants.

Tourism is an important industry for the region economically, supporting jobs and businesses. But Mid Wales has felt far less of the – both positive and negative - impact of tourism than neighbouring North and South Wales, which represent well established, high-profile destinations. The impact that is felt is not spread equally, meaning parts of the region are congested in peak season, while many places receive limited visitors at any time of year.

The COVID-19 pandemic caused enormous disruption to the global economy, with tourism and hospitality two of the sectors damaged most severely. Alongside this, however, the pandemic caused many people and organisations to re-evaluate their priorities and desires, a change that will continue to impact upon people's choices in terms of living, working, and travel patterns in the future.

As such, now is an opportune moment to consider the future of tourism across Mid Wales.

A clear vision and strategy, with guidance on investment priorities and requirements in the coming years, will allow the region to develop its visitor offer, infrastructure, and economy in a way that can maximise the positive impacts of tourism for all residents positively, minimise the negative effects of over-tourism and respond to the climate crisis facing us all.

The strategy will help local authorities, businesses, and community organisations to work together more closely, delivering new opportunities for residents to benefit.

It will ensure that the region can maintain a unique offer in a crowded global marketplace, helping to create authentic experiences that the contemporary traveller looks for, without neglecting existing audiences at the same time.

This Regional Tourism Study outlines the first steps in this journey, establishing a vision and series of investment priorities that can then be developed further. The Study's recommendations will require time and resource to co-ordinate and deliver effectively, and collaboration across the public and private sectors.

Bringing together a broad body of research, hundreds of engagements with local businesses and tourism organisations, and learnings from the UK and beyond, this study provides a strong, shared direction for Mid Wales tourism investment moving forwards.

1.1 Our Work

Fourth Street and Chris Blandford Associates were commissioned in February 2022 by Growing Mid Wales to deliver a Mid Wales Regional Tourism

Strategy. The purpose of the report is to guide the long-term sustainable development of tourism in the region.

The scope of the work was to undertake a strategic review of tourism assets and infrastructure in Mid Wales and identify a pipeline of investment opportunities and supporting interventions in order to develop an action plan for tourism in the region.

This report consists of:

- An analysis of the strategic policy context. The Action Plan will also need to respond to other strategic priorities set out in a range of existing policy documents. We have included national, regional, and local policy objectives in this analysis, as well as a review of relevant Destination Management Plans (Section 2.1).
- An analysis of the tourism sector at present across Mid Wales, including the dynamics of domestic and international tourist arrivals across the region (Section 2.2).
- An Asset Audit which has been undertaken as part of this project to provide an understanding of current tourism assets, including understanding their strength and weaknesses, the gaps and the opportunities (Section 2.3).
- A summary of the numerous stakeholder consultations presented through a detailed SWOT Analysis (Section 3.1), and an analysis of the second stage of engagement, extending to the private and third sectors (Section 3.2).
- The Vision and Values for tourism in the region, which will guide the development of and investment in the sector (Section 4).
- The categorised interventions forming the Investment Action Plan, along with the next steps to delivering each intervention (Section 5).

This document is supported by an Evidence Base report, which consists of further detail and evidence for the vision and strategy outlined here.

2 Market Evidence

To support and guide the Investment Action Plan, extensive background research was completed. This section contains a summary of the analysis of the strategic context of Mid Wales, the current state of the tourism market, and of the in-depth assessment of the tourism assets. Further details can be found in the evidence base report.

2.1 Strategic Context

Our review of strategic policy has highlighted a number of themes common to the priorities of several organisations across Mid Wales. We have included national, regional, and local policy objectives in this analysis, as well as a review of relevant Destination Management Plans. Themes that have emerged repeatedly throughout this body of literature include:

- **Economy and Innovation** – particularly around a fostering a collaborative approach between private, public, third and education sectors, and on the importance of creating year-round jobs in tourism sector, with clear and aspirational career paths, to help reverse out-migration and support existing businesses.
- **Environment** - a sustainable approach, investing in low-carbon transport and technologies, supporting active travel, and protecting the region's landscapes and natural assets.
- **Community and Health** – Placing local people at the heart of decision-making, ensuring the needs of communities are recognised and balanced with tourism growth.
- **Tourism and the experience –** a shift towards higher-value, conscious travel, prioritising spend and dwell time over absolute numbers of visitors. Encouraging year-round visits and dispersal across the region will help support this transition.
- **Welsh Culture –** a uniquely Welsh offer, distinguishable from the other parts of Wales and the UK. This offer could draw, in part, on the historical and present-day importance of the Welsh language in Mid Wales.
- **Learning and skills -** the importance of educational and learning opportunities in tourism and related industries, to support young people into work in the sectors, and to provide progression and life-long learning and professional development to those already in the sector to improve retention.
- **Product** – The strategic context also identifies several key product areas for Mid Wales to grow and develop, including:
    - World-class event-based tourism reflecting local character, industry, and culture
    - Adventure and outdoor tourism, including walking, cycling, water-based activities, dark skies activities etc.
    - Products centred directly on health and wellbeing of visitors and residents
    - Strengthening the region's growing arts and cultural sectors, including promotion of the Welsh language, literature, poetry, and song.

- The region’s heritage offer
- Strengthening the region’s retail offer as well as improving its historic market towns and villages
- Basic infrastructure being in place to support these attractors

2.2 Tourism Context

We carried out a detailed analysis of the tourism sector at present across Mid Wales, including the dynamics of domestic and international tourist arrivals across the region. Key conclusions from our review of the dynamics of the current tourism sector include:

- Mid Wales captures a disproportionately small amount of tourism to Wales. It represents only 8% of visitor numbers and 14% of economic impact from tourism in Wales.
- However, it has been growing in popularity among visitors and it is well placed to capitalise on the changes happening to the tourism industry. Trends in the tourism industry pertinent to tourism in Mid Wales include a growing desire for ‘uncharted destinations’ and authentic experiences, growth of wellness and quiet tourism, culinary explorers seeking out unique and high quality food offers, and a trend towards quirky accommodation. The opportunities for Mid Wales include to:
    - Improve ease of access the outdoors to enable the ‘discovery’ of these ‘untouched’ places through e.g., signage, cycle paths and walking networks.
    - Develop the opportunity for wellness tourism through the offer of spas and retreats, and by strengthening the connection to wellness and nature, the outdoors, and the dark skies.
    - Promote the growing quirky and unique accommodation offer.
    - Draw in a conscious and responsible traveller by promoting Mid Wales as a green destination drawing on local food production, active travel, and a respect for nature.

Figure 1: Key tourism indicators[1]

CEREDIGION COUNTY COUNCIL

	2019
Staying visitors	1,366,000
Day visitors	1,576,000
Direct Expenditure (£)	296,880,000
Economic Impact (£)	402,940,000
Direct Employment FTEs	4,772
Total Employment FTEs	5,854

POWYS COUNTY COUNCIL

	2019
Staying visitors	1,972,000
Day visitors	3,011,000
Direct Expenditure (£)	752,800,000
Economic Impact (£)	1,012,030,000
Direct Employment FTEs	10,007
Total Employment FTEs	12,651

- Tourism has an important economic role. It represents almost 20% of employment in Mid Wales. This is higher than other parts of Wales e.g., North Wales (2018), where tourism represents 13% of employment.
- Tourism generated £1,000 million of direct expenditure and contributes £1,453 million to the economy.
- Visitors to Mid Wales have a higher economic impact per visitor day than the rest of Wales. This is because of the higher proportion of staying visitors in Mid Wales, and the higher costs of overnight trips. However, staying visitors spend less on average in Mid Wales than in other parts of Wales. There is an opportunity to increase the spend of staying visitors by, for example, increasing the number of paid leisure activities, extending the length of stay, and higher value accommodation.
- The high proportion of staying visitors in Mid Wales leads to accommodation-related spend, with limited spend in other parts of the economy. It is necessary to diversify spending patterns to other related sectors, such as arts and culture, leisure and recreation, and food and beverage.
- There are fewer children / families with children visiting Mid Wales than the Welsh average. There is an older demographic of visitors in Powys: over half are 55+, and there are fewer 35-54s visiting than the Wales average. There is a loyal visitor base evidenced by a very high level of repeat visitors, similar to the rest of Wales. Broadening the audience base to a younger audience would likely boost the vibrancy and economic impact of tourism.
- Most visitors to Mid Wales are domestic tourists, predominantly from England. International visitors represent 1% of total visits to Mid Wales. There are opportunities for Mid Wales to capture a larger proportion of the international visitors to Wales.

[1] STEAM reports

Figure 2: 10-year growth of economic impact from tourism by sector[2]

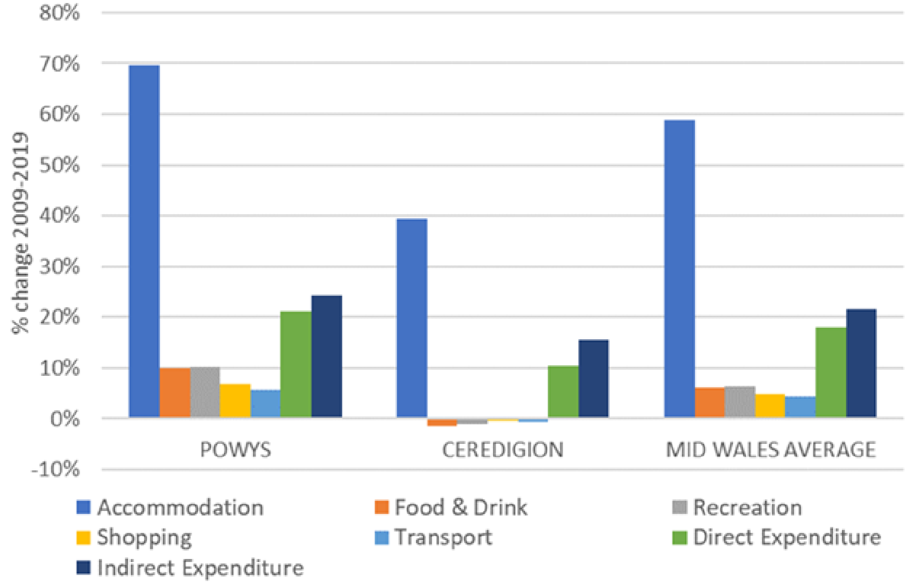
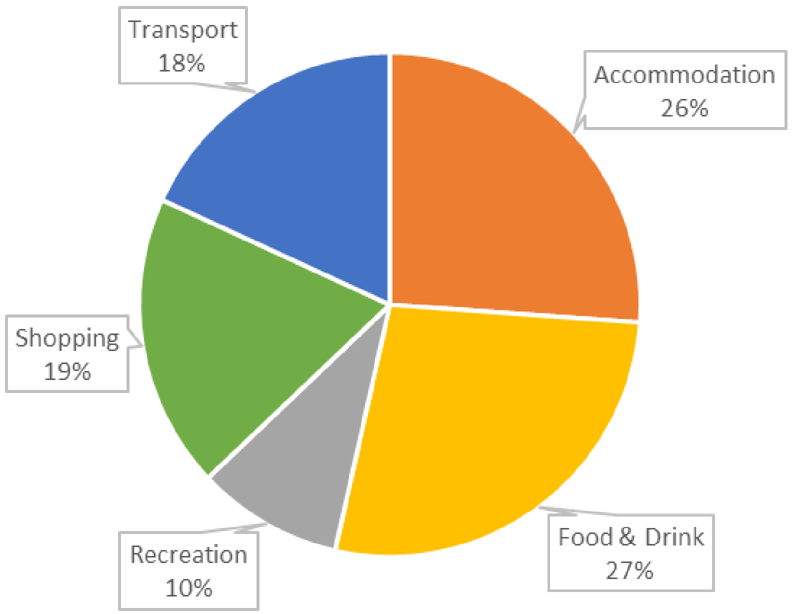


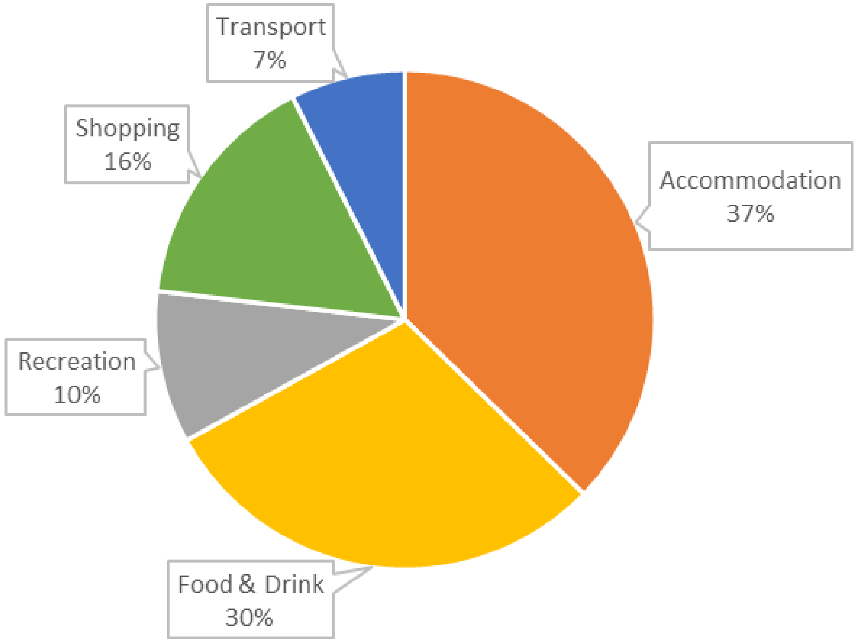
Figure 3: 2019 sectoral distribution of tourism related direct expenditure in Mid Wales[3]



[2] STEAM reports

[3] STEAM report

Figure 4: 2019 sectoral distribution of tourism related employment (FTE) in Mid Wales[4]



2.3 Asset audit

We have completed a comprehensive audit of current tourism activities across the region, including identification and categorisation of a range of natural and cultural attractions, accommodation offerings, retail and food and beverage provision, and the most important events in Mid Wales. This audit has demonstrated the following:

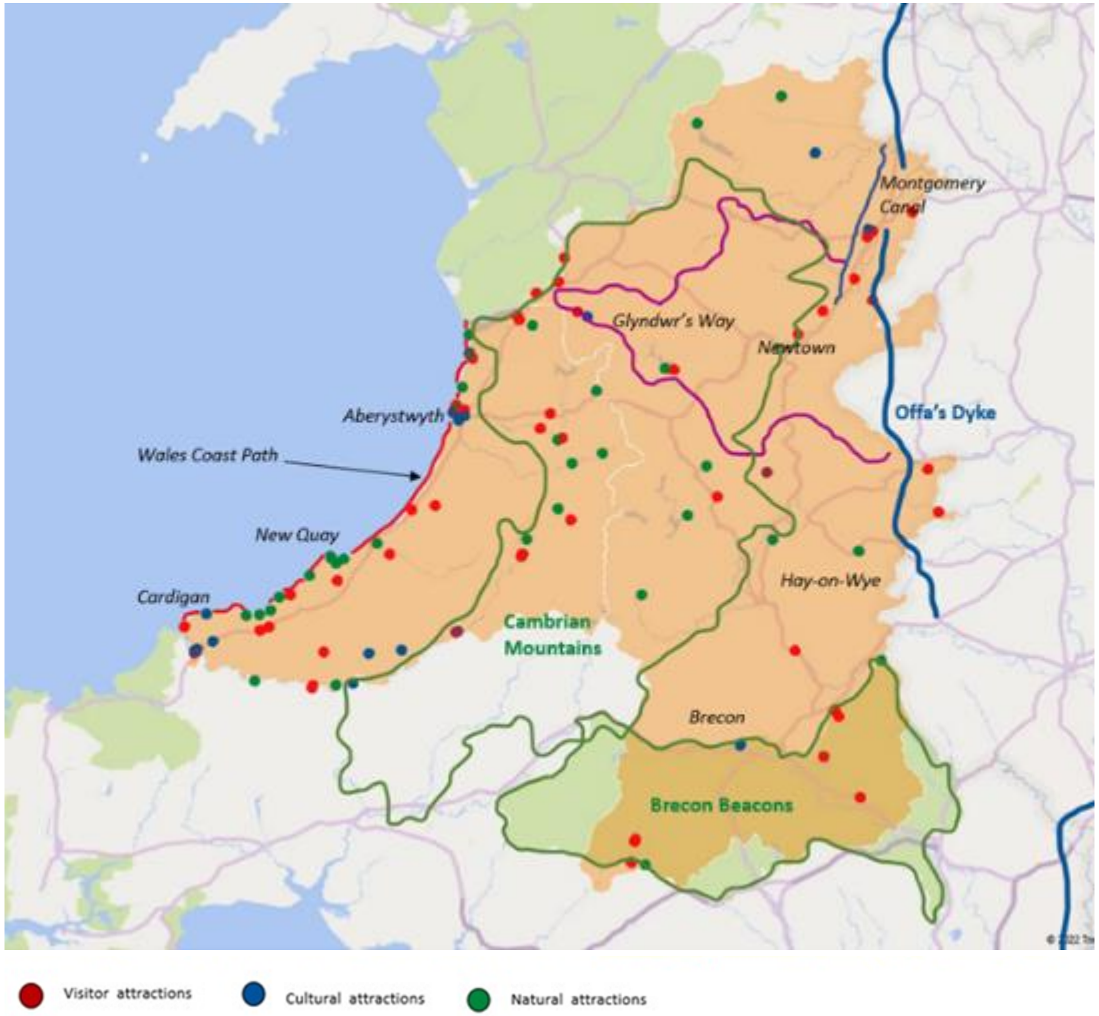
- Mid Wales offers a tourist destination that has been shaped by its strong cultural identity and unique and varied rural landscape. Welsh myths and legends tie directly to many of the historical sites and natural landscape features, providing a meaningful context within which people can experience these places.
- There is also a particular focus on the western Ceredigion coastline, nature reserves and man-made / natural water features across Mid Wales. These combined elements create a tourist experience that would satisfy a range of people including nature lovers, history buffs and those wishing to explore Wales's unique culture. Growing and enhancing the network of paths for walking and cycling and promoting routes through signage and interpretation will help disperse visitors across the region and enable deeper experiences with the area's history and landscape. With the implementation of focused promotion and signposting, both online and onsite, guests can feel confident in exploring more widely. Aligning transport routes with attractions and improved service frequency, along with providing enhanced information on transport

[4] STEAM report

timetables, are all essential in enabling visitors to access the attractions with confidence and ease.

- The visitor offer in Mid Wales is seasonal with a majority of visitors coming during the summer months. Many of the attractions are outdoor and are impacted by bad weather. The supply of accommodation is also reflective of the seasonality of tourism. Boosting tourism outside of the peak season would ease the pressure caused by visitors (particularly at honeypot sites) during the peak season. Providing sheltered facilities for outdoor sites would enable visits during wet weather and during colder seasons.
- Mid Wales also offers a high quality and traditional food offer, with numerous food producers, notably smokeries, meat farms, breweries, and distilleries, and fresh produce. The variety of high-quality food, a legacy of the region's farming and fishing industries, and growing number of high-end restaurants have strong potential to attract foodie visitors.
- The retail sector, although much more limited in terms of its offers, gains strength from its independent and craft shops and galleries.
- The accommodation sector has seen rapid growth in the last 10 years, particularly in self-catering accommodation units, and recently, toward quirky and unusual units such as tree houses and shepherd's huts. To increase spending and to accommodate large groups and events, more large and high-quality hotels are required, as well as consistent quality accommodation for coach groups. There needs to be less focus on campsites and caravan parks, which contribute less to spending as they are cheaper, and visitors typically bring what they need with them.

Figure 5: map of visitor, cultural, and natural attractions



3 Engagement

Engagement played a crucial role in the research and in informing the investment action plan. We conducted two main engagement activities: a series of stakeholder consultations and a survey of stakeholders and businesses.

3.1 Stakeholder engagement

As part of the initial phase of work, we engaged a range of individuals and organisations with an interest in the development of tourism across Mid Wales. This engagement included primarily public sector organisations working at national, regional, and local levels, as per the full list of consultees below. Engagement was extended to the private and third sectors in the second stage of work, as part of the survey (section 3.2).

Our consultations were fruitful, and while a range of opinions and ideas were discussed, a significant degree of alignment between individuals and organisations was clear.

Figure 6: Full list of consultees from the initial round of engagement

Name	Organisation
Gwenfair Owen	Ceredigion County Council
Arwyn Davies	Ceredigion County Council
Carwyn Jones-Evans	Ceredigion County Council
Julie Lewis	Powys County Council
Claire Miles	Growing Mid Wales Partnership
Cathy Martin	Mid Wales Growth Deal Portfolio Management office
Gareth Jones	Powys County Council
Diane Reynolds	Powys County Council
Ann Watkin	Welsh Government Regional Economy Team
Peter James	Welsh Government Regional Economy Team
Rhydian Morgan	Visit Wales
Rob Holt	Visit Wales
Kerry Thatcher	Visit Wales
Rebecca Rees	Visit Wales
Lucy Von Weber	Visit Wales
Meleri Richards	Ceredigion County Council
Louise Nicholson	Powys County Council
Aggie Caesar-Homden	Mid Wales Regional Learning & Skills Partnership
Helen Roderick	Brecon Beacons National Park Authority
James Lawrence	Brecon Beacons National Park Authority
Andy Rowland	Dyfi Biosphere
Dafydd Wyn Morgan	Cambrian Mountains Initiative
Wendy Abel	Powys County Council
Adrian Greason-Walker	Wales Tourism Alliance
Laura Thomas	Brecon Beacons Tourism Association
Ann Elias	Mid Wales Transport
Rob Bullen	Dyfi Biosphere/Centre for Alternative Technology
Val Hawkins	Mid Wales Tourism

The key conclusions stemming from these conversations is summarised in the SWOT Analysis below.

Figure 7: SWOT analysis of the tourism sector in Mid Wales, informed by consultations

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Product	Outdoor landscapes and attractions (mountain, coast, water) Wildlife and ecology Coastal towns and beaches Events (major/minor), particularly in Powys Food and drink offer, with strong links to producers Significance in Welsh history, language, culture Strong selection of smaller heritage attractions Authentic communities Growing arts offer in certain places (e.g., Cardigan, Machynlleth)	Off-season offer Wet weather offer Large, big-ticket attractions (e.g., Surf Snowdonia No significant cultural offer (e.g., National Contemporary Arts Gallery) Limited spend opportunities for visitors Some perceptions of Mid Wales as a “cheap” destination when compared to other parts of Wales Limited retail offer Busy sites often poorly managed at peak times (Pen Y Fan, Dyfi Furnace waterfall)	Health and wellbeing, retreat/escape, spas and high-end accommodation Desire to escape cities and towns. Dark Sky tourism Off-season events, improved coordination Food and drink, and links to producers Cultural activities and Welsh language More moderate landscapes compared to Mid Wales – family friendly, more accessible outdoor experiences Towns (border, coastal, mountain) Growth Deal to stimulate big ticket attractions and larger offerings Water based tourism – lake, river, sea	Competition for outdoor/adventure tourism from Snowdonia, Pembrokeshire etc. Further growth of second homes and rising house prices Lack of inward investment in the region, driven by challenging market economics Price-point of products increases, reducing inclusivity and driving out certain visitor groups Sensitive environments preclude tourism development
Infrastructure	Quantity, variety, and improved quality of self-catering accommodation across the region (e.g., shepherd’s huts, yurts) Quantity of long-standing camping and caravanning sites and businesses Long distance walking routes (Wales Way, Wales Coastal Path, Offa’s Dyke, Glyndŵr's Way) extensive and unique Improved digital infrastructure and information points (e.g., in Cardigan)	Transport – offer is far apart, accessed by minor roads, with limited parking Campervan facilities/AIRES Public transport links are insufficient Hotel offer (particularly large hotels) Luxury accommodation Road cycling infrastructure – interrupted and limited routes Event infrastructure Group tourism facilities (e.g., coaches) Harbours do not fulfil their potential Footpath signage and trail management	Key investment hubs and gateway locations servicing attractions Facilities on existing walking routes (long and short distance) Expand National Cycle Networks and trails (and bike stores, E-bikes, charging points) Viewing platforms Stronger transport connections to international airports (Birmingham, Manchester, Cardiff) Managed ‘wild’ camping Use of empty retail units on high streets Alternative transport at busy sites	Self-catering and casual accommodation offers saturate the market Energy prices and insufficient power for expanded charging requirements Transport infrastructure does not receive required investment, necessitating continued use of private cars Lack of funding precludes development of required infrastructure

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Audience and Visits	UK and Welsh visitors – committed traditional markets who come year after year Older visitors attracted to landscape, heritage, and cultural offer High rates of day visits to certain parts of Mid Wales (e.g., Brecon Beacons) New audiences discovered region during COVID-19	Few international visits to region Fewer domestic visits to Mid Wales compared to other parts of the country Low rates of staying visitors and mostly shorter breaks Limited dispersal of visits throughout the region – impact is limited to key sites and areas Seasonality of offer – season is fairly short, and off-season products are limited Family market is not catered for beyond traditional coastal holidays – there is a limited offer for children elsewhere	Increasing spend per visit Longer stays, converting day visitors to staying visitors Dispersal throughout region and season to impact all residents Capturing and attracting new markets: ➢ The responsible, conscious traveler and sustainable tourism ➢ Capture family markets through improved child-friendly offer ➢ Niche markets (wellbeing, environmental, spiritual tourism) ➢ LGBTQ+ tourism ➢ Cycle, water-based, horse-riding tourism	Over-tourism at key sites, limited dispersal to rest of region Failure to penetrate key target markets Alienation of current markets Reduction in staycation market as overseas tourism returns after COVID-19 Reduced discretionary spending due to cost-of-living crisis Continued limited international visits
Marketing and Promotion	Clear character and USP of Mid Wales and its offer Strong national messaging from Visit Wales Hard working Destination Management Organisations and partnerships Membership organisations supporting promotion of the region	Perception that Mid Wales is difficult to get to (compare Highlands of Scotland, Cornwall etc.) Difficulty in creating a critical mass of products and infrastructure in the minds of potential visitors. Signage to attractions and facilities is not always sufficient	Opportunities to cluster and connect offer geographically, thematically, or by audience group to encourage longer stays and create a critical mass Local, authentic experiences driven by vibrant communities Peace and quiet, open space Eco-tourism offers, sustainability Highlighting the (much improved) quality of offer in many areas Region of storytellers Made in Mid Wales brand to encourage use of local produce	Inconsistent messaging between different organisations Marketing efforts of public sector have limited impact because of influence of key tourism websites (e.g., TripAdvisor, Airbnb, Lonely Planet)

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Resourcing	Energetic and entrepreneurial residents Range of tourism organisations and groups working towards developing the sector in Mid Wales Skills development and education hubs in the region	Young people moving out of region and not taking up jobs in Mid Wales Staff vacancies difficult to fill throughout tourism and hospitality industry – resourcing issues forcing cutbacks and even closure of businesses Many jobs in sector are seasonal and relatively low-paid/skilled – poorly perceived Some businesses are unable or unwilling to offer more to potential employees, limiting intake Reliance on single individuals in a place to drive progress Public sector teams are small and under resourced	Mid Wales Tourism graduate scheme Potential to introduce Community Tourism Facilitator roles or similar, to empower businesses and organisations Deeper cross-sectoral partnerships Training for businesses in marketing, finance, etc. Cross-sectoral training for employees of businesses in tourism and hospitality, to increase retention Develop and grow newly established Mid Wales Regional Learning and Skills Partnership Cross-organisation staffing roles	Poor retention of staff Difficulty in filling vacancies in tourism Limited upskilling of individuals Businesses cannot adapt to changed expectations of employees Community organisations, town councils, or businesses do not have sufficient resource to identify and tackle challenges or grow skills Investment does not have desired impact because resource is not available to operate and maintain facilities
Organisation and Structure	Engaged community organisations and ambassadors Unique businesses and offer. Independent offer with few national chains Some strong Destination Management Organisations and related initiatives that have made progress on skills, marketing and branding, and development of offer because of dedicated resource	DMOs and related organisations rely on volunteers and goodwill/energy from individuals. Funding threats mean future is not guaranteed (e.g., Cambrian Mountains Initiative) Fragmentation and lack of co-operation, leading to overlapping and competing offers Poor information sharing between tourism operators Complexity and number of tourism organisations Dependence on skilled, motivated volunteers within communities – not everywhere has such people	Clustering and connecting offers in an area, with improved information sharing and co-operation Stronger interface between the public sector/funders and businesses/local community groups/councils. Region-wide success measures Simplification of public sector infrastructure across tourism Link tourism to statutory responsibilities (economy, health, education and skills) more closely Catalyst funding to support organisations to sustainability (e.g., Ceredigion food festivals)	Case for support for tourism projects is not successfully made Lack of clarity for businesses and communities about who to approach with problems remains Funding cuts remove support for key sectoral organisations Over-reliance on public bodies for support and expertise

3.2 Survey

We conducted a public survey that was distributed widely through tourism forums and networks to several hundred individuals and organisations across the region. Of the almost 100 respondents to the survey, 45% were local tourism businesses, and of these, 65% were accommodation businesses. The remainder were national and regional charities and tourism associations, clubs and special interest groups, and representatives of the public sector. Respondents were spread almost equally between Ceredigion and Powys.

The survey aimed to collect a range of information including:

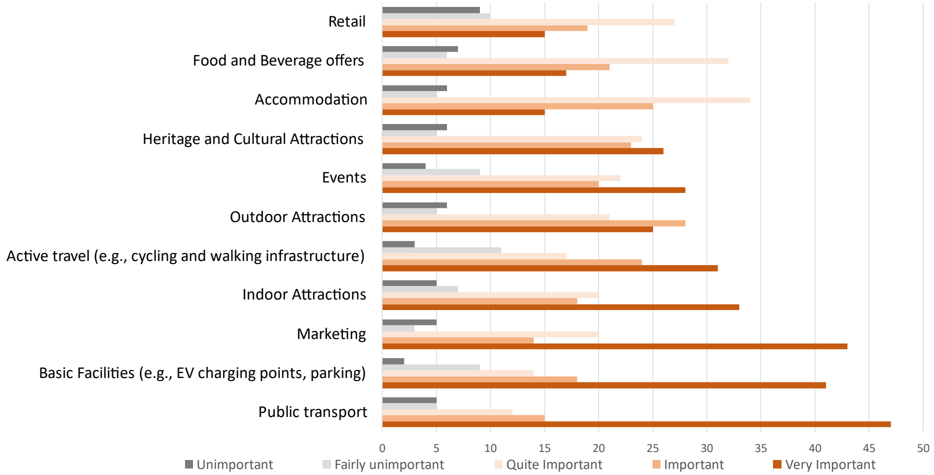
- Feedback from the 'vision, values, objectives, and products (section 4)
- Identifying and categorising town into the hub groups
- Scoring of investment priorities
- Qualitative data on challenges, opportunities, and investment areas in Mid Wales.

Crucially, there is fairly widespread support and buy-in to the 'vision, values, objectives, and products from the industry. A majority of the feedback received was positive and a large proportion was neutral but constructive. Many of the constructive feedback responses were detailed and thorough, indicating to a high level of engagement by the tourism industry with this research. The depth of the comments has resulted in a tourism vision that is highly relevant and specific to local issues.

We asked survey respondents to score each segment of the tourism industry based on its requirement for investment, as shown below. Basic facilities, public transport, and marketing were identified as the most important areas in need of investment, while commercial offerings such as retail, food & beverage, and accommodation scored lower.

Further work might seek to understand what the investment priorities should be from the tourists' perspective.

Figure 8: importance of investment priorities



Alongside this, a vast amount of qualitative data was collected on challenges and investment opportunities for the tourism industry in Mid Wales. The findings from this data heavily informed the investment action plan. Respondents commented on the main challenges to investment in the sector. The quotes below provide an indication of the most common challenges raised.

Figure 9: Challenges to investment in Mid Wales

"The 'un joined-upness' of towns/communities"
- Activity provider

"Lack of staff to work in the tourism industry partly because it is not attracting young people"
- Accommodation business

"I would say [investment] could be done a bit more proactively, maybe reaching out to tourism sites you have identified as hubs and letting businesses know there is funding available for them and encourage/support them in applying for it."
- Accommodation business

"Not enough support for SMEs"
- Local charity

"Investment opportunities out there currently are pitched a large-scale development, million-pound projects, and there is nothing lower level to support the SME's businesses in Mid Wales who want to grow since the Visit Wales MSBS ended in 2020."
- Local authority

"Not knowing how to access grants"
- Local Charity

Respondents were also asked to feedback on current and ongoing investments, in order for the Investment Action Plan to align with the current state of investment in Mid Wales. Far fewer respondents addressed this question. The lack of responses could point to a shortage of funding, a disconnect between funders and businesses, and a general lack of awareness of available funding opportunities, all of which were raised a main barriers to investment.

4 Vision for Tourism in Mid Wales

Building on our research into the strategic context of the Mid Wales tourism, current dynamics of the visitor economy and trends in the industry, and our range of engagement, we offer this foundational vision to underpin tourism development across the region.

The vision has been tested with local tourism organisations and local stakeholders through the survey. The survey feedback points to clear support and buy-in across the public and private sector to the vision, values, and objectives. Most feedback was positive, and constructive feedback has been factored into the vision and wider report.

4.1 Vision

The following vision and values aim to unite all individuals and organisations working within tourism in the region, and will guide the development of and investment in additional infrastructure and offers in the future:

Vision

To maximise the positive impacts of tourism in a sustainable way for the benefit of the communities of Mid Wales. We will do this by encouraging investment in meaningful experiences and opportunities rooted in the distinctive places and culture of the region.

Values

- **We are Authentic** – our communities are living, breathing places where tradition and innovation coincide
- **We are Unique** – our offer is independent, sustainable, and unlike anywhere else in the UK
- **We are Curious** – we encourage visitors to linger, and explore beyond the usual places
- **We are Responsible** – we care about protecting and promoting our landscapes, wildlife, and heritage
- **We are Equitable** – our people and businesses deserve an equal share of the benefits of tourism
- **We are Welcoming** – this is the Heart of Wales, where visitors are treated like friends
- **We are Quality** – our destinations, products, and infrastructure are world-class, managed effectively, and promoted widely

4.2 Objectives

Building on this vision, several key objectives capture the aspirations and ambition for the development and growth of tourism across Mid Wales:

- **Sustainable growth** of a **regenerative tourism sector** that focuses on increasing spend, dwell time, and engagement, rather than absolute visitor numbers
- Encouraging **visit dispersal** throughout the region, away from "honeypot" sites in peak season, strengthening the off- and shoulder season offers to encourage a **year-round visitor economy**

- The creation, facilitation, and promotion of **clusters of offers for visitors**, providing sufficient critical mass in each area to allow multi-day stays
- Ensuring key pieces of **visitor infrastructure** are in place in and between tourism hubs across the region, including a suitable range of accommodation offers
- Supporting the **public, private and third** sectors to work more closely and effectively together, through formal partnerships, and clearer routes to information and support for businesses
- Prioritising **meaningful, secure employment and training** in tourism to ensure businesses have access to talent, young people do not leave Mid Wales for elsewhere, and the sector is seen as an aspirational career choice
- Protecting **the environment** for generations to come, by encouraging biodiversity, and helping to address the climate emergency through the introduction of green infrastructure, active travel networks, and improved public transport

4.3 Products

Several primary product areas have been identified based on our consultations and research, playing on the strengths and existing assets of Mid Wales:

- **Outdoors and landscape**-based activities, utilising the mountains, water, beaches, and nature of Mid Wales
- **Indoor and year-round** offers to encourage visits in the off-season (e.g., dark sky tourism) and provide alternatives for visitors during poor weather (e.g., heritage, museums, indoor sports)
- An expanded event offer, developing a **co-ordinated, region-wide event calendar** that avoids conflict and facilitates multi-event visits and post- or pre-event exploration.
- Emphasise the region's excellent produce through the idea of **Farm to Fork**, linking the agricultural sector of Mid Wales with its growing culinary offer.
- Catalysing further growth in the **Arts and Culture sector**, at strategic locations throughout the region.
- Improving the region's key **towns and villages**, with prioritised high street renewal, public realm and pedestrianisation, and mixed-uses introduced into empty retail units to encourage vibrancy.
- Tourism based on escape relaxation, and peace, or ***Heddwch***

These broad categories of product have been expanded in the Investment Action Plan below.

4.4 Clustering

Alongside this vision, we have begun to consider how and where investment may be focused to achieve these aims. Dispersal is one of the primary driving factors behind this strategy, but simply marketing attractions across the region without investing in infrastructure will potentially cause harm to the communities and environments in those places.

It is therefore important that this strategy reinforces strategic hubs, around which clusters can be encouraged to grow, incorporating the attractions themselves as well as everything required to facilitate greater visitor numbers or longer stays. Such "critical masses" of provision can help to encourage greater spend and extend dwell times in places that at the moment may see visitors pass through on their way somewhere else.

We have suggested three types of hubs, with different scales of provision and function depending on the size and nature of the settlements themselves:

- **Major Hubs** – key locations for retail, accommodation, attractions, support services and connections; urban in nature and able to accommodate larger numbers of visitors.
- **Destination Hubs** – settlements that are inherently attractive to visitors and of a size that means they are able to support and accommodate increased visitor numbers and additional facilities. These hubs will likely be close to important clusters of visitor attractions.
- **Secondary Hubs** – well-located settlements with existing facilities that can be further expanded to provide services and support for visitors.

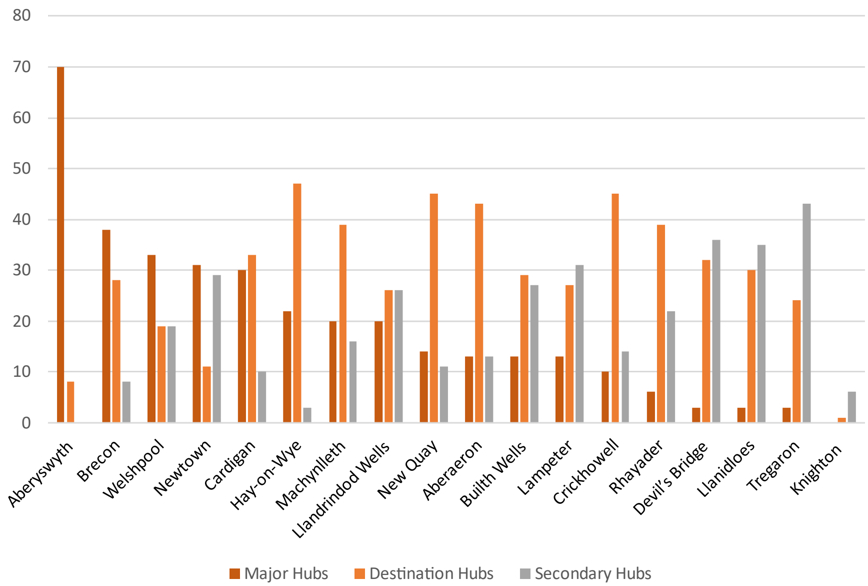
These hubs should incorporate accommodation, retail, and food and beverage offers if not already present, contain or be directly connected to attractions, and be on public transport routes. **This approach does not preclude investment being made outside of these hubs**, but we would anticipate that they would contain much of the key infrastructure requirements to support the vision in a given area. **Future funding decisions will not be linked to hub categorisation**. Projects in rural areas and outside of these hubs would form part of the cluster closest to them.

For instance, facilities will be needed at key attractions across the region, including parking, EV charging points, toilets, stopping points etc. But few such locations would demand retail or food and beverage offers on-site – these are more likely to be located within the Hubs.

We have suggested the following initial list of hub locations, based on the findings of our consultations and the survey (see the Investment Action Plan report for survey details). These have been identified to ensure spread across Mid Wales, to provide access to the region's key attractions, and to build on existing infrastructure and services within towns and villages. They also typically sit on major transport routes in and out of the region, including the A40, A44, A487, A470, A489, and A458, and the Cambrian and Heart of Wales rail lines.

The hubs have been selected through consultation and via the survey. The results of categorising of the towns into hubs were varied. As shown in the graph below, most towns were voted as all three categories of hubs. This is perhaps influenced by voters' bias to score a particular way based on their location, their business location or area of work, or knowledge of towns. As residents and business owners, respondents will likely have a vested interest in where investment is prioritised and how tourism is geographically managed across the region, possibly explaining why even some very small towns e.g., Tregaron, were voted as major hub. The classification of the hubs was finalised based on the most common ranking in the survey.

Figure 10: Ranking of hubs



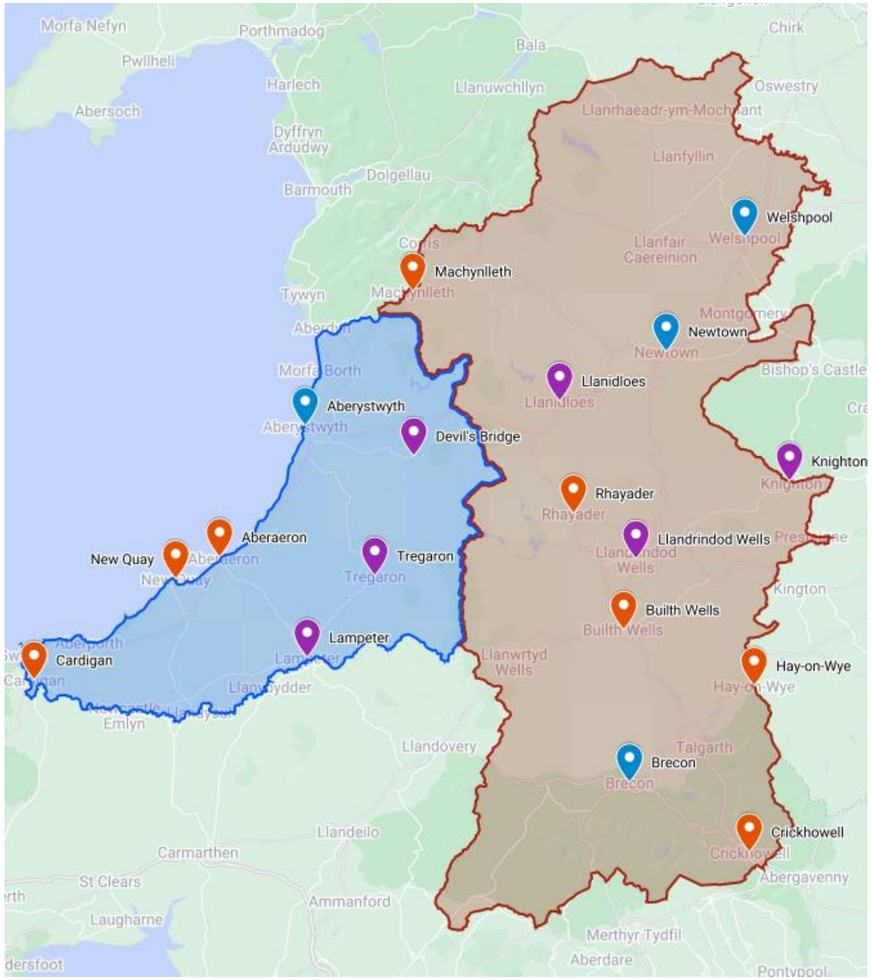
Major Hubs – Aberystwyth, Brecon, Newtown, and Welshpool

Destination Hubs – Cardigan, Machynlleth, Hay-on-Wye, New Quay, Rhayader, Aberaeron, and Crickhowell

Secondary Hubs - Builth Wells, Llandrindod Wells, Lampeter, Llanidloes, Devil's Bridge, Tregaron, and Knighton

We illustrate the geographical spread of these hubs in the figure below.

Figure 11: Major (blue), Destination (red) and Secondary (purple) hubs across Mid Wales



4.5 Theory of Change

The theory of change is a detailed logic model connecting key issues to actions designed to address them, and the resulting impact these actions will have.

The challenges are evidenced by market research and supported by data (section 2) and the results of our engagement (section 3), and are grouped into the objectives they best address (section 4.2).

As displayed in the qualitative assessment (Section 5.2), most interventions address several objectives and issues. For the sake of this model, only the interventions that best address the challenge and objective are included.

The Theory of Change allows the motivation for and response to a single issue (e.g. visitor dispersal) to be followed and understood.

Figure 12: Theory of change

Objectives	Challenges	Relevant interventions	Impact
Sustainable growth of regenerative tourism	➢ Low spend per overnight visitor compared to rest of Wales ➢ Dominance of low spend activities e.g., walking ➢ Older demographic profile of visitors (55+) compared to the rest of Wales ➢ Fewer families visiting Mid Wales compared to Wales ➢ Perceptions of Mid Wales as a “cheap” destination ➢ Few high-value accommodation (e.g., hotels), many low value accommodation (e.g., camping) ➢ Attracts visitors from lower socioeconomic band (visitors are less likely to be in the highest band, AB)	➢ Town centre vibrancy ➢ Support for local museums, cultural and arts organisations ➢ Support the development of art and craft makers network Offer of wellbeing retreats and luxury spa hotels ➢ Corporate tourism packages ➢ Spiritual tourism pilgrimage	➢ Increased spend per visit ➢ Higher spending in high-quality accommodation ➢ Boost to local businesses ➢ More attractive/vibrant town centres ➢ High spend visitors attracted to region ➢ Deeper engagement with history and heritage of the region ➢ Wider offer attracting new visitors and capturing niche markets
Visit dispersal	➢ Limited dispersal of visitors throughout the region ➢ Concentration of visitors to Brecon and Aberystwyth ➢ Over tourism at honeypot sites e.g., Pen Y Fan, resulting in environmental degradation ➢ Rapid growth of domestic tourism over the last 5 years, significantly faster growth than the rest of Wales. ➢ Visitors often drive through mid-Wales on the way North / South with minimal exploration ➢ High seasonality of visitors and of tourism revenue ➢ Signage to attractions and facilities is not always sufficient	➢ Development of data-led tourist management tool ➢ Enhancing the network of walking and cycling paths ➢ Viewing platforms ➢ Interpretation and sheltered facilities at rural outdoor visitor attractions ➢ Aires for motor homes and campervans in or near small towns	➢ Less over tourism ➢ Wealth distribution across Mid Wales ➢ Less environmental degradation at honey pot sites ➢ More consistent tourism revenue throughout the year
Clusters of offers	➢ Lack of significant cultural offer ➢ Disproportionately few visitors relative to the size of the region. ➢ Length of stay falling faster than Wales average for last 10 years ➢ Lack of wet weather offer ➢ Hotel size and capacity limits event offer	➢ Development of flagship cultural offer ➢ Develop and diversify events calendar ➢ Offer of large hotels ➢ Develop water-based tourism activities ➢ Food and beverage producers’ trail	➢ Capacity to host large events and more events ➢ More developed offer in ‘hubs’ Longer stays and higher spend ➢ Improved perception of the region

Objectives	Challenges	Relevant interventions	Impact
Visitor Infrastructure	➢ Perception that Mid Wales is difficult to access ➢ Poor road quality limiting visits to some attractions ➢ Insufficient public transport links ➢ Poor management (e.g. car parking) at peak sites	➢ Disability access ➢ Provision of public toilet facilities ➢ Improved road infrastructure, EV charging points, and car parks ➢ Improved public transport links	➢ Improved access to visitor attractions ➢ Increased use of public transport by visitors
Partnership work	➢ Ensuring consistency in awareness and sharing of knowledge down to a local level ➢ Lack of knowledge by businesses about funding opportunities and / or resources to apply ➢ Lack of knowledge in the business community about how and from where to access support ➢ Unclear Mid Wales identity	➢ Clarify the tourism management organisational structure ➢ Training and support for businesses ➢ “Made in Mid Wales” brand ➢ Marketing and promotion	➢ Simplified process of acquiring help and support for businesses and individuals in the sector ➢ Unified and coherent branding ➢ More efficient and better supported business sector
Employment and skills	➢ Severe staff shortages ➢ Young people leaving the region ➢ Tourism sector predominantly made up of SMEs and independent businesses. Reportedly lack of management skills in some SMEs. ➢ Tourism related employment growth predominantly in accommodation. Lack of growth in other segments. ➢ Tourism represents large proportion of employment, but is perceived as low-paid and low-skilled	➢ Employment and training in tourism-related careers ➢ Training and support for businesses	➢ Greater pool of skilled staff ➢ Recruitment of more staff into the industry and overcome challenges of staff shortages ➢ Improved retention of staff ➢ Improved perception of the sector and perceived as an aspirational career option
Environment	➢ Vast majority of visitors arriving by car ➢ Environmental degradation at honeypot sites e.g., beaches, Brecon Beacons, etc.	➢ Environmental tourism ➢ Provision of EV charging points ➢ Improved public transport links ➢ Sufficient maintenance for beaches	➢ Minimised environmental impact ➢ Protected biodiversity ➢ Environmentally conscious visitors attracted to the region ➢ Learning by visitors about sustainability

5 Investment Action Plan

The Action Plan is based on the aim of building Mid Wales' visitor economy through enhancing and expanding upon existing assets and improving the sector's support structures.

The following investment recommendations & Action Plan have been developed from findings of the engagement and SWOT analysis, and by market research. They have been developed to achieve the Vision, Value, and Objectives (see sections 4.1 & 4.2).

5.1 Approach

A shortlist of interventions have been categorised into ten groups: Accommodation; Arts, Culture and Spiritualism; Outdoors; Events and vibrancy; Corporate tourism; Transport; Basic Facilities; Marketing and Promotion; Resourcing; Organisation and Structure. Each intervention has been detailed with the following information:

- **Intervention Overview**: Summary and detail about the suggested intervention, and the type of outcome that can be expected from the intervention.
- **Action**: We have set out a series of actions to be taken in order to deliver the interventions. These should provide an indication of the series of steps required.
- **Fit with objectives**: The interventions have been scored against each objective. This is detailed further in 5.2.
- **Timeframe**: The interventions have been assigned a timeframe over which it is expected that they could be delivered.
    - Short term – should be deliverable in the period 2023-24
    - Medium term – should be deliverable within the 2024-28 timeframe
    - Long-term – likely to be delivered after 2028, but may still require initial works to commence in the short term
- **Priority**: The priority of each intervention has been categorised as either: Must; Should; or could. The priority has been informed by three main factors: the importance ranking of product areas from the survey, initial consultations with key stakeholders, and the fit with objectives.
- **Funding and Delivery:** We have made suggestions about the potential funding sources that could be used, the potential delivery mechanisms, and what organisations or types of organisation and partnerships need to be involved to deliver the interventions. Funding will be a key factor of delivery, and although some funding sources have been identified and suggested, funding gaps will need to be addressed. **Funding source identified include:**
    - Shared Prosperity Fund
    - Mid Wales Growth Deal
    - Visit Wales TISS and Development Bank of Wales
    - Visit Wales Brilliant Basics

  - Arts Council of Wales
  - National Lottery Heritage Fund
  - National Lottery Community Fund
  - Architectural Heritage Fund
  - Transforming Towns Fund

- **Risk**: We have suggested what the key risks are e.g., whether the intervention is high cost, if and what the planning risks are.

5.2 Qualitative Assessment

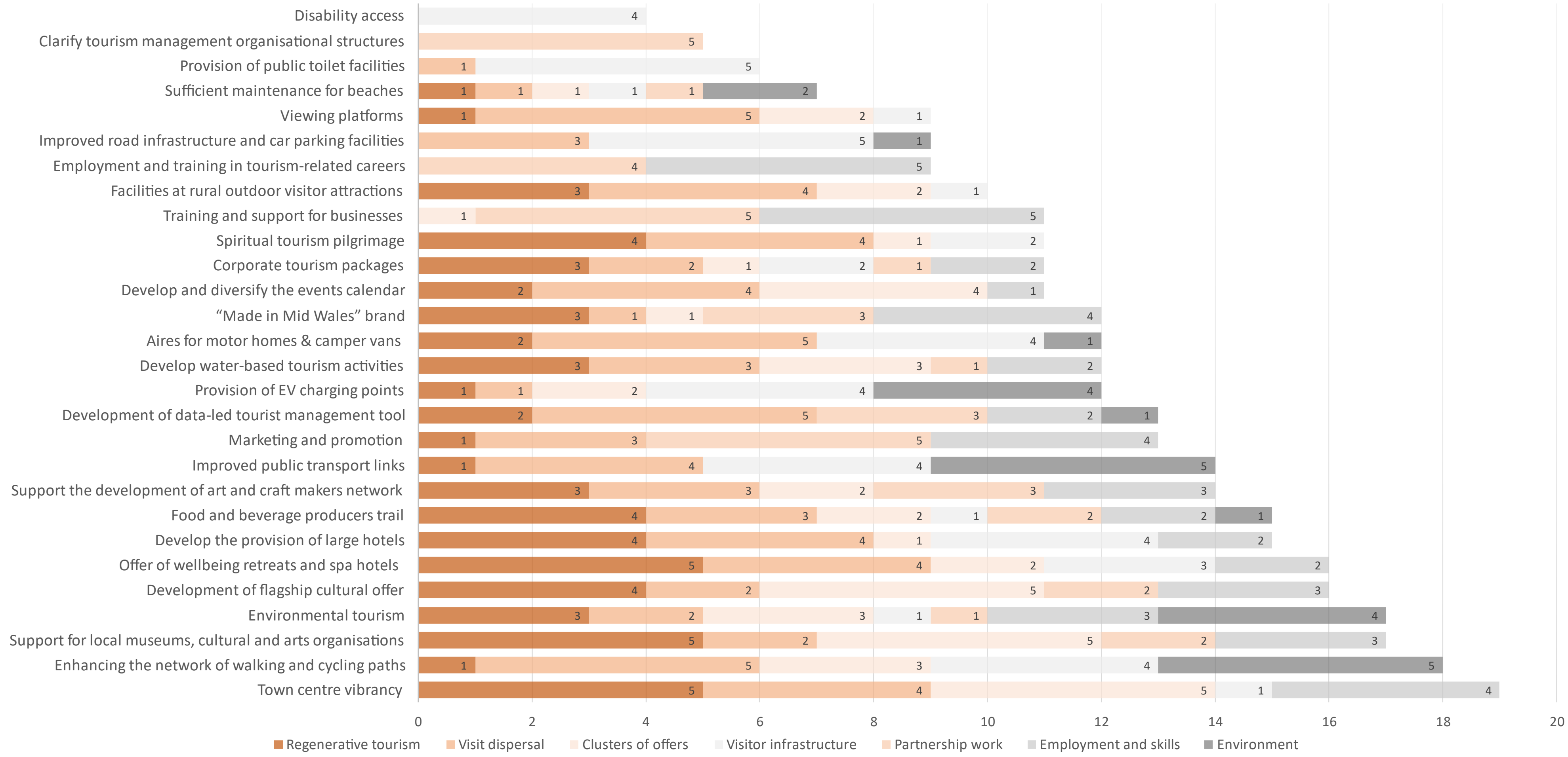
The Investment Action Plan sets out categories of investment to boost the tourism sector in Mid-Wales, according to the vision and objectives above. To identify the fit with objective, each intervention has been assigned a score between 0-5 against each objective. The total score, and thus how closely the intervention aligns with the objectives.

The broader interventions (e.g., town centre vibrancy) typically have higher overall scores, as they contribute to several strategic objectives at once, whereas more specific interventions (e.g., disability access) often deliver on a smaller number of priorities, but are still important.

As a result, while this overall score is useful to help identify particular actions that are critical to delivery of the Vision, it is not the only factor and should be understood as forming part of the overarching 'priority' judgement that has been made in each case.

The bar graph below illustrates the fit with objectives of each intervention, broken down by objective, and ordered from lowest-scoring to highest.

Figure 13: Fit with objectives



5.3 Investment Action Plan

The action plan below intends to give direction and guidance on a series of possible interventions that respond positively to the vision outlined above and agreed by all stakeholders. It establishes actions in each case that may help to establish next steps to move the intervention forward. The precise delivery of each intervention is beyond the scope of this report. It should be considered as a starting point, which Growing Mid Wales and partners will need to take forward.

These interventions have been developed based on detailed evidence of business and market need and opportunity, which can be found in this study's Stage 1 report. The interventions are categorised in the following way:

Accommodation

- Develop the provision of large hotels
- Offer of wellbeing retreats and luxury spa hotels

Arts, culture, and spiritualism

- Support and promote spiritual tourism attractions
- Support for local museums, cultural and arts organisations
- Development of flagship cultural offers

Outdoors and environment

- Develop water-based tourism activities
- Provide further interpretation and shelter infrastructure to attractions
- Environmental tourism
- Viewing platforms

Events and vibrancy

- Develop and diversify the events calendar
- Town centre vibrancy

Corporate tourism

- Development of corporate tourism packages

Basic Facilities

- Sufficient cleaning and maintenance at popular coastal areas and beaches
- Disability access
- Provision of public toilet facilities

Transport

- Enhancing the network of walking and cycling paths and trails
- Increase the provision of EV charging points
- Provision of Aires for motor homes and camper vans
- Improve public transport links
- Improved road quality and connectivity and car parking facilities

Resourcing

- Employment and training in tourism-related careers
- Training and support for businesses

Marketing and promotion

- Food and beverage producers trail
- Support the development of art and craft makers network
- Create a "Made in Mid Wales" brand and certification
- Marketing Mid Wales

Organisation and structure

- Clarify the tourism management organisational structure
- Development of data-led tourist management tool

Accommodation

Develop the provision of large hotels Large hotels that can provide capacity of consistent quality will enable groups travel and accommodate events and conferencing.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify priority areas where large hotels would bolster other offers. These should be close to major event locations, clusters of attractions and in key tourism hubs.	Long-term	It may not be possible to identify suitable operators interested in developing the hotel offer in Mid Wales, even with co-investment, incentives, or other forms of support. Risks are associated with the need for planning consents and very high delivery cost. There are also risks associated with the demand by visitors for this offer and the seasonality of demand.	Hotel developers and operators will be required to fund, deliver and operate the hotels. However, there may be potential to support this through existing or new funding or loan schemes from the public sector.	Must	15
Identify existing and potential hotel providers, including those operating facilities outside of Mid Wales currently, who may be interested in developing offers within the region. These operators should be approached to understand current barriers to investment.					
Investigate the possibility of incentivising the delivery of hotel developments in the region through schemes that reduce the risk of investment for potential operators. Explore the opportunity for lending through the Public Works Loan Board, or similar.					

<table>
<tr><th colspan="6">Offer of wellbeing retreats and luxury spa hotels
Develop the provision of health and wellbeing focused accommodation and activities. This should include spas, spa hotels and resort, and retreats centred around wellbeing and relaxation, targeted to couples and high-spend visitors. This will encourage tourism based on escape, relaxation and peace, or Heddwch. Luxury hotels with a large capacity would support the offer of both events and corporate tourism, by allowing large groups to stay in high-quality accommodation. Small capacity boutique hotels will cater to smaller groups and may be better suited to rural / small towns, offering a more authentic experience of Mid-Wales.</th></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Investigate the possibility of incentivising developments of spa hotel or retreats through schemes that reduce the risk of investment for potential operators. Explore the opportunity for lending through the Public Works Loan Board, or similar, to incentivise the development of spa hotels.</td><td rowspan="3">Long-term</td><td rowspan="3">Risks are associated with the need for planning consents. There are high risks associated with the very high delivery cost.
There are also potential risks associated with the seasonality of demand.</td><td rowspan="3">Private sector organisations will be required to develop and operate the spas or retreats.</td><td rowspan="3">Could</td><td rowspan="3">16</td></tr>
<tr><td>Identify suitable locations for spa retreats. These may include coastal locations and woodlands.</td></tr>
<tr><td>Produce a guide for wellbeing-based tourism for potential tourists. The guide could be produced by Visit Wales or Mid Wales Tourism, and should include all existing offers related to wellbeing and health.</td></tr>
</table>

Arts, culture, and spiritualism

<table>
<tr><td colspan="6">Support and promote spiritual tourism attractions to grow tourism based on escape and peace, or Heddwch.
Develop pilgrimage tourism by ensuring supporting infrastructure and exploring opportunities for establishing new pilgrimage routes and river pilgrimage.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify pilgrimage routes in need of funding or support. Explore providing funding and support such as marketing or promotion to the routes that need it.</td><td rowspan="4">Medium-term</td><td rowspan="4">This intervention is medium risk as much of the necessary infrastructure already exists and costs will be relatively low.
Risks are associated with the need for private-sector involvement.</td><td rowspan="4">Relevant associations such as the British Pilgrimage Trust and organisations such as Guided Pilgrimage should be involved in delivery.
Partnerships with accommodation and food & beverage providers will be required to ensure sufficient offer along pilgrimage routes.</td><td rowspan="4">Could</td><td rowspan="4">11</td></tr>
<tr><td>Support the development of suitable infrastructure, including accommodation and food & beverage along those routes. Ensure signage and wayfinding is sufficient and appropriate.</td></tr>
<tr><td>Explore the opportunity to support the development of new routes (such as the planned development of a new route from Ferns in Ireland to St David’s in Pembrokeshire). Ensure spiritual places such as Strata Florida are connected to pilgrimage routes.</td></tr>
<tr><td>Explore the option of developing a portfolio of river-based pilgrimage routes, building on the Teifi River Pilgrimage.</td></tr>
</table>

CASE STUDY: MAGNA VIA FRANCIGENA, SICILY, ITALY

The Magna Via Francigena is a 187km pilgrimage walking, MTB or Trekking bike route around the Italian island of Sicily. It follows the ancient route between Agrigento and Palermo that was used for millennia by pilgrims and travellers.

Pilgrims and visitors support the rural economy and enable many small local accommodation and catering facilities to exist. Traditional pilgrim hospitality is found in churches and hostels run by non-profit organisations where you pay by donation, and a network of volunteers provides assistance to pilgrim. There are also private accommodation options such as B&Bs, youth hostels, farm houses and hotels. The Magna Via has its own credential which grants pilgrims discounts at restaurants and hostels. Pilgrims collect stamps in their passports at each stage to demonstrate that they have walked at least 100 km to get their testimonium.

Visitors can find out about the route through a dedicated webpage and an app. Only 'ethical' tour operators and travel agencies are allowed for group experiences. Commercial partners are encouraged to join the " Aware Agents " operation and choose an ethically responsible project and consciously invest to improve the Via.

<table>
<tr><td colspan="6">Support for local museums, cultural and arts organisations
Support development of cultural and arts attractions and strengthen attractions at local museums and arts organisations. Strengthening the indoor offer will also contribute to a year-round visitor economy.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify local cultural attractions most in need of support.</td><td rowspan="3">Short-term</td><td rowspan="3">Risks are associated with successful implementation of improvements to the offer.</td><td rowspan="3">Arts and cultural offer to be developed by relevant organisations, and where appropriate, in partnership with the public sector. Financial support and investment may be required to improve attractions.
Funding from the Arts Council of Wales, the NLHF, National Lottery Community Fund, Architectural Heritage Fund may be applicable.</td><td rowspan="3">Must</td><td rowspan="3">17</td></tr>
<tr><td>Promote areas where there is a growing arts offer (e.g., Cardigan, Machynlleth) to become key sites for experiencing culture and arts. Integrate into regional marketing strategy.</td></tr>
<tr><td>Provide support to attractions seeking funding, ensuring that organisations are clear on the process involved and have access to the skills and training required to deliver strong applications.</td></tr>
</table>

Development of flagship cultural offers

The region does not currently have a cultural offer of national standing and profile. The development of such an attraction would help to recognise the strength of the existing arts and cultural sector in Mid Wales, support its wider promotion, and attract new visitors interested in the arts.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Identify a suitable location for a flagship cultural/arts offer to provide an attraction of international scale and profile.	Long-term	Risks are associated with the need for planning consents. There are high risks and very high costs associated with a major capital project.	Delivery by the Local Authority and / or major cultural institution.	Should	16
Establish a plan for delivering the cultural offer, including producing a business plan and detailed design.					

CASE STUDY: TURNER CONTEMPORARY, MARGATE, UK

Turner Contemporary, which opened in 2011, is one of the UK's leading contemporary art galleries. It hosts a year-round exhibition programme and offers free access to creative and cultural experience. It has won awards for excellent tourism to the south east of the UK.

Prior to the pandemic the gallery attracted c.400,000 visitors a year, making it one of Kent's top visitor attractions. It is also widely recognised as a catalyst for regeneration of East Kent.

Margate has fast become one of the major a fast growing creative hubs in the UK. The gallery fosters relationships and builds networks between artists, art professionals, and organisations looking to increase co-production opportunities and champion a more creative connected community.

Outdoor Tourism

<table>
<tr><td colspan="6">Develop water-based tourism activities
Utilise Mid Wales' remarkable water-based assets more effectively for water sports and recreation.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify suitable bodies of water (both coastal and inland) that could be used for water sport and be designated for wild swimming (ensuring that there is bathing water quality).</td><td rowspan="4">Medium-term</td><td rowspan="4">Risks are relatively low due to evidenced demand for water-based activities.
The highest risks and costs will be associated with creating the infrastructure to support these activities and ensuring participant safety.
Funding and planning risks inherent in all capital projects of this scale.</td><td rowspan="4">There are planned investments already agreed to improve the visitor experience at Lake Vyrnwy, Llandrindod Wells Lake, and Brecon Promenade/River Usk, funded by Brilliant Basics.

Activity providers will need to be involved to develop the water sports offer. Water bodies to be maintained by the local authority, Natural Resources Wales, and water authorities.

There are several projects in the development phase for the Mid Wales Growth Deal of relevance here, including the Ceredigion Harbours project, and investment in the Elan Valley and Montgomery Canal, in partnership with Dwr Cymru and the Canal and Rivers Trust.</td><td rowspan="4">Should</td><td rowspan="4">12</td></tr>
<tr><td>Plan for supporting facilities where appropriate e.g., lifeguards at popular coastal beaches, ticketed access, beach showers, equipment storage, changing facilities, etc.</td></tr>
<tr><td>Identify a primary location for the development of an inland water sports centre. Identify potential funding opportunities for the development of a new water sports centre and supporting infrastructure e.g., pontoons/ramps.</td></tr>
<tr><td>Consider the development of Blueways trail (as produced in Ireland) running on and long lakes, canals and river. A produce a webpage for promotion with the trail and all supporting infrastructure including water-based activity providers, connecting active travel networks, food & beverage and accommodation.</td></tr>
</table>

CASE STUDY: BLUEWAYS, IRELAND

Blueways is a new tourism and outdoor recreation offering in Ireland that aim to celebrate and promote scenic inland waterways, lakes, rivers and coastal areas. It also aims to encourage more people to experience and enjoy outdoor activities in water locations, and to support rural tourism.

It consists of a network of paddling, cycling and walking trails running on and alongside Ireland's lakes, canals and rivers. It is connected to local providers of water sports and activities, and highlights places to eat, places, and other activities to do.

Businesses need to apply to the Blueway Accreditation scheme. The country's first three Blueways were developed by Waterways Ireland and local authorities and are now considered best-in-class destinations for water-based and water-side activities including sailing, kayaking, windsurfing, hiking, snorkelling and more.

Provide further interpretation[5] and shelter infrastructure to rural outdoor attractions facilitating year-round and wet-weather visitations. Focused promotion and signposting, both online and onsite will make guests feel more confident in exploring more widely.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify attractions that are in need of shelter and interpretation facilities.	Short-term	Risks are associated with the need for planning consents. Delivery costs will be medium / low.	Delivery by individual attractions with local authority support. Interventions can range from simple shelter to visitor centres. The delivery of basic shelter will be fairly low cost and will require low-cost maintenance by the attraction or local authority. Interpretation will be higher cost and will require maintenance and updating. Visitor centres will require significantly more investment, maintenance and operational costs including staff.	Must	10
Identify the type of shelter infrastructure required. For more popular attractions, wet weather visitor centres with basic facilities may be suitable, with more simple shelter points throughout the outdoor attraction. Simple shelters at less popular attractions would be sufficient.					
Identify the type of interpretation required. Interpretation may be physical, digital, or in person (e.g., guided tours by a warden). Interpretation will likely need to be bilingual (Welsh and English) and may need to be presented in additional languages depending on the market demand from international tourists.					
Investigate opportunities for digital interpretation e.g., Augmented Reality at visitor experiences– helping visitors engage more deeply with visitor experiences.					

[5] Interpretation, in a museum or historic site context, refers to the communication of factual information. It is considered to extend beyond information boards and constitute the whole visitor experience and enable a greater understanding and appreciation of a place and its content.

<table>
<tr><th colspan="6">Environmental tourism
Develop the eco-tourism offer in Mid-Wales to attract conscious and responsible travellers, drawing on the strong offer of outdoor and landscape-based activities</th></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify investment proposals for the development of eco-lodges and environmentally sustainable forms of accommodations.</td><td rowspan="3">Medium-term</td><td rowspan="3">Risks are relatively low due to evidenced demand for eco-tourism.
There are, however, risks associated to relying on the private sector to deliver the eco-tourism offer.</td><td rowspan="3">Delivery by tourism activity and accommodation providers will be required. Incentives would be delivered by the Council Councils.</td><td rowspan="3">Could</td><td rowspan="3">17</td></tr>
<tr><td>Encourage / incentivise local food and beverage producers to develop and promote a low-carbon/low food-miles offer.</td></tr>
<tr><td>Produce resources for tourism agencies to spread awareness about the need for protection of the natural environment and biodiversity by tourists, urging visitors to “leave no trace”.</td></tr>
</table>

Viewing platforms Creating viewing platforms will encourage visitor dispersal and support marketing efforts to promote landscape-based tourism.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify suitable locations for viewing platforms e.g., at key tourist sites including waterfalls and high elevation points, in an aim to encourage dispersal away from the most popular sites. This could also include enhanced accessibility for woodland and wetland experiences.	Short-term	Risks are associated with the need for planning consents. Viewing platforms will be fairly low risk and cost.	Delivery and maintenance will be required by the local authority or destination management organisations.	Should	9
Identify the suitable type of infrastructure needed at each viewing point. Wayfinding and signposting may also be required, particularly if focused on active travel.					
Develop a suitable communication strategy that informs potential visitors of the presence and locations of these viewing points.					

Events and vibrancy

Develop and diversify the events calendar Extend the programme of events to include more variation in the types of events and establish a year-round calendar of events to promote the off-shoulder season.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Explore way of incentivising the organisation of events, particularly in the off-season.	Medium-term	Risks are associated with the need for planning consent and the reliance on demand by event organisers to host events.	Involvement of event organisers will be required to fund and host events. Local authorities will need to support and enable the organisation of more events. Event based activation outside of tourism hubs will rely on availability of wider infrastructure.	Should	11
Identify suitable sites for hosting events, particularly larger indoor events.					
Support event organisers to host more events, particularly in the off season. This could include the development of indoor event facilities in Mid Wales.					
Develop a Mid Wales Events calendar and identify channels through which to promote it.					
Provide further support and training for event organisers. Currently, many are volunteer led – support could be provided on how to safely and cost-effectively maintain and grow. Existing event providers and locations should work together to deliver skills workshops and knowledge sharing across the sector.					

Town centre vibrancy Provide support to town centres and boost vibrancy to generate more time and spend by visitors in towns across the region.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify town centres where there are higher-than-average vacancies. Explore measures to fill town centre vacancies and explore opportunities to use empty retail units as part of the tourism offer e.g. events. Facilitate the introduction of pop-up and event-based offers in quieter town centres that help to draw residents back to their high streets.	Medium-term	Risks are associated with outcompeting existing high street businesses.	Support and measures to be provided by local authorities in partnership with private sector organisations. Work with local and community councils to deliver temporary events and pop-ups. Shared Prosperity Fund, Transforming Towns, Arts Council of Wales and NLHF funding may be suitable.	Must	19

Corporate Tourism

<table>
<tr><td colspan="6">Development of corporate tourism packages and corporate retreats across Mid Wales
Developing corporate tourism will require high quality accommodation and food and beverage for large groups, and sufficient provision of leisure facilities and activities.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Produce a strategy to promote Mid Wales as a region suitable for corporate tourism, to encourage the private sector to develop its offer, and to grow the market demand for corporate tourism.
The strategy should distinguish between corporate retreats, meetings and conferences (requiring business-oriented resources).</td><td rowspan="3">Medium-term</td><td rowspan="3">Risks are associated with finding private-sector providers who will be required to deliver it.</td><td rowspan="3">Corporate tourism packages will need to be provided by tour operators or activity providers. Partnership with private sector tourism organisations will be necessary to develop the offers.</td><td rowspan="3">Should</td><td rowspan="3">11</td></tr>
<tr><td>Identify suitable locations for the different types of corporate tourism offers. The provision of large hotels, meeting spaces, high-quality food & drink and recreation facilities (where relevant) should be considered.</td></tr>
<tr><td>Produce a guide of corporate tourism activities and providers. This could be produced by Visit Wales or Mid Wales Tourism.</td></tr>
</table>

Basic Facilities

Ensure sufficient cleaning and maintenance at popular coastal areas and beaches In Ceredigion, the beach is a key reason for people visiting. It is important to ensure they are high-quality and well maintained because of the impact on perceptions of the region.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify key beaches which are insufficiently maintained, managed, or provided for. Improving beach quality could include a number of considerations such as water quality, access facilities, environmental degradation, litter, lifeguard services, and beach shower and changing facilities.	Short-Term	There is a risk of over allocating resources where the beaches are already well maintained.	Maintenance to be provided by the relevant local authority / Natural Resources Wales, or through community/charitable partner organisations.	Should	7
Increase resource allocation to services for active management and enhancements to achieve high quality beaches and water quality.					
Consider aiming to achieve blue flag accreditation at more beaches.					

Disability access Create a tourism offer that is inclusive and accessible to all, regardless of physical limitations or disabilities. This extends to enhancing access to outdoor spaces and experiences to those with disabilities, as well as to the accommodation, recreation, and public services.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify or establish tourism-specific guidelines and resources (e.g., 'Planning for Inclusive Access in Wales') for ensuring accessibility of facilities. Encourage all tourism-related businesses to follow and adopt these guidelines.	Medium-term	Private sector involvement will be required. There is fairly high cost associated with retrofitting infrastructure, but risk is low.	Public sector and private sector organisations will be required to upgrade or retrofit their infrastructure to accommodation a range of abilities. Establish partnerships with relevant bodies e.g., Disability Wales.	Should	4

<table>
<tr><td colspan="6">Provision of public toilet facilities
Ensure sufficient provision of basic facilities such as public toilets in town centres and villages and at visitor attractions. This should include Changing Places toilets where possible.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify locations (town centres, villages and visitor attractions) that require new or upgraded public toilet facilities</td><td rowspan="2">Medium-term</td><td rowspan="2">Very low risk and fairly low cost.</td><td rowspan="2">Facilities at visitor attractions should be provided and maintained by the attraction, while those in town centres should be provided and maintained by the local authority.</td><td rowspan="2">Must</td><td rowspan="2">6</td></tr>
<tr><td>Determine and identify the resources required to maintain the toilets.</td></tr>
</table>

Transport

Enhancing the network of walking and cycling paths and trails

Active transport networks must be connected up to tourism hubs, towns, and rural cultural and natural attractions. Safe and clearly signposted active transport routes will facilitate exploration of the surrounding area and encourage sustainable transport to the attractions and throughout the region.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Identify regional walking paths that need improving. Walking paths must be well maintained and well connected into other transport infrastructure.	Short-term	Risks are associated with the need for planning consents. There will be risk around securing permission and ownership/right of way rights where private land must be crossed.	Delivery by the local authorities or Sustrans (custodians of the National Cycle Network). Coordination is required between transport providers to ensure public and active transport routes are connected. Private partners could be involved in delivery of supporting facilities e.g., bike shops and rental. All active transport routes will require regular maintenance. Routes should be integrated into existing land and facility management regimes.	Must	18
Identify cycling paths that need improving. Cycling routes that are separate to the main roads, and therefore more scenic and safer, will encourage cycling. These must be well maintained and well connected into other transport infrastructure.					
Identify new routes for development of strategic cycling and walking paths, including long-distance cycling loops/routes in parallel to recent long distance walking paths. Active transport networks must be connected up to tourism hubs, towns, and rural cultural and natural attractions.					
Identify sites where supporting infrastructure is needed close to these routes e.g., signposting and wayfinding, bike storage, bike shops, E-bikes, charging points.					

Increase the provision of EV charging points A network of charging points will allow for lower carbon travel by residents and visitors.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify specific locations where charging points are required. These should be located at major, destination, and secondary hubs, as well as at significant visitor destinations. The number of spaces delivered should be proportional to the size of the settlement and / or popularity of the visitor attraction and should ensure geographical coverage across Mid Wales.	Short-term	Risks are associated with the need for planning consents and availability of land. Grid access will also be a risk. Delivery will be medium to high cost.	Investment by Transport for Wales is already in place to install EV charging points in Ceredigion and Powys. Depending on the location of the chargers, either the local authority, visitor attraction / private company will be required to maintain the chargers.	Must	12
Identify the predicted requirement for chargers in Ceredigion and Powys (as part of the Electric Vehicle Charging Strategy for Wales) and establish a strategy to meet that demand.					
Develop a suitable communication strategy that informs potential visitors of the presence and locations of these charging points, perhaps working with a private partner (e.g., Dragon Charging) or organisation such as Visit Wales.					

Provision of Aires for motor homes and camper vans in or near small towns

Aires for motor homes and camper vans would help income in local shops and food & beverage establishments, reduce unwanted overnight parking, and help disperse visitors throughout the region.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Identify suitable locations for Aires for motor homes and camper vans. These should be located near small towns and close to natural and cultural attractions across Mid Wales. Suitable geographical spread across Powys and Ceredigion should be ensured.	Short-term	Risks are associated with the need for planning consents. Delivery of the Aires will be low cost and low risk.	Delivered and maintained by local authorities or private sector organisations. Brilliant Basics funding may be suitable.	Should	12
Identify the requirements for supporting infrastructure and documentation such as signage and wayfinding and disposal of waste.					
Develop a suitable communication strategy that informs potential visitors of the presence and locations of these Aires. Consider how to market this network of Aires to ensure awareness and use. Ensure Aires are listed on appropriate websites, such as UK AIRE.					

Improved road quality and connectivity and car parking facilities Proactively managing and providing for visitors that come by car – which is still the vast majority – by adequate road quality and reducing impacts on parking on local town centres.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify the roads which are in poor condition and inhospitable to larger volumes of traffic which are limiting visits to attractions. Prioritise repairs to key tourist routes where possible.	Medium-term	Risks are associated with the need for planning consents and with the availability of land. Works to roads will cause traffic disruption. The delivery will be medium / high costs.	Roads to be maintained by Local Authorities. Car parking facilities at visitor attractions to be delivered and maintained by the attractions.	Must	9
Identify key tourism sites where parking facilities are currently insufficient and where car parking should be increased. Car parking strategies for major tourism sites may be required. All new car parks should incorporate EV charging points (see above).					

Improve public transport links Improved public transport will facilitate visitor movement throughout the region and encourage transport through lower-carbon means					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Identify current gaps and weaknesses in the public transport network through, e.g., public consultation. Identify key visitor attractions where there are poor public transport links.	Long-term	There are very high costs and risks associated with delivery.	Delivery and maintenance will be required by transport providers. Likely to involve a partnership between local authorities, universities in Mid Wales, and private companies	Must	14
Investigate the potential for innovative, net-zero transport services and shuttles to and from key attractions/towns, which can be paid for through fares from visitors and residents.					

Resourcing

<table>
<tr><td colspan="6">Employment and training in tourism-related careers
Ensuring opportunities for quality tourism employment and training opportunities such as apprenticeships will enable the recruitment of more staff into the industry and overcome challenges of staff shortages. Quality employment and opportunities for upskilling will improve retention of staff in the sector and ensure it is viewed as an aspirational career option.</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Investigate with Mid Wales Regional Learning and Skills Partnership the viability of a ‘Mid Wales Tourism Graduate Scheme’.</td><td rowspan="5">Long-term</td><td rowspan="5">This is a low-risk intervention as the partnership has already been established.

Risks are associated with the quality of the training of offer and course intake.

It will be important to work with the sector businesses to understand what the needs are and how employment and training can meet those needs.</td><td rowspan="5">Collaboration between Mid Wales Regional Skills Partnership and private sector tourism organisations to create high value employment and training opportunities.
Additional staff will be required to deliver this intervention.
The Shared Prosperity Fund could be suitable for funding.</td><td rowspan="5">Must</td><td rowspan="5">9</td></tr>
<tr><td>Investigate ways to generate more cross-sectoral training for employees in businesses in tourism and hospitality, to increase retention of staff (e.g., rotation schemes where individuals work for several tourism/hospitality businesses in the region over a period of time).</td></tr>
<tr><td>Identify training providers (e.g., Cambrian training) that can promote and generate tourism-related apprenticeship to recruit more staff into the industry.</td></tr>
<tr><td>Consult with academic institutions on ways students might be engaged in tourism and start gaining relevant skills.</td></tr>
<tr><td>Introduce a Mid Wales Tourism Officer, whose role it is to co-ordinate and deliver this plan across the region.</td></tr>
</table>

Training and support for businesses

Provide training for tourism SMEs in marketing, finance, and management. This will help to achieve a higher quality and efficient private sector for the tourism industry and provide support to staff and generate aspirational careers in the sector.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Identify and consult with key organisations already providing tourism support and training for businesses. Establish next steps for how training for businesses can be improved, further developed, and how the reach can be extended.	Short-term	Risks are associated with the quality of the training of offer and course intake. Costs associated with delivery are relatively low.	Training to be provided through existing organisations like Mid Wales Tourism/MWT Cymru, or / in collaboration with tourism associations and / or academic institutions.	Must	11
Develop online training resources or training courses in partnership with existing tourism associations and / or academic institutions.					
Establish a plan to promote training courses and use of resources.					
Encourage businesses to join existing organisations providing advice and guidance e.g., UK hospitality Wales. On a local level, businesses should be encouraged to join or form local groups.					

Marketing and promotion

Food and beverage producers trail

Connecting up producers and restaurants throughout the region via a trail, with sufficient supporting infrastructure such as public transport and accommodation, will contribute to dispersing visitors and supporting food and beverage businesses.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Develop an extensive network or database of food and beverage businesses. Existing networks e.g., Mid Wales Tourism and/or regional tourism forum, could be used to engage with food and beverage organisations.	Short-term	There is a fairly low cost and low risk associated with delivering the trail.	Tourism Associations could deliver and coordinate the trail, in partnership with private sector businesses.	Could	13
Create a webpage dedicated to the food and beverage trail. The food trail webpage could be hosted or promoted by tourism associations e.g., Visit Wales or Mid Wales Tourism.					
Identify opportunities for bookable food and drink related experiences and guided food tours.					
Encourage food producers to adopt the “Made in Mid Wales” brand (see below) for produce and products made primarily in the region, to contribute to a destination brand that is known for high-quality food.					

CASE STUDY: SLIGO FOOD TRAIL, IRELAND

Launched in 2016, the Sligo food trail is a platform for promoting the fresh, local, healthy food and drink of the region. The region's food highlights including restaurants and producer are promoted on a dedicated webpage. It also promotes food experiences organised by the region's food and beverage businesses and weekly food markets and events.

The trail operates on a membership basis whereby businesses are required to pay a fee to join and meet certain criteria. It currently has almost 40 members. Member businesses benefit from appearing on an active social media and national marketing campaign. The project is funded and receives private-sector sponsorship.

CASE STUDY: WINE ROUTE, GERMANY

The wine route is the country's oldest scenic drive. The 85km route runs through the Rhineland Palatinate, Germany's second largest wine growing region. It consists of wine shops, tasting rooms, and many local wine festivals. Its dedicated webpage highlights food and drink businesses including wineries and wine taverns, accommodation (many wineries offer bed and breakfast), points of interest, and sports and recreation activities.

The route can also be cycled and bike tours are offered along the route.

Support the development of art and craft makers network Connecting up arts and crafts producers throughout the region via a trail, with sufficient supporting infrastructure such as public transport and accommodation, will contribute to dispersing visitors, supporting arts and crafts businesses, and encouraging knowledge transfer.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Develop an extensive network or database of arts and craft producers. Existing networks e.g., Mid Wales Tourism and/or regional tourism forum, could be used to engage with arts and crafts producers.	Short-term	There is a fairly low cost and low risk associated with delivering the trail.	Tourism Associations could deliver and coordinate the trail, in partnership with private sector businesses.	Could	14
Provide specific training and support for arts and craft producers to develop networking and expert artisan clusters and trails (e.g., jewellery making at Tregaron and textile trail along the Teifi valley).					
Create a webpage dedicated to the arts and crafts producers trail. The arts and crafts producers trail webpage could be hosted or promoted by tourism associations e.g., Visit Wales or Mid Wales Tourism.					
Encourage art and craft makers to adopt the "Made in Mid Wales certification.					

<table>
<tr><td colspan="6">Create a “Made in Mid Wales” brand and certification
Creating a recognizable “Made in Mid Wales brand” will increase local spending, raise the profile of the region, support local businesses, and contribute to encouraging local supply chains</td></tr>
<tr><th>Actions</th><th>Timeframe</th><th>Risks</th><th>Funding and Delivery</th><th>Priority</th><th>Fit with objectives</th></tr>
<tr><td>Identify the suitable organisation or group to drive forward this intervention.
Work with the Cambrian Mountain Initiative (among others) to ensure alignment and expansion of existing work in this area, rather than duplication.</td><td rowspan="3">Short-Term</td><td rowspan="3">There is a relatively low cost and low level of risk.
Risks include a lack of buy-in and uptake of the brand.</td><td rowspan="3">Delivery by County Councils and / or destination management organisations, and / or tourism management organisations (e.g., Visit Wales, Mid Wales Tourism).
The involvement of private sector businesses notably Food & Beverage producers and craft producers will be necessary.</td><td rowspan="3">Could</td><td rowspan="3">12</td></tr>
<tr><td>Create a document of guidance on the “Made in Mid Wales” certification. Draw on private sector consultations and feedback to guide the document. A membership model for certification may be appropriate to ensure quality of the products.</td></tr>
<tr><td>Integrate “Made in Mid Wales” branding across local products (e.g., food and beverage, local crafts, manufacturing), and encourage local businesses to adopt the brand.</td></tr>
</table>

Marketing and Mid Wales identity Ensure and maintain a unified approach to marketing and identity in Mid Wales that reflects the Mission, Values, and Objectives (see section 4). Care needs to be paid to the local marketing initiatives that have taken place and continue to take place to make sure marketing is coherent across several layers of messaging.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Clarify existing layers of messaging at the national, regional, and local levels, organisations involved, and themes and places promoted. Establish a marketing working group with representatives from the national (Visit Wales), regional, and local level, whose role will support unified messaging across public communications and information. Ensure stories are told in a coherent and complimentary way, with local and regional messages aligning with established work done on a national level by Visit Wales among others.	Long-term (ongoing)	There is a risk that tourism related business will not adopt and reflect the marketing brand values. There is a medium cost associated with producing and integrating a new marketing strategy.	Spearheaded by Visit Wales and Marketing working group, incorporating County Councils and tourism management organisations (e.g., Visit Wales, Mid Wales Tourism). Much of the content will be delivered, in time, by tourism businesses and organisations across the region. Partnerships and involvement of destination management organisations will be important.	Must	13
Put in place a strategy to promote and enhance awareness of the existing brand identity and guidelines for Mid Wales that all organisations and businesses should make use of. This would support those organisations in their advertising, digital marketing, content creation, social media promotions, and community engagement.					
Ensure identity is reflected across tourism infrastructure, social media, tourism websites, promotional materials, wayfinding, and signage as appropriate.					

Organisation and structure

Clarify the tourism management organisational structure Provide clarity on the different tourism management organisations in Mid Wales and their respective roles and responsibilities, and improve structures for collaborative working. Simplify the process of acquiring help and support for businesses and individuals in the sector.					
Actions	**Timeframe**	**Risks**	**Funding and Delivery**	**Priority**	**Fit with objectives**
Produce a map of all existing public and private sector organisations working in Tourism, their roles and support offered to operators in the Tourism Sector. Identify potential for simplification.	Long-term	Risks include the restructuring of relevant tourism organisation and potential changes to staff.	Delivery by tourism management organisations (e.g., Visit Wales, Mid Wales Tourism) and the County Councils.	Should	5
Establish a single point of contact for tourism businesses to reach support, through which the appropriate assistance can be signposted or recommended.					
Identify a pilot project, or small number of pilot projects. to trial partnership working between a selection of tourism organisations. Pilot projects could be identified from the list of interventions in this document. Pay specific attention to the process of partnership working throughout the pilot project(s). Learn from the experience(s) to improve structures and organisational process to enable partners to work more collaboratively and effectively going forward.					

CASE STUDY - UNESCO WORLD HERITAGE SITE, GREENWICH

The UNESCO World Heritage Site of Maritime Greenwich is operated and managed by three primary partner organisations - the Old Royal Naval College (ORNC), the Royal Museums Greenwich (RMG) and the University of Greenwich (UoG), who each own different assets, have different overarching objectives, and work in different ways to deliver their activities. For many years, the management of this internationally significant tourism destination in London was therefore disjointed, with the three partners pursuing their own projects and agendas separately, creating tensions and complexities and not maximising outcomes for the organisations or visitors.

Following many years of working with the partners individually, Fourth Street were commissioned in 2019 to explore ways in which the three organisations could better collaborate and develop their shared interest in the Maritime Greenwich World Heritage Partnership. Our work identified a small number of shared pilot initiatives that they could work on together, that were urgent but relatively small in scale to ensure they were achievable immediately. These pilot projects allowed the partners to better understand each other, and at the same time highlighted how the partnership could be better structured moving forwards.

Such an approach would be helpful in the context of Mid Wales Tourism, where there are a number of priority projects and a large range of partner organisations. Identifying a smaller number of pilot projects, and the partners required to deliver them, will ensure swift progress can be made against this plan, involve a range of organisations in that progress, but will also help to identify improvements to processes and organisational relationships and structures for the future.

Development of data-led tourist management tool

Digital data-led tools would enable visitor dispersal and encourage visitors to explore further afield. They would help prevent bottlenecks in tourist hotspots and mitigate associated issues related to over-tourism at honeypot sites. Building on a visitor offer centred around peace and the outdoors, dispersal of visitors away from busy areas is important.

Actions	Timeframe	Risks	Funding and Delivery	Priority	Fit with objectives
Support development of data-led tourism management tools. These could be digital app-based and involve sensors to detect how busy key areas are. For example, a digital tool could be used to show live ‘busyness’ data, allowing visitors to manage their visit and perhaps chose quieter spots. It could also be used to alert council authorities to the need for services e.g., emptying bins, closing car park, direct people to other sites. Examples of this exist in Scotland.	Medium-term	This intervention is medium cost. The main costs are associated with installing sensors and development of the system. Risks are associated with finding the right delivery partner.	Delivery will likely take place at a County Council level. Involve a private company to develop a digital tool.	Should	13
Consider how this intervention can align with Powys Digital Towns Project, involving investment in Wi-Fi and footfall counters in town centres. This intervention could also link to digital tools for EV charging points, amongst others.					

CASE STUDY: DATA-LED DIGITAL TOOLS, SCOTLAND

Scotland has a series of digital and data-based programmes to manage tourism.

Sky: Sensors are used to show how busy some areas are and alert Highland Council to the potential need to empty bins, close a car park or direct people to other sites through social media, signage or using council staff.

East Lothia: An app uses sensor data at beach car parks to gauge the 'busyness' which can be seen by visitors.

North Coast 500 app: The app encourages visits to less-frequented spots on the route, as well as more popular places which can become crowded.

Travel tech for Scotland is a community of traveltech organisations:

- **Fuse Mobility**: Helps visitors to Loch Lomond and Trossachs National Park choose the greenest route for them by giving a breakdown of the carbon cost of their trip.
- **Electrek Explorer**: Mapped out all EV charging points in Scotland and curates routes for visitors to follow between them, taking into account things like cold temperatures which can reduce the battery life of electric vehicles

There is an upcoming project as part of CivTech digital accelerator programme to reduce the amount of overcrowding seen in the National Park. It will involve a series of sensors – in car parks, on roads and at visitor centres – which anonymously record how busy a specific place is. This data will be available for an app for tourists, as well as for variable message boards on roadsides.

6 Monitoring and Evaluation

It will be important to measure the progress made against this plan over the coming years, and to capture the impact of the interventions towards the vision and objectives outlined here.

To do this, we suggest utilising a simple appraisal framework. Key Performance Indicators (KPIs) should be agreed that aim to quantify progress against each of the key objectives, and which can help to prioritise specific forms of behaviour or outcomes.

Ongoing evaluation and monitoring of activities can also help with demonstrating impact for subsequent funding applications, and avoid the need to periodically collect additional data and evidence.

However, a balance always needs to be struck between the usefulness of the data and the time taken to collect and analyse it. A set of metrics that is onerous to collect will likely cause errors or see teams pulled away from more important work. Therefore, KPIs that are straightforward to measure should be prioritised, and these should form part of a quarterly KPI report compiled and shared with relevant people moving forwards.

One important outstanding question is who will own and be responsible for this monitoring framework. This is clearly related to broader resourcing requirements around the actions identified in this Tourism Study.

A suggestion for the sorts of KPIs that could form the basis for the appraisal framework is provided below, and should be finalised and agreed by the Project Team:

Sustainable growth of a regenerative tourism

- Visit dwell time and repeat visit rate
- Resident life satisfaction and happiness
- Visitor satisfaction rate

Visit dispersal, and a year-round visitor economy

- Occupancy rate of regional hotels spread through Mid Wales
- Occupancy rate of regional hotels throughout the year
- Visitor satisfaction rate
- Website visits (e.g. Visit Wales) throughout the year
- Number of annual events/event days held in Mid Wales

Creation of clusters of offers

- Visit dwell time
- Visitor spend
- Local business birth and death rate

Suitable visitor infrastructure

- Visitor satisfaction rate

Public, private and third sectors partnership

- New partnerships formally created
- Local business birth and death rates

Meaningful, secure employment and training

- Employment in tourism in Mid Wales
- Number of attendees to training and skills courses
- Industry career retention rate
- Number of students on FE/HE courses related to the sector

Protecting the environment

- Car journeys in Mid Wales at key sites
- Public transport use and revenue
- Resident life satisfaction and happiness
- Visitor satisfaction rate
- Quantum of natural space protected or improved

These metrics can be measured directly (i.e. through observation), through existing data analysis or processes undertaken at the regional level, or through periodic surveys (digital or in-person) given to visitors and residents.

It is recommended that for the chosen metrics, a baseline measurement is taken as soon as possible, and that moving forwards each is monitored routinely.