



External evaluation of the Coastal Uplands: Heritage and Tourism (CUPHAT) Project



Evaluation Report
FINAL
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EXECUTIVE SUMMARY

CUPHAT

The €3million CUPHAT project is supported by €2.4million from the European Regional Development Fund (ERDF) through the Ireland Wales Co-operation Programme. It aimed to sustainably realise the potential of natural and cultural heritage for four coastal upland communities, the Cambrian Mountains, Mynydd Preseli in Wales and the Wicklow Mountains and Blackstairs Mountains in Ireland, with a view to attracting new types of tourists into areas that are relatively underdeveloped.

Evolved Research and Consulting Ltd were contracted to undertake the evaluation of CUPHAT, with specific objectives to:

- conduct an **initial evaluative review** to establish **baseline data** that demonstrates both the need for the project and from which progress towards the project's objectives can be evaluated.
- conduct an **end-of-project evaluation** to assess and understand the **impact** of the project.

This evaluation report encompasses a review of the potential changes resulting from the CUPHAT project and includes the reflections of accommodation providers and tourism businesses on the situation pre and post CUPHAT, as well as considering the potential impact it might have on the numbers of overseas tourists visiting the areas.

EVALUATION METHODOLOGY

The evaluation involved three phases. Following an initial scoping, design and planning stage, a baseline of current tourism activity in the four coastal upland areas was established using data collected by CUPHAT as part of their initial engagement activities with businesses and communities as well as reviewing available secondary data. Data analysis took place between January and March 2023 and the Interim Review Report was delivered in March 2023.

Stage 3 of the evaluation involved the collection and analysis of data including surveys and interviews with key stakeholders with a particular focus on the impact of the CUPHAT activity on visitor numbers. The evaluation did not consider the effectiveness of the project management systems and processes, methods of delivery, or the CUPHAT partnership as these were outside the scope of the contract. The data collection took place between February and June 2023 and included the following approaches:

- **Project activities, delivery and outcomes** were assessed by reviewing the monitoring data collected by CUPHAT.
- **Surveys with visitors.** Face-to-face surveys were conducted with tourists at 'hotspot' locations outside of the core project areas to see whether these visitors would be likely to visit the project areas when informed of the CUPHAT activities. In addition, an online survey was conducted using SmartSurvey, aimed at contacting previous overseas visitors directly, with the link shared via accommodation providers. In addition, 119 tourism organisations, local businesses, tour and heritage site operators were asked to publicise the survey on

their social media accounts or at their premises and posters were distributed at various locations, sites or attractions that visitors are known to frequent within the four areas.

- **Online survey of accommodation providers** was conducted with providers sourced within each of the four coastal upland areas through a comprehensive online search. A total of 512 providers were identified and contacted via email with attempts also made to contact Airbnb providers through Facebook groups. In addition, a number of local organisations such as the Cambrian Mountains Initiative, Visit Ceredigion and Visit Wexford were also contacted to see if they could assist in promoting the survey.
- **Interviews** were offered to those accommodation providers that had indicated a willingness to participate with the intention being that the sample should reflect specific criteria. In addition, a sample of 32 local business owners and heritage site operators were also invited for interview.
- **Stakeholder engagement** was conducted as part of the community festivals in each of the four coastal upland areas to celebrate the work of CUPHAT. This included a stand at each festival where visitors were encouraged to answer a small number of key questions on flip charts and face to face discussions were held with businesses and other community groups who visited the festivals.
- **Cross Cutting Themes** relating to how the CUPHAT project met the Ireland Wales indicator targets were considered as part of the final evaluation based on information provided by the CUPHAT team.

The **Interim Review** formed a baseline, and whilst there were limitations associated with non-comparable data sets and variation due to the impact of the Covid-19 pandemic, where the metrics aligned, data was analysed with respect to the eight key CUPHAT data requirements. This provided baselines against which to assess the impact of CUPHAT on tourism and heritage in the four coastal upland areas. Where there were still gaps, the data collection was aimed at addressing those to complete the datasets.

The end of project evaluation also considered whether the anticipated CUPHAT **outputs and outcomes** were achieved against the target results indicators using a Red/Amber/Green (RAG) assessment.

KEY FINDINGS

Despite the time constraints placed on the project, based on input from the team, the majority of the project's key activities and targets were met by August 2023, with those still classified as Amber (ongoing) due to be completed by the end of the project funding.

The effectiveness of these activities in meeting the project objectives was evaluated based on the various data collection methods conducted between March and July 2023. Whilst the overall number of responses to the different surveys was lower than desired, despite targeting a large sample, using different techniques, and sending numerous reminders and incentives, the key findings demonstrate the impact of CUPHAT with the key impact findings as follows:

Visitor survey key findings

- **Potential to visit the coastal upland areas** – Very few people were aware of the coastal upland areas as places to visit, however on seeing marketing material produced by CUPHAT

the majority, including overseas visitors, would be 'quite or very likely' to visit for at least a day visit and some for longer depending on factors such as available accommodation *inter alia*.

Accommodation surveys key findings

- **Awareness** - Overall 50% of the accommodation providers completing the survey were aware of the CUPHAT project.
- **Marketing** - Most popular method for marketing accommodation was online, through a third-party website (majority Airbnb), followed by marketing through a private website and word of mouth. Around a quarter of providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of activities undertaken within the CUPHAT project, but it was not stated how.
- **Potential to visit the coastal upland areas** - The views were mixed with more providers in the Cambrian Mountains stating they thought that the work CUPHAT had done would result in more overseas visitors coming to the coastal upland area. Some were unsure possibly because it was too early to tell.
- **CUPHAT has helped accommodation providers to overcome challenges or barriers** – Half of the accommodation providers surveyed in the Cambrian Mountains and the Wicklow Mountains that were aware of CUPHAT felt that the project had helped or will help them to overcome challenges or barriers. However, in the Blackstairs Mountains and Mynydd Preseli, none of those providers (2 in total) that were initially aware of the project felt that it had helped/will help them to overcome challenges or barriers.
- **Information provision about local heritage** - CUPHAT has helped a small number of accommodation provider to provide further information about their local heritage to their guests. As CUPHAT had not produced any specific material themselves when the survey was carried out, it is assumed that the CUPHAT activity had enabled these accommodation providers to provide either their own information about the areas or to source information produced by others.

Tourism business interviews key findings

- **Awareness** - Around half of those interviewed were aware of CUPHAT.
- **Marketing** - CUPHAT provided greater opportunities for improved marketing of the areas, particularly a well-timed, coordinated, targeted, professional campaign which would be extremely beneficial to the smaller tourist businesses which would hopefully encourage visitors to stay longer in the coastal upland areas. It's important to ensure a balance between promotion and keeping the areas unique rural appeal. It was hoped that improved marketing through CUPHAT could find a balance in attracting more regenerative tourism to the areas.
- **Engagement with heritage** - The areas could use the heritage and culture to encourage more people to visit the coastal upland areas and CUPHATs work on gathering information about local histories or objects of interest was useful to provide information for visitors.
- **Impact CUPHAT has had on tourism.** Some business felt it was too early to tell whether CUPHAT would make a difference as the project had only been running for a relatively short period of time and the outputs were still in the process of being completed and disseminated. However, some businesses were positive about CUPHATs potential to improve tourism in the four areas. The main impacts that CUPHAT had had or would have

in the future were improved marketing (i.e. to improve the visibility of the areas, 'one stop shop' website to access information easily), networking between businesses (i.e. encouraging everyone to work together with widespread benefits for tourism as a whole for example creating a sense of community, developing basic amenities and facilities within a village and encouraging regenerative tourism) and supporting businesses to take forward their ideas.

Stakeholder engagement key findings

- **Understanding and engagement with local heritage**
CUPHAT has supported understanding and engagement with local heritage. More people were aware of the heritage, and it is hoped it will enable visitors to engage better with heritage in the future, however, there needs to be a strong legacy to ensure this take place. CUPHAT has also set local heritage in the wider context, creating a strong knowledge and a feeling of pride in the heritage. This has helped businesses understand the positive resources they have so that they can maximize their potential and pass this on to visitors.
- **Marketing and promotion** - CUPHAT has improved opportunity for promotion of the areas through the development of the website, communication, and a practical marketing strategy. Rural businesses are now more visible to tourists, and this should help lead to growth.
- **Regenerative tourism** - CUPHAT has made a positive difference and has helped to deliver regenerative tourism in the areas.
 - CUPHATs focus on helping, supporting, and giving confidence to local tourism businesses will help them to work towards a regenerative tourism approach (particularly in relation to environmental issues, citizen science, climate issues, local products and culture). CUPHAT was seen as a positive starting point for delivering change as it encouraged businesses to think about how they could be more sustainable.
 - It is hoped that CUPHAT will encourage more visitors in the future though this depends on the project's legacy. In order to ensure long-term sustainability there is a need to consider what will happen next and how to influence government policy.
- **Networking** - CUPHAT provided the opportunity for networking, connecting local small diverse businesses together to collaborate and understand better the opportunities to develop ideas and joint working. This included:
 - Creating a sense of community and belonging.
 - Learning from others, how they do things.
 - Learning about other things going on locally.
 - Opening up new opportunities.
 - A supportive network of start-ups.
- **Lessons learnt** - A key aspect highlighted that could have been done better was that of the project communication, for example promoting and advertising the events, as well as communication within the wider community. This highlights the challenge of a short-term project being able to fully embed in the community.
- **Legacy** - There is a need to continue supporting the areas and promoting them for tourism on a wider scale than has happened previously, either through a continuation of the project, or through government funding / policy. There is a need to ensure continued collaboration and engagement.

The evaluation also considered the three **Cross Cutting Themes** i.e., Equal Opportunities and non-discrimination, Sustainable development and Tackling poverty and social exclusion. The CUPHAT business plan outlined policies and procedures to address these, and a project level Eco and Well-being Code was written, with project staff being encouraged to follow it. The Code covered a range of issues including health, equality, cohesive workplace, Welsh and Irish language and culture, waste, transport, office environment, purchasing, water, energy, biodiversity, raising environmental and other awareness. At training and events, CUPHAT also considered the needs of different individuals, shared transport wherever possible, and sourced catering from local community-based cafes and restaurants and local produce.

EVALUATION

The key impacts of CUPHAT arising from the evaluation are summarised as follows:

- ❖ CUPHAT has the potential to **increase overseas visitor numbers** by at least the 5% target which would therefore also result in higher visitor spend.
- ❖ CUPHAT has **promoted the natural, historic and cultural heritage** of the four coastal uplands areas. This has raised awareness and provided a means by which visitors can easily engage with the heritage, either through the CUPHAT marketing website or by enabling and supporting local businesses to provide opportunities to engage with heritage.
- ❖ CUPHAT has **overcome some of the barriers** and challenges for people visiting the areas by improving the visibility of the areas and of their heritage. People are now more aware of them as places to visit. Other barriers such as those related to transport have been highlighted with the policy makers.
- ❖ CUPHAT has provided training, guidance and support to local businesses and communities to help them develop a **regenerative approach to tourism** in their coastal upland areas. This also gave businesses the confidence to progress their ideas.
- ❖ CUPHAT has helped tourism businesses become more **aware of the importance of the heritage** of the coastal upland areas and how it can be used to not only promote tourism in the area in general but also their own businesses.
- ❖ CUPHAT has enabled businesses and communities to participate in **cross border cooperation** resulting in raised awareness, learning and opportunities for joint working.
- ❖ CUPHAT tourism **network has connected people** locally who can now work together to promote the tourism in the area and promote and improve their own businesses.
- ❖ CUPHAT project has contributed to the indicators in relation to **priorities of the Ireland Wales Co-operation Programme**.

CONCLUSIONS AND RECOMMENDATIONS

Effective community engagement takes time to embed and CUPHAT has had only a short time to develop with this three-year project being delivered within only 18 months. This has presented a challenge. However, the project has delivered against its objectives, contributing to the Priority Axis 3 indicators of the Ireland Wales Co-operation Programme, and initiated a series of activities that have the potential for long-lasting and significant impact. There are a number of key success stories that reflect the impact of CUPHAT, these are summarised as follows:

- CUPHAT has **raised awareness of the coastal upland areas** as places to visit and the role that the natural, cultural and historic heritage can have to encourage more visitors, including those from overseas. CUPHAT has helped businesses understand more about and have pride in their local heritage so that they can pass this on to visitors.
- Whilst it is too early to tell whether CUPHAT has definitively had a **positive impact on regenerative tourism** in the areas, there are undoubtedly many positive aspects of CUPHATs work that will very likely deliver a more regenerative approach to tourism in the four areas.
- CUPHATs focus on **working with microenterprises**¹, including the training programme and guidance it provided has given confidence to local tourism businesses and challenged them to think about how they could be more sustainable and encourage more visitors.
- The CUPHAT **marketing** website and strategy will provide greater opportunities for improved promotion of the areas, improving the visibility of the areas to visitors and helping them access information more easily. This will be particularly beneficial to the smaller tourist businesses and support a regenerative approach.
- CUPHAT has provided an opportunity for business to business (b2b) **networking** that has not happened before. This has several benefits, including connecting local small diverse businesses, collaboration, creating a sense of community, developing joint plans for local facilities and developing new opportunities to encourage regenerative tourism.

The ongoing success for regenerative tourism will depend on a legacy of sustaining action into the future, beyond the project funding period which ends August 2023. Such actions require that there is continuing support for the project areas to promote tourism, either through the specific continuation of the project's activities, or through additional support from government, whether this be through the provision of additional funding or through the development of a supportive policy framework.

¹ For the CUPHAT project microenterprises were defined in Ireland as less than 10 employees and in Wales as between 0-9 employees. The project worked with this scale (rather than SMEs per se), because initial scoping of tourism-related businesses revealed the majority are very small, sole trader, and family-run so targeting them would support local livelihoods and economies.

Recommendations based on the outcomes of this evaluation can be classified as being ones that reflect either the scoping of the project and its immediate legacy or the potential for scaling it geographically and are outlined as follows.

CUPHAT LEGACY RECOMMENDATIONS

Recommendation 1 – Ensure the effective dissemination and promotion of the CUPHAT website and marketing strategy.

Recommendation 2 – Explore opportunities for delivering a successful and sustainable legacy, such as using social media that can be run by the community for the community.

Recommendation 3 - Seek further funding to continue and build on the work with local communities, continuing the support and developing the regenerative approach to tourism. This could include funding to provide ongoing support for the local tourism networks that have been set up in the four coastal upland areas and funding to support and promote the website.

SCALING RECOMMENDATIONS

Recommendation 4 – Seek funding to extend the pilot work from CUPHAT into other areas, for example current funding application to Agile Cymru to support community tourism networks along the Atlantic Celtic coast.

POLICY FRAMEWORK RECOMMENDATIONS

Recommendation 5 – Review the current policy framework regarding regenerative tourism in coastal upland areas with a view to target specific interventions and policy development.

Recommendation 6 – Disseminate the findings of CUPHAT to raise awareness of the potential for regenerative tourism and the need for new development plans and strategies in rural coastal upland areas.

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1.0 INTRODUCTION

1.1 CUPHAT

The Coastal Uplands: Heritage and Tourism (CUPHAT) project aimed to sustainably realise the potential of the natural and cultural heritage of four coastal upland communities, the Cambrian Mountains, Mynydd Preseli in Wales and the Wicklow Mountains and Blackstairs Mountains in Ireland, with a view to attracting new types of tourists into areas that are relatively underdeveloped. The €3million project is supported by €2.4million from the European Regional Development Fund (ERDF) through the Ireland Wales Co-operation Programme.

The project involved developing cross-border cooperation through linked activities and by joint marketing that makes use of common themes.

“CUPHAT operation is to increase and enhance tourism in the Coastal Uplands in four regions of Ireland and Wales through the development of a range of initiatives designed to stimulate interest in the four areas and add value to the visitor experience.”

It involved raising awareness and fostering engagement with the landscapes of the coastal uplands, with the focus on increasing the capacity for community development and sustainable tourism and helping to encourage tourists to visit new areas, away from the already busy coastline. It also aimed to foster linked visits between the four coastal upland sites. The project embraced new technologies and new modes of both generating interest in the uplands while also encouraging visitors to participate in active research through citizen science activities.

1.2 CUPHAT EVALUATION

The Common Provision Regulation (CPR) European Social Fund (ESF) and European Regional Development Fund (ERDF) Regulations for the 2014- 2020 programming period lay down the requirements for monitoring of operations and subsequent reporting by Member States (1303/2013;1304/2013; 1301/2013).

The SRA/WEFO monitoring and evaluation strategy for the 2014-2020 Programmes comprises Programme and Operation level evaluations. It is also a condition of funding that all beneficiaries agree a Monitoring and Evaluation Plan (M&E Plan) and commission external evaluation(s).

CUPHAT had produced a Monitoring and Evaluation Plan as an Annex to their project (Annex 9), which was considered towards the end of the evaluation contract. As such the Plan was not incorporated in the evaluation design, however the main points have been considered during the analysis and incorporated in the report where possible.

Evolved Research and Consulting Ltd were contracted to undertake the evaluation of CUPHAT, with specific objectives to:

- conduct an **initial evaluative review** to establish **baseline data** that demonstrates both the need for the project and from which progress towards the project’s objectives can be evaluated.
- conduct an **end-of-project evaluation** to assess and understand the **impact** of the project.

This end of project evaluation provides a summative assessment of the success of CUPHAT in meeting the key priorities of the Ireland Wales Co-operation Programme. Priority 3: Cultural and Natural Resources and Heritage relates specifically to this project as it has the specific objective of sustainably realising the potential of natural and cultural assets in increasing visitor numbers to coastal communities and sets out to achieve:

- An increase in the number of visitors to the coastal communities of the cross-border region by sustainably utilising their natural and cultural assets.
- An increase in the capacity of coastal communities to utilise their natural and cultural heritage as a driver to economic growth.

There are four specific output indicators which relate to this as detailed in Table 1, directly informing the key outputs of the CUPHAT project.

Table 1: Ireland Wales Co-operation Programme Priority Axis 3 Indicators

Indicator	Measurement unit
Employment increase in supported enterprises	Full time equivalents
Number of pilot projects completed	Completed pilot projects
Number of new tourism networks promoting cultural, natural or heritage assets	Cross-border networks
Number of coastal communities participating in cross-border cooperation around cultural, natural or heritage tourism	Communities

This evaluation report encompasses a review of the potential changes resulting from the CUPHAT project and includes the reflections of accommodation providers and tourism businesses on the situation pre and post CUPHAT, as well as considering the potential impact it might have on the numbers of overseas tourists visiting the areas. Regenerative tourism is also considered by examining the project’s impact to evaluate the prospective longevity of their legacy, in addition to the impact on the local environment, community and economy.

1.3 REPORT STRUCTURE

This report is structured into four sections, as follows:

- Section 1 forms the introduction.
- Section 2 sets out the requirements from CUPHATs Monitoring and Evaluation Plan.
- Section 3 outlines the evaluation methodology.
- Section 4 presents the findings derived from surveys and interviews and any other data available through CUPHAT.
- Section 5 presents the evaluation through an analysis of the findings to consider the impact CUPHAT has had on regenerative tourism.
- Section 6 outlines the legacy, conclusions and recommendations.

2.0 CUPHATS MONITORING AND EVALUATION PLAN

2.1 INTRODUCTION

This section outlines the requirements of CUPHATs Monitoring and Evaluation Plan and includes how these have been incorporated either in this Final Evaluation Report or elsewhere by the CUPHAT team.

CUPHATs Monitoring and Evaluation Plan states that the partner organisations within the CUPHAT Partnership are committed to monitoring and evaluation in order to learn lessons and benefit from the operation. It also states that monitoring and evaluation may also provide opportunities to improve the delivery of the operation and that partners and stakeholders would wish to understand from an evaluation of the operation:

- What works and for whom?
- How interventions work and why they work
- Highlight good practice
- Demonstrate value for money
- Feed outcomes into development of future policy, projects and research activities
- Identify unintended consequences

2.2 CUPHATS LOGIC MODEL

CUPHAT designed a logic model which maps out the relationship between the underlying challenge for the project, the activities to address the challenge, the outputs, outcomes/deliverables and impacts. The logic model from the Monitoring and Evaluation Plan is set out in Appendix 1 and this Evaluation Report focuses on the desired 'Impact' from the model i.e.

'An increased amount of visitors and spend based on this heritage, and a different kind of tourist attracted to coastal uplands. This increase taking place in shoulder and off-peak seasons. Logic: The community and business benefits of tourism will be embedded in the coastal uplands and will be supported by the tourism network.'

2.3 INTERNAL FORMATIVE EVALUATION

The CUPHAT Monitoring and Evaluation Plan set out how **internal formative evaluations** would be used to assess progress towards key objectives, outputs and deliverables, as well as to monitor the effectiveness of partner engagements with participating communities, tourism network participants, key stakeholders, and supported enterprises. These internal formative evaluations would be closely monitored by the Aberystwyth University Project Manager leading Work Package 6, the Aberystwyth University Project Board, and the overarching Programme Board. This information would then help to identify good practice and potential gaps in the approach in order to maximise the operation's outcomes and impact.

The Monitoring and Evaluation Plan lists the following data collection and monitoring for the internal formative evaluation:

- Data gathering and evaluation of the number of voluntary and local groups the operation has worked with, the numbers of people attending outreach events, and qualitative analysis of the impact of these events on understandings of heritage in the coastal uplands (e.g. using questionnaires with group leaders and participants).
- Data gathering and evaluation of the number and range of stakeholders participating in the tourism network, the extent and nature of their involvement, the reported influence of the network on their capacity to promote tourism (particularly heritage-related tourism)
- Collecting data on each supported enterprise in line with the ERDF reporting guidelines, using a standard template
- Any data on the numbers of individuals making use of, or engaging with, the various outputs produced as part of the operation (e.g. web site, apps).

Other information that was gathered as part of the internal evaluation process is also listed in the Monitoring and Evaluation Plan as follows:

- Delivery of operation to budget and within time-frame.
- Health and Safety protocols developed and followed.
- Number of enquiries from communities, organisations and enterprises.
- Number of enquiries progressing to operation involvement (e.g. on a Stakeholder Group).
- Reasons for non-participation by communities, organisations and enterprises.
- Level of community engagement prior to operation.
- Number of enterprises assisted to produce new marketing techniques and approaches.
- Feedback forms – from communities, organisations and enterprises periodically to establish whether support and information dissemination is effective and appropriate.
- Data on community, organisation and enterprise characteristics.
- Information about any withdrawal of support by communities, organisations or enterprises.

At the end of the project the CUPHAT each work package completed guidance documents that look at the impact of each individual element of the project and this includes lessons learnt that can be applied to other projects or by other organisations considering regenerative tourism in coastal upland areas. These guidance documents that have been produced by CUPHAT will be available on the project's website and are not included in this evaluation report.

2.4 REQUIREMENTS FOR THE EVALUATION

The '**Evaluation**' section of the **Monitoring and Evaluation Plan** lists specific questions to be asked by the evaluation including both quantitative and qualitative. The possible questions listed are set out in Table 2, which also states whether or how these have been included in the final Evaluation Report:

Table 2 - CUPHAT Monitoring and Evaluation Plan and the Final Evaluation

CUPHAT Monitoring and Evaluation Plan – Questions for the final evaluation	Included in this final Evaluation Report Red – not included. Amber – partly included. Green – included
Has the operation achieved its outputs & results	Included in section 4.2
Has it come in on (is on) budget?	This was not included in this evaluation and was not part of the brief.
How effective has the management of the project been?	This was not included in this evaluation and was not part of the brief.
What impact has the project had on the partner organisations?	This was not included in this evaluation and was not part of the brief.
What impact has the project had on participating communities and enterprises?	Included in section 5.2.6 and 5.2.7
What will be the legacy of the operation?	Included in section 6
How successful has the operation been in involving target communities and enterprises? What worked well and what didn't work well?	Included in section 5.2.7 Partly covered in section 5.2.7 and 5.4 and 5.5, however this was not a specific aim of the evaluation so is not covered in full.
How has the operation performed against the delivery of CCT aims, objectives and indicators, as well as CCT case (project) related indicators, including what worked well/what didn't work, problems identified and how these were addressed?	Included in section 4.3.5
How has the operation contributed to the goals of the Well-being of Future Generations Act and equivalent policies in Ireland?	This was not included in this evaluation and was not part of the brief.
What contribution has the operation made to sustainable development and improving the environment?	Partly included in section 5.2.4, however this was not a specific aim of the evaluation so is not covered in full.
How has the operation identified language preference e.g., English or Welsh for its stakeholders/enterprises and provided opportunities to meet the demand?	Included in section 4.3.5

In summary many of the questions / issues set out in Table 2 have been included in this final evaluation. Some were not in scope for this evaluation contract, however where possible they are included in the Evaluation Report where relevant and where the information existed. For a small number of areas, it has not been possible to include them in this report, however they may be covered by other outputs from the CUPHAT team e.g., individual work packages guidance documents.

3.0 METHODOLOGY

3.1 INTRODUCTION

The methodology was split into three distinct phases, shown in Figure 1, which resulted in four deliverables. Each of these stages is outlined further in the following sections.

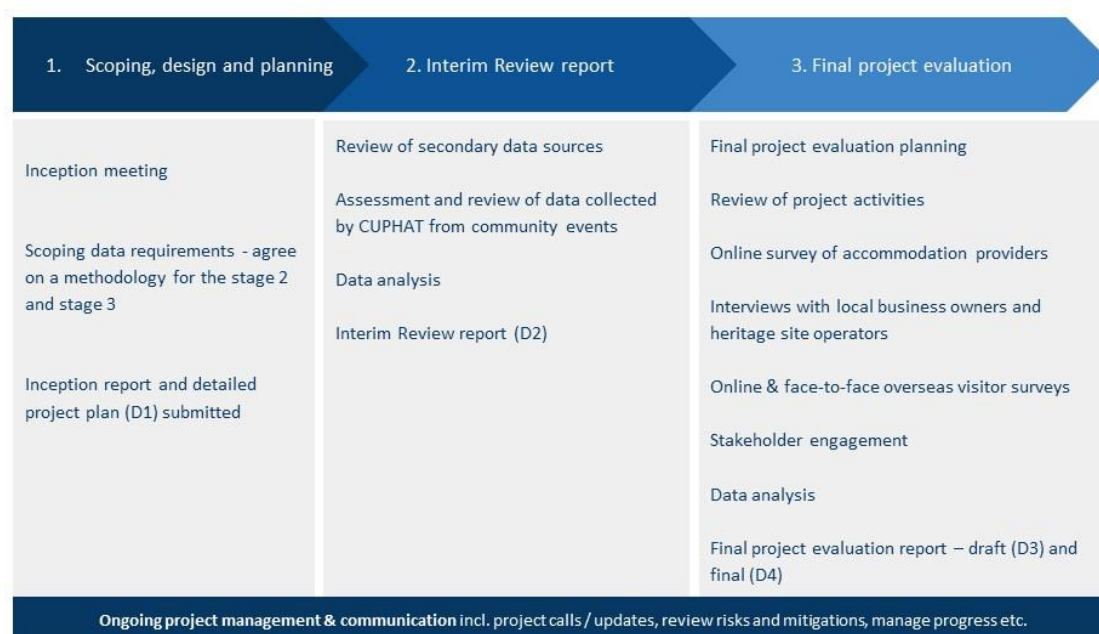


Figure 1: Methodological stages

3.2 STAGE 1: SCOPING, DESIGN AND PLANNING

The purpose of this stage was to develop a comprehensive and agreed understanding of the project goals, approach, and planning. A key element was an inception meeting between the ERC project team and key CUPHAT members, which agreed a revised project methodology delivery plan.

The original specification required the initial evaluative review to include an analysis of data collected through a series of new surveys, interviews, and focus groups to establish a baseline of the current tourism activity in the four coastal upland areas. However, discussions with the CUPHAT project team as part of the inception phase of the work, identified a number of constraints to that approach. Instead, it was agreed that the Interim Review Report (D2) would construct a baseline using secondary data and existing information (including data collected as part of the CUPHAT activities) which would be used to help to assess the impact of CUPHAT for this final end of project evaluation.

A revised methodology was agreed and outlined in the first deliverable (D1), the Inception Report and Project Plan, in January 2023.

3.3 STAGE 2: INTERIM REVIEW

Stage 2 focused on establishing a baseline of current tourism activity in the four coastal upland areas by analysing data collected by CUPHAT through their initial engagement activities with businesses and communities as well as a review of other available secondary data.

Data analysis took place between January and March 2023 based on the data gathered against each of the primary data collection requirements (i.e., A-H), as shown in Table 3.

Table 3: Data collection methods

Primary data collection requirements	Data review	Assessment of data collected through CUPHAT activities
A. Number of visitors	*	*
B. Time	*	*
C. Spend	*	*
D. Engagement with heritage		*
E. Challenges		*
F. Benefit to businesses.	*	*
G. Heritage draw		*
H. Promotion of heritage		*

This resulted in the production of an Interim Review Report (D2) which was delivered in March 2023. The report detailed the outcomes of this stage and outlined the initial findings and the implications for subsequent data collection and the final evaluation.

This is summarised in section 4.1.

3.4 STAGE 3: PROJECT EVALUATION

Stage 3 involved the collection and analysis of data including surveys and interviews with key stakeholders to consider the impact or potential impact of the CUPHAT project activity on visitor numbers. The methodology for stage 3 was refined following the Interim Review report in order to take into account the findings from Stage 2.

The evaluation did not consider the effectiveness of the project management systems and processes, methods of delivery, or the CUPHAT partnership as these were outside the scope of the contract. However, the evaluation did consider how effective the project was in promoting sustainability, equality, and diversity with these aspects being reviewed within the context of regenerative tourism, since regenerative tourism necessitates reaching out to a diverse range of stakeholders and providing equality of opportunity to those wishing to participate.

The data collection took place between February and June 2023 and included the activities listed in Table 4.

Table 4: Final evaluation work schedule

Activity	Mar 23				Apr 23				May 23				Jun 23				Jul 23				Aug 23			
	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28
Review of project activities																								
Online survey of accommodation providers																								
Interviews with accommodation providers and businesses																								
Online overseas visitor surveys																								
Face-to-face overseas visitor surveys																								
Stakeholder engagement at key CUPHAT events																								
Data analysis																								
Draft evaluation report (D3)																								
Final evaluation report (D4)																								

Each of these approaches gathered data in relation to each of the primary data collection requirements (i.e., A-H) as shown in Table 5.

Table 5: Approach to gather data for the primary data collection requirements

Primary data collection requirements	Survey of accommodation providers	Interviews	Overseas visitors' surveys	Stakeholder engagement
A. Number of visitors	*			
B. Time	*		*	
C. Spend (GBP)	*		*	
D. Engagement with heritage		*	*	*
E. Challenges		*		*
F. Benefit to businesses.	*	*		*
G. Heritage draw	*	*		*
H. Promotion of heritage		*		*

3.4.1 Review of CUPHAT project activities, delivery and outcomes

This evaluation report assessed the monitoring data collected by CUPHAT in order to review whether CUPHAT's activities had been completed. The key project activities and results indicators and their targets (where available) were tabulated and evaluated using the Red Amber Green (RAG) assessment to highlight successful delivery.

Where relevant an assessment was also conducted to determine how they contributed to the projects' impact and the degree to which this would support the delivery of regenerative tourism in the four coastal upland areas.

3.4.2 Surveys with visitors

In order to gather views from overseas tourists in the four coastal upland areas, and maximising opportunities for gathering data, overseas visitors were targeted using both a face to face and online survey.

3.4.2.1 Face to face surveys

Face-to-face surveys were conducted with tourists at 'hotspot' locations outside of the core project areas to see whether these visitors would be likely to visit the project areas that were the focus of the CUPHAT project. The locations and dates were as follows.

- Cambrian Mountains: 20 June at Aberystwyth Pier
- Mynydd Preseli: 21 June at Newport and St Davids
- Blackstairs Mountains: 27 June at Enniscorthy, Gorey and Wexford
- Wicklow Mountains: 28 June at Glendalough

The questions were based on those within the online survey to allow comparisons to be made when analysing the results. However, some additional questions were included to determine the impact that CUPHAT could have on visitor numbers. One of the project's final outcomes is to have an increase in 5% in overseas visitors and spend in these upland areas therefore the questions were aimed at trying to determine whether that might be the case. This was achieved during the face-to-face surveys by showing the visitors photographs of the upland areas to see how likely they would be to visit them.

As it was not always possible to distinguish between UK/Ireland based and overseas visitors the survey was aimed at any visitors and specific responses from the overseas visitors were disaggregated during the analysis stage based on the answer to a question about where they live.

3.4.2.2 Online survey

The online survey was conducted using SmartSurvey and was aimed at gathering data on the amount of time and money spent by individuals in the coastal upland areas (B and C), as well as the level of engagement with natural and cultural heritage (D). Broader questions also asked what they think about visiting these upland areas, what the barriers to visiting are and anything that might encourage them to visit in the future. As an incentive, visitors who complete the survey were given the opportunity to enter into a prize draw to win a selection of CUPHAT merchandise.

Since it was not possible to contact overseas visitors directly, the link to the survey was shared in the following ways:

- Accommodation providers were asked to forward the visitor survey link to their past and current overseas guests. This was requested in the online survey which had been sent to over 400 accommodation providers in the areas, however it is not known whether any of these forwarded the link.
- One accommodation provider who was interviewed did forward information on to past guests and another displayed a poster about the visitor survey at their accommodation.
- 119 tourism organisations, local businesses, tour and heritage site operators in the areas were sourced via the internet and contacted to ask to publicise the link to the survey on their social media accounts or at their premises. This took place from Easter 2023 however it is not known whether any of these advertised the survey.
- Two posters (the Wales poster was also produced in Welsh) were designed (see Figures 2 and 3) to advertise the link to the visitor survey. These were distributed by the local CUPHAT staff to various locations, sites or attractions that visitors are known to frequent within the 4 areas.



Figure 2 – Poster for visitors to Welsh CUPHAT areas



Figure 3 – Poster for visitors to Irish CUPHAT areas

3.4.3 Accommodation providers

An online survey of accommodation providers in each area was conducted using SmartSurvey with the aim being to establish a pre CUPHAT baseline for tourism numbers (data requirement A) thereby enabling an estimation of potential increases as a result of the CUPHAT activities.

The survey also asked about the cost of each stay, employment statistics and the extent to which accommodation providers promote the natural and cultural heritage to their guests (data requirements C, F and H). It also explored the impact that CUPHAT activities has had for their accommodation businesses and whether they see themselves being able to promote their areas more effectively as a result. In addition, it explored whether potential overseas visitors would be more likely to visit the areas due to the work of CUPHAT.

The survey was available bilingually for Welsh providers, with Welsh the first option, so owners could participate in their preferred language.

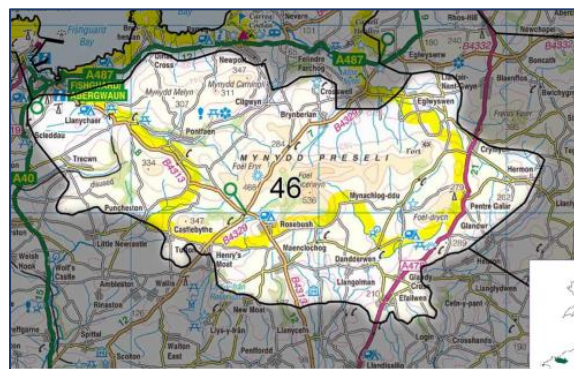
A database of accommodation providers and their contact details was produced in MS Excel for each of the four coastal upland areas. Rather than narrowing the field to those providers solely based within the three target communities within each of the 4 coastal upland areas, accommodation providers from across the areas were sourced. However, each accommodation provider was asked to provide their postcode, which enabled data to be analysed spatially.

The original target was to send the survey to at least 100 accommodation providers in each of the four coastal upland areas i.e., a total of 400. Assuming a response rate of 25%, this would enable data to be gathered from approximately 25 providers in each area.

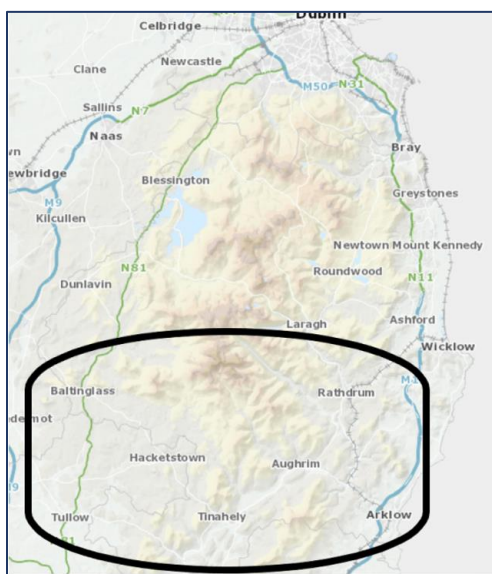
Comprehensive research was undertaken to identify the accommodation providers in the 4 coastal upland areas and to source email addresses to which the online survey link could be sent. The sample was sourced from within the project boundary, based on the maps that were provided by the CUPHAT team (see Figure 4).



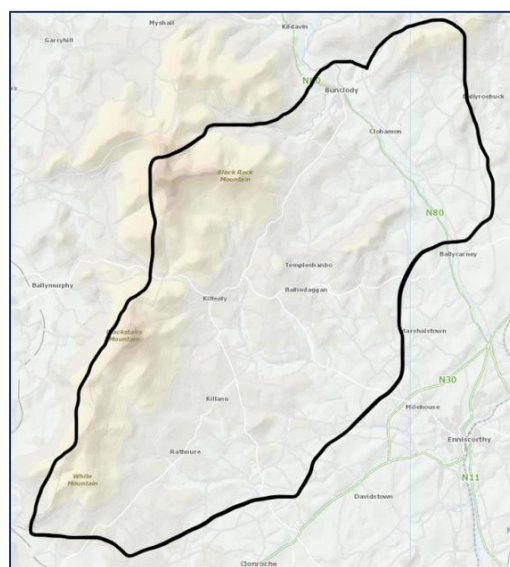
Cambrian Mountains CUPHAT area



Mynydd Preseli CUPHAT area



Wicklow Mountains CUPHAT area



Blackstairs Mountains CUPHAT area

Figure 4 – Boundary of each of the four CUPHAT areas.

The following online websites were searched for accommodation providers:

Wales	Ireland	Generic
• Visit Pembrokeshire	• Wicklow County	• AirBnB
• Pembrokeshire holiday company	• Tourism	• Booking.com
• PLANED	• Fáilte Ireland	• Sawdays
• Cambrian Futures Project	• Discover Ireland	• Google
• Cambrian Mountain Initiative	• B&B Ireland	• Campsites.co.uk
• Pentir Pumlumon	• Visit Wicklow	• Vrbo
• West Wales Holiday Cottages	• Visit Wexford	• Holiday lettings
• Wales cottages	• Stay in Wicklow	• Landmark Trust
• Visit mid Wales	• Irelands blue book	• National trust
• FBM Holidays	• Wicklow way	• English heritage
• Best of Wales	• Tinahely.ie	• Cottages.com
• Powells Cottage Holidays	• Hogan Irish Cottage	• Sykes cottages
	• Rural retreats	• Google search
	• Shamrock cottages	• Simply owners
	• Imagine Ireland	
	• Ancient East	

An online search identified serviced accommodation (hotels, guest houses, inns and B&B), self-catering accommodation (holiday cottages and Airbnb style accommodation), hostels and bunkhouses, camping, caravans and glamping sites (including yurts, shepherds huts, etc). In addition, Visit Ceredigion also provided contacts for a number of accommodation providers in the Welsh areas.

Table 6 shows that there were 414 providers identified across a range of accommodation types in the 4 areas.

Figure 5 shows that the majority were either holiday cottages (111 properties) or providers who advertise via a third-party website such as Sykes Cottage, West Wales Holiday Cottages etc., (148 properties).

Where it was possible to find an email address, all these accommodation providers were contacted directly via email. However, a small number bounced back or failed to send. In some instances, the third-party websites allowed direct contact through the website with the provider, so contact was made with these accommodation providers through a web-based contact form.

Where a third-party website did not allow direct contact with the provider, an email was sent to the third-party provider asking them to send the survey to the accommodation providers they represented, and a list of the relevant properties was provided. Some third parties replied to say they had forwarded the survey as requested, however where they did not reply it is unknown whether the survey was forwarded.

Table 6 – Number of accommodation providers sourced

Type of Accommodation	Number of accommodation providers sourced				
	Cambrian Mtns	Mynydd Preseli	Blackstairs Mtns	Wicklow Mtns	Total
Serviced	28	11	11	37	87
Holidays cottages	57	35	5	14	111
Camping, caravans & glamping	25	18	2	15	71
Hostel	7	0	0	1	8
Self-catering through 3 rd party websites e.g., West Wales cottages. *	99	37	3	9	148
Total	216	101	21	76	414

*It is not always known whether the third party has forwarded to their holiday cottages as requested

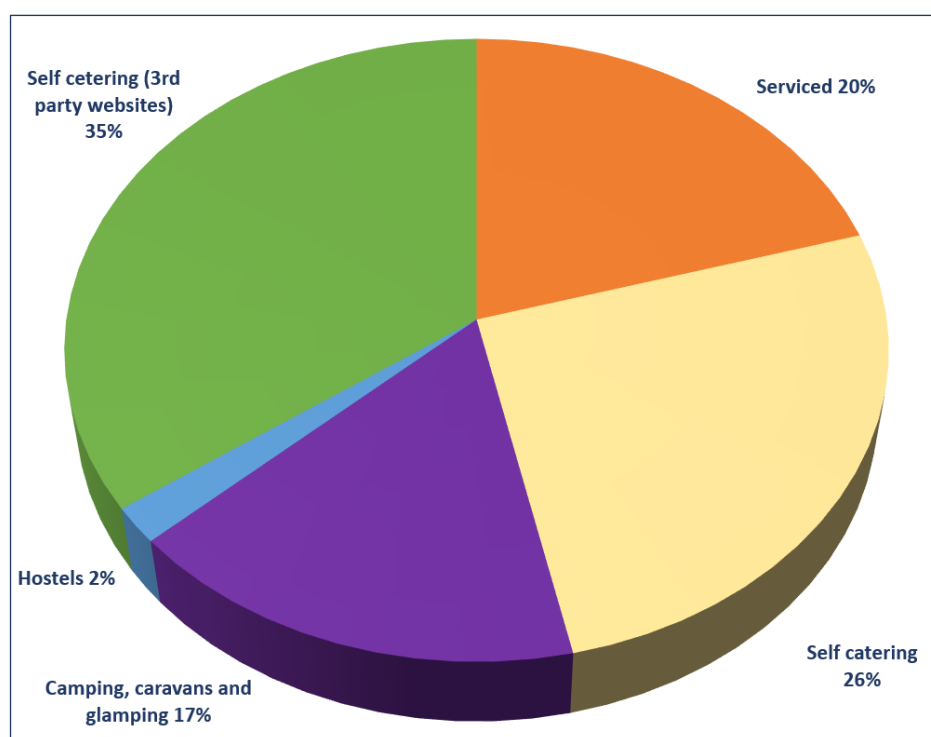


Figure 5 – Accommodation types sourced across the four CUPHAT areas

An additional 98 providers were sourced through Airbnb. An attempt was made to contact these providers directly through the Airbnb website as an enquiry to the ‘hosts’. This included the following:

- 31 in the Cambrian Mountains
- 19 in tew Mynydd Preseli
- 20 in the Blackstairs Mountains
- 28 in the Wicklow Mountains

However, although this was possible with a small number of Airbnb providers (approximately 10 in the Cambrian Mountains and 10 in the Blackstairs Mountains) it was not possible to contact the majority. Where possible and if the name of the holiday cottage was given on the Airbnb site, the holiday cottage was searched through Google to see if they could be contacted

by any other means. However, not many had any online presence except on Airbnb and where they did it often resulted in another third-party website such as Cottage.com, Sykes, booking.com etc., which could not be contacted directly or did not respond. In addition, an attempt was made to join local Airbnb hosts Facebook sites in order to post a message advertising the survey. This included the following groups:

- Ireland Airbnb hosts Facebook group – a message was successfully posted.
- Pembrokeshire Airbnb hosts Facebook group – no response ever received to join the group.
- Mid-Wales Airbnb hosts Facebook group - no response ever received to join the group.

As shown in Table 6 only 21 providers were found within the Blackstairs Mountains area through the internet search, which demonstrates the lack of available accommodation in that area, this included a small number on the Carlow side of the Blackstairs Mountains in order to include a large enough sample.

The link to the survey was sent to the accommodation providers on 22 March 2023 with covering emails explaining the purpose of the survey. As an incentive, accommodation providers who complete the survey were also given the opportunity to enter into a prize draw to win a selection of CUPHAT merchandise and this was included in a reminder email that was sent after the Easter holidays (19 April 2023) to those businesses who had not responded to the survey and for which we had a direct email contact. Businesses that had started the survey but had not completed it were also contacted to encourage them to finish it.

In an attempt to get more responses a number of local organisations were contacted to see if they could assist in promoting the accommodation providers survey. The following were contacted and were provided with text that could be used to either email any contacts they have or used in newsletters or social media posts:

- Cambrian Mountains Initiative
- Pentir Pumlumon
- Visit Ceredigion
- PLANED
- North Pembrokeshire Tourism Alliance
- Visit Pembrokeshire
- Visit Wexford
- Visit Wicklow
- Visit Carlow

A few of these were able to add an article in their newsletters or post on social media.

As well as the original email to the accommodation providers, 2 reminders were also sent out to encourage participation in the survey.

3.4.4 Interviews

Interviews were conducted with accommodation providers and other local tourism businesses in the four coastal upland areas to assess how they might benefit (data requirement F) from CUPHAT, i.e., were they benefitting more from tourism since CUPHAT started or do they

foresee benefits in the future? Also, could they see themselves being able to promote their areas more effectively as a result.

In addition, the interviews focused on whether the level of engagement with cultural and natural heritage had increased throughout the project, and whether the challenges that limit dwell time, spend and engagement with heritage in each area have changed and/or reduced (data requirements D, E and H). The interviews also determined the current visitor numbers recorded by the individual businesses to ascertain whether these had increased, or had the potential to increase, as a result of CUPHAT activities.

3.4.4.1 Interviews with accommodation providers

Interviews were offered to those accommodation providers that had indicated a willingness to participate via their response to the online accommodation providers survey. It was intended that the sample chosen to invite for interview would take into account a number of criteria to ensure a range were contacted (e.g., type of provider, size, location etc), however only a few were willing to participate further so all were invited.

Interviews were conducted via MS Teams or telephone and participants were contacted via email and invited to engage in the process, with a doodle poll used to arrange the interview timings. If located in one of the two coastal upland areas in Wales, interviewees were given the option to request that the interview was conducted in Welsh or English.

3.4.4.2 Interviews with local tourism businesses

A sample of at least 8 local business owners and heritage site operators in each of the four coastal upland areas were also invited for interview, with the expectation that 3 would be interviewed (i.e., a total of 12 interviews).

The sample was drawn from businesses who had joined the CUPHAT network together with other known local businesses. The sample chosen to invite for interview took into account the following criteria to ensure a range were contacted:

- Type of business (café, pub, restaurant, heritage operator, visitor centre, tour company).
- Size of business.
- Location (rural or within a village / within CUPHAT's 3 target communities in each upland area or outside).
- Level of engagement with the CUPHAT project.

As with the accommodation providers interviews were conducted via MS Teams or telephone with the same arrangement in place for conducting the interviews in English or Welsh in Wales.

As well as the original email to the local businesses, 2 additional reminders were also sent out to encourage participation.

3.4.5 Stakeholder Engagement

The objective of the stakeholder engagement was to meet data requirements D-H in particular to:

- Seek views on the extent to which engagement levels with each area's cultural and natural heritage among community groups and local enterprises has changed as a result of the project.
- Discuss the benefits that the project has brought in terms of tourism.
- Determine whether it has addressed any challenges that have historically limited engagement.

CUPHAT ran community festivals in each of the four upland areas to celebrate the work of CUPHAT and to thank the community for their involvement. These were at the following locations:

- Cambrian Mountains: 20 June (12 noon till 8pm) in Pontrhyafenigaid community hall.
- Mynydd Preseli: 21 June (12 noon till 8pm) in Maenclochog hall.
- Blackstairs Mountains: 27 June (12 noon till 8pm) in Killealy community hall.
- Wicklow Mountains: 28 June (12 noon till 8pm) in Avoca community hall.

The festivals were drop in events with a programme of activities including talks, films, music performances and children's activities alongside a number of stalls which demonstrated the work from the 4 work programmes. The original intention was to run focus groups at each festival, however the drop in nature of the events meant that this was unlikely to work as people coming to the events may all want to be there at different times to see different activities, therefore it would be unlikely that there would be enough people at any one time to run a focus group. Therefore, the key questions for the focus groups were adapted so that people dropping in could still provide feedback for the evaluation.

The ERC team set up a stand at each festival and carried out the following activities:

- Discussions with businesses and other community groups who visited the festivals. Where people had time, a member of the ERC team went through some set questions and took notes on their responses. These were then later added into a SmartSurvey form for analysis.
- Visitors to the festivals were encouraged to answer some key questions on flip charts using sticky dots and post its.

The questions for both of these approaches are shown in Table 7 and Figure 6 shows the stand at Pontrhyafenigaid community hall. For the festivals in Wales a Welsh speaker was present so that visitors to the festival could respond in either Welsh or English.

Table 7 – Questions posed to visitors to the CUPHAT festivals

Face to face survey questions	Flip chart questions
Name (optional)	NA
Business type	NA
Have you heard of CUPHAT (If not then ask if once they have spent time at the festival finding out more about CUPHAT whether they could return to answer some questions.	NA
Can the CUPHAT objectives help deliver sustainable tourism in this area?	NA
Name one positive thing that CUPHAT has done?	NA
Name one thing that CUPHAT could have done better?	NA
What did you get out of your involvement with CUPHAT?	NA
What difference has CUPHAT / will CUPHAT make to tourism in the area?	Flipchart Question - What difference has CUPHAT made to tourism in the area? (Question written on a flip chart and people invited to add their thoughts on post it notes)
Has CUPHAT supported your understanding and engagement with local heritage?	Flipchart Question - Has CUPHAT supported your understanding and engagement with local heritage? (Line on flip chart with range 'Better levels' to 'Same levels', people added a dot.
Has /will CUPHAT enable visitors to engage with the area's cultural and natural heritage?	Flipchart Question - Will the work of CUPHAT enable visitors to engage better with the area's local heritage? (Line on flip chart with range from high to low and people added a dot).
What more needs to be done to support sustainable / regenerative tourism in the area?	



Figure 6 – The evaluation stand at Pontrhyfenigaid community hall in the Cambrian Mountains

3.4.6 Cross Cutting Themes

The Ireland Wales Cooperation Programme 2014-2020 contributes to the European Union strategy for smart, sustainable and inclusive growth and to the achievement of economic, social and territorial cohesion. The aim of the programme is to provide a framework for organisations in the cross-border area to actively cooperate to address challenges and share priorities of common interest on both sides of the Irish Sea thereby contributing and adding value to the economic and sustainable development priorities of Ireland and Wales

Therefore, included in the Guiding Principles for selection of operations under the Ireland Wales Cooperation programme is that the interventions should seek to integrate economic, social and environmental outcomes, consistent with the Welsh Governments central organising principle of sustainable development and contributing to the outcomes of the cross-cutting themes (CCTs).

The aim of the CCTs is to improve the quality and the legacy from each operation supported by the Structural Funds and to add value to the programmes as a whole and were embedded within the design and delivery of all the CUPHAT operations.

There are three CCTs which are outlined below and CUPHAT undertook continuous monitoring of its activities to ensure that the monitoring and evaluation criteria were in compliance with the required policies and procedures.

The final evaluation considered how the CUPHAT operation has met the Cross Cutting Themes based on an assessment of information provided by the CUPHAT team.

3.4.6.1 CCT Equal Opportunities, Gender Mainstreaming

This aims to promote equal access for all to education, training and employment opportunities and the prevention of any discrimination on the grounds of gender, disability, racial or ethnic origin, religion or belief, age, sexual orientation and with regards to the bilingual nature of many of the communities in Wales. There is a requirement to take account of the needs of various target groups at risk of discrimination, in particular disabled people and those covered by the 2010 Equality Act (Welsh Beneficiary), the Employment Equality Act 2004 and the Equal Status Acts 2000 to 2004 (Irish Beneficiary) as having ‘protected characteristics’ and in Wales the promotion of the Welsh language and support for Welsh speakers. This is not only for legal reasons, but also because overcoming inequalities between different social and demographic sections of society contributes to the overall effectiveness of the activity delivered by the programmes. The key ERDF programme objectives to achieving Equal Opportunities and Gender Mainstreaming are to:

- Support the creation of an environment which supports inclusive workplaces and promotes equality of opportunity for staff, including reconciliation of work and private life
- Ensure access to technology is available and accessible to all, particularly for people in rural areas, older people, disabled and others affected by the ‘digital divide’
- Support RD&I which seeks to address societal challenges, such as supporting active ageing, opening up employment and training opportunities for individuals and supporting independent living
- Encourage entrepreneurship and business start-up initiatives to encourage more take up from young people, women, Black and minority ethnic people, disabled people and LGBT people
- Support access for disabled people and those from BME backgrounds to training and employment opportunities, including through sustainable transport solutions
- Identify and support opportunities to promote and facilitate the use and promotion of the Welsh language, use of bilingual, encouraging the use of both languages, opportunities for lessons.

The specific case-level indicators under Equal Opportunities, Gender Mainstreaming for the CUPHAT project, as identified in the Annex 9 of the application are:

- Positive action measures – women
- Activity supporting female participation in STEM
- Activity supporting speakers of the Welsh/Irish language

In addition a further general cross Cutting Themes for CUPHAT was developing and engaging CTT champions.

3.4.6.2 CCT Sustainable Development

The aim is to ensure the sustainable development of the environment, by promoting practices of environmental protection and improvement, resource efficiency, climate change mitigation and adaptation, disaster resilience and risk prevention and management. Sustainable development is the central organising principle. The inclusion of sustainable development as a cross-cutting theme is a crucial element to ensure that programmes and operations meet social, economic and environmental objectives simultaneously.

The key ERDF programme objectives to achieving sustainable development are:

- Promoting research and innovation in the Grand Challenge area of low carbon, energy and environment, building on the significant investments made in this area under the 2007-2013 programmes;
- Developing the low carbon, energy and environment sector through business advice and support and business finance under the SME Competitiveness
- Promoting resource efficiency, including energy efficiency, through interventions under the SME Competitiveness
- Increasing the potential to generate renewable energy through support for R&I, and enabling infrastructure investments in the marine energy industry in Wales;
- Increasing the number of small scale and community renewable energy projects;
- Improving the energy efficiency of Welsh Homes, in particular in areas of fuel poverty and deprivation (as measured by WIMD);
- Promoting low carbon energy schemes for urban and rural areas and;
- Supporting low carbon and sustainable transport solutions, including through linking unemployed and economically inactive individuals with work and training.

The specific case-level indicators under sustainable development for the CUPHAT project, as identified in the Annex 9 of the application are:

- Development of an organisational Travel Plan, Eco-plan and sustainable transport initiatives.
- Resource efficiency measures.

3.4.6.3 CCT Tackling Poverty and Social Exclusion

The focus is to stimulate economic growth and the creation of sustainable jobs across the programmes, while enhancing the connectivity between areas of economic growth and the needs of disadvantaged individuals. The ERDF programme looks to connect people, skills and jobs, increasing their mobility and opportunities to gain sustainable employment which would support an individual's journey towards a life free from poverty. The ERDF programmes also aims to increase the competitiveness of SME's and consequentially increase their capacity for job creation and growth.

The Cross-cutting theme "Tackling poverty and social exclusion" is a European Commission and Welsh Government commitment which focuses on actions to create employment and progression opportunities and to help people to access those opportunities.

The key ERDF programme objectives to Tackling Poverty and Social Exclusion include:

- A focus on the creation of jobs and growth providing employment opportunities for those who are out of work. For example, through increasing the competitiveness of SMEs;
- Tackling barriers to employment. For example, addressing poor skills and lack of childcare through the ESF, complemented by addressing transport barriers to accessing employment through the ERDF and;
- Focusing on growth. For example, through support for key knowledge-based sectors through the ERDF, aligned with skills development interventions enabling those

experiencing in-work poverty to access more highly-skilled, better paid jobs through the ESF.

There are no specific case-level indicators under this theme for the CUPHAT project, as identified in the Annex 9 of the application are:

3.4.7 Data analysis

The accommodation provider surveys, interviews, visitor surveys and stakeholder engagement provided a rich data source that has been analysed in order to reflect on the key questions/data requirements (A-H) and to evaluate the impact of the project on tourism and engagement with cultural and natural heritage within the four coastal upland areas. The method of data analysis is outlined in Table 8.

Table 8 - Final evaluation - data analysis methods

Approach	Data analysis methods
Review of project activities	<ul style="list-style-type: none"> • Project documentation collated and tabulated in MS Excel • Textual analysis of project documentation
Accommodation provider surveys	<ul style="list-style-type: none"> • Numerical data will be collated and presented in tabular form to enable cross-tabular quantitative analysis in accordance with different variables. • Content analysis of qualitative data.
Interviews	<ul style="list-style-type: none"> • Transcription using Otter ai and content analysis of the transcripts. Use of quotes as evidence to support emerging findings.
Overseas visitor surveys	<ul style="list-style-type: none"> • Numerical data will be collated and presented in tabular form to enable cross-tabular quantitative analysis in accordance with different variables. • Qualitative analysis: summarising; narrative accounts of each visit; thematic analysis; coding and categorising.
Stakeholder Engagement	<ul style="list-style-type: none"> • Numerical data will be collated and presented in tabular form to enable cross-tabular quantitative analysis in accordance with different variables. • Qualitative analysis: summarising; narrative accounts of each visit; thematic analysis; coding and categorising.

3.4.8 Reporting

This draft end-of-project evaluation report (D3) details the outcomes of the work, in addition to including detailed stakeholder/participant feedback and recommendations on how to best ensure the long-term impact of the project.

4.0 FINDINGS

This section summarises the findings from the different survey techniques.

4.1 INTERIM REVIEW

The review of secondary data and information gathered through CUPHAT, showed that there were differences in the data sets available in Wales and Ireland, with the surveys often being based on different metrics. This meant that making direct year on year comparisons, was not always possible. The data sets were also subject to variation as a result of the Covid-19 pandemic, with differences occurring prior too, during, and since the pandemic. This impacted on which year could be considered a baseline when analysing any changes due to CUPHAT activity.

The Covid-19 pandemic had a devastating impact on the tourism sector across Wales and Ireland. Lockdown measures and travel restrictions, which had to be imposed by Governments to contain the spread of the disease, meant that the vast majority of accommodation businesses had to remain closed for prolonged periods of time in 2020 and the beginning of 2021.

However, the uncertainty and complications around travelling abroad encouraged more people to holiday in their own country during the summer of 2021 and so gave the tourism sector a boost in domestic visitors in the latter half of 2021. This has meant there are certain limitations to looking at WEFO metrics such as overseas visitors which have been skewed due to the impact of COVID-19 restrictions during the pandemic and afterwards.

The data has shown that there has continued to be a significant impact on both domestic and international tourism in the four CUPHAT areas. However, the data is showed that numbers are starting to return to pre-Covid levels and in some instances exceed pre-Covid levels.

It is possible that 2023 will see more people move back to holidaying abroad. This may result in an increase in overseas visitors to the CUPHAT areas. However, it may also result in lower numbers of domestic visitors to the CUPHAT areas, who were previously either restricted or reluctant to travel further afield, now choosing to travel abroad. Therefore, this is considered in end of project evaluation of the number of visits and the reasons for any observed changes. These changes will need to be observed over a longer term once new 'normal' patterns of travel emerge.

Where the metrics aligned, the data was compared and analysed with respect to the eight key data requirements. All the findings and the analysis are presented in the full report that is available separately from the CUPHAT team, and the analytical headlines with regards to the key indicators are highlighted in the following sections along with the results of the gap analysis and final baselines.

4.1.1 Analysis Data Requirement A - Number of visitors

The data that is available for visitors gives some indication for Wales-wide and Ireland-wide visitor numbers and, in Ireland there is also data available for Wicklow and Wexford but no data specific to the CUPHAT project areas. There was also some data available on overseas visitors for both countries (only data from 2019 for Wales).

The data shows how Covid-19 caused difficulties across all sectors of the tourism industry in both countries; in particular for hostels and bunkhouses, which have struggled more to bounce back, it also shows that the impact is still apparent particularly in Wicklow, Ireland. For other types of accommodation, and in the other three CUPHAT areas the most recent figures do show positive signs of recovery of visitor numbers.

In summary, analysis of the secondary data has not provided an accurate baseline of the number of visitors to each coastal upland area during a fixed period in 2021-22 or the proportion that are from overseas. However, it shows that there are significant numbers of visitors (including overseas visitors) to both countries.

The data also shows the potential for more regenerative tourism, for example the Wales Overseas Visitors Survey had a high percentage of visitors who were classed as ‘adventurers’ and ‘explorers’ and who also wanted a visit that was distinctly Welsh. Future marketing through CUPHAT could further capitalise on this market in the future.

4.1.2 Analysis Data Requirement B - Time Spent

Analysis of the secondary data shows a range of length of stay in both countries. Figures from different surveys in Wales vary from 3.7 to 4.11 nights and in Ireland vary from 2.3 to 5.6 nights. Although this does not provide an accurate baseline of the time spent by visitors in each of the four areas, the figures of 3.8 nights for Wales and 3.2 nights for Ireland are proposed as a starting point.

4.1.3 Analysis Data Requirement C - Spend

The available spend data sets for Wales and Ireland cannot be directly compared as they are for use different metrics. However, they both show that Covid-19 has had an impact on spend.

The spend from surveys in Wales shows a £27 spend for 3+ hour leisure trip and £36 for a day trip in 2021 with the overnight average spend varying from £159 in 2020 to £198 in 2021.

The spend from surveys in Ireland shows average holiday spend of €365 per capita in 2019. Data also shows a recent increase in spend in Wexford and Wicklow counties by all visitors compared to pre-Covid levels.

In summary, although the available data does not provide an accurate baseline of the spend in each of the four areas, the figures of £178 for an overnight trip and £36 for day trips in Wales and €365 per capita for Ireland are proposed as an initial baseline.

4.1.4 Analysis Data Requirement D-Engagement with Heritage

The data shows that visitors to Wales and Ireland including to the four coastal upland areas are engaged with the natural, cultural and historic heritage. The types of engagement with heritage include visiting historic attractions and sites, wildlife watching, walking and visiting a country/forest park and visiting religious sites. These are seen particular strengths of the areas and something that set them apart as a holiday destination. In particular important elements of the local heritage in Wales includes Welsh ancestry and Welshness and in Ireland Irish music and genealogy.

There are a number of specific local organisations within the areas that aim to engage visitors with the local heritage of the area through different types of experiences. Some data is available on numbers; however, these are not comprehensive.

The data shows that the heritage of the four areas is a key strength and could be used to attract and provide further visitor opportunities in all the project areas where there is known to be an appetite for cultural or heritage experiences. This will help to develop more regenerative forms of tourism leading to greater levels of appreciation of the areas and more respect of the local environment.

4.1.5 Analysis Data Requirement E-Challenges

All the CUPHAT areas have experienced challenges due to the impact of the Covid-19 pandemic and lockdown restrictions limiting travel. Since restrictions have been lifted and there are more opportunities for travel other challenges and barriers have had an impact on all the areas, this includes issues related to the cost of living and energy prices, difficulties in recruiting, the remoteness of the areas and related transport issues and the lack of promotion and lack of facilities. These challenges can lead to tourists not spending enough time or money in the areas so are key to unlocking the tourism potential.

Although some of these issues, such as rising cost of living, are beyond the ability of CUPHAT to solve, many of the CUPHAT activities will help to overcome these challenges for example through greater promotion of cultural, natural and heritage tourism, development of a themed marketing strategy, improvement of the tourist experience at existing cultural and natural heritage sites, identification and creation of new sites, experiences or businesses. Therefore, the success of CUPHAT can be measured by determining whether it has overcome some of these key challenges.

4.1.6 Analysis Data Requirement F-Benefits to businesses

The available data provides some indication of people employed in the CUPHAT areas, but it is not comprehensive. In summary, analysis of the secondary data has not provided an accurate baseline of the benefits to businesses, however it shows that there are significant numbers of jobs that are dependent on the tourism industry sector in each of the four areas. This includes accommodation providers, pub and restaurants, heritage site operators, visitor attractions, tour operators, local producers and various support organisations.

4.1.7 Analysis Data Requirement G- Heritage draw

The data shows that the natural, cultural and historic heritage are key motivators for people visiting the four CUPHAT project areas. The available data provides a sense of what the areas have to offer including natural landscape, wildlife, cultural and built heritage, ancestry and local distinctiveness.

CUPHAT have worked with local communities to consider the opportunities for tourism in the four coastal upland areas. Through this work there is a better understanding of what community members would like to learn more about and what support they might need to help them improve or establish their tourism businesses using heritage as the key draw. The key opportunities include making the most of the heritage the areas have to offer through better promotion and marketing, having more of a focus on heritage visitors, capitalizing further on opportunities for low impact / slow tourism and integrating tourism into the local communities.

This provides an indication that more could be made of these aspects to encourage more people to visit and spend time in the areas, making the most of the potential the areas offer for regenerative forms of tourism which would have less of an impact on the natural and cultural heritage. There is a need to strike a balance between encouraging more people to visit whilst also protecting the special qualities of the areas, such as tranquilly and remoteness, that make for a positive visitor experience.

4.1.8 Analysis Data Requirement H- Promotion of heritage

The data shows that friends and family and the internet are key sources of information for people choosing and planning their visits. The data collected by CUPHAT also provides some good indications of how community groups and local enterprises are currently engaged with the cultural and natural heritage of the areas and how they promote these aspects to visitors through a variety of activities and experiences.

Many local groups are in a good position to be able to use their local knowledge and networks to support and promote the heritage further in the future. CUPHAT activities will be able to build on this through the development of a tourism network and greater marketing of the area, which has the natural, cultural and historic heritage at its core.

There is also a sense that there needs to be a balance between encouraging visitors and over-promotion which could itself lead to issues. Again, this highlights the importance of encouraging more regenerative forms of tourism.

4.1.9 Baseline indicators

Table 9 identifies the potential baselines which can provide a starting point from which to assess the impact of CUPHAT on tourism and heritage in the four coastal upland areas. The main gaps in the data collection requirements A-H for CUPHAT were also identified, with the aim that the CUPHAT evaluation surveys as part of the end of project evaluation would collect additional primary data to fill those gaps in order to create a stronger baseline or where further

information is required or whether it is outside the scope of the current study and timescale. These are included in section 4.

Table 9 - Possible baselines indicators for the key data requirements

Key Data Requirements	Baselines	
	Wales CUPHAT areas	Ireland CUPHAT areas
A. Number of visitors	NA	NA
B. Time spent	3.8 nights	3.2 nights
C. Spend	Overnight trip £178 Day trip £36	€365 per capita
D. Engagement with heritage	The Natural and historic heritage are key motivators for visitors including Welsh ancestry, wildlife attraction, wildlife watching, walking, visit a castle or other historic attraction, visit a beach, visit a country/forest park. There are opportunities to use heritage to engage and attract more visitors.	The natural, cultural and historic heritage are key motivators for visitors including hiking and visiting heritage sites such as castles or museums. There are opportunities to use heritage to engage and attract more visitors.
E. Challenges	<ul style="list-style-type: none"> • Remoteness. • lack of digital connectivity. • Lack of facilities (toilets/cafes), activities during bad weather and promotion. • Transport issues. • Recruitment crisis. • Rising day to day running and living costs. 	<ul style="list-style-type: none"> • Remoteness. • lack of promotion. • Lack of facilities (some of which are shut on certain days). • Transport issues. • Rising day to day running and living costs.
F. Benefits	NA	NA
G. Extent heritage encourage visitors	The natural and historic environment are key motivators for visitors to Wales and to the 2 project areas, so this could be used to attract more respectful visitors and help influence behaviour.	Cultural and natural heritage of the areas could be used to encourage more people to visit and spend time in the areas.
H. Community groups engaged with promotion	Internet is a key source of information for visitors.	Internet and friend and family are key sources of information for visitors.

4.2 CUPHAT ACTIVITY

The evaluation considered whether the anticipated outputs and outcomes were achieved as well as whether there were any unexpected outcomes. The CUPHAT project team has conducted ongoing monitoring to inform this part of the evaluation. Table 10 summarises the achievements against the target results indicators. The table shows that most of the targets were achieved, those that remain amber include a narrative to explain either why the target wasn't achieved or when it will be.

Table 10: CUPHAT indicators and targets assessment

Results indicators (outputs / outcomes)		RAG Assessment
Coastal upland communities participating in cross-border cooperation around cultural, natural and heritage tourism (A total of 12 i.e., 3 in each coastal upland area).		
A new tourism network created, which will promote cultural, natural and heritage tourism within and between the 12 communities and 4 coastal upland areas.		
An increase of 5% in: – tourism numbers – spend in the 4 coastal uplands. Social media usage data information (and potentially face-to-face surveys) to track, measure and drive uptake.		
A sustainable tourism model piloted in the 4 coastal upland areas, which can be employed in other under-developed coastal uplands.		
4 FTEs in supported enterprises (one in each coastal upland area).		There are currently 2 in place and a further 2 planned / in progress.
Work Package 1 - Marketing and promoting coastal uplands (AU)		
1.1	Tourism Network connecting the coastal uplands.	
1.2	Joint Marketing Strategy for the coastal uplands.	
1.3	5 common themes identified to market the coastal uplands.	
1.4	Different types of tourists identified and targeted through different forms of marketing/promotion.	
1.5	Strategy and common marketing themes uploaded onto project website and other marketing/promotional material.	
Work Package 2 - Engaging with local communities		
2.1	80 Oral histories (selection of material uploaded onto the project website/app).	At time of writing, 75 were complete and the final 5 were due for completion by the end of the project.

Results indicators (outputs / outcomes)		RAG Assessment
2.2	20 Images relating to cultural and natural heritage uploaded onto the project website/app.	Exceeded with a possible total of 20 in each area by the end of the project.
2.3	12 Community events convened (one each in each area).	Exceeded with a possible total of 16.
2.4	Events organised in 19 schools to promote CUPHAT.	Events organised with 19 different classes across a number of schools, but not 19 different schools.
2.5	Artistic representations of cultural and natural heritage of the coastal uplands, with a selection used on website/displays etc.	
2.6	12 Tourist experiences developed, based on community activities (e.g., choir practices, hedge laying, music sessions etc.)	
2.7	Virtual events to promote dialogue between communities in the different coastal uplands.	
Work Package 3 - Citizen science		
3.1	19 Schools taking part in citizen science activities.	19 different classes across a number of schools, but not 19 different schools.
3.2	Citizen science activities undertaken targeted at tourists (ideally a total of 8 i.e., two each in each area).	
3.3	Pre-existing remote sensing data identified and fed into deliverables 3.1 and 3.2.	
3.4	Information generated from citizen science uploaded onto project website.	
3.5	Guidance/model outlining how citizen science might continue to be used to increase tourism.	
Work Package 4 - Sustainable livelihoods/entrepreneurial activities		
4.1	Survey of current entrepreneurial activity in the coastal uplands.	
4.2	8 additional businesses (ideally two each in each area).	8+ additional businesses were supported through the CUPHAT microenterprise and community groups support programme and had reached the action planning stage. It's too early to say that this has resulted in additional businesses being in place.
4.3	8 pre-existing businesses, enhanced (ideally two each in each area).	Exceeded as 8+ business benefit from the CUPHAT

Results indicators (outputs / outcomes)		RAG Assessment
		microenterprise and community groups support programme.
4.4	8 community development projects underway (ideally two each in each area).	Exceeded 8+ taken part in CUPHAT microenterprise and community groups support program.
4.5	Guidance/model to continue to increase tourism (post intervention).	
Work Package 5 - Digital technologies		
5.1	20 sites/landscapes digitally reconstructed and uploaded onto project website/app.	
5.2	20 artefacts digitally repatriated and uploaded onto project website/app.	
5.3	Pre-existing representations collated and uploaded onto project website/app.	
5.4	Website and app trialed and updated, containing accessible visual representations of cultural and natural heritage.	Website has been designed and information uploaded, however had not been trialed by the end of the project. The App was not complete.
5.5	Guidance/model outlining how digital technologies might continue to be used to increase tourism (post intervention).	
Work Package 6 - Project management and governance		
6.1	Collaboration agreement.	
6.2	Minutes of all meetings.	
6.3	Record of delivery against output indicators.	
6.4	Progress reports at six-monthly intervals.	
6.5	Reports on research.	
6.6	Financial reports for all institutions at required intervals.	
6.7	Claims to be submitted in a timely manner and managed on a six-monthly basis.	
6.8	Commissioning external evaluations of the project activities (at start and end of operation).	
Work Package 7 - Communication and dissemination		
7.1	Strong and positive public identity for CUPHAT.	
7.2	Engagement with public, coastal communities and stakeholders via CUPHAT presence on social media channels.	
7.3	Project website and Tourism Network web-forums that will include news of CUPHAT events and calls, facilitate dialogue and cultural exchange relating to	

Results indicators (outputs / outcomes)		RAG Assessment
	the work packages, and include all project reports and minutes.	
7.4	On-site displays and associated leaflets promoting cultural and natural heritage.	
7.5	App conveying information about cultural and natural heritage.	The App was not complete.
7.6	Provision of translated materials as needed.	
7.7	Branded material promoting CUPHAT.	

4.3 EVALUATION FINDINGS

As set out in section 3, the end of project evaluation included various types of surveys with different audiences over a period of several months from March to August 2023. The purpose was to evaluate the impact of CUPHAT and also to continue to build the baseline of data on tourism activity in the four coastal upland areas.

Table 11 shows the number of responses to the different surveys that were carried out. The overall number of responses to the different surveys were lower than expected despite contacting a large initial sample, using different techniques, sending reminders and using incentives.

Table 11 – Number of survey responses received

Survey Type	Contacted			Responses		
	Target	Actual	%	Target	Actual	%
Visitor survey (face to face)						
Wales	NA	Unknown	NA	NA	20	NA
Ireland	NA	Unknown	NA	NA	23	NA
Total	NA	Unknown	NA	NA	43	NA
Visitor survey (online)						
Wales	NA	Unknown	NA	NA	1	NA
Ireland	NA	Unknown	NA	NA	1	NA
Total	NA	Unknown	NA	NA	2	NA
Accommodation providers online surveys						
Cambrian Mountains	100	216	216%	25	8	32%
Mynydd Preseli	100	101	101%	25	4	16%
Wicklow Mountains	100	21	21%	25	13	52%
Blackstairs Mountains	100	76	76%	25	2	8%
Total	400	414	104%	100	27	27%
Accommodation providers interviews						
Cambrian Mountains	6	4	67%	3	2	67%
Mynydd Preseli	6	2	33%	3	1	33%
Wicklow Mountains	6	8	133%	3	4	133%
Blackstairs Mountains	6	1	17%	3	1	33%

Survey Type	Contacted			Responses		
	Target	Actual	%	Target	Actual	%
Total	24	15	63%	12	8	67%
Business interviews						
Cambrian Mountains	6	9	150%	3	2	67%
Mynydd Preseli	6	8	133%	3	2	67%
Wicklow Mountains	6	10	167%	3	1	33%
Blackstairs Mountains	6	8	133%	3	1	33%
Total	24	35	146%	12	6	50%
Stakeholder Engagement at Festivals (Surveys completed)						
Cambrian Mountains	NA	NA	NA	NA	6	NA
Mynydd Preseli	NA	NA	NA	NA	7	NA
Wicklow Mountains	NA	NA	NA	NA	3	NA
Blackstairs Mountains	NA	NA	NA	NA	3	NA
Total					19	

The findings demonstrate the impact of CUPHAT with the key impacts findings as follows for each of the surveys (these are covered in more detail in later sections):

Visitor surveys key findings

- **Potential to visit the coastal upland areas** – Very few people were aware of the coastal upland areas as places to visit, however on seeing marketing material produced by CUPHAT the majority, including overseas visitors, would be ‘quite or very likely’ to visit for at least a day visit and some for longer depending on factors such as available accommodation *inter alia*.

Accommodation surveys key findings

- **Awareness** - Overall 50% of the accommodation providers completing the survey were aware of the CUPHAT project.
- **Marketing** - Most popular method for marketing accommodation was online, through a third-party website (majority Airbnb), followed by marketing through a private website and word of mouth. Around a quarter of providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of activities undertaken within the CUPHAT project, but it was not stated how.
- **Potential to visit the coastal upland areas** - The views were mixed with more providers in the Cambrian Mountains stating they thought that the work CUPHAT had done would result in more overseas visitors coming to the coastal upland area. Some were unsure possibly because it was too early to tell.
- **CUPHAT has helped accommodation providers to overcome challenges or barriers** – Half of the accommodation providers surveyed in the Cambrian Mountains and the Wicklow Mountains that were aware of CUPHAT felt that the project had helped or will help them to overcome challenges or barriers. However, in the Blackstairs Mountains and Mynydd Preseli, none of those providers (2 in total) that were initially aware of the project felt that it had helped/will help them to overcome challenges or barriers.

- **Information provision about local heritage** - CUPHAT has helped a small number of accommodation provider to provide further information about their local heritage to their guests. As CUPHAT had not produced any specific material themselves when the survey was carried out, it is assumed that the CUPHAT activity had enabled these accommodation providers to provide either their own information about the areas or to source information produced by others.

Tourism business interviews key findings

- **Awareness** - Around half of those interviewed were aware of CUPHAT.
- **Marketing** - CUPHAT provided greater opportunities for improved marketing of the areas, particularly a well-timed, coordinated, targeted, professional campaign which would be extremely beneficial to the smaller tourist businesses which would hopefully encourage visitors to stay longer in the coastal upland areas. It's important to ensure a balance between promotion and keeping the areas unique rural appeal. It was hoped that improved marketing through CUPHAT could find a balance in attracting more regenerative tourism to the areas.
- **Engagement with heritage** - The areas could use the heritage and culture to encourage more people to visit the coastal upland areas and CUPHATs work on gathering information about local histories or objects of interest was useful to provide information for visitors.
- **Impact CUPHAT has had on tourism.** Some business felt it was too early to tell whether CUPHAT would make a difference as the project had only been running for a relatively short period of time and the outputs were still in the process of being completed and disseminated. However, some businesses were positive about CUPHATs potential to improve tourism in the four areas. The main impacts that CUPHAT had had or would have in the future were improved marketing (i.e. to improve the visibility of the areas, 'one stop shop' website to access information easily), networking between businesses (i.e. encouraging everyone to work together with widespread benefits for tourism as a whole for example creating a sense of community, developing basic amenities and facilities within a village and encouraging regenerative tourism) and supporting businesses to take forward their ideas.

Stakeholder engagement key findings

- **Understanding and engagement with local heritage**
CUPHAT has supported understanding and engagement with local heritage. More people were aware of the heritage, and it is hoped it will enable visitors to engage better with heritage in the future, however, there needs to be a strong legacy to ensure this take place. CUPHAT has also set local heritage in the wider context, creating a strong knowledge and a feeling of pride in the heritage. This has helped businesses understand the positive resources they have so that they can maximize their potential and pass this on to visitors.
- **Marketing and promotion** -CUPHAT has improved opportunity for promotion of the areas through the development of the website, communication, and a practical marketing strategy. Rural businesses are now more visible to tourists, and this should help lead to growth
- **Regenerative tourism** - CUPHAT has made a positive difference and has helped to deliver regenerative tourism in the areas.

- CUPHATs focus on helping, supporting, and giving confidence to local tourism businesses will help them to work towards a regenerative tourism approach (particularly in relation to environmental issues, citizen science, climate issues, local products and culture). CUPHAT was seen as a positive starting point for delivering change as it encouraged businesses to think about how they could be more sustainable.
- It is hoped that CUPHAT will encourage more visitors in the future, this depends on the project’s legacy.
- In order to ensure long-term sustainability there is a need to consider what will happen next and how to influence government policy.
- **Networking** - CUPHAT provided the opportunity for networking, connecting local small diverse businesses together to collaborate and understand better the opportunities to develop ideas and joint working. This included:
 - Creating a sense of community and belonging.
 - Learning from others, how they do things.
 - Learning about other things going on locally.
 - Opening up new opportunities.
 - A supportive network of start-ups.
- **Lessons learnt** - A key aspect highlighted that could have been done better was that of the project communication, for example promoting and advertising the events, as well as communication within the wider community. This highlights the challenge of a short-term project being able to fully embed in the community.
- **Legacy** - There is a need to continue supporting the areas and promoting them for tourism on a wider scale than has happened previously, either through a continuation of the project, or through government funding / policy. There is a need to ensure continued collaboration and engagement.

The following sections set out the findings from each of the different surveys in more detail including a summary of how the data collected has added to the baseline on tourism. Each section starts with a summary of the key findings from that particular survey. It then looks in more detail at the findings including graphs and tables of the responses and quotes where relevant to illustrate the findings.

4.3.1 Visitor survey responses

In total 43 visitor surveys were completed at the various locations in Wales and Ireland listed under section 3.4.2.2. These surveys were undertaken in tourist hotspots outside of the core CUPHAT project areas and focused on finding out whether visitors would be likely to visit the coastal upland areas in the future. The surveys captured the views of 102 people (52 in Ireland and 49 in Wales).

The key findings from the visitor surveys that either contribute to the baseline or demonstrate the impact of CUPHAT are as follows:

KEY FINDINGS - VISITOR SURVEYS

Findings that demonstrate the impact:

Potential to visit the coastal upland areas.

Very few people were aware of the coastal upland areas as places to visit, however on seeing marketing material produced by CUPHAT the majority, including overseas visitors, would be 'quite or very likely' to visit for at least a day visit and some for longer depending on factors such as available accommodation *inter alia*.

Findings that contribute to the baseline:

Demographics of visitors surveyed.

Overall, most visitors travelled from within the UK, but with a substantial proportion from the rest of Europe (21%) and elsewhere in world (23%). There was a higher proportion of overseas visitors interviewed in Ireland. A range of age, gender and type of visiting party was sampled, although due to the time of year (outside of the school holidays), there were more couples than families with children and more people from the older age ranges.

Information sources. Google searches and speaking to family and friends were the most common sources of information people used to help plan their visit. People also used leaflets, brochures, social media, tourist sites, guidebooks, review sites and accommodation booking sites to plan visits and also whilst on their visit but to much less extent. Other sources of information become more important whilst on the visit such as maps and signs on the roads that show the location of tourist sites, talking to accommodation hosts, tours operators and taxi drivers or other travelers.

Reasons for visits. The natural, cultural or historic heritage influences people's decision to visit a particular area. The main reasons for visiting were 'to enjoy the landscape, countryside or beach', 'to take part in informal outdoor activities' and 'to visit family and friends'. Whilst visiting, people undertook a wider range of activities and visited a variety of places whilst on their visit with the highest percentages visiting a castle or other historic attraction.

Barriers. The main barriers that would prevent visitors from exploring the heritage of an area were transport (including lack of public transport, parking, confidence in driving), lack of information and knowledge, access / mobility, time and availability of facilities / accommodation.

The following sections give an overview of the findings based on the responses which are outlined in full in Appendix 2 and 3.

4.3.1.1 Demographics

Table 12 shows the places that people had travelled from. Overall, most had come from within the UK, but with a substantial proportion from the rest of Europe (21%) and elsewhere in world (23%) which included the USA, New Zealand, Australia and South Africa. There was a higher proportion of overseas visitors interviewed in Ireland, potentially due to the location of the survey which was at a particular popular spot for tours. Visitors in Wales were predominantly from within the UK (80%).

Table 12 – Visitors permanent residence

	Permanent Residence	Number of groups surveyed (%)
Ireland	Ireland	1 (4%)
	Wales	0 (0%)
	The rest of the UK	6 (26%)
	The rest of Europe	7 (30%)
	Rest of the World	9 (39%)
	Total	23
Wales	Ireland	1 (5%)
	Wales	3 (15%)
	The rest of the UK	13 (65%)
	The rest of Europe	2 (10%)
	Rest of the World	1 (5%)
	Total	20
Total	Ireland	2 (5%)
	Wales	3 (7%)
	The rest of the UK	19 (44%)
	The rest of Europe	9 (21%)
	Rest of the World	10 (23%)
	Total	43

The tree map in Figure 7 demonstrates that a range of age, gender and type of visiting party was sampled, although due to the time of year (outside of the school holidays), there were more couples than families with children and more people from the older age ranges.

Characteristics of all the people who completed the visitor surveys (%)

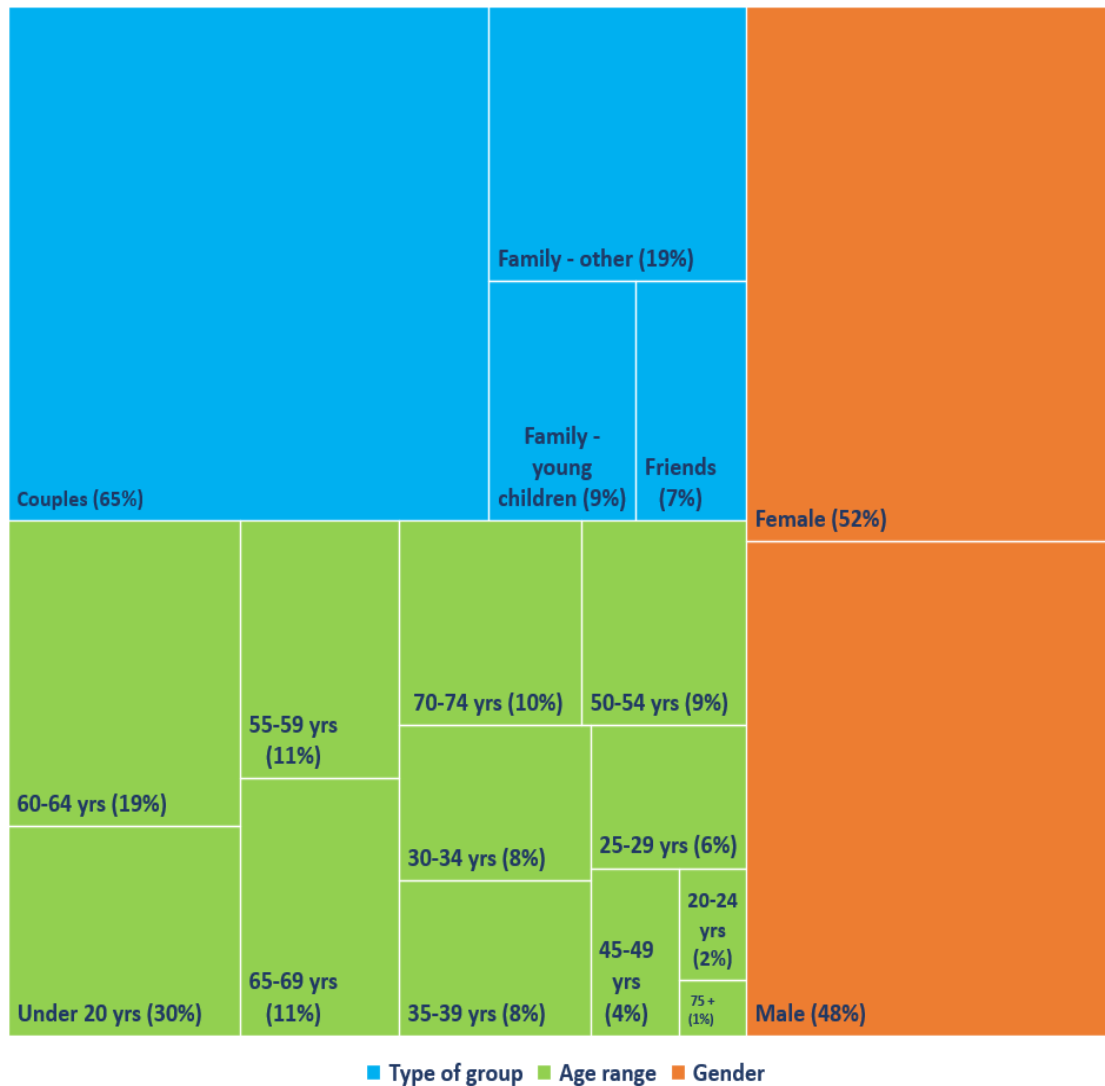


Figure 7 – Tree map of visitor demographics (Wales and Ireland face to face surveys)

4.3.1.2 Information sources used to plan visits

Visitors were asked what information they used to plan their visit and what they used whilst on their visit. Google searches and speaking to family and friends were the most common sources of information people used to help plan their visit:

- 70% of the visitors surveyed in Wales and 78% of visitors surveyed in Ireland used Goggle before their trip;
- 40% of the visitors surveyed in Wales and 65% of visitors surveyed in Ireland spoke to family and friends before their trip;
- People also used leaflets, brochures, social media, tourist sites, guidebooks, review sites and accommodation booking site but to much less extent.

Whilst Google is still an important source of information whilst on their trip, it was apparent from the survey that other sources of information become more important whist on the visit:

- 30% of the visitors surveyed in Wales and 35% of visitors surveyed in Ireland using Goggle whilst on their visit.

- 40% of the visitors surveyed in Wales and 39% of visitors surveyed in Ireland used leaflets or brochures whilst on their visit.
- A number of other sources were mentioned including using maps and signs on the roads that show the location of tourist sites, talking to accommodation hosts, tours operators and taxi driver or other travellers.

4.3.1.3 Reasons for visits

The main reasons given for visiting the areas differed between the visitors surveyed in Wales and Ireland. In Wales, the most popular reasons to visits were to enjoy the landscape, countryside or beach (35%) and to take part in informal outdoor activities (35%) and in Ireland it was to take part in informal outdoor activities (30%) and to visit family and friends (26%).

However, the range of activities that people were undertaking and places that people visited covered a much wider range. Figure 8 shows that there were similar activities being undertaken by visitors to both Wales and Ireland, with high percentages visiting historical sites / cultural sites / religious sites (65%), enjoying the landscape / countryside / beach (63%), taking part in informal outdoor activities (56%) and sightseeing or visited specific attractions (49%). More visitors surveyed in Wales were visiting the countryside and beaches and more visitors to Ireland were visiting family and friends.

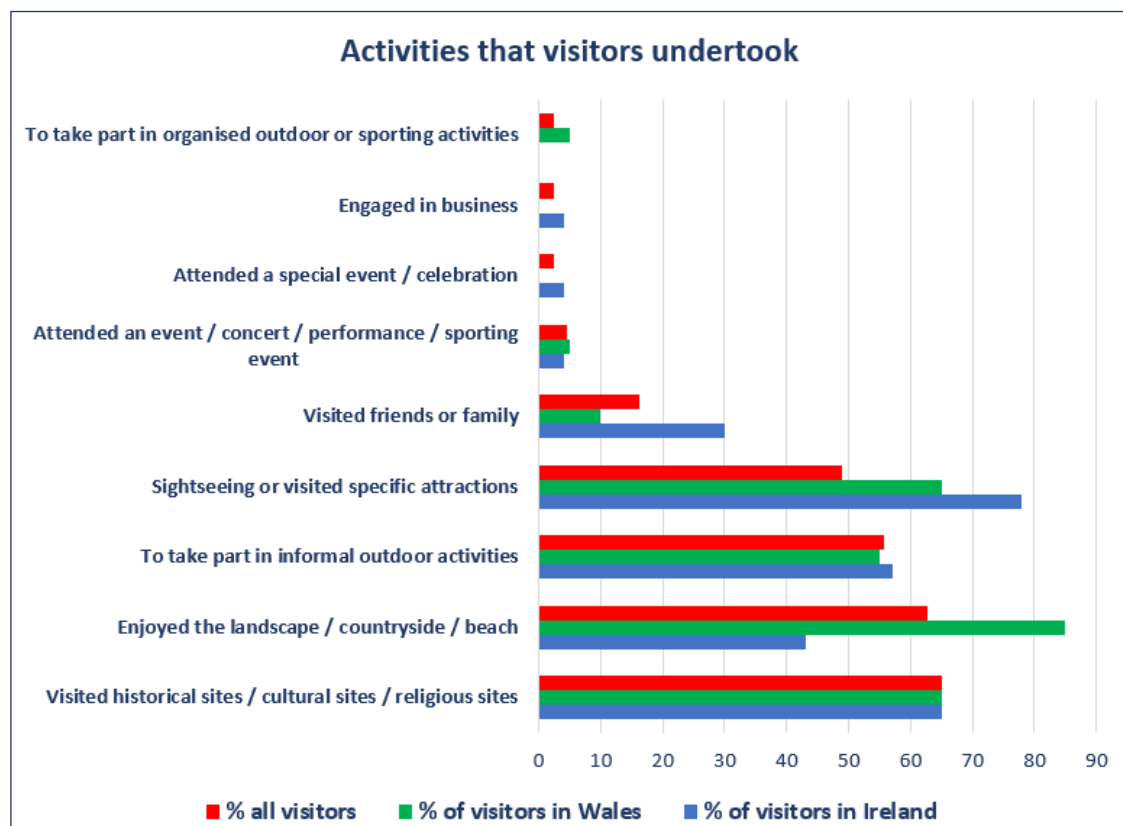


Figure 8 – Activities that visitors surveyed in Wales and Ireland undertook on their trip.

Figure 9 shows that visitors to both Wales and Ireland were visiting similar places, with high percentages visiting a castle or other historic attraction e.g., church, cathedral, monastery (77%).

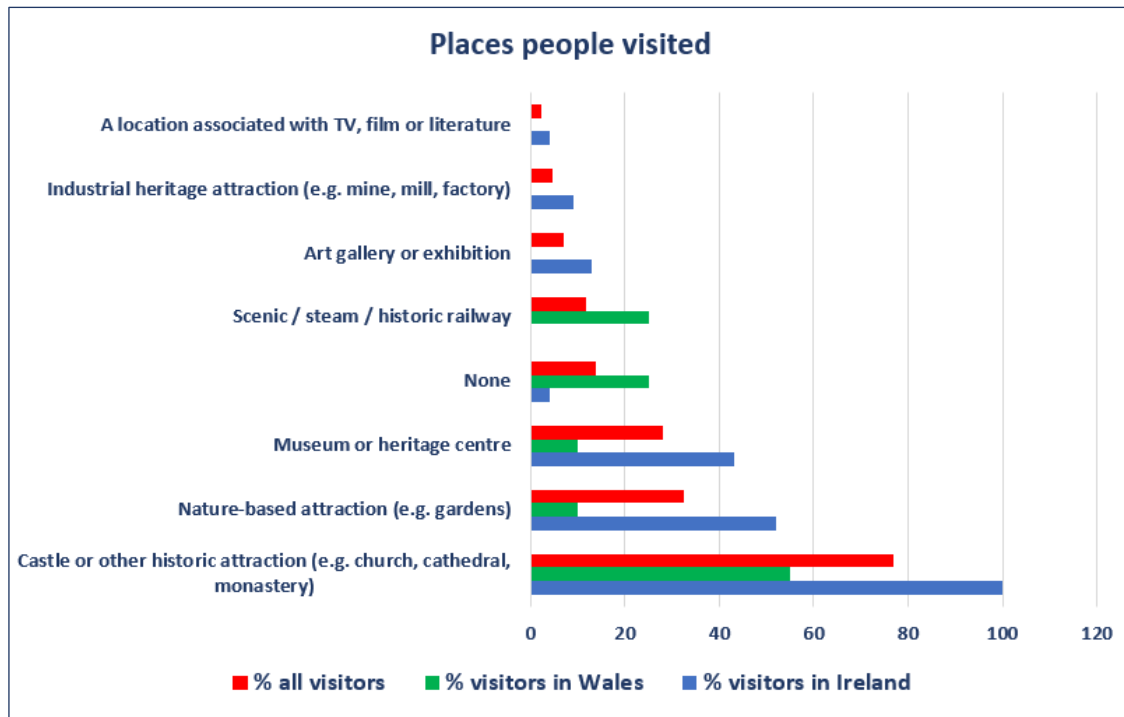


Figure 9 – Places that visitors surveyed in Wales and Ireland visited on their trip.

In a separate question the survey showed that many visitors are likely to decide a location to visit based on the natural, cultural or historic heritage of an area. In Wales 60% and in Ireland 83% were either very likely or quite likely to take into account heritage in deciding where to visit.

4.3.1.4 Potential to visit the coastal upland areas

The visitors were asked whether they had seen or heard any advertising, marketing or publicity about the natural, historic or cultural heritage of the areas within the CUPHAT project. This included whether they were aware of the coastal upland areas or knew anything about potential walks and things to do or visit or places to stay in these areas. Figure 10 demonstrates that very few were aware of these areas as place to visit, with similar levels of awareness of visitors in Wales and Ireland.

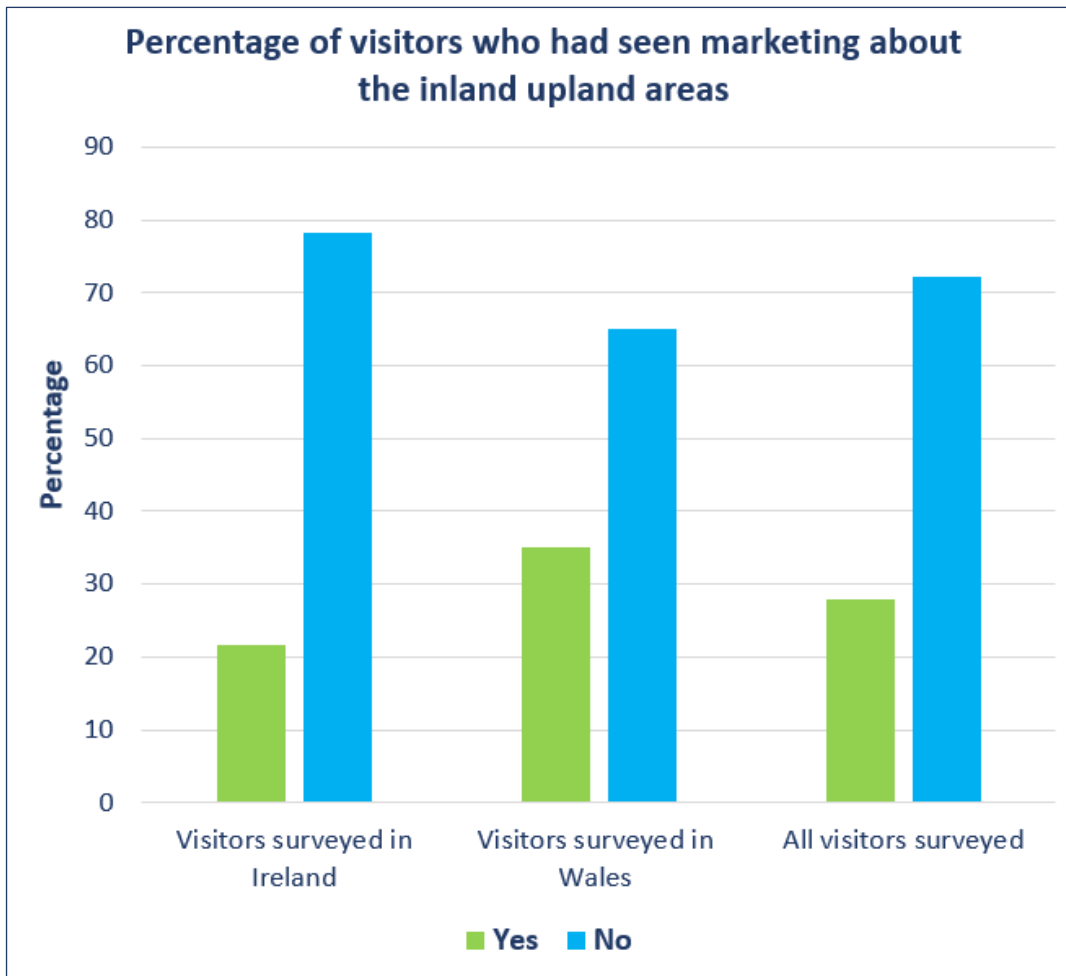


Figure 10 – Visitors awareness of the coastal upland areas

The visitors who were interviewed were shown some images of the project areas which had been produced through CUPHAT which showed some aspects of the landscape and historic heritage. They were then asked whether seeing advertising like this or knowing about the natural and cultural heritage of the coastal upland area would encourage them to visit, stay in or explore that area. Figure 11 shows that majority would be 'quite or very likely' to visit and importantly no one surveyed responded 'very unlikely'. Some of those that did respond 'quite unlikely' or 'neither likely or unlikely' said this was because they were visiting family so this was the priority for visiting certain areas so had little time to do other trips. Overall, 43% were 'very likely' to visit those areas.

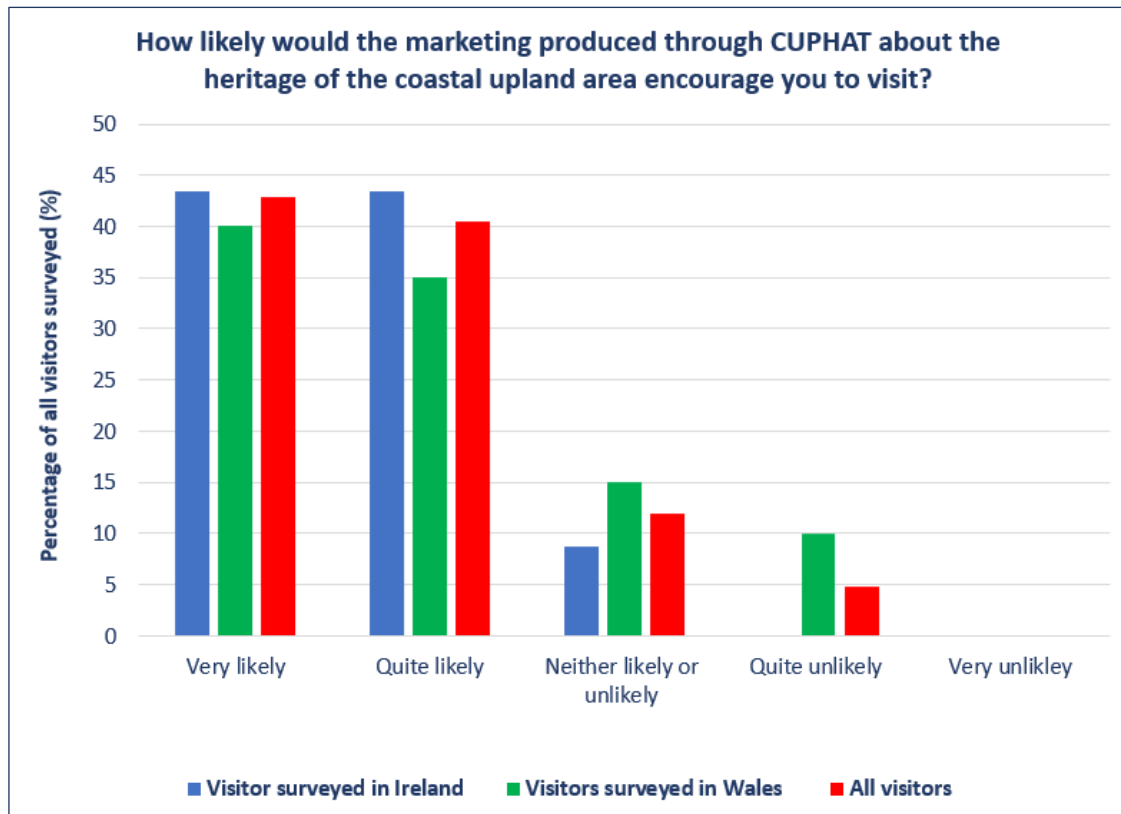


Figure 11– The likelihood of tourists visiting the coastal upland areas

The data can be further analysed to consider the response of overseas visitors only. Figures 12 and 13 shows that 46% of the overseas visitors surveyed who were visiting Ireland and 75% of the overseas visitors visiting Wales would be ‘very likely’ to visit the coastal upland areas.

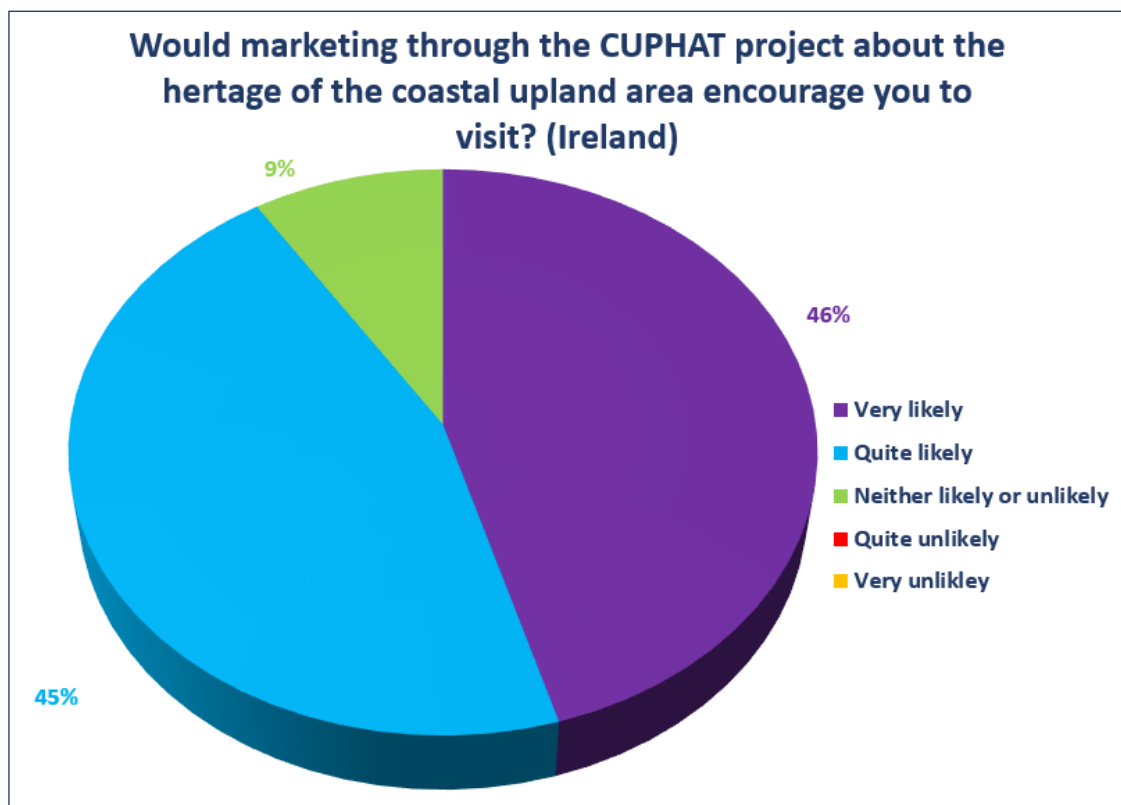


Figure 12 - The likelihood of overseas tourists to Ireland visiting the coastal upland areas

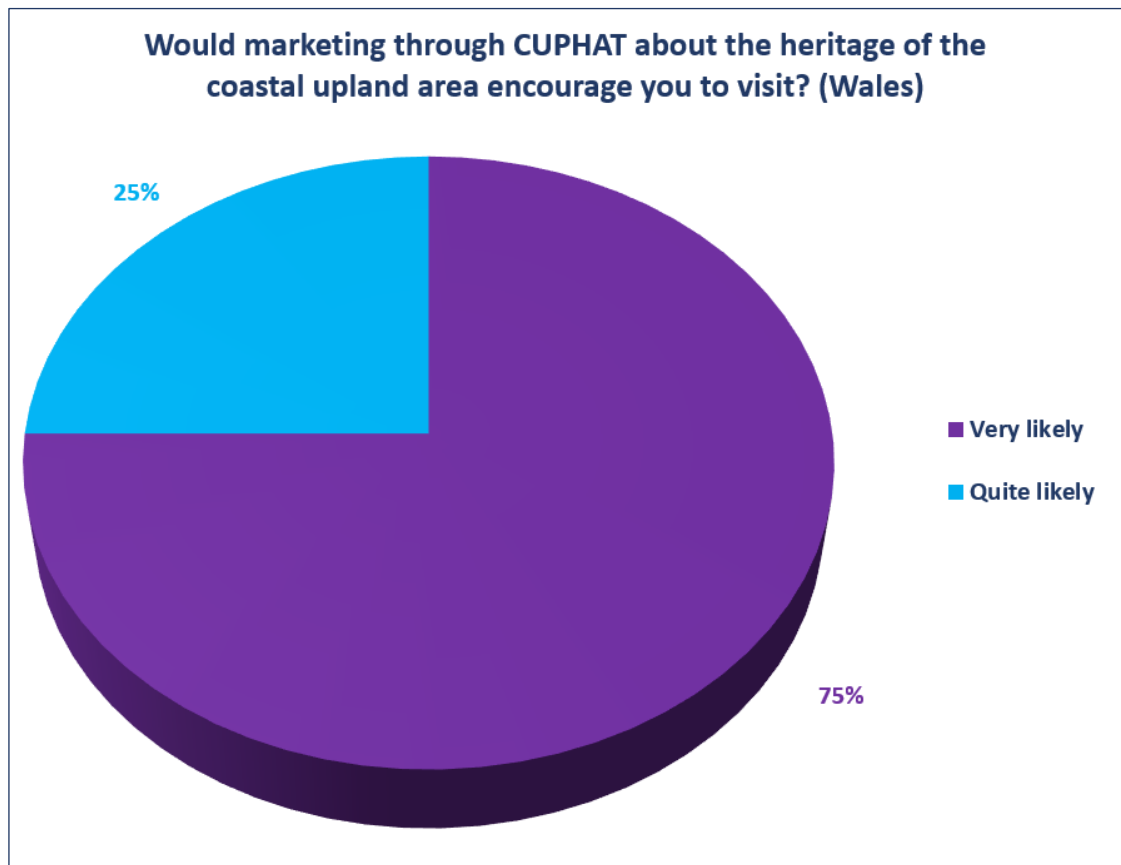


Figure 13 - The likelihood of overseas tourists to Wales visiting the coastal upland areas

Visitors were also asked how long they might stay in the coastal upland areas. The most popular option was as a day visit, this was stated by 60% in Wales and 39% in Ireland. 20% in Wales and 39% in Ireland said that they would visit for a couple of days with an overnight stay, but only 10% in Wales and 4% in Ireland thought they would stay for a week. However, in discussion many stated that it depended on a number of unknown factors such as available accommodation in the area, what there is to do etc, and if these factors were favourable then this could extend their length of stay.

The most popular time for visits was the spring and summer and the least popular was the winter. Many of those surveyed stated that they prefer to visit outside of school holidays, however this is likely to be a skewed result as the survey was undertaken outside of the school holiday so was always likely to include more people who are already traveling outside of the main school holidays.

4.3.1.5 Barriers

The survey asked visitors what barriers would prevent them from exploring the heritage of an area. The main barriers that were raised are shown in Table 13.

Table 13 – Main barriers that would prevent visitors from exploring the heritage of an area

Barriers	Number of people surveyed who identified the barrier	
	Wales	Ireland
Transport	8	9
Lack of information and knowledge	6	4
Access / mobility	5	7
Time	3	4
Facilities / accommodation	3	3

- **Transport**

The main barrier raised was in relation to transport, in particular the lack of public transport, the fact that these areas are not included as part of a tour, issues related to parking (cost, safety, availability and knowing where to park), and the difficulty and lack of confidence in driving on small rural roads.

“Small roads are difficult to drive on in camper vans” (Overseas visitor to Wales)

- **Knowledge and information**

Knowing about the existence of the areas was also seen as a major barrier. If visitors are not aware of an area, they will not be able to visit or may not be confident going into unknown areas where little is known about what there is to do and whether there are any facilities, parking etc. Some of the issues in relation to knowledge and lack of information are summed up by the following comments made in the surveys.

“Generally visit what’s easy to find out about.” (Overseas visitor to Wales)

“Difficult to find out about many places as information is in many different places / website - not all in one place - therefore time consuming to research.” (Overseas visitor to Ireland)

“Go where I already have been when growing up so places, I already know or where my relatives know.” (Overseas visitor to Ireland)

- **Access/ mobility**

Access and mobility were a barrier for a lot of people which meant that they were unable to visit more rural upland areas, particularly for walking, due to their own health issues which impacted on their walking ability. When visiting areas, it was important to be able to find out how accessible places are before visiting.

- **Time**

Time is seen as a limiting factor, there are only so many places that can be visited on a trip and people felt that they have to prioritize, and this can often mean seeing the main attractions with no time for more remote visits which may be off the beaten track. People did not want to miss out on some of the more famous landmarks.

- **Facilities / accommodation**

Visitors feel that a lack of amenities and facilities such as places to eat, stay and things to do would be a barrier. In particular finding accommodation for 1-2 days rather than a whole week and sites that would accept camper vans. Those with young children would also be unlikely to visit areas where there wasn't much to do with the children.

“Difficult to find suitable sites for camper van anywhere in Ireland” (*Overseas visitor to Ireland*)

- **Others**

A number of other barriers were mentioned by one of two people including the following:

- Language i.e., Welsh signs should be in different font like in Ireland, so they stand out and are easier to read.
- Crowds
- Weather
- Cost
- Distance

4.3.1.6 Online visitor survey findings

There were only 2 visitor surveys completed, one in Wales and one in Ireland. The findings from these are presented in Appendix 3 and are summarised here.

- **Demographics**

The visitor to Wales was visiting Tregaron and was a family with no children from Wales in the 60-64 age range and the visitor to Ireland was visiting County Wicklow and was a family with older children visiting from overseas in the 40-44 age range.

- **Information sources used to plan visits**

Both visitors had used online sources to research their visit beforehand and the visitor to Wales had also used leaflets, and newspapers and magazines. During their visit similar sources were used and the visitor to Ireland also had advice from their accommodation provider.

- **Reasons for visits**

The reason for the visit to Wales was to visit historical, cultural, religious sites. They also enjoyed the landscape, countryside and beaches and did some sightseeing. The reason for the visit to Ireland was to take part in informal outdoor activities. They also visited historical, cultural, religious sites and sightseeing.

- **Potential to visit the coastal upland areas**

The online survey was aimed at visitors who were within the core CUPHAT areas and asked whether they would be likely to visit these areas again in the future. Both responded that they would be neither likely or unlikely to visit again but they were very likely to recommend the areas to a friend or relative.

- **Barriers**

The survey asked visitors what barriers would prevent them from exploring the heritage of the areas. No barriers were raised by the visitor to Wales and cost was raised as a barrier by the visitor to Ireland.

4.3.2 Accommodation survey findings

A total of 27 surveys were completed by the accommodation providers, this included 12 from the areas in Wales and 15 from the areas in Ireland. Although this is below the target of 50 responses it still provides a range of views that are analysed under a number of heading below.

The key findings that either contribute to the baseline or demonstrate the impact of CUPHAT are as follows for each of the surveys

KEY FINDINGS – ACCOMODATION PROVIDER SURVEYS	
Key findings that demonstrate the impact of CUPHAT	Key findings that contribute to the baseline
<p>Awareness. Overall 50% of the accommodation providers completing the survey were aware of the CUPHAT project.</p> <p>Marketing. Most popular method for marketing accommodation was online, through a third-party website (majority Airbnb), followed by marketing through a private website and word of mouth. Around a quarter of providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of activities undertaken within the CUPHAT project, but it was not stated how.</p> <p>Potential to visit the coastal upland areas - The views were mixed with more providers in the Cambrian Mountains stating they thought that the work CUPHAT had done would result in more overseas visitors coming to the coastal upland area. Some were unsure possibly because it was too early to tell.</p> <p>CUPHAT has helped accommodation providers to overcome challenges or barriers. Half of the accommodation</p>	<p>Visitors and occupancy</p> <ul style="list-style-type: none"> • The highest average room occupancy in 2022 was in the Wicklow Mountains and the lowest was in the Cambrian Mountains. • There was no consistency in changes in occupancy from pre Covid to 2022 across the four areas: Wicklow Mountains had the highest percentage of respondents reporting increases, followed by Cambrian Mountains and Mynydd Preseli; Blackstairs Mountains had no respondents reporting increases. • There was also no consistency in changes predicted for the 2023 compared to 2022: Cambrian Mountains had the highest percentage of respondents predicting increases, followed by Wicklow Mountains and Mynydd Preseli; Blackstairs Mountains had no respondents predicting an increase. • All except Wicklow (which was significantly higher) had low proportions of overseas visitors in

providers surveyed in the Cambrian Mountains and the Wicklow Mountains that were aware of CUPHAT felt that the project had helped or will help them to overcome challenges or barriers. However, in the Blackstairs Mountains and Mynydd Preseli, none of those providers (2 in total) that were initially aware of the project felt that it had helped/will help them to overcome challenges or barriers.

Information provision about local heritage.

CUPHAT has helped a small number of accommodation provider to provide further information about their local heritage to their guests. As CUPHAT had not produced any specific material themselves when the survey was carried out, it is assumed that the CUPHAT activity had enabled these accommodation providers to provide either their own information about the areas or to source information produced by others.

relation to domestic visitors staying; predictions for increases in the occupancy of overseas visitors for 2023 was high for the Wicklow, Cambrian and Blackstairs Mountains.

- In 2022 visitors stayed in the coastal upland areas for an average of 3.4 nights, with the longest stays in the Mynydd Preseli and the shortest stays in the Blackstairs Mountains.
- Accommodation sites in all four coastal upland areas were open for at least 9 months of 2022, with sites open longest in the Mynydd Preseli.

Reasons for visits. Guests visit the coastal upland areas mainly to enjoy the landscape/countryside/beach, to take part in informal outdoor activities, and to visit historical, cultural or religious sites.

Barriers to attracting guests. The biggest barriers were marketing or advertising constraints, poor transport links, remoteness, and the fact that the coastal upland areas are not more well-known.

Barriers to length of stay. The biggest barriers were lack of amenities or services (which includes public transport), lack of major tourist attractions, and lack of knowledge about what is available/on offer within the area. It was also noted that short-stays are, and will continue to be, common-place among walkers/cyclists.

Local natural, cultural and historic heritage

- The key natural features in the four coastal upland areas that attract people are mountains, forests, rivers, un-spoilt natural beauty, and quietness. In terms of historic/cultural heritage there are more differences, the Welsh language, Welsh-speaking, mining and crafts are key features in the Welsh areas and history

cultural/historic heritage and a Canadian connection a key aspect in Ireland.

- Visitors in all areas have a better level of awareness of the area's natural heritage compared to the local cultural or historic heritage.
- Between 20-50% of the accommodation providers have links with heritage site providers in their area and the majority provide their guests with information about the heritage of their local area.

The following sections give an overview of the findings based on the responses which are outlined in full in Appendix 4 (Wales) and Appendix 5 (Ireland).

4.3.2.1 Demographics

The proportion of respondents to the survey from each area are shown in Figure 14. In Wales, the majority of respondents' accommodation was located in the Cambrian Mountains and in Ireland, within the Wicklow Mountains. One of the main limitations of the data set, is that the sample of accommodation providers from the Mynydd Preseli and Blackstairs Mountains is small (4 and 2 respectively) which reflects the smaller number of providers that were identified and contacted to complete the survey.

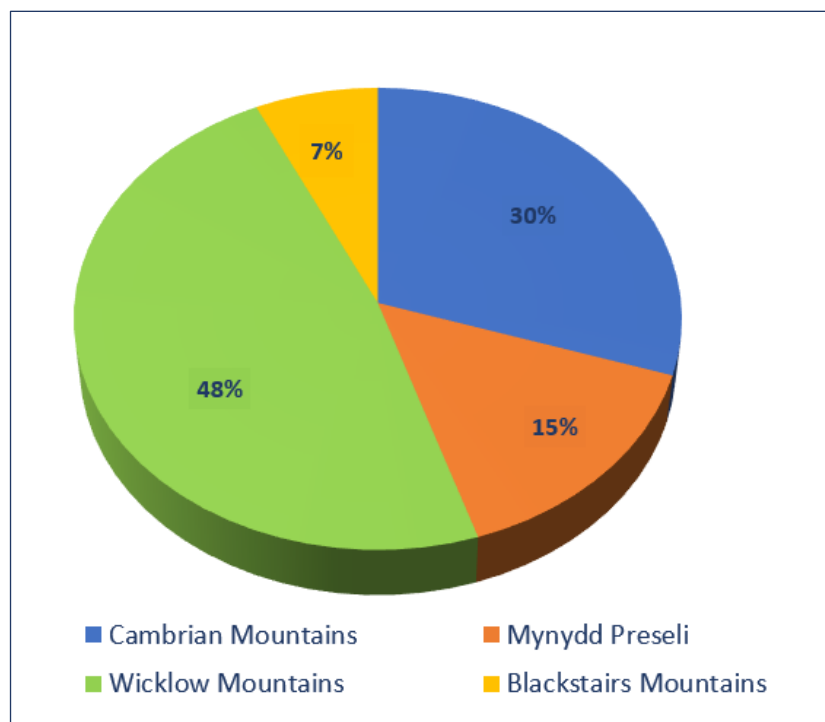


Figure 14. The proportion of respondents by coastal upland area

Accommodation providers were located in a range of communities within each of the coastal upland areas, as displayed in Figure 15. However, in the Cambrian Mountains, 50% of respondents were based in Tregaron, and within the Wicklow Mountains, 30% located in Shillelagh. In the Blackstairs the respondents were from the Carlow side of the mountains and not the Wexford side which was the main area of study.

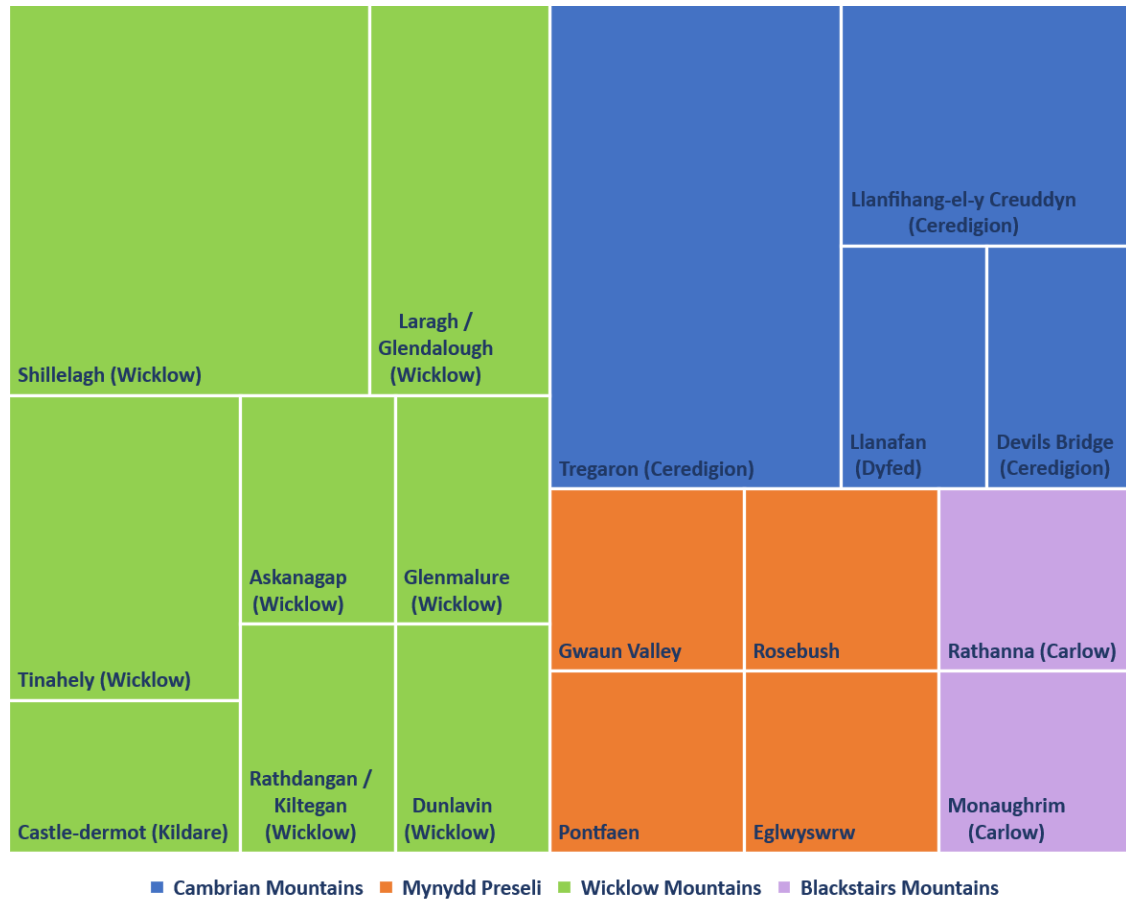


Figure 15. The communities within which accommodation providers are located.

As seen in Figure 16 the majority accommodation type was self-catering in all four coastal upland areas, although in the Blackstairs Mountains there was an even split between self-catering and serviced accommodation.

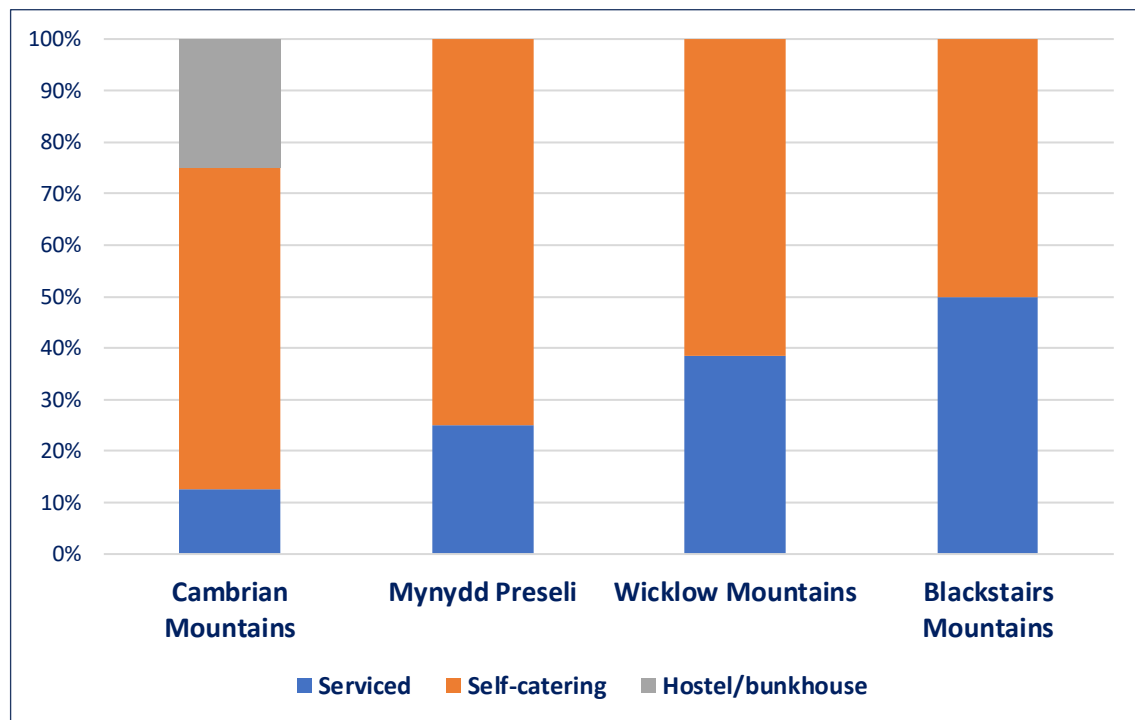


Figure 16. The main type of accommodation provided by survey respondents.

Figure 17 shows whether the accommodation providers were aware of CUPHAT before receiving the invite to complete the survey. It shows that generally awareness was 50/50, with approximately 62% of providers within the Wicklow Mountains and 50% of those located in the Cambrian Mountains and Blackstairs Mountains being aware of the CUPHAT project, as opposed to just 25% in Mynydd Preseli. However, it can also be assumed that the process of doing the survey has helped increase awareness of the CUPHAT project, at least by those who completed the survey.

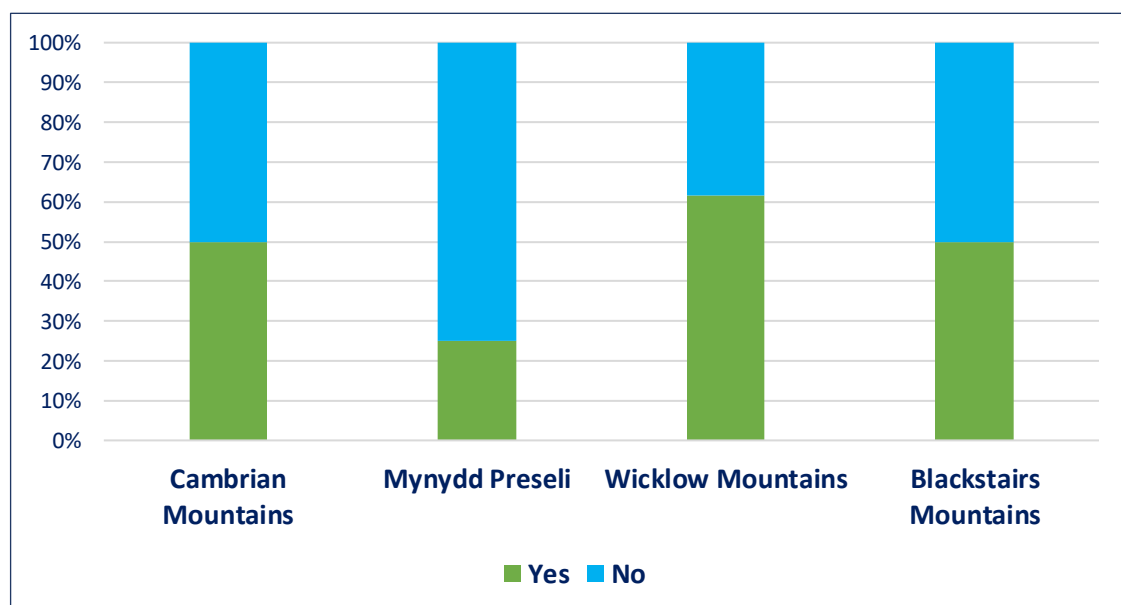


Figure 17. The proportion of respondents who are aware of the CUPHAT project

4.3.2.2 Visitors and occupancy

Figure 18 shows the average room occupancy in 2022 based on the data provided by the accommodation providers. The highest average room occupancy was in the Wicklow Mountains at 64%, which was double the average room occupancy in the Cambrian Mountains (32%), which was the lowest from of each of the four coastal upland areas.

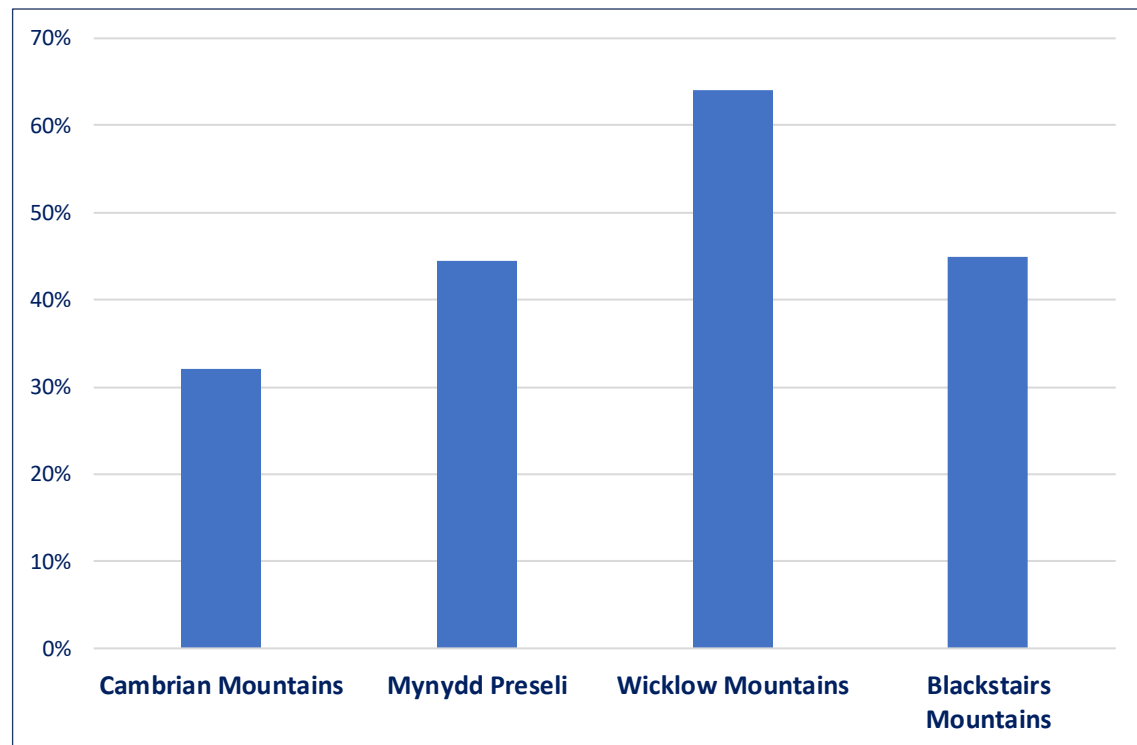


Figure 18. Average room occupancy in 2022

Figure 19 shows how the average room occupancy levels in 2022 varied from occupancy levels in 2019, prior to the Covid-19 pandemic.

Based on the information provided, occupancy levels in the Blackstairs Mountains have not seen the increases that other coastal upland areas have seen; however, it is important to reference that only two accommodation providers from the Blackstairs Mountains responded to the survey.

However, 39% of accommodation providers in the Wicklow Mountains stated that average room occupancy levels in 2022 had increased by up to 25% since 2019, with an additional 30% stating that they had remained at a very similar level. This would seem to be consistent with the high average occupancy levels of 64% within the Wicklow Mountains in 2022.

However, although the Cambrian Mountains had the lowest occupancy levels of all four coastal upland areas, with 32% in 2022, Figure 19 indicates that 29% of accommodation providers stated that occupancy levels had increased by 11-25% from 2019, with an additional 29% stating that they had remained at a very similar level.

In the Mynydd Preseli, 25% of accommodation providers stated that occupancy levels for 2022 had increased by 51% or more in comparison to 2019 however, 75% said that these had

decreased, by between 6 and 25%. However, the representativeness of these figures are limited by the lack of responses from accommodation providers in the Mynydd Preseli (4 in total).

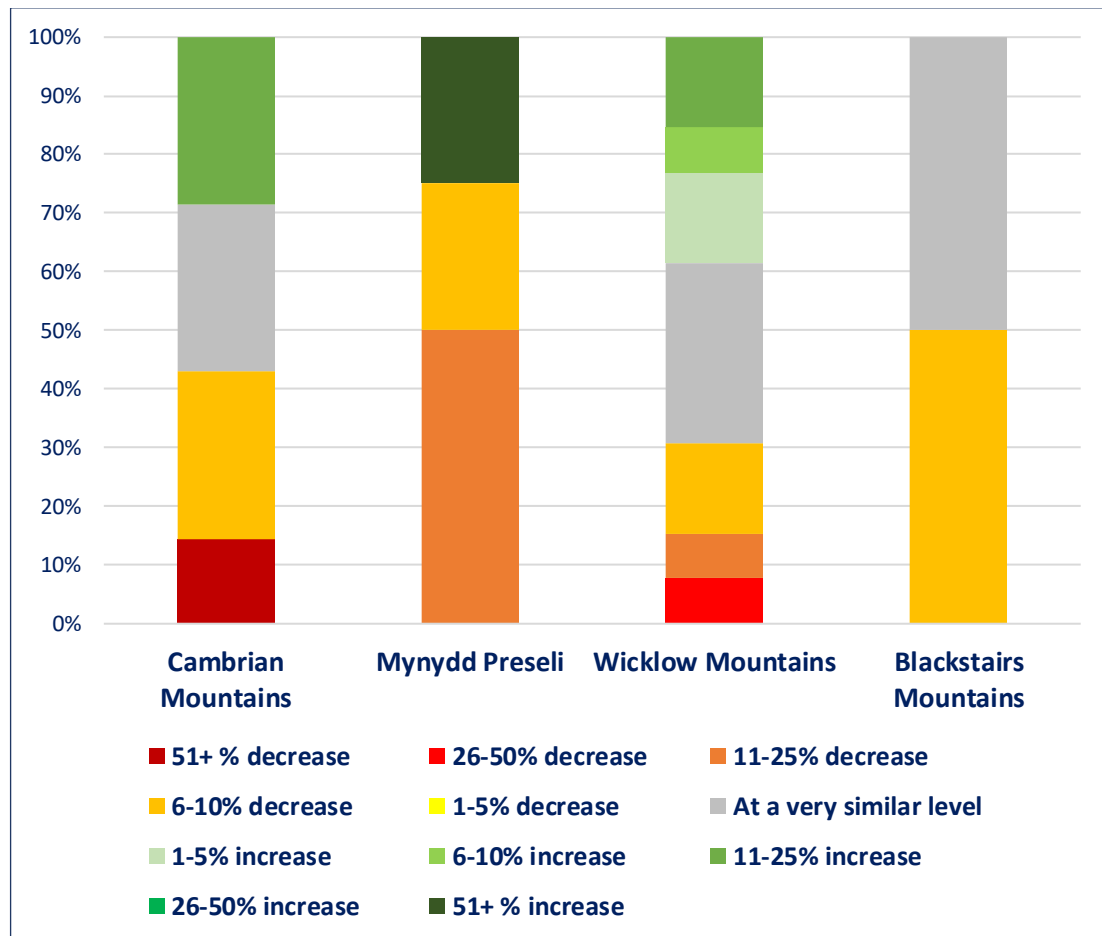


Figure 19. Average room occupancy in 2022, compared to 2019

Figure 20 shows how respondents predict how the average room occupancy levels in 2023 may change in comparison to 2022. Accommodation providers in the Cambrian Mountains were most positive, with 75% predicting an increase and 38% an increase of between 6 and 25%. Conversely, in the Mynydd Preseli, only 25% predicted a small increase of 1-5%. In Ireland, in the Wicklow Mountains, 46% of accommodation providers envisaged an increase in occupancy levels of between 6 and 25%, as opposed to those in the Blackstairs Mountains, with 50% of accommodation providers predicting occupancy levels to remain at a very similar level and none predicting an increase compared to 2022.

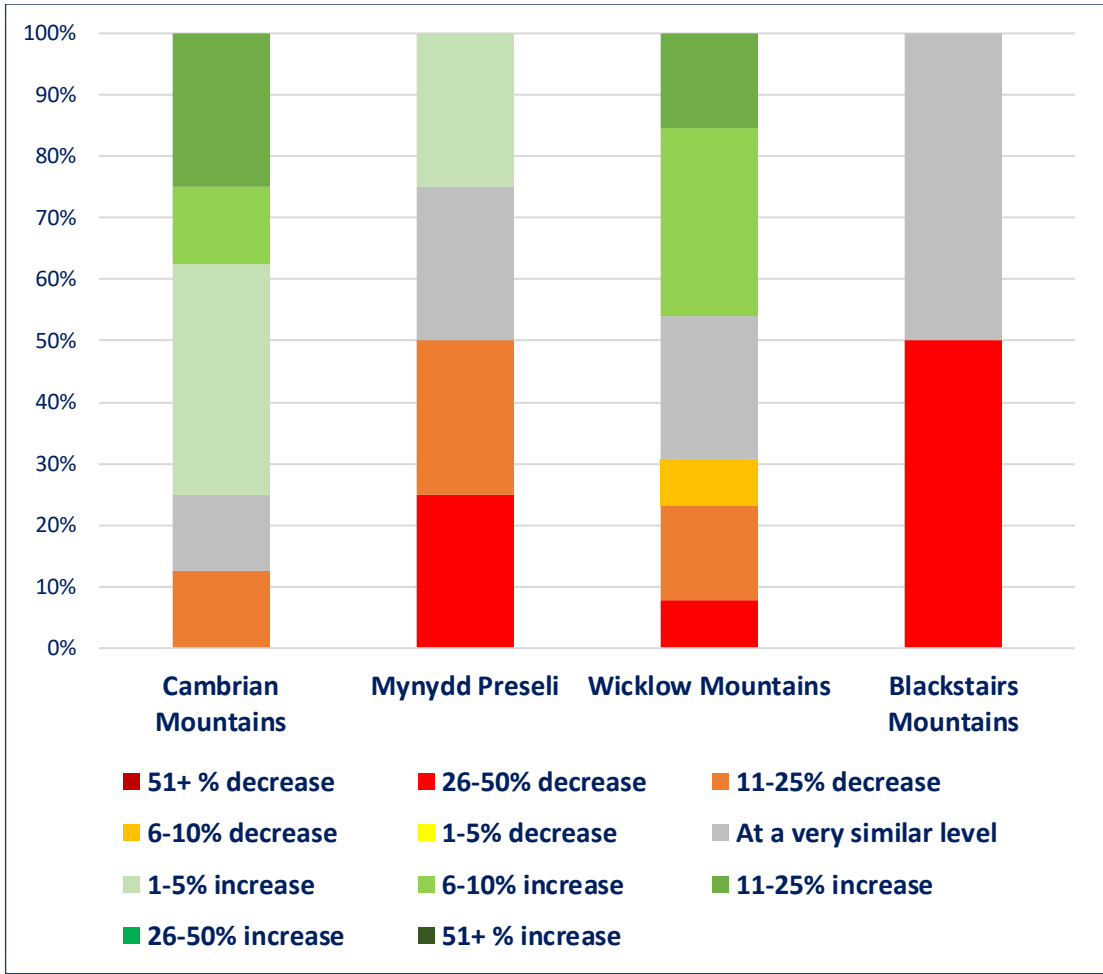


Figure 20. Prediction of average room occupancy levels in 2023, compared to 2022

Figure 21 shows the proportion of overseas visitors in relation to domestic visitors staying with the accommodation providers. In the Cambrian Mountains, Mynydd Preseli and the Blackstairs Mountains this was 10% or less; however, in the Wicklow Mountains the proportion of overseas visitors recorded was 73%, so significantly higher.

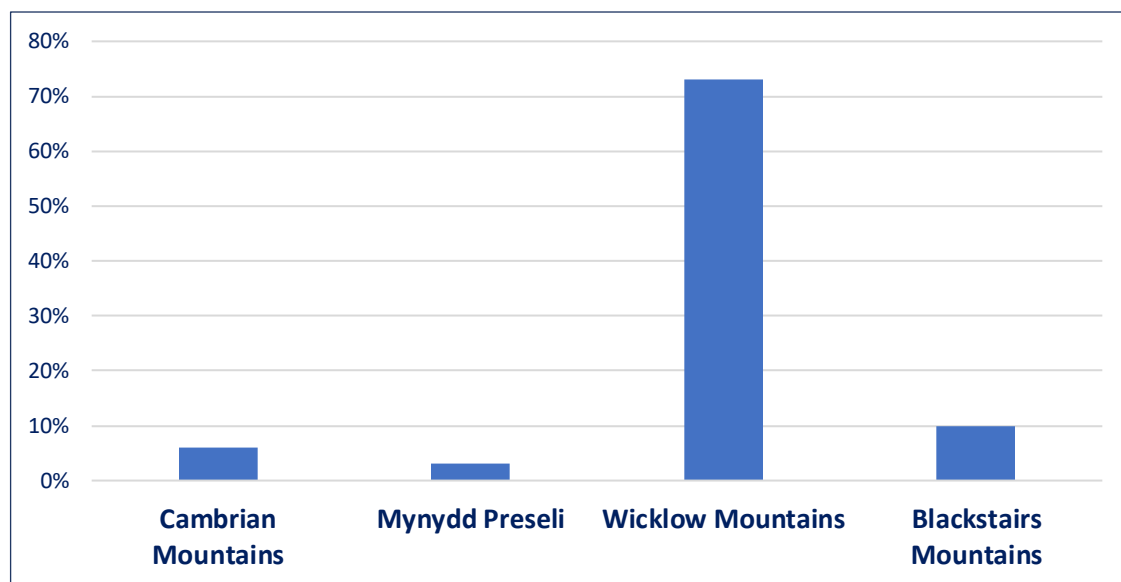


Figure 21. The proportion of overseas visitors compared to domestic visitors in 2022

Accommodation providers estimated how the average occupancy levels for overseas visitors in 2023 will compare to 2022 levels. Figure 22 indicates that the majority of accommodation providers in the Cambrian Mountains predict overseas visitor occupancy levels to increase, with 25% stating that they will increase by between 6 and 10%. However, in the Mynydd Preseli, there were no predictions of an increase in average occupancy levels for overseas visitor, with 50% stating they would remain at a very similar level and 50% expecting a decrease. In the Wicklow Mountains, 46% of accommodation providers predicted an increase in overseas visitors in 2023, with 38% expecting an increase of between 6 and 50%. In the Blackstairs Mountains, 50% predicted a minor increase of 1-5%, whilst the remaining 50% felt that average occupancy levels for overseas visitors would remain at a very similar level. The only accommodation providers who expected a decrease in average occupancy levels of overseas visitors were in the Mynydd Preseli (50%) and the Wicklow Mountains (31%).

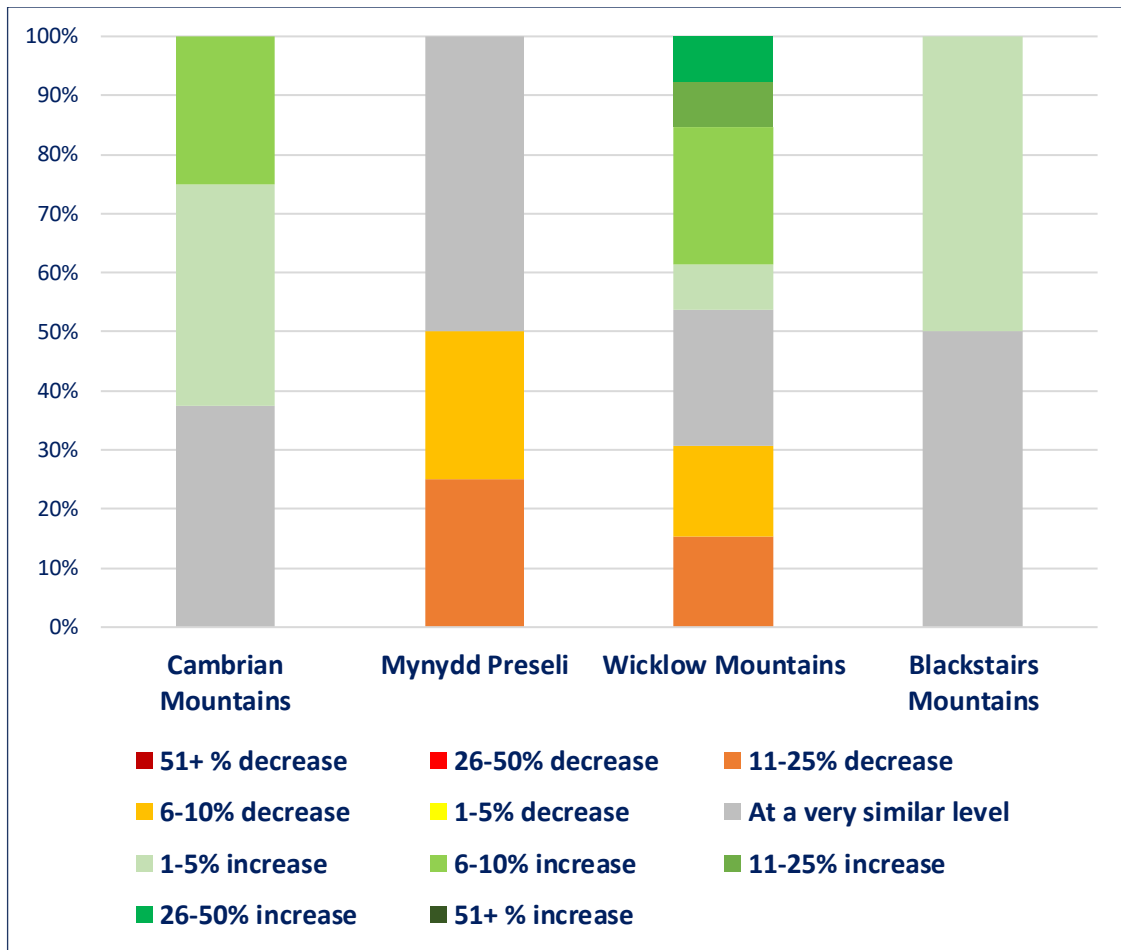


Figure 22. Prediction of average occupancy levels for overseas visitors in 2023, compared to 2022

Figure 23 shows that overall, visitors stayed in the coastal upland areas for an average of 3.4 nights in 2022, with the longest stays taking place in the Mynydd Preseli (4.3 nights) and the shortest stays in the Blackstairs Mountains (2 nights).

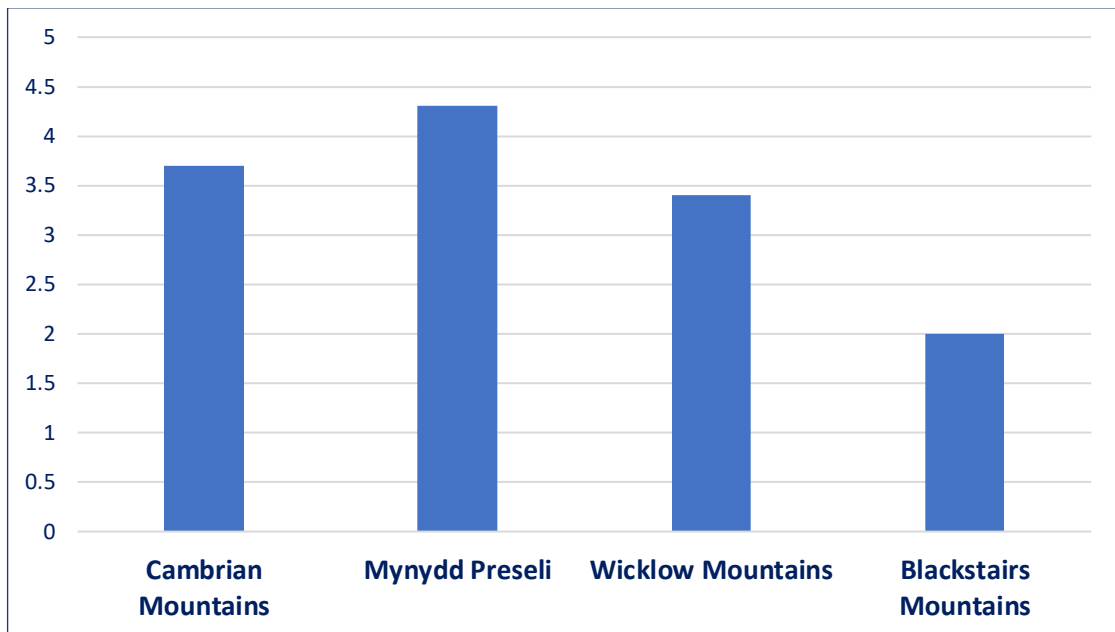


Figure 23. Average length of stay (in nights) of visitors in 2022

Figure 24 shows that, on average, accommodation sites in all four coastal upland areas were open for at least 9 months of 2022, with sites open longest in the Mynydd Preseli (approximately 10.5 months).

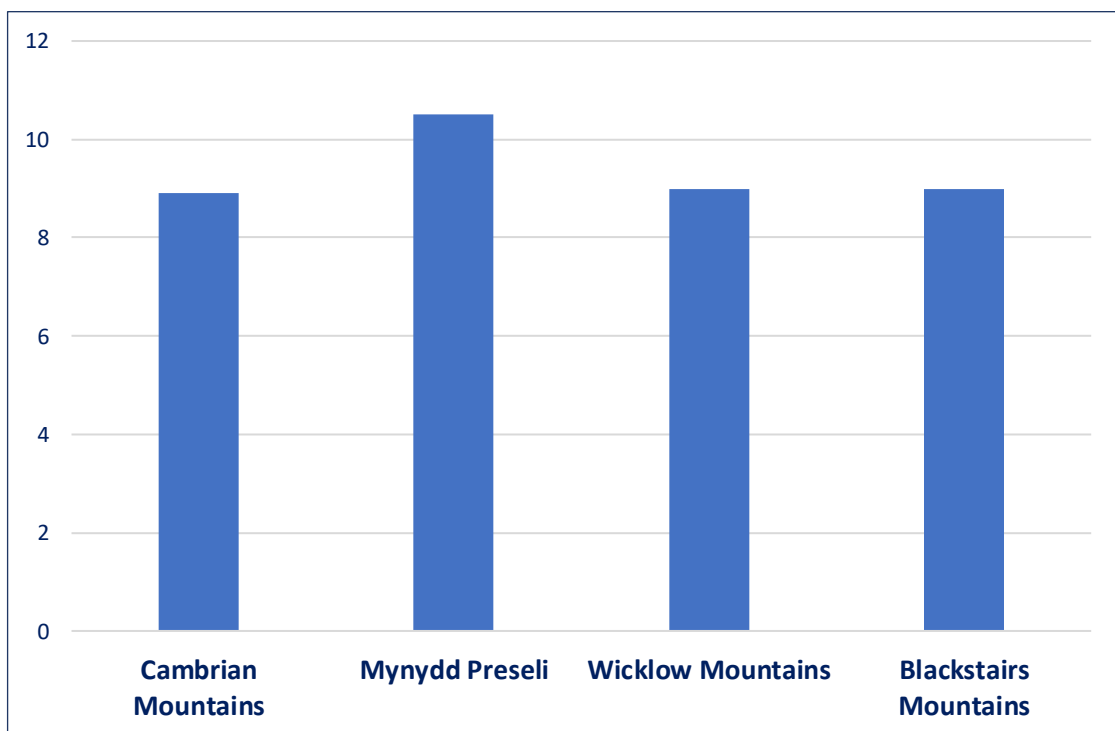


Figure 24. Average number of months that accommodation sites were open in 2022

Figure 25 shows the number of full-time and part-time employees that were employed by the accommodation providers. In the Cambrian Mountains and the Mynydd Preseli, accommodation providers on average employed 1 part-time member of staff. In the Cambrian Mountains, on average, there were no full-time staff members employed, as opposed to 0.25 in the Mynydd Preseli. In the Blackstairs Mountains, accommodation providers on average employed one full-time and one part-time member of staff; however, this data is significantly less representative of the region, given this is based on the responses of just two accommodation providers. In the Wicklow Mountains, the accommodation providers employed on average 3.8 members of full-time staff and 4.9 members of part-time staff. However, this data is not representative of the sample, which contained two large, serviced accommodation providers, which accounted for 78% of the total full-time and 84% of the part-time staff of all providers in the area.

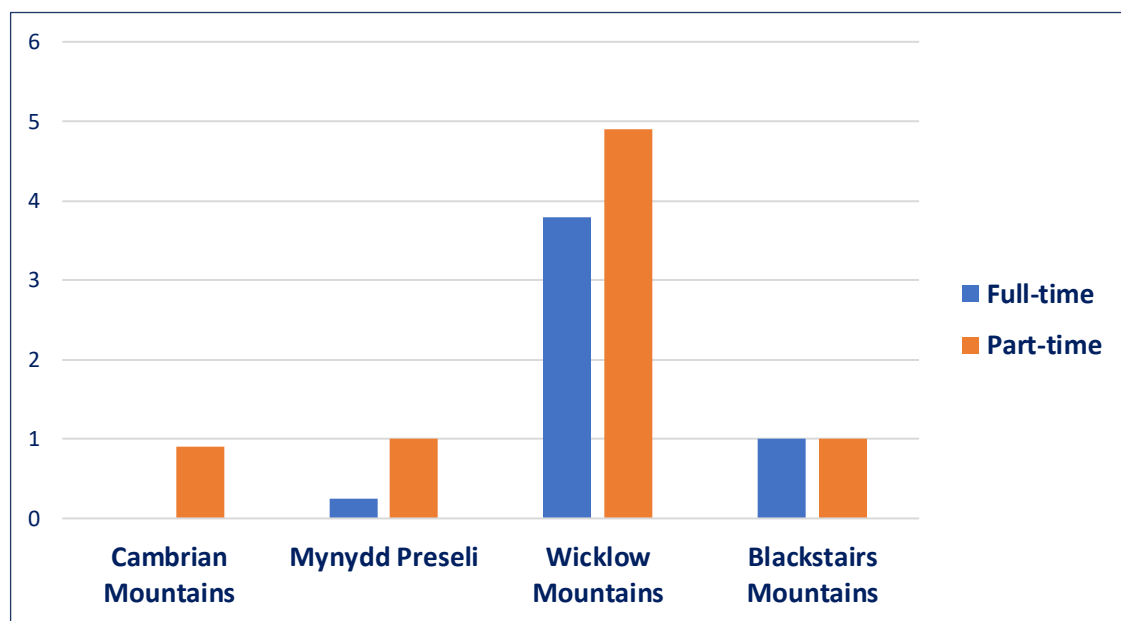


Figure 25. Average number of employees per accommodation provider

4.3.2.3 Marketing

Figure 26 shows that the most popular method for marketing accommodation was online, through a third-party website, although this was closely followed by marketing through a private website. The third most popular method was via word of mouth.

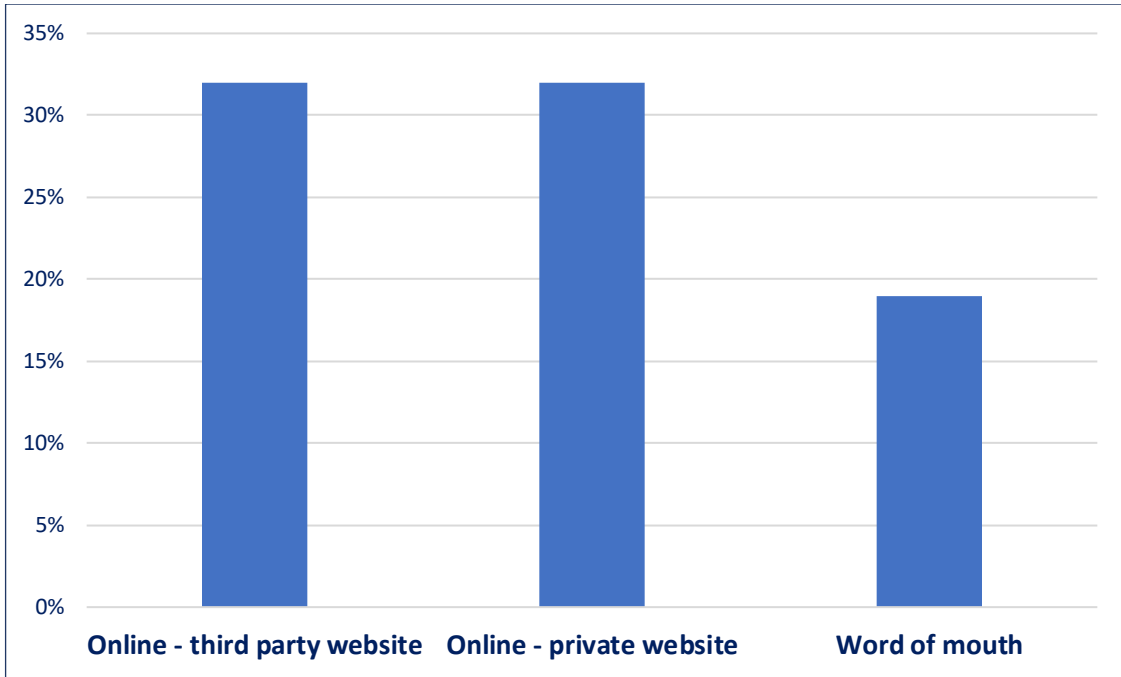


Figure 26. The top 3 most popular methods for marketing accommodation

For accommodation providers who marketed their site through a third-party website, the most commonly used site was Airbnb, which was used by 33% of providers. The other two most popular sites used were Booking.com (8%) and Sykes Holiday Cottages (8%).

Accommodation providers were also asked if they have changed their marketing strategy due to any activities within the CUPHAT project that they have engaged with. Figure 27 shows that 21% of the providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of activities undertaken within the CUPHAT project, but it was not stated how.

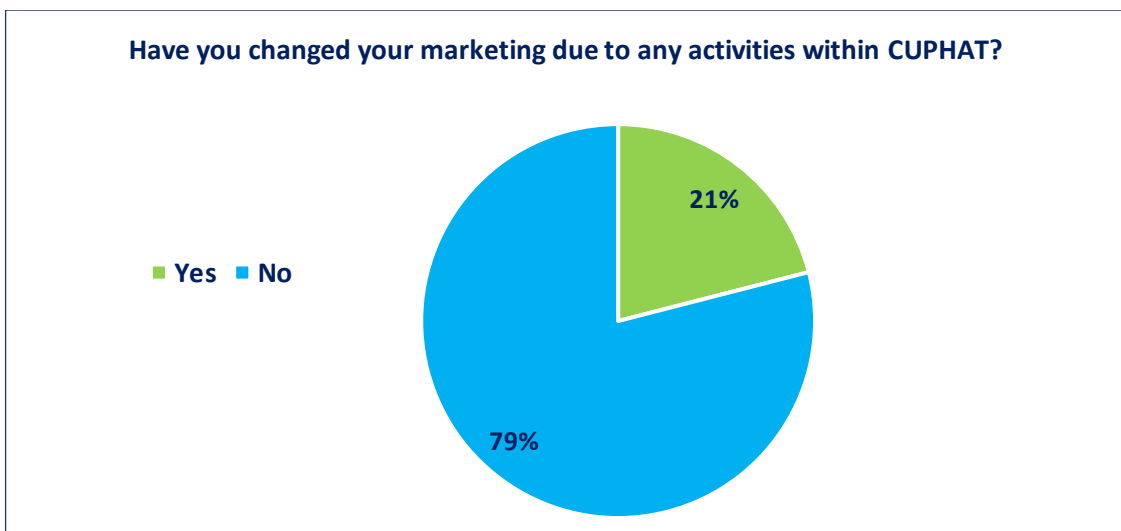


Figure 27. Accommodation providers that are aware of CUPHAT and have changed their marketing strategy as a result of CUPHAT activities

4.3.2.4 Reasons for visits

Figure 28 shows that the vast majority of accommodation providers in all four coastal upland areas believe that guests visit to enjoy the landscape/countryside/beach (100% of providers in the Cambrian, Wicklow and Blackstairs Mountains). The second most common reason for visiting is believed to be to take part in informal outdoor activities, (at least 75% of providers in the Cambrian Mountains, Mynydd Preseli and Wicklow Mountains). In addition, 100% of accommodation providers in the Mynydd Preseli stated that their guest’s reason for visiting was to visit historical, cultural or religious sites, as opposed to between 35 and 55% of providers in the other three coastal upland areas.

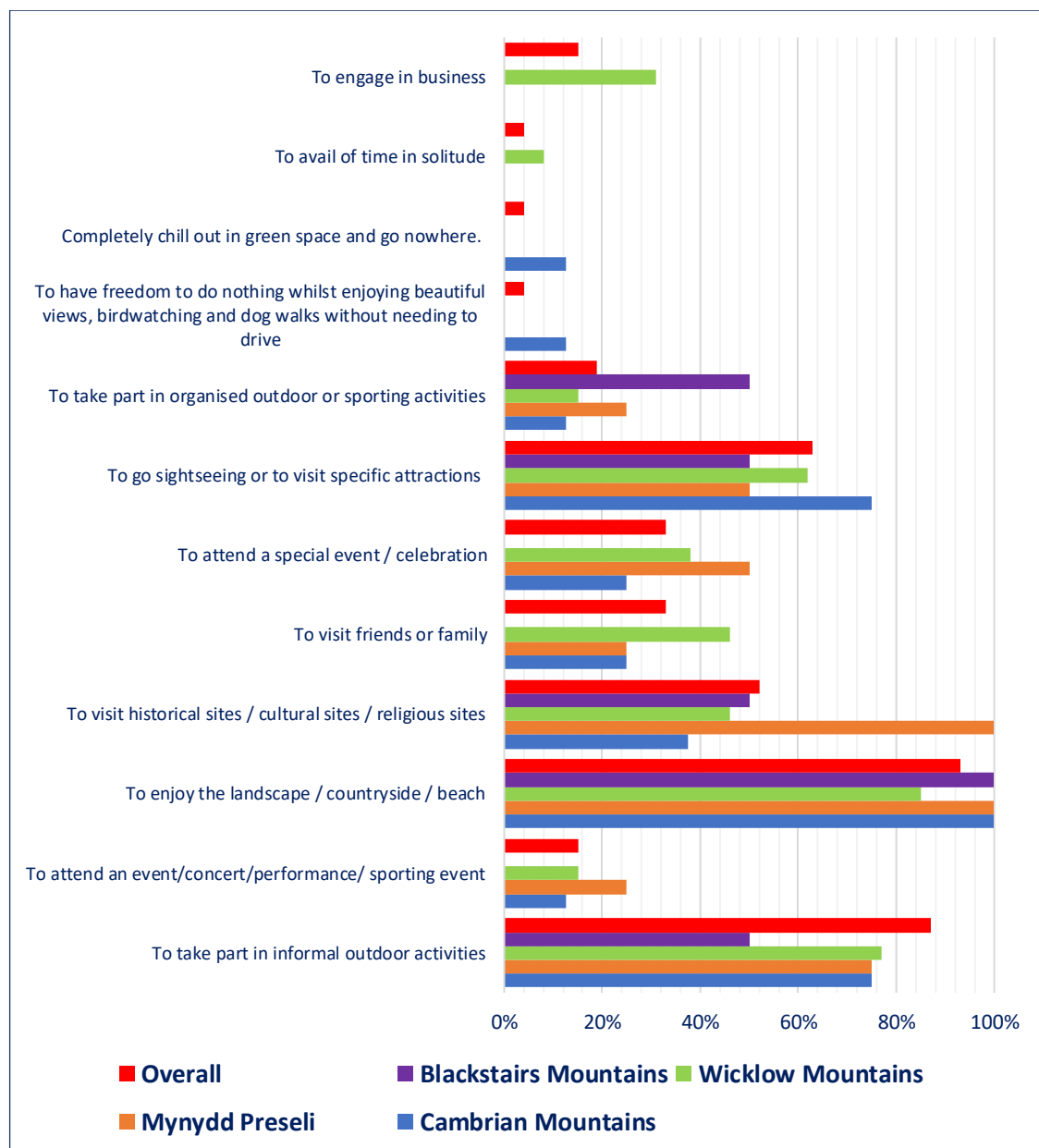


Figure 28. Accommodation providers’ views on the main reasons that guests visit the area

4.3.2.5 Barriers

The top five challenges cited by accommodation providers in attracting guests to stay in their accommodation are set out in Figure 29. The most commonly cited challenge was marketing or advertising constraints, specified by 30% of all accommodation providers, followed by poor transport links (19%), remoteness (15%), remoteness (15%) and the fact that coastal upland areas are not more well-known (15%).

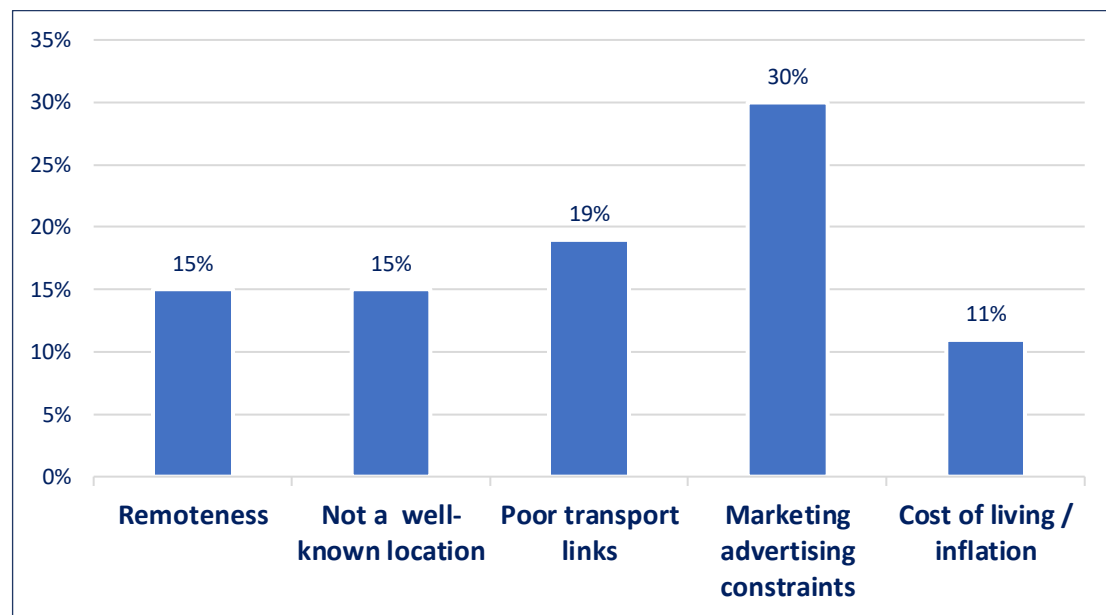


Figure 29. The top 5 challenges cited by accommodation providers in attracting guests

Figure 30 outlines the principal barriers that accommodation providers feel prevent guests from staying longer with them in the coastal upland areas. The most frequently cited barrier was a lack of amenities or services (which includes public transport), which was referenced by 41% of all accommodation providers. Other barriers include a lack of major tourist attractions (11%) and the fact that short-stays are common-place among walkers/cyclists (11%), particularly in the Wicklow Mountains with guests traveling the Wicklow Way, in addition to a lack of knowledge about what is available/on offer within the area (7%).

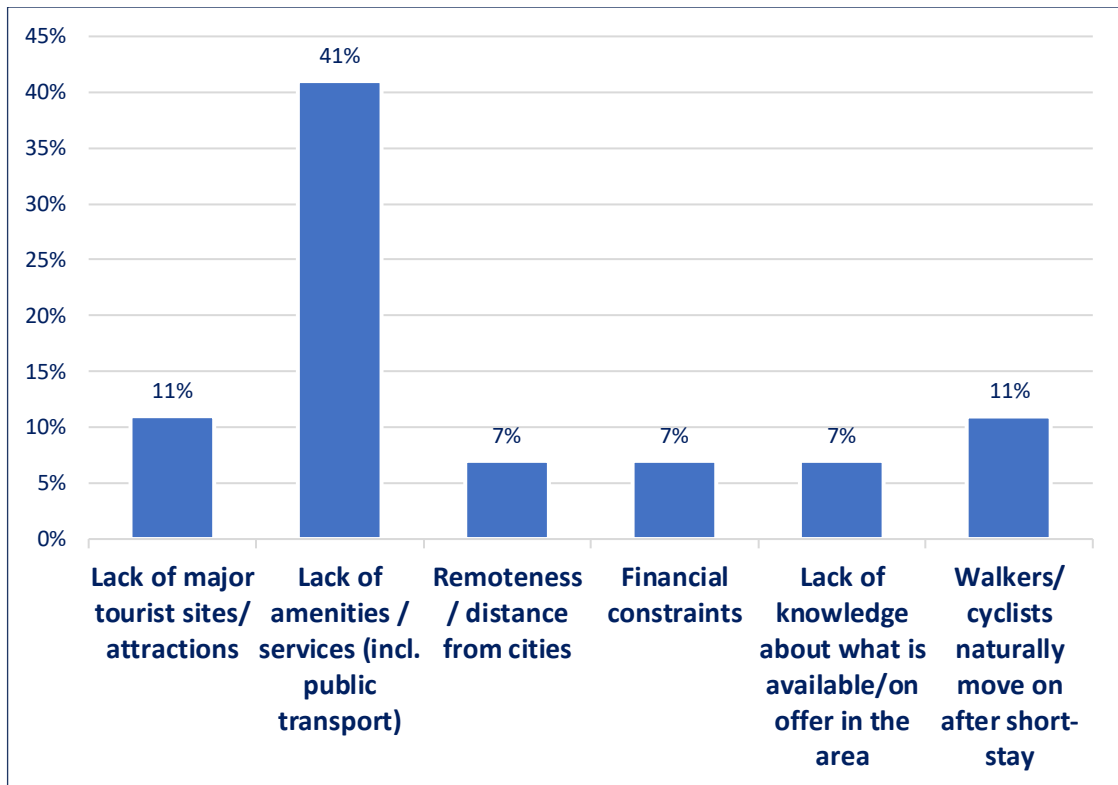


Figure 30. The principal barriers cited by accommodation providers that prevent guests from staying longer in the area

Accommodation providers were also asked if they felt that potential overseas visitors would be more likely to visit the area now and whether this was due to the work of CUPHAT. The views were mixed with more providers in the Cambrian Mountains stating they thought it would result in more overseas visitors coming to the coastal upland areas as a result of CUPHAT activity. Figure 31 shows that:

- In the Cambrian Mountains, half of the accommodation providers who were aware of CUPHAT (25% of all respondents) felt that overseas visitors were more likely or probably more likely to visit the area as a result of the work of CUPHAT.
- In the Wicklow Mountains, only 13% of the accommodation providers who were aware of CUPHAT (8% of all respondents) felt that overseas visitors were more likely to visit the area as a result of the project.
- In the Mynydd Preseli and the Blackstairs Mountains, accommodation providers were unsure whether the work of CUPHAT would encourage more overseas visitors to visit the area, possibly because it was too early to tell.

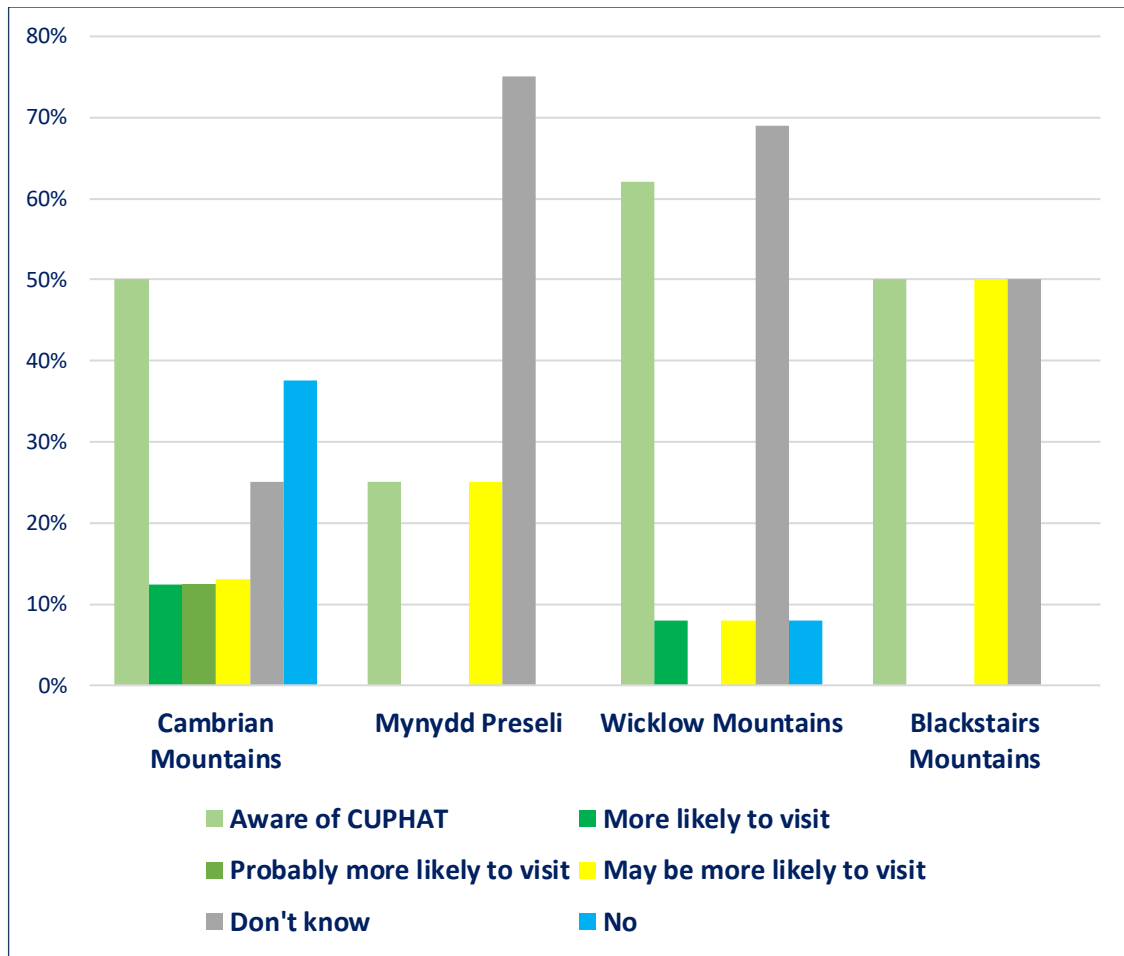


Figure 31. Accommodation providers' views on whether the work of CUPHAT would encourage more overseas visitors to visit the area.

Figure 32 sets out the responses of accommodation providers to a question which asked whether they felt that CUPHAT had helped them to overcome any challenges or barriers, in relation to the proportion of accommodation providers that were aware of the project at the time of survey completion. Half of the accommodation providers surveyed in the Cambrian Mountains and the Wicklow Mountains that were aware of CUPHAT felt that the project had helped or will help them to overcome challenges or barriers. However, in the Blackstairs Mountains and Mynydd Preseli, none of those providers (2 in total) that were initially aware of the project felt that it had helped/will help them to overcome challenges or barriers, although it was not explained why not. It should also be noted that these respondents were from the Carlow side of the Blackstairs Mountains so may not be reflective of those in the Wexford area.

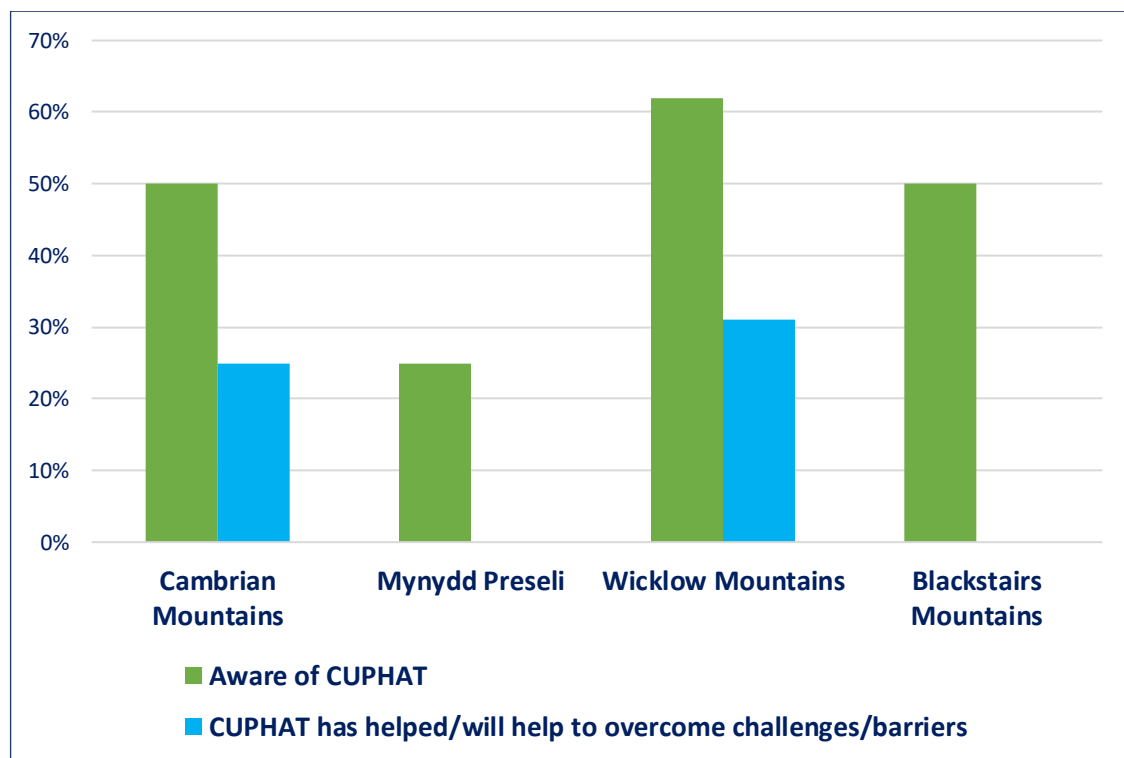


Figure 32. The proportion of accommodation providers that are aware of CUPHAT in relation to the proportion that feel that the project has helped or will help to overcome any challenges or barriers

4.3.2.6 Local natural, cultural and historic heritage

The word clouds displayed in Figures 33a-d set out the views of Welsh and Irish accommodation providers of the natural and cultural/historic heritage of the coastal upland areas within each country. They indicate that the key features of natural heritage in Welsh coastal upland areas are considered to be mountains, forests, rivers and coast paths, in addition to quietness. Similarly, it shows that the key features of natural heritage in Irish coastal upland areas were mountain hikes, walking routes, mountains, forests and unspoilt, natural beauty.

In terms of historic/cultural heritage, the figures shows that the Welsh language (Cymraeg) or Welsh-speaking, mining and crafts are the most commonly cited features by accommodation providers within the Cambrian Mountains and Mynydd Preseli. Within the Irish coastal upland areas, accommodation providers referenced history and a Canadian connection as key aspects

of cultural/historic heritage; however, multiple providers also stated that their cultural/historic heritage was underdeveloped.



Figure 33a. Welsh accommodation providers' understanding of the natural heritage of the Cambrian Mountains and Mynydd Preseli

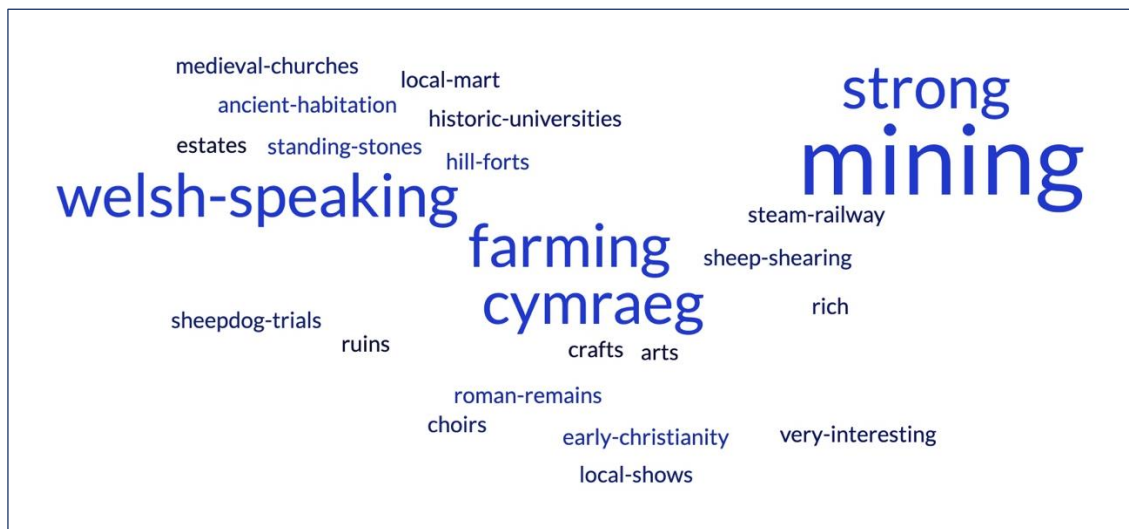


Figure 33b. Welsh accommodation providers' understanding of the cultural and historic heritage of the Cambrian Mountains and Mynydd Preseli



Figure 33c. Irish accommodation providers' understanding of the natural heritage of the Wicklow Mountains and Blackstairs

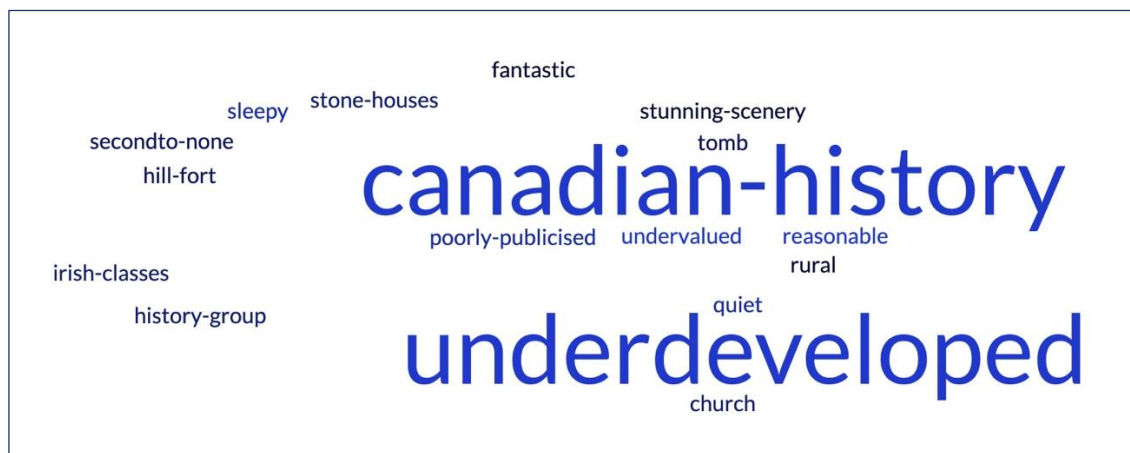


Figure 33d. Irish accommodation providers' understanding of the cultural and historic heritage of the Wicklow Mountains and Blackstairs

Figure 34 outlines how accommodation providers in each coastal upland area view their guests' awareness of local natural heritage to be better than their awareness of local cultural or historic heritage). In the Cambrian Mountains, accommodation providers felt that guests had a higher level of awareness of the area's natural heritage, with an average level of 4.5 out of 10, as opposed to 2.5 for cultural/historic heritage. Similarly, in the Mynydd Preseli, accommodation providers felt that on average guests had a level of awareness of 5 out of 10 for natural heritage, as opposed to 4 out of 10 for cultural/historic heritage.

In Ireland, accommodation providers in the Blackstairs Mountains considered guests to have a higher level of understanding of natural heritage than cultural/historic, with an average level of 7.5 in comparison to 4. Accommodation providers in the Wicklow Mountains stated that on average, guests had a level of awareness of natural heritage of 5.2 out of 10, as opposed to 4.5 out of 10 for cultural/historic heritage.

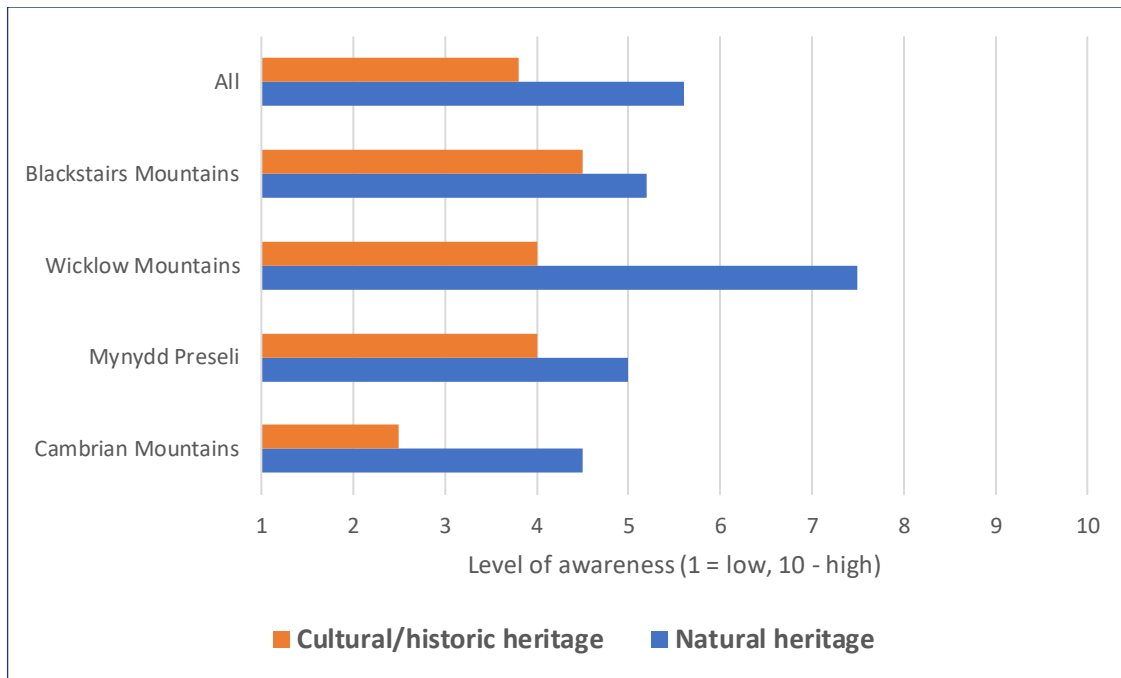


Figure 34. Accommodation providers' views on guests' level of awareness of local heritage

Accommodation providers were also asked about their links with natural, cultural or historic heritage site providers in their local area (Figure 35) and whether they provide information about this to their guests (Figure 36). In the Cambrian Mountains and the Wicklow Mountains, 40% of accommodation providers have links with heritage site providers, in comparison to 25% in the Mynydd Preseli and 50% in the Blackstairs Mountains; however, for the latter, this refers to just one provider.

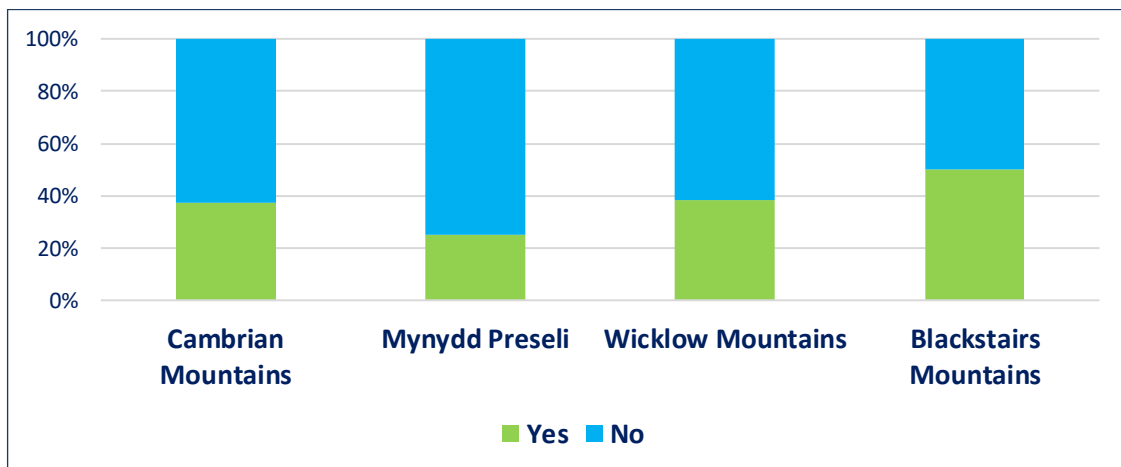


Figure 35. The proportion of accommodation providers that have links with natural, cultural or historic local heritage site providers

However, despite this, the majority of accommodation providers in the Cambrian Mountains, Mynydd Preseli and the Wicklow Mountains provide their guests with information or promotional material about the natural, cultural or historic heritage of their local area, as shown in Figure 35, with 100% of accommodation providers in the Cambrian Mountains and 95% of providers in the Wicklow Mountains offering their guests this information.

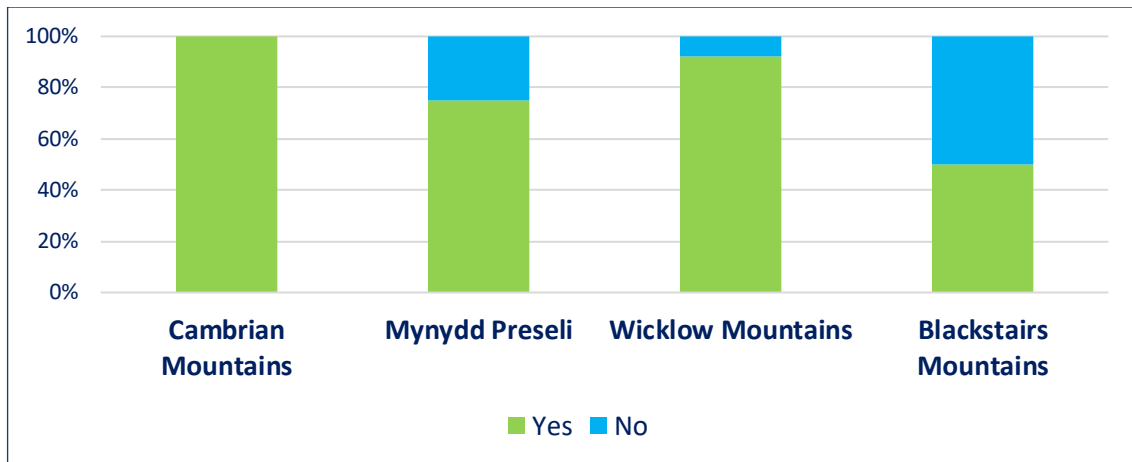


Figure 36. The proportion of accommodation providers that provide guests with information or promotional material about the natural, cultural or historic heritage of their local area.

Figure 37 shows that accommodation providers offer information or promotional material about local heritage to their guests in three main ways. 50% of accommodation providers deliver this information through printed publications, 30% through word of mouth and 20% electronically, either via email or through a private website.

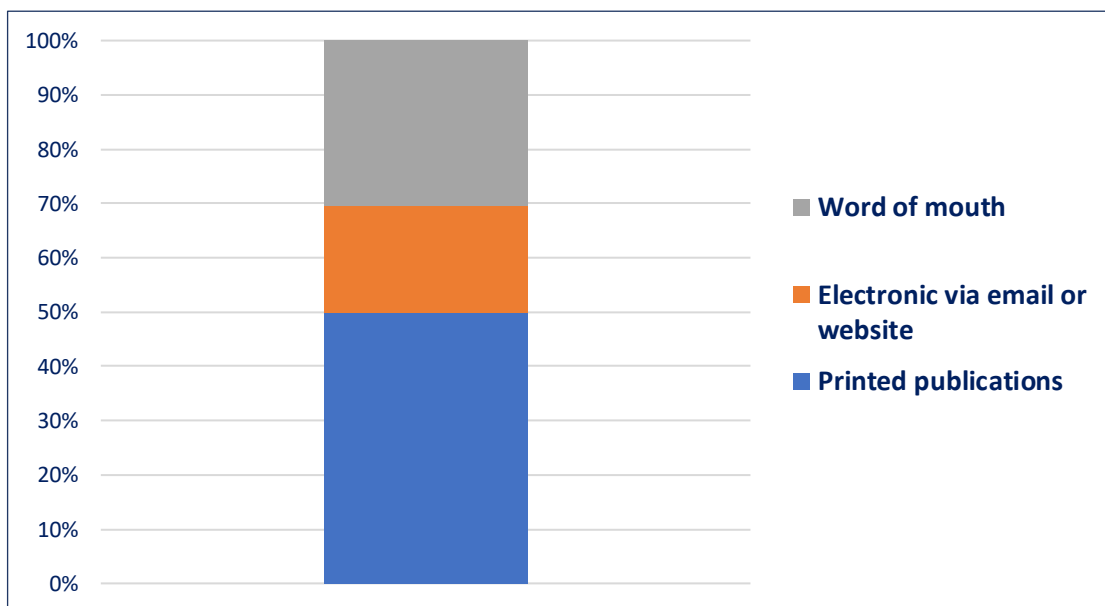


Figure 37. The format in which information or promotional material about local heritage is provided to guests

Accommodation providers were asked whether they felt that CUPHAT had helped them to provide further information about local heritage to their guests. Figure 38 shows the proportion of accommodation providers in each coastal upland area that were aware of the CUPHAT project in contrast to the proportion that have been helped by CUPHAT to provide further information about local heritage to guests. This shows that 12.5% of the accommodation providers in the Cambrian Mountains have been helped by CUPHAT, which equates to 25% of the total number of accommodation providers that were aware of the CUPHAT project. In the Mynydd Preseli, only 1 accommodation provider (25%) had heard of CUPHAT but this provider did not consider CUPHAT to have helped them to provide additional information about local heritage to their guests. In the Wicklow Mountains, 23% of

accommodation providers have been helped by the CUPHAT project, which is equivalent to 37.5% of the providers that had heard of the CUPHAT project. In the Blackstairs Mountains, the provider that had heard of CUPHAT, also felt that the project had helped them to provide further information about local heritage to their guests. As CUPHAT had not produced any specific material themselves when the survey was carried out, it is assumed that the CUPHAT activity had enabled these accommodation providers to provide either their own information about the areas or to source information produced by others.

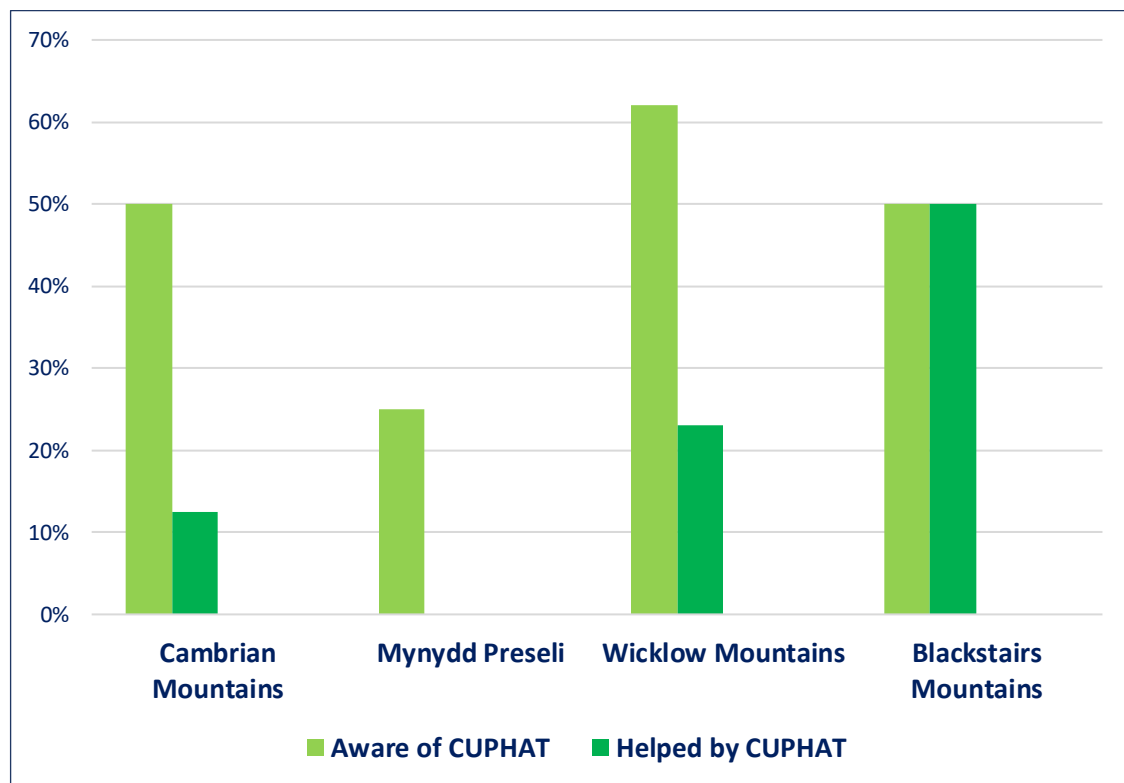


Figure 38. Accommodation providers that are aware of CUPHAT in relation to the proportion that think CUPHAT has helped to provide information about local heritage to their guests

4.3.3 Interview findings

A total of 14 interviews were undertaken with accommodation providers and local businesses, this included 8 in Wales and 6 in Ireland. The target was to interview 24 so only 58% was achieved. However, this provided a good range of views, that addressed the main issues.

The key findings that either contribute to the baseline or demonstrate the impact of CUPHAT are as follows.

KEY FINDINGS – TOURISM BUSINEESES INTERVIEWS

Key findings that demonstrate the impact of CUPHAT

Awareness. Around half of those interviewed were aware of CUPHAT.

Marketing

- CUPHAT provided greater opportunities for improved marketing of the areas, particularly a well-timed, coordinated, targeted, professional campaign which would be extremely beneficial to the smaller tourist businesses which would hopefully encourage visitors to stay longer in the coastal upland areas.
- It's important to ensure a balance between promotion and keeping the areas unique rural appeal. It was hoped that improved marketing through CUPHAT could find a balance in attracting more regenerative tourism to the areas.

Barriers to attracting overseas visitors.

- The most significant barrier was transport, in particular the rural locations make it difficult for people who do not have access to or want to travel by private car, lack of public transport, high car rental prices, and confidence. Other common barriers for all four areas were access to information and knowledge about the areas and lack of facilities and amenities.
- In Ireland, a specific issue was that tour groups only include the main tourist hot spots in their itineraries so there are limited opportunities to visit more 'out of the way' locations. There could be opportunities to explore further here.

Key findings that contribute to the baseline

Visitors to the areas

- In Ireland, the proportion of overseas visitors to the coastal upland areas is between 10-50%, many are short stays and are touring, visiting family or tracing their roots.
- In Wales, the proportion of overseas visitors to the coastal upland areas is low and the majority of visitors are from South Wales, the Midlands, and Bristol. They often come for a short break and particularly overseas visitors, specifically because it's a holiday in Wales, for the local heritage, for the peace and quiet, walking away from the main tourist hotspots and for a true Welsh experience.
- More local people seem to be looking for short breaks and many people are now seeking out the Eco tourism offering.
- Immediately post COVID, when people weren't able to travel overseas, all the respondents experienced higher than average numbers of visitors travelling from within the UK. However, bookings for 2023 were down, particularly in the Welsh areas, possibly through to be due to aftereffects of the COVID-19 pandemic lockdown, Brexit, the war in Ukraine, the general rise in the cost of living, and lack of marketing of these areas by the main national and regional tourist organisations.

Marketing

- Businesses were promoted in a variety of ways, including through their own websites and third-party accommodation sites (e.g., VRBO and Airbnb) or through more direct

- In Wales, all the businesses interviewed in Wales raised a concern about the new Welsh Government '182-day rule' related to business and council tax and the impact of this on the accommodation stock with knock on effects on other tourism businesses. In addition, there were concerns regarding the proposed new 'tourist tax'.

Engagement with heritage. The areas could use the heritage and culture to encourage more people to visit the coastal upland areas and CUPHATs work on gathering information about local histories or objects of interest was useful to provide information for visitors.

Impact CUPHAT has had on tourism. Some business felt it was too early to tell whether CUPHAT would make a difference as the project had only been running for a relatively short period of time and the outputs were still in the process of being completed and disseminated. However, some businesses were positive about CUPHATs potential to improve tourism in the four areas. The main impacts that CUPHAT had had or would have in the future were improved marketing (i.e. to improve the visibility of the areas, 'one stop shop' website to access information easily), networking between businesses (i.e. encouraging everyone to work together with widespread benefits for tourism as a whole for example creating a sense of community, developing basic amenities and facilities within a village and encouraging regenerative tourism) and supporting businesses to take forward their ideas.

marketing to their target audience. Word of mouth and repeat visitors were also common.

- In Wales tourism businesses often rely on accommodation providers promoting their activities either on their websites or through leaflets and this is seen as a useful arrangement.

Engagement with heritage

- Irish heritage is a major draw for people, many visitors are looking for a unique, authentic experience. Many people visit Wales for the beaches and outdoor activities such as walking.
- In all areas visitors are not always fully aware or do not have extensive knowledge about the local cultural, historic, and natural heritage of the coastal upland areas.

The following sections give a more detailed overview of the findings, the full transcripts are not provided as interviews were conducted anonymously so that views could not be attributed to any individual.

4.3.3.1 Visitors

- **Ireland**

In Ireland, the businesses interviewed were currently attracting a range of visitors, with people staying between a day and a week, often as part of a longer holiday visiting various places across Ireland. The proximity of both Dublin and Rosslare port to the Wicklow and Blackstairs Mountains meant that both locations are often first stops for people traveling further west. There is a desire from some of the accommodation providers to encourage them to stay longer in the area.

*“We're trying to get them not to rush away so that they can maybe join other eco-tourism providers in the area and support the Blackstairs”
(Accommodation provider in Ireland)*

Visitors had come from Ireland, the UK, the rest of Europe and from further afield. The proportion of overseas visitors ranged from 10% to 50% of the number of guests staying with the accommodation providers. Visitors from the UK made up only a small proportion of visitors.

“I've had people from USA, Canada, Singapore, Germany, Israel, New Zealand. The majority would be the USA if they're international, but there will be some Europeans as well.” (Accommodation provider in Ireland)

Many international travellers are visiting to trace their roots or visit where their ancestors came from.

They had seen a change since COVID, with more local visitors in 2022, however bookings for 2023 had been slow to take off for many of the providers, with the notable exception of an accommodation provider on the Wicklow Way whose bookings were extremely high.

“It's getting busier every year. I know some hikers have had to abandon their trip to complete the Wicklow way because they just can't find accommodation. You might find it okay for the first three days. But the more you get into the Wicklow Mountains, it just booked up.” (Accommodation provider in Ireland)

It was felt that more people seem to be coming from more local areas for a short break and many people are now seeking out the Eco tourism offering.

*“The sustainability brand is beginning to mushroom slightly.”
(Accommodation provider in Ireland)*

Another local business in the Blackstairs was mainly attracting visitors from the USA to be part of their education programme, but also attracted artists for residencies from all over Ireland as well as from abroad.

The accommodation providers were attracting mainly couples, but also a range of groups including families and people visiting for events such as weddings. They also had a good percentage of repeat visitors.

- **Wales**

In Wales visitors to the Mynydd Preseli and Cambrian mountains are either visiting for the day from surrounding areas or staying for up to a week. They are often coming for a short break and there has been a shift towards more people looking for short breaks rather than a week's stay.

The majority of visitor are travelling from South Wales, the Midlands, and Bristol but also other areas, however the proportion of overseas visitors was low.

*“Quite frankly, we don't see foreign tourists in Wales. It's not that they're not finding us, it's that they aren't finding Wales.”
(Accommodation provider in Wales)*

Immediately post COVID, when people weren't able to travel overseas, all the accommodation providers and tourist businesses experienced higher than average numbers of visitors travelling from within the UK. However, bookings for 2023 were significantly down for nearly all those that were interviewed with one tourism business reporting a predicted 70% downturn in numbers. It was thought that this might be due to a combination of reasons including the aftereffects of the COVID-19 pandemic lockdown, Brexit, the war in Ukraine, the general rise in the cost of living, and lack of marketing.

“I haven't seen a real recovery from the pandemic, if anything, we had more tourism during the pandemic than we do now. Because we had these period when we were booked up as people couldn't go to Spain.” (Accommodation provider in Wales)

This has had a particular impact on overseas visitors.

*“The overseas market was developing well until early 2020. This year it is about 5% of what 2020 should have been.”
(Tourism business in Wales)*

An exception was a hostel whose numbers were still on a par with previous levels, possibly attracting guests due to its lower prices compared with other accommodation sectors, particularly given the current cost of living crisis.

The type of visitors depended on the accommodation, the type of business, exact location and the time of year e.g., remote glamping type accommodation attracted mainly couples, summer/school holidays attracted more families.

Often people are booking the accommodation as they 'like the look of it' rather than due to its location. It was reported that often people don't really know where they are going and

often don't realise it's in a Welsh speaking area. This was a particular issue during the COVID staycation period where visitors who would normally have holidayed abroad may not have done their research before booking and expected more facilities such as swimming pools and entertainment.

Many reported that they attracted 'a more discerning type of visitor' who are looking for peace and quiet, a true Welsh experience, or walking away from the main tourist hotspots on the Welsh coast.

Most accommodation providers would like to attract more overseas visitors particularly during the shoulder season, but they are not sure how to go about it.

*"Would like to tap into foreign market, haven't actively looked at attracting overseas visitors, not sure how."
(Accommodation provider in Wales)*

Some visitors and particularly those from overseas come as it's a holiday in Wales, and specially for the local heritage, but most are not fully aware of the local heritage.

4.3.3.2 Marketing

- **Ireland**

Businesses were promoted in a variety of ways, including through their own websites and third-party accommodation sites (e.g., VRBO and Airbnb) or through more direct marketing to their target audience.

One accommodation and tour business talked about the success of having Faite Ireland bloggers and podcasters who post photographs and drone footage which had really helped boost the profile of their business. This was possible because the business was seen as a key small eco-tourism business that had won awards so it's unlikely that this kind of marketing is available to all businesses, but it shows when it is, it can help with the business's visibility.

All could see that CUPHAT provided greater opportunities for improved marketing of the areas. The success seen by the eco-tourism business of being profiled by Faite Ireland shows the impact successful marketing can have for a business.

It was thought that a competent marketing campaign run by professionals with professional imagery and video etc would be extremely beneficial to the smaller tourist businesses that might be off the beaten track, or more difficult to find out about for the majority of tourists.

Timing was seen as important; any marketing needs to be done before February in any one year with any input from community groups or small tourist businesses outside of their busy periods (i.e., during October to January).

The marketing should aim to target overseas visitors before they reach Ireland and more local visitors before they reach the specific areas so that they can plan to stay for longer than one or two days and preferable including visiting in the shoulder seasons and encourage people to visit out of the way destinations.

A new marketing campaign alone would not be enough and should be progressed in collaboration with other organisations such as Failte Ireland and Wicklow Tourism.

“We could probably do with a Tourism info point in Glendalough itself to make people/tourists visiting there more aware and send people to other places in the county.” (Tourism business in Ireland)

It was also noted that there needs to be a balance between promotion and keeping the areas unique rural appeal. However small tourist businesses will only be financially viable if they attract enough customers. Small businesses in Wicklow were finding it difficult to attract enough visitors for the 2023 season because they were either off the beaten track, hard to get to, or because there seems to be less demand. It was hoped that improved marketing could find a balance in attracting more regenerative tourism to the areas in order to find that balance.

“The irony of truly small local regenerative tourism attractions / businesses is that they are attractive to visitors because they are out of the way, off the beaten track.” (Accommodation provider in Ireland)

An accommodation provider in Ireland suggested that marketing could be aimed at particular places that people had emigrated to in the past from Wicklow and Blackstairs. These may be in America, Canada or Australia, and links could be created and encourage people to visit, and they could then also be encouraged to visit Wales.

“Wales is just as beautiful and just as green. So, I don't know why Ireland is on this pedestal?” (Accommodation provider in Ireland)

- **Wales**

Those interviewed promoted their business in different ways, including leaflets, their own websites, and third-party websites such as VRBO. Word of mouth and repeat visitors were also common.

“In the summer, we'll get to excellent turnover. No, we don't have a problem advertising the place really, it's getting people to come during the winter.” (Tourism business in Wales)

Tourism businesses also relied on accommodation providers promoting their activities either on their websites or through leaflets. Although not all accommodation providers are willing to do this.

The Vale of Rheidol Railway have found that 50% of people find out about the attraction from a leaflet, 25% on word of mouth, 20% are return visitors and 4% through social media.

Some businesses were on the Visit Wales website; however, the cost was sometimes seen as prohibitive for smaller businesses.

“Everyone seems to want to take their little bit of the cake, leaving not enough money for us to survive.” (Tourism business in Wales)

4.3.3.3 Barriers to attracting overseas visitors

There were similar barriers that were raised by businesses in both countries.

Transport was the most significant barrier raised, in particular the rural ‘off the beaten track’ locations which can make it difficult for people who do not have access to or want to travel by private car. The lack of public transport was seen as an issue which can prevent some people from travelling to these more remote areas. Some accommodation providers overcame this barrier by offering local pick up which tied in with their sustainable tourism offer. It was recognised that a project like CUPHAT could not necessarily solve the ‘lack of public transport’ in these remote areas, however many hoped that CUPHAT could further raise the issue for improvements to be made e.g., more buses and stops and more of a focus on some rural locations rather than just the major cities and towns. Transport was not seen as a barrier by everyone as many visitors would be travelling by car anyway so are aware of this in advance and others are attracted to the area because of its remoteness and lack of accessibility.

The distance from international airports and lack of public transport can discourage overseas visitors if they are not planning on hiring a car. Even when travelling by car there are issues of high car rental prices, long distances to drive, and not being able or confident to navigate the narrow rural roads to reach the more remote areas which can all be barriers to visiting.

“Roads and transport links could be improved– a bad road feels like a much longer drive to get here.” (Tourism business in Wales)

Another barrier is **information and knowledge** if people don’t know about an area they can’t visit. Some people will make an effort to seek out information but for others it needs to be more readily accessible. Some visitors want to go to an area where there is a variety of things to do, places to eat etc., so not knowing what else might be on offer in an area may discourage people from visiting, even if they had identified somewhere to stay. However, for others the accommodation may be the main draw in itself.

“We can have all the public transport in the world. But if it's not promoted, then people won't be aware of it. So, I think number one would have to be promotion. Obviously, every small place tries to do it themselves. But I think if it could be done at a national level and an international level that would be better.” (Accommodation provider in Ireland)

“It's really joining a few more dots. If we could entice more people coming into Ireland from abroad, to experience the Blackstairs and spend two or three nights here or with my other providers who I know we all win if we're all working together.” (Accommodation provider in Ireland)

“There is so much online information, but if they don't know what to look for then they might miss it.” (Accommodation provider in Wales)

Some of the accommodation providers provide their guests with information about the area, including activities to do, places to visit etc., which can help encourage people to stay longer.

“I think that's a big draw when people come here. Some people like to just have the quietness in the house, and some people like to tour around.” (Accommodation provider in Ireland)

The **lack of facilities and amenities** were seen as a barrier to people visiting some of the more remote areas. In Ireland this included lack of cafes, car parks, niche/local/family run accommodation and public toilets. In Wales, the lack of visitor centres and good signage were raised.

In addition, there were some barriers and challenges raised that were specific to each country.

In Ireland, an issue raised was that **tours groups** only include the main tourist hot spots in their itineraries and therefore there are very few opportunities for those who want to travel as part of a tour to visit some of the more rural out of the way locations and see the 'authentic' culture of an area. Tours could be encouraged to visit one or two more rural villages and take in the local culture and heritage, and this may then result in more competition in that area resulting in a cluster of places for the tour to visit. There could be opportunities for tours for overseas visits to link areas in Wales and Ireland as part of a package with the aim of seeing comes of the more remote coastal upland areas with a true authentic Irish and Welsh cultural experience.

In Ireland **financial support** for small businesses and community groups within the tourism sector was seen as a barrier to improving the local tourism infrastructure which is needed to attract visitors. Funding that is available for larger or state-run organisations is more difficult for small businesses to access.

One accommodation provider in Ireland felt that their area had a lot of **advantages** rather than barriers due to their proximity to Dublin and their central location with easy access to many visitor attractions and amenities. This could be capitalised on further.

All the businesses interviewed in Wales raised a concern about the new **Welsh Government '182-day rule'**, whereby a self-catering unit has to be occupied for 182 days per year to be on a lower business rate tax rather than the higher council tax. The rule was originally brought in as so many second homes were designating themselves as 'businesses' to avoid the higher

council tax charges. However, this is not only affecting second homeowners but also hugely impacting on small farmers who have been encouraged to diversify into tourism by converting unused farm buildings into self-catering accommodation. Many of these now won't be able to meet the 182-day threshold, and the higher council tax will result in their self-catering accommodation business not being viable. A reduced accommodation stock will have a knock-on effect on other tourism businesses who rely on people staying in the areas.

"These are numbers that we've never been able to really achieve in this part of Wales. It would make it not a viable company.....it's not even a building that can ever be lived in by anybody.... it can't become somebody's house..... it's specifically stated in the planning permission that no one could live in it." (Accommodation provider in Wales)

"The 182-day rule is, I think, going to kill off about a third of our holiday cottage stock. And I've heard of lots that have closed and sold up. And where they have sold up, they're not selling to young Welsh couples, they're selling to English retirees." (Tourism business in Wales)

It will also mean that tourists will concentrate in the more popular areas such as South Pembrokeshire.

"Will lose the true cultural experience of Wales that you get in these more rural upland areas." (Tourism business in Wales)

A number of Welsh businesses interviewed also mentioned the impact that the proposed new 'tourist tax' could have on visitors to Wales. If visitors think it's going to cost them a little bit more to stay in Wales, they may decide to go elsewhere in the UK that does not have a tourist tax.

"When you look at that from the perspective of anybody in England, looking to come to Wales, and they hear about the tourist tax. It's another little bit of a drip feed to put them off coming to Wales." (Tourism business in Wales)

Also, the **Welsh language** can be seen as a barrier to visitors, whereas it should be used as a positive aspect to encourage visitors to the area.

"Ceredigion is seen as one of the last bastions of the Welsh language".

4.3.3.4 Engagement with heritage

- **Ireland**

The majority of people visiting Ireland do have some knowledge of Irish heritage and this is a major draw for people. However, they may not always be fully aware or have extensive knowledge about the local cultural, historic and natural heritage of the upland areas.

Accommodation hosts can and do provide their guests with information on culture, history, and ideas of places to go and things to do and many people take advantage of this local knowledge.

“I tell them about what history I know on the area, I tell them about the mountains. We have a lovely book written by the Irish mountaineers during COVID, which I have which details all of the routes on the mountains.” (Accommodation provider in Ireland)

“And we talk about everything from religion, even down to the obviously the landlord's and the battles that we would have had with England and, I think that people love hearing that history side of it, and how does fit in how families fit into the Irish history and the world.” (Accommodation provider in Ireland)

CUPHAT work on gathering information about local histories or objects of interest was seen as successful and had been useful by providing a platform for tourism to build on whereby people can access the information about the place.

“There's lots of things that are hidden under the surface that could be uncovered and connected to for people to enjoy when they visit here. I think that's really valuable resource to have highlighted for the community, but then also to gather and make it digital, because that's how we find out about things now” (Tourist business in Ireland)

Some visitors are looking for unique, authentic experiences. This was raised by one of the Irish businesses who had attended the course and it had become apparent to those on the course that they were all offering something different but had a shared set of values and could support each other.

- **Wales**

Many people visit Wales for the beaches and outdoor activities such as walking, others because it's a nice place to visit or because they specifically like the accommodation rather than specifically wanting to visit Wales.

“Some people don't even realise they are coming to Wales – might have found the accommodation as it looked nice.” (Accommodation provider in Wales)

They will know about some aspects but may not have a deeper knowledge of the local cultural and historic heritage.

Many accommodation providers that were interviewed do provide information on the heritage of the area, they often find that a large number of people are not necessary visiting because of the heritage but they are interested when they know about it, often wanting to find out more.

“People leave knowing more about the heritage of the areas than they came with.” (Accommodation provider in Wales)

“When you take them out of that mad rush to see the must-see places, they really appreciate taking some time out to enjoy a bit of peace and quiet and different landscapes and the stories in those landscapes.” (Tourism business in Wales)

Many thought that the areas could use the heritage and culture to encourage more people to engage in tourism in these coastal upland areas, for example the mining history of the Cambrian mountains or the blue stones of the Mynydd Preseli.

“The Welsh hide their light under a bushel – need to sing and dance about it more.” (Tourism business in Wales)

If people were more aware of the local heritage, then this could also be used to encourage people to stay longer in the area if they are aware of more places to visit and more things to do.

CUPHAT has worked with tourism businesses to help them understand the local heritage of the areas and this is now being passed onto visitors.

“CUPHAT has given everybody a little bit of a lift, to perhaps put out a bit more of a positive vibe to potential visitors to show what the areas has to offer.” (Tourism business in Wales)

4.3.3.5 Impact CUPHAT has had on tourism

Around half of those interviewed were not aware of CUPHAT and therefore were not able to comment on whether it had had an impact on tourism in their area or potentially could have an impact in the future.

Some felt it was too early to tell whether it will make a difference as the project had only been running for a relatively short period of time and the outputs were still in the process of being completed and therefore have not had a chance to fully have an impact on tourism.

*“Intellectually it’s made a difference but not on the ground yet.”
(Accommodation provider in Ireland)*

However other that had heard of CUPHAT and were aware of the work it had undertaken were positive about its potential to improve tourism in the four areas. The main impacts that CUPHAT had had or would have in the future that were raised were common to all 4 upland areas in Wales and Ireland.

Improved marketing through CUPHAT will improve the visibility of the areas for tourists and hopefully encourage more people to visit the areas and to stay longer. It would be beneficial for visitors to have a 'one stop shop' such as the CUPHAT website where they can access all the information about an area in one location, rather than having to search numerous separate websites.

"Media resources and marketing, good support without being over heavy." (Accommodation provider in Ireland)

At the same time, individual providers should also have very specific information on their websites so that people can find out what's right on their doorstep as well as in the wider area. CUPHAT was enabling this to also happen by raising the awareness of businesses of the heritage all around their area.

Marketing can also focus on the location of these areas being far enough away from all the busy areas to provide some peace and quiet but still close enough to explore the adjacent well-known landmarks and attractions.

Marketing should also link in with other organisations and not duplicate, as this would further add to the number of information sources available to visitors.

Networking between local business in each area and between businesses across the four areas was seen as a very positive outcome which would help everyone to work together with widespread benefits for tourism in the area.

"It has helped some people interact with each other and set up little collaborations. I think it's as important as anything for people who work in tourism to feel a part of the big picture. I think that's what gets missed by a lot of people, you can end up feeling that you're very much on your own" (Tourism business in Wales)

For example, the network of accommodation providers will enable those who receive enquiries when they are already fully booked to pass the enquiry onto others in the network. In addition, accommodation providers can suggest local activities, tours, pubs and cafes etc. based on contacts made through the network, thereby keeping the business in the area.

"Helped me connect with accommodation providers who can then promote my business to their guest and vice versa by showing people areas of the Cambrian mountains through tours we can help encourage people to revisit the areas again the future with benefits for accommodation providers and others." (Tourism business in Wales)

It's hoped that businesses within the network will be able to work on joint ventures in the future that may help encourage more visitors to the area for example a group of accommodation providers being able to offer local tours to their guests which they could not do individually.

A local business in the Blackstairs attended the CUPHAT course with the aim of seeing how it could help the village **develop the basic amenities and facilities** needed in order to encourage tourism to the area. The CUPHAT course helped the local development group in the village to grow and plan for the future, particularly with aspects such as plan development to access funding for larger scale projects in the village to improve facilities.

"I'm personally interested in developing things within the village that the community can use. And if they're happy and excited about those things, then that'll bring in people." (Tourism business in Ireland)

There was expectation from some community members that CUPHAT would be able to provide funding for capital works.

"The group, honestly, were quite disappointed that there wasn't going to be funding to spend on any capital projects." (Tourism business in Ireland)

However, the aim of the CUPHAT business course was to **train people** to help them to further develop their business ideas themselves. The training enabled people to consider wider ideas in relation to regenerative tourism and helped change people's mindsets.

"I do think that most people who have attended workshops etc will have found ways to up their game a little, hopefully resulting in making what the area had to offer a little more available." (Tourism business in Wales)

The course helped provide a **sense of community** and meant that different people involved in the community were able to network and share ideas and consider how they could bring those ideas into projects in the community. This means that the community can feel that they are all 'in it together' which creates a valuable positive feeling.

"It was really great to meet other providers and to learn about what they're doing. And then also to kind of build a sense of hope, and community." (Accommodation provider in Ireland)

Tourism needs people who want to do it, and who are going to take the risk in terms of starting a business and these people need to feel **supported**. CUPHAT has helped with that support and developed a sense of community whereby individual member can support each other. Educating people who want to start a business has been important to encourage them and give them the confidence to take the risk of starting a new business.

4.3.4 Stakeholder engagement findings

The CUPHAT community festivals were a celebration of the work in each of the four areas. The drop in events were attended by local businesses, community members and local school children who had been involved in the project. The numbers attending each festival is unknown.

The number of people who were able to engage in the evaluation stand at the festivals were low in all 4 festivals, with 18 people completing the survey and a similar number completing the flip chart exercises.

The key findings that either contribute to the baseline or demonstrate the impact of CUPHAT are as follows.

KEY FINDINGS – STAKEHOLDER ENGAGEMENT

Key findings that demonstrate the impact

Understanding and engagement with local heritage

- CUPHAT has supported understanding and engagement with local heritage. More people were aware of the heritage, and it is hoped it will enable visitors to engage better with heritage in the future, however, there needs to be a strong legacy to ensure this take place.
- CUPHAT has also set local heritage in the wider context, creating a strong knowledge and a feeling of pride in the heritage. This has helped businesses understand the positive resources they have so that they can maximize their potential and pass this on to visitors.

Marketing and promotion

- CUPHAT has improved opportunity for promotion of the areas through the development of the website, communication, and a practical marketing strategy.
- Rural businesses are now more visible to tourists, and this should help lead to growth.

Regenerative tourism

- CUPHAT has made a positive difference and has helped to deliver regenerative tourism in the areas. CUPHATs focus on helping, supporting, and giving confidence to local tourism businesses will help them to work towards a regenerative tourism approach (particularly in relation to environmental issues, citizen science, climate issues, local products and culture). CUPHAT was seen as a positive starting point for delivering change as it encouraged businesses to think about how they could be more sustainable.
- It is hoped that CUPHAT will encourage more visitors in the future though this depends on the project’s legacy.
- In order to ensure long-term sustainability there is a need to consider what will happen next and how to influence government policy.

Networking. CUPHAT provided the opportunity for networking, connecting local small diverse businesses together to collaborate and understand better the opportunities to develop ideas and joint working. This included:

- Creating a sense of community and belonging.
- Learning from others how they do things.
- Learning about other things going on locally.
- Opening up new opportunities.
- A supportive network of start-ups.

Lessons learnt

- A key aspect highlighted that could have been done better was project communication, for example promoting and advertising the events, as well as communication within the wider community. This highlights the challenge of a short-term project being able to fully embed in the community.

Legacy

- There is a need to continue supporting the areas and promoting them for tourism on a wider scale than has happened previously, either through a continuation of the project, or through government funding / policy.
- There is a need to ensure continued collaboration and engagement.

The following sections give an overview of the findings, and these are outlined in more detail in Appendix 6 and 7.

4.3.4.1 Flip chart exercise findings

- **What difference has CUPHAT made to tourism in the area?**

The comments made were positive about the impacts that CUPHAT had had in the areas, the key differences that were mentioned were increased networking opportunities which were of great benefit to those involved, improved opportunity for promotion of their areas and the focus on helping and improving the local tourism businesses. One attendee remarked on the noticeable increase in Welsh visitors to the Irish areas.

*“Opportunity to network, make connections to help promote tourism and local rural businesses.”
(Example post it response from a local business in Wales)*

- **Has CUPHAT supported your understanding and engagement with local heritage?**

All those that completed the exercise reporting that CUPHAT had supported their understanding and engagement with local heritage.

- **Will the work of CUPHAT enable visitors to engage better with the area’s local heritage?**

All those that completed the exercise reported that CUPHAT would enable visitors to engage better with the area's local heritage.

4.3.4.2 Findings of the survey with festival attendees

- **Can the CUPHAT objectives help deliver sustainable tourism in this area?**

The overwhelming response from participants was that CUPHAT was a positive agent for change in all of the case study areas as it encouraged businesses to think about how they could be more sustainable and also raised awareness of other businesses within the local areas. This networking was seen as key.

“Connecting organisations and businesses together is a great way to grow tourism in a sustainable way”.

The only concerns raised were in relation to the project coming to an end, as “what happens then”? It was recognised that delivering sustainability takes time and that it would be best if the project could be continued. A wider externalisation of the projects' influence on government policy to support further funding and more “boots/troops on the ground” (in Preseli) was also identified as being important to deliver sustainable tourism but that CUPHAT did represent a useful and worthwhile starting point for delivering change.

- **Name one positive thing that CUPHAT has done?**

CUPHAT provided support and a foundation for local businesses at the heart of regenerative tourism, encompassing environmental, citizen science, climate issues, local products and culture. In doing so it raised awareness of these issues, creating a community of practice to drive forward sustainability. This included an understanding of the strengths (and weaknesses) in the approach to tourism currently and some direction of how to develop going forward. This enabled one company to have the confidence to develop and establish a new hamper business, gave another the confidence to progress their views and for others it enabled a platform to inform government policy.

“It gave me the confidence to speak publicly and contribute my views within the group”.

The single most positive benefit however, cited by the majority of participants, was that it provided the opportunity for networking, connecting local small businesses, bringing a diverse set of businesses together to collaborate and understand better the opportunities to develop ideas and joint working. This development of a supportive network was intrinsic to the local case study areas but also more broadly across the totality of the CUPHAT area so that participants in both countries could see the similarities between the different upland areas, their communities, shared culture and challenges. This networking was seen as inclusive and provided good guidance on the direction for sustainable tourism businesses.

- **Name one thing that CUPHAT could have done better?**

Other than having more time to deliver its goals, including for example the work on walking trails and development of horse trails, the key aspect highlighted that could have been done better was that of the project communication.

More notice was required to promote and advertise the CUPHAT events, for example the community festivals. It was considered that marketing, publicity, promotion and advertising of courses and events could have been stronger, as well as communication within the wider community. This highlights the challenge of a short-term project being able to fully embed in the community.

Poor attendance at the festivals was also possibly due to being held on a weekday with more likely to attend on a weekend due to work commitments during the week.

Communication was particularly slow at the outset. One suggestion was that a website should have been developed sooner to enable communication earlier on in the project cycle.

“I didn't learn of it until a chance encounter in October 2022 and have been heavily involved since”.

In relation to the microenterprise support programmes a specific issue was raised about enabling better introduction of businesses. Whilst the diversity of businesses and speakers was welcomed, more could have been done to introduce them to each other.

“It would have been nice to have everyone introduce themselves and their business at the start of events so that we had a better idea of who was in the room”.

“More of an introduction to each other at the start of the programme would have been great to have a better understanding of each other's background and story from the first session”.

The size of the group was also referenced by one participant who considered that it would have been better to treat groups separately so they could have focused on specific issues.

There were also some comments about the lack of exit and legacy planning and the business did not seem to know if there was a plan to apply for further funds to build on the project and future sustainability.

- **What did you get out of your involvement with CUPHAT?**

Participants strongly identified networking as a key benefit they got from engaging with CUPHAT. This was largely focused on businesses, but one participant also stressed “a sense of community and belonging”. Business related networking included forming new links, getting to know other businesses and collaborating with local tourism operators. The benefits extended to practical aspects such as action planning and the clear, concise and varied approach to considering business strategy, aims and achievements. The workshops were considered very helpful, and participants learnt a lot from how others do things, and also learning of other things going on locally. The provision of content was interesting and informative, and one participant stated that it had “made me think deeper about our story”.

The hope is that this will increase tourism and business footfall by opening up new opportunities and getting more people engaged.

- **What difference has / will CUPHAT make to tourism in the area?**

As discussed, CUPHAT has brought businesses together, potentially to work more collaboratively. This was necessary as the network to date has been weak. It has also encouraged businesses think about the future by developing 5-year plans which should help with their long-term development. CUPHAT has also helped give an identity to smaller, rural businesses which should make them more visible to tourists and should help lead to growth.

Having been introduced to the programme, it could also create a stronger, supportive network of start-ups. To date regional support for tourism has focussed on bigger companies, offering little to smaller ones who generally have less resources and time to engage.

Whilst it is hoped that CUPHAT will encourage more visitors to the upland areas, this is still questionable, dependent on the project's legacy.

- **Has CUPHAT supported your understanding and engagement with local heritage?**

The overwhelming response from participants was that CUPHAT has been excellent in setting local heritage in the wider context, creating a greater interest in heritage and environment. It also generated a strong feeling of heritage, and greater pride in the case study areas.

The project provided useful information and developed understanding of certain areas i.e., biodiversity and citizen science.

The project will hopefully lead on to more signage at historical/prehistoric sites to engage visitors further.

- **Has /will CUPHAT enable visitors to engage with the cultural and natural heritage?**

Thoughts on whether CUPHAT will lead to more visitors engaging with cultural and natural heritage were more mixed, with many thinking it would and others hoping that it might.

There was a view that more people were aware of the respective area's heritage, but that there would need to be a strong legacy to ensure that good foundations were laid before the end of the project. CUPHAT has helped businesses understand the positive things they have so that they can maximize their potential and pass this on to visitors but there was an understanding that local businesses needed together in order to make the most of this. This should involve the development of a good website, communication and a practical marketing strategy.

It was noted that it would be good if CUPHAT can influence national government and tourism governance so as to recognise the local case study areas and draw attention away

from national honey spots. Such as the west coast or Ireland and the Brecon Beacons / Snowdonia in Wales.

- **What more needs to be done to support sustainable/regenerative tourism?**

There was a strong recognition of the need to continue supporting the areas and promoting them for tourism on a wider scale than has happened previously. This could be done either through a continuation of the project, if that were possible, or more likely through government funding to ensure that the resources used are sustained / extended into the future. Further resourcing could be used to address accessibility issues in the areas and develop effective transport links and associated infrastructure. In addition, funding could be used to provide a tourism hub to ensure the continuation of sustainable regenerative tourism and provide constructive assistance to tourist providers. This would need paid staff to lead and build confidence, and to work with businesses and communities.

This could also lead to the development of a marketing strategy for small businesses, with a slogan that unites and represents the local businesses, making it easier to promote the areas online and through social media.

Everyone agreed of the need to ensure continued collaboration and engagement.

4.3.5 Cross Cutting Themes findings

4.3.5.1 Equal Opportunities and non-discrimination

The CUPHAT business plan outlined the Universities and Dyfed Archaeological Trusts commitment to the principle of equal opportunities and their policies and procedures that are in place which would help to address the equal opportunities and non-discrimination objectives.

A project level Eco and Well-being Code was written and project staff were encouraged to follow this code. It covered a range of issues relevant to equal opportunities and non-discrimination including health, equality, cohesive workplace, Welsh and Irish language and culture.

The CUPHAT team have a nominated CCT Champion (Rhys Jones, Aberystwyth University) and have assessed the work against the objectives and a separate document outlines this in detail. The findings are summarised here together with any other relevant findings through the evaluation work.

- **Inclusive workplaces that promote equality of opportunity**

The CUPHAT business plan outlined the Universities and Dyfed Archaeological Trusts policies, procedures, events, commitments and other interventions that are in place to ensure an inclusive workplace that promotes equality. The following are key actions that have been taken:

- All job applications for the CUPHAT project at Aberystwyth University, University College Dublin and the Dyfed Archaeological Trust have included statements regarding equal opportunities and gender mainstreaming. Those in Wales also took

into account the Welsh language. Both AU and UCD are signed up to using Athena Swan to promote/help advance women's careers in STEM.

- Table 14 shows the gender makeup of the final CUPHAT team which overall has a bias towards more female members of staff. This does not take into account those members of staff that are part or full time. In terms of leadership roles, the project management role in Aberystwyth University was jointly managed by 2 women and the activity lead in University College Dublin was also led by a woman. The project was divided up into seven work packages and four of these were led by woman.

Table 14 – Gender split of CUPHAT team

	Female		Male	
	Number of individuals	% of total	Number of individuals	% of total
Project leads	5	42%	7	58%
Project staff	31	69%	14	31%
Total	36	63%	21	39%

- In order to promote an inclusive working environment, the project has provided childcare-flexible working arrangements, with time off in lieu, and the provision of time off during school holidays where appropriate.
- **Access to technology is available and accessible to all**
 - The activities of CUPHAT including those that are using technology have been made available to all and in particular were aimed specifically at those in the more rural upland areas.
 - The activities took place within the communities, so people were able to access the project easily without the need for travel. The training and support was tailored to make it as accessible as possible to the target communities
 - Discussions throughout the project considered access for all to the tourism sites that were selected. When selecting sites, consideration was given to sites which offered both accessible walking routes, as well as more challenging routes. The project also considered parking access and the facilities available at the sites selected.
 - By digitising cultural and natural heritage sites and artefacts, the project has made these project areas and artefacts accessible to all. This included providing digital images of hard-to-reach areas.
 - Within the project, staff with hidden disabilities were given appropriate support to enable them to participate actively on all relevant project activities.
- **Support Research Development and Innovation (RD&I) which seeks to address societal challenges**
 - Tailored support for communities and businesses on the CUPHAT programme was developed alongside skills training for businesses and communities that acknowledged different individual needs.
 - Training for project staff was also made available within the confines of the project.

- To increase visitor numbers and to encourage diverse groups to visit the heritage sites in the project areas, marketing strategies have been developed which will improve the participation of underrepresented groups, including Black and minority ethnic groups, disabled people, and lower socio-economic groups to visit these areas. It is however too early to report if the impact of the project has increased the numbers at this stage.
- **Encourage entrepreneurship and business start-up initiatives to encourage more take up from young people, women, Black and Minority Ethnic people (BAME), disabled people and LGBT people.**
 - The free entrepreneurial training programmes, the citizen science app training, the LIDAR training and the oral history training courses have been open to all in the communities, encouraging participation from as wide a group as possible.
- **Support access for disabled people and those from BME backgrounds to training and employment opportunities, including through sustainable transport solutions.**
 - Project events in the project areas have been held at different times of the day to encourage those who work or are retired or have specific commitment at times of the day or week.
 - The project activities have been held at different geographical locations within the target communities, to reach as wide an audience as possible and also at different type of venues e.g., community halls, pubs, schools etc. so that the activities were take not where people are rather than expecting them to come to the project.
 - The project has encouraged participation from across the communities and where possible has encouraged car sharing to the events to enable participants without transport to attend events.
- **Identify and support opportunities to promote and facilitate the use and promotion of the Welsh language**
 - The CUPHAT project has used the Welsh language, English and Gaelic throughout the project, including on the project website, in project tweets, in promotional materials, in all the event invitations and posters, the delivery of material at events, surveys.
 - Project staff in Wales being encouraged to attend Welsh lessons.
 - For the project evaluation surveys with participants were offered in English or Welsh. Two out of seven interviews with accommodation providers and local businesses were conducted in Welsh and 10 out of 13 interviews at the community celebration festivals were also conducted in Welsh.

4.3.5.2 Sustainable development

The CUPHAT business plan outlined Universities and Dyfed Archaeological Trusts commitment to sustainability and their policed and practices that are in place which would help to ensure the sustainable development objectives.

The CUPHAT team have assessed the work against the objectives and a separate document outlines this in detail. The findings are summarised here together with any other relevant findings through the evaluation work.

- A project level Eco and Well-being Code was written and project staff were encouraged to follow this code. It covered a range of issues relevant to sustainability including waste, transport, office environment, purchasing, water, energy, biodiversity, raising environmental and other awareness.
- A poster provided practical tips and reminders for saving energy, conserving water and encouraging improved waste management and to raise environmental awareness.
- After project closure any equipment purchased for delivering the project e.g., old laptops will be repurposed within departments to ensure resource efficiency measures are undertaken.
- As the project included project staff living and working over a wide area, most project meetings were held via Zoom and Teams links. This reduced the need to travel as frequently for every meeting and thus reduced the carbon footprint for regular project meetings.
- Whilst travelling within and to the project areas for events, shared transport was arranged wherever possible. There were also on-going discussions with the communities about local transport and the need for better public transport for access to the upland areas and about options such as electric bikes, but the project was able to take this further due to the time and funding constraints of the project.
- Where project meetings included travel between Wales and Ireland shared transport for team members was arranged to reduce the carbon footprint. Travel to and from Ireland has been via ferry and the ferry companies used for travel have a commitment to sustainability.
- Catering during site visits and events were primarily purchased from local community-based cafes and restaurants, which sourced local produce where possible and employed staff from the surrounding areas.
- When accommodation was needed whilst travelling in the project areas, it was mainly booked using local providers, and within the project areas. This was encouraged to support the local businesses, as well as to avoid travelling backwards and forwards from the project areas. However, in some instances when large groups were involved in visits, for example when travelling with the project network, accommodation was booked at locations large enough to accommodate big groups. In these circumstances care was taken to book venues and events in the local communities for meals and site visits.
- More broadly, the overall goal of CUPHAT is to promote cultural and natural heritage as a means of attracting tourists, but to do so in a sustainable and regenerative way (e.g., less of emphasis on mass tourism and more of an emphasis on attracting smaller numbers of tourists to bespoke activities and experiences, as well as attracting tourists during the off-peak and 'shoulder' season). There is therefore an emphasis throughout this evaluation on the relation to the natural heritage of coastal uplands on promoting environmental forms of sustainability.
- CUPHAT ran a course called 'Regenerative Tourism Programme for Microenterprise and Community Groups'. This was aimed at local businesses and communities and encouraged them to think about how they could be more sustainable and provided training and new ideas around environmental improvements, sustainability, circular economy, funding

opportunities and the value of local products. Feedback from the businesses that attended training was very positive about this aspect of the work and how it could improve their sustainability.

“We are really interested in regenerative practices and circular economy.....we've been doing things ourselves independently but now we're trying to move towards completely green energy at our business.”

4.3.5.3 Tackling poverty and social exclusion

The CUPHAT team have assessed the work against the objectives and a separate document outlines this in detail. The findings are summarised here together with any other relevant findings through the evaluation work.

- The CUPHAT project set up and delivered an entrepreneurial and community development programme in each of the project areas. Participants were invited from each of the project areas, which was free to attend and open to all. The programme was developed to build skills within the communities and local businesses to enhance skills development and was developed with input from the local communities and businesses in order to address the needs of each project area. The programme ran for 6 weeks in each of the project areas and in Wales it was delivered in both Welsh and English. Participants were encouraged to engage with others on the programme with peer support activities and learning, as well as encouraging peer support after the completion of the programme. Businesses and community groups were also invited to submit an action plan and to apply for one-to-one coaching for further help to develop their businesses and ideas.
- CUPHAT also provided opportunities for upskilling, which included volunteering in the project area, and taking part in archaeological surveys and digs.
- Communities were invited to learn about the use of LIDAR to survey sites in the project area. Communities were invited to participate in learning how to use citizen science apps to monitor the environment and to take part in a free oral history training session to teach communities how to record oral histories.
- The project set up a network within and between the project areas to encourage cross county and cross nation collaboration between communities and businesses, to encourage learning between the four project areas in Wales and Ireland. Communities have been encouraged to continue this collaboration beyond project closure.

5.0 EVALUATION

5.1 INTRODUCTION

The findings that were collected through the surveys as outlined in section 4 have been analysed for the evaluation in order to assess whether the key CUPHAT requirements and outcomes have been achieved and to assess the impact of CUPHAT. The key questions addressed are:

- The impact on the number of visitors to each coastal upland area and the proportion that are from overseas (i.e., normally resident outside the UK if visiting Welsh coastal upland areas; normally resident outside of Ireland if visiting Irish coastal upland areas).
- The impact on the amount of time spent by individuals in the four coastal upland areas.
- The impact on the amount of money spent by individuals in the four coastal upland areas and how it was spent.
- The impact on the levels of engagement with heritage in the four coastal upland areas.
- How challenges that limit dwell time, spend and engagement with heritage have been overcome.
- The extent to which different businesses benefits from tourism has changed due to CUPHAT.
- The extent to which CUPHAT has increased the draw of cultural and natural heritage for visitors to spend more time in the four coastal upland areas.
- The extent to which CUPHAT has enabled community groups and local enterprises to engage with and promote cultural and natural heritage.
- The extent to which CUPHAT has enabled the communities to participate in cross-border cooperation around cultural, natural and heritage tourism.
- The impact of a new tourism network promoting cultural, natural and heritage tourism within and between the 12 communities and four coastal upland areas.

In addition, other key outcomes or issues have emerged as a result of the data collected and these are also presented as part of this evaluation including what has worked well and what could be improved.

The evaluation is summarised in Table 15 which lists the baselines and predicted impact of CUPHAT on the key data requirements. Table 15 also indicates where the end of project evaluation added to the baseline data collated in the interim review.

It should be noted that this evaluation has not included an evaluation of the work of all the work packages as this was outside of this contract. It has primarily looked at work that is related to the impact on regenerative tourism and as such has not looked in details at the work with schools, citizen science or digital technologies etc.

Table 15 - Summary of the impact of CUPHAT

Key Data Requirements	Wales CUPHAT areas		Ireland CUPHAT areas	
	Baselines from interim review report <i>(Updated where relevant from data collected in the final evaluation surveys)</i>	Potential change due to the work through CUPHAT	Baselines from interim review report <i>(Updated where relevant from data collected from the final evaluation survey)</i>	Potential change due to the work through CUPHAT
A. Number of visitors	<p>NA</p> <p><i>Cambrian Mountains (32% occupancy in 2022)</i></p> <p><i>Mynydd Preseli (42% occupancy in 2022)</i></p>	<p>Accommodation providers survey predicted change 2022 to 2023:</p> <ul style="list-style-type: none"> • Cambrian Mountains - 75% of those surveyed predict an increase in occupancy levels of all visitors, and 61% of those surveyed predict an increase overseas visitor's occupancy level. • Mynydd Preseli - 25% of those surveyed predict an increase in occupancy levels of all visitors, and 0% of those surveyed predict an increase overseas visitor's occupancy level. <p>Visitors survey:</p> <ul style="list-style-type: none"> • 75% of the overseas visitors surveyed who were visiting areas of Wales adjacent to the CUPHAT upland areas would be 'very likely' to visit the coastal upland areas 	<p>NA</p> <p><i>Wicklow Mountains (64% occupancy in 2022)</i></p> <p><i>Blackstairs Mountains (42% occupancy in 2022)</i></p>	<p>Accommodation providers survey predicted change 2022 to 2023:</p> <ul style="list-style-type: none"> • Wicklow Mountains - 46% of those surveyed predict an increase occupancy levels all visitors, and 48% of those surveyed predict an increase in occupancy levels of overseas visitors. • Blackstairs Mountain - 0% of those surveyed predict an increase in occupancy levels all visitors, and 50% of those surveyed predict an increase in occupancy levels of overseas visitors. <p>Visitors survey:</p> <ul style="list-style-type: none"> • 46% of the overseas tourists surveyed who were visiting areas of Ireland adjacent to the CUPHAT upland areas would be 'very likely' to visit the coastal upland areas

Key Data Requirements	Wales CUPHAT areas		Ireland CUPHAT areas	
	Baselines from interim review report <i>(Updated where relevant from data collected in the final evaluation surveys)</i>	Potential change due to the work through CUPHAT	Baselines from interim review report <i>(Updated where relevant from data collected from the final evaluation survey)</i>	Potential change due to the work through CUPHAT
B. Time spent	3.9 nights (not specific to the core CUPHAT area) <i>Cambrian -3.5 nights</i> <i>Preseli – 4 nights</i>	Visitor survey – length of future visit to core CUPHAT areas: <ul style="list-style-type: none"> • 60%-day visit • 20% couple of days with an overnight stay • 10% a week or more However, if various factors were favorable then this could extend their length of stay.	3.2 nights (not specific to the core CUPHAT area) <i>Wicklow – 3.5 nights</i> <i>Blackstairs – 2 nights</i>	Visitor survey – length of future visit to core CUPHAT areas: <ul style="list-style-type: none"> • 39%-day visit • 39% couple of days with an overnight stay • 4% a week or more However, if various factors were favourable then this could extend their length of stay.
C. Spend	Overnight trip £178 Day trip £36 (not specific to the core CUPHAT area)	An increase in number of visitors and length of stay would result in an increase in spend.	€365 per capita (not specific to the core CUPHAT area)	An increase in number of visitors and length of stay would result in an increase in spend.

Key Data Requirements	Wales CUPHAT areas		Ireland CUPHAT areas	
	Baselines from interim review report <i>(Updated where relevant from data collected in the final evaluation surveys)</i>	Potential change due to the work through CUPHAT	Baselines from interim review report <i>(Updated where relevant from data collected from the final evaluation survey)</i>	Potential change due to the work through CUPHAT
D. Engagement with heritage	<p>The Natural and historic heritage are key motivators for visitors including Welsh ancestry, wildlife attraction, wildlife watching, walking, visit a castle or other historic attraction, visit a beach, visit a country/forest park.</p> <p><i>Accommodation survey top 3 reasons for visiting were: landscape /countryside /beach, informal outdoor activities, visiting historical/cultural/religious sites.</i></p>	<p>CUPHAT has shown that visitors to these areas are engaged with the natural, cultural and historic heritage.</p>	<p>The natural, cultural and historic heritage are key motivators for visitors including hiking and visiting heritage sites such as castles or museums. There are opportunities to use heritage to engage and attract more visitors.</p> <p><i>Accommodation survey top 3 reasons for visiting were: landscape /countryside /beach, informal outdoor activities, visiting historical/cultural/religious sites.</i></p>	<p>CUPHAT has shown that visitors to these areas are engaged with the natural, cultural and historic heritage.</p>

Key Data Requirements	Wales CUPHAT areas		Ireland CUPHAT areas	
	Baselines from interim review report <i>(Updated where relevant from data collected in the final evaluation surveys)</i>	Potential change due to the work through CUPHAT	Baselines from interim review report <i>(Updated where relevant from data collected from the final evaluation survey)</i>	Potential change due to the work through CUPHAT
E. Challenges	<ul style="list-style-type: none"> • Remoteness. • lack of digital connectivity. • Lack of facilities (toilets/cafes), activities during bad weather and promotion. • Transport issues. • Recruitment crisis. • Rising day to day running and living costs. <p><i>Accommodation survey top three challenges in attracting guests: Marketing, advertising constraints, poor transport, not a well-known location.</i></p> <p><i>Accommodation survey top three challenges to guests staying longer: lack of amenities, lack of major tourist sites, walkers naturally move on.</i></p>	<p>CUPHAT has raised awareness of the challenges and has given advice and support to empower local communities and businesses to address these where possible.</p> <p>Accommodation providers surveys showed that those in the Cambrian mountains felt that CUPHAT had helped them overcome barriers, but those in Mynydd Preseli had not.</p>	<ul style="list-style-type: none"> • Remoteness. • lack of promotion. • Lack of facilities (some of which are shut on certain days). • Transport issues. • Rising day to day running and living costs. <p><i>Accommodation survey top three challenges in attracting guests: Marketing, advertising constraints, poor transport, remoteness.</i></p> <p><i>Accommodation survey top three challenges to guests staying longer: lack of amenities, lack of major tourist sites, walkers naturally move on.</i></p>	<p>CUPHAT has raised awareness of the challenges and has given advice and support to empower local communities and businesses to address these where possible.</p> <p>Accommodation providers surveys showed that those in the Wicklow mountains felt that CUPHAT had helped them overcome barriers, but those in Blackstairs had not.</p>
F. Benefits	NA		NA	

Key Data Requirements	Wales CUPHAT areas		Ireland CUPHAT areas	
	Baselines from interim review report <i>(Updated where relevant from data collected in the final evaluation surveys)</i>	Potential change due to the work through CUPHAT	Baselines from interim review report <i>(Updated where relevant from data collected from the final evaluation survey)</i>	Potential change due to the work through CUPHAT
G. Extent heritage encourage visitors	The natural and historic environment are key motivators for visitors to Wales and to the 2 project areas, so this could be used to attract more respectful visitors and help influence behaviour.	CUPHAT has used heritage to engage and attract more visitors e.g., through production of a visitor website which raises awareness about the area's heritage through photography, digitized reconstructions, oral histories etc., setting up a tourism business network, training courses for local businesses.	Cultural and natural heritage of the areas could be used to encourage more people to visit and spend time in the areas.	CUPHAT has used heritage to engage and attract more visitors e.g., through production of a visitor website which raises awareness about the area's heritage through photography, digitized reconstructions, oral histories etc., setting up a tourism business network, training courses for local businesses.
H. Community groups engaged with promotion	Internet is a key source of information for visitors.	CUPHAT has engaged the local communities and tourism businesses in creating the CUPHAT website. The accommodation providers survey showed that 21% of the providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of CUPHAT activities.	Internet and friends and family are key sources of information for visitors.	CUPHAT has engaged the local communities and tourism businesses in creating the CUPHAT website. The accommodation providers survey showed that 21% of the providers that have heard of the CUPHAT project, have changed their marketing strategies as a result of CUPHAT activities.

5.2 IMPACT OF CUPHAT

The key impacts of CUPHAT arising from the evaluation are summarised as follows.

5.2.1 Potential to increase visitor numbers, time spent and spend in the area

KEY IMPACT

CUPHAT has the potential to increase overseas visitor numbers by at least the 5% target which would therefore also result in higher visitor spend.

The views expressed by visitors and businesses that were surveyed demonstrate that there is potential for the work of CUPHAT to increase visitor numbers, time spent and spend in the four coastal upland areas.

The accommodation providers survey asked the respondents to predict changes in occupancy levels from 2022 to 2023 for all visitors and specially for overseas visitors. The responses were as follows:

- Cambrian Mountains - 75% of those surveyed predicted an increase in occupancy levels of all visitors, with 61% predicting an increase overseas visitor's occupancy levels.
- Mynydd Preseli - 25% of those surveyed predicted an increase in occupancy levels of all visitors, though no respondent specifically predicted an increase overseas visitor occupancy levels.
- Wicklow Mountains - 46% of those surveyed predicted an increase occupancy levels all visitors, with a similar amount predicting an increase in occupancy levels of overseas visitors.
- Blackstairs Mountain – No respondent surveyed predicted an increase in occupancy levels of all visitors, although 50% predicted an increase in the occupancy levels of overseas visitors.

Whilst overall, this does show a predicted increase in visitor occupancy levels, it also appears to show some contradictory results with respect to Blackstairs. In part this can be explained by the low response rate and the fact that the respondents were from the Carlow side of the Blackstairs Mountains, skews the results but also might show a prediction that the growth market might be overseas tourists as opposed to national ones.

However, the predicted increase in numbers overall does not necessarily align well with the main comments received during the interviews (accommodation providers and businesses), particularly in Wales where interviewees reported lower booking numbers in 2023 at the time of the interviews (with the hope that these would improve later in the season).

Accommodation providers were also asked if they felt that potential overseas visitors would be more likely to visit the area as a result of the work of CUPHAT. In the Cambrian and Wicklow Mountains, many of the accommodation providers who were aware of CUPHAT felt that overseas visitors were more likely or probably more likely to visit the area as a result of the work of CUPHAT. However, in the Mynydd Preseli and the Blackstairs Mountains, accommodation providers were unsure whether the work of CUPHAT would encourage more overseas visitors to visit the area.

With regards to the visitors, one of the main barriers cited for not visiting the upland areas was that they did not know anything about them. During the face-to-face survey, visitors were provided with information about the respective upland areas and shown photographs that had been produced by the CUPHAT project. The results showed that 43% of all respondents said as a result that they would be 'very likely' to visit these areas had they had known about them (and a further 40% responded 'quite likely'). The responses from the overseas visitors were higher with 46% of the overseas visitors in Ireland, and 75% of the overseas visitors in Wales saying would be 'very likely' to visit the upland areas.

This would seem to demonstrate therefore that CUPHAT has the potential to increase overseas visitor numbers by at least the 5% target which would therefore also result in higher visitor spend.

There is also potential for increasing length of stay, however the majority of visitors surveyed from outside of the area would see this as a day visit, though some responded they might stay a couple of days or longer depending on a number of unknown factors such as availability of suitable accommodation and other facilities such as cafes, car parks etc in the area, what there is to do, and places to visit. If these factors were favourable and people could find out about them then this could extend their length of stay to more than a day visit.

The accommodation providers surveys reported that people were staying on average between 2 to 4.5 nights in these areas. This therefore shows that there is the potential to increase length of stay and therefore spend in these areas. However, it should be noted that short-stays are common-place among walkers/cyclists, particularly in the Wicklow Mountains where guests are hiking the Wicklow Way.

Many people commented on the desire for an authentic experience and the rise in people seeking this can also be capitalised on by the areas. CUPHAT has the ability to do this by promoting the heritage through greater marketing, targeting these types of visitors and supporting local businesses to do the same.

Overseas visitors make up a large percentage of visitors to Ireland, however only a small percentage of visitors to Wales. As such there is potential to increase the overseas visitors to Wales to a greater extent through better connections with Ireland which could be achieved through better promotion and networking. Many international travellers are visiting Ireland to trace their roots or visit where their ancestors came from as well as experiencing the Irish landscape, heritage and culture. Links between Wales and Ireland could emphasise the similarities of these areas and encourage those same international travellers to also visit similar areas in Wales to experience an authentic Welsh experience.

5.2.2 Visitors better able to engage with heritage

KEY IMPACT

CUPHAT has promoted the natural, historic and cultural heritage of the four coastal upland areas. This has raised awareness and provided a means by which visitors can easily engage with the heritage, either through the CUPHAT marketing website or by enabling and supporting local businesses to provide opportunities to engage with heritage.

The four coastal upland areas all have an unspoilt landscape of natural beauty including mountains, forests and rivers with unique habitats, plants and animals which is attractive to visitors to visit and carry out informal activities such as walking, enjoying nature and the peace and quiet. In addition, the areas have a strong cultural identity with traditional land use, local buildings, language, traditional song, dance, music and folklore. There is also a rich and varied historic heritage from the neolithic to the present, including bronze age sites, early Christian heritage, Celtic cultural links. There are many places to visit including the archaeological sites, monuments, museums, historic houses, religious sites and areas that show evidence of past human activity such as mining. Each area has its own unique sense of place with which visitors can engage. The accommodation providers survey highlighted that the cultural/historic heritage of the areas was often underdeveloped, so visitors were often unaware or found it difficult to engage with all aspects of the heritage.

CUPHAT has addressed and promoted the varied cultural and natural heritage of these coastal uplands through 4 key natural and cultural heritage themes: geomorphology and landforms, archaeological heritage, biodiversity, and cultural lives as they present an opportunity to create diverse forms of value (economic, social, cultural, environmental) that local business can integrate into their product or service. From the work undertaken with visitors and tourism businesses a further theme could be 'enjoying the outdoors'.

The visitor survey showed that the top four activities that people were doing on their visits were visiting historical sites / cultural sites / religious sites, enjoying the landscape / countryside / beach, taking part in informal outdoor activities (56%) and sightseeing or visiting specific attractions. This therefore demonstrates that visitors already have a high level of engagement with heritage. When provided with more information about the heritage, whether through their own research, from advice from their accommodation provider, tours guides or taxi drivers, people are interested to learn more showing that there is a strong desire to become more engaged with the heritage in a variety of ways.

The survey responses show that in order to engage better, people need to be provided with the information or need to be able to access it as easily as possible, if it's hard to find then people are likely to miss it and instead will visit those areas that are better covered online or elsewhere. This is particularly evident in Ireland where a lot of overseas visitors rely on tour guides for information rather than researching visits themselves.

The visitor survey showed that the majority of visitors are using google searches to plan their trips and to further research their visit whilst on holiday. A specific website which included information all in one location would therefore help raise the visibility of the upland areas and therefore visitors' engagement with the local heritage. The CUPHAT website plans to include stories from the oral histories in relation to the local culture, photographs and flyovers of the landscape and digitisations of some of the historic heritage features. The website will also promote regenerative tourism in the areas. All these will help bring the heritage alive for visitors and encourage them to visit to experience the heritage first hand.

5.2.3 Barriers and challenges

KEY IMPACT

CUPHAT has overcome some of the barriers and challenges for people visiting the areas by improving the visibility of the areas and of their heritage. People are now aware of them as places to visit. Other barriers such as those related to transport have been highlighted with the policy makers.

Similar barriers and challenges which impact on the ability for people to visit the areas and engage with the heritage were raised by both visitors, accommodation providers and local businesses.

As discussed, one of the main barriers that prevented people from visiting the upland areas related to the fact that the areas are remote, not well known, and not marketed, so visitors are not aware of them as a possible destination.

When informed about the areas and shown photographs, the majority of visitors who were surveyed said they would like to visit these areas. Therefore, access to information about the areas is a key barrier which the CUPHAT project has sought to overcome. It has addressed this in the following ways:

- By improving the visibility of the area's heritage for visitors through production of a website.
- Digitisation of historic features to make them come alive for visitors.
- Recording oral histories.
- Working with schools to raise awareness of the area's heritage.
- Helping local businesses be more aware of their local heritage and helping them develop ways to better promote it to visitors.
- Developing citizen science activities that record changes in landscapes, environmental quality, and plants and animals. This will provide data for tourists but also allows tourists to engage with collecting this information, so enabling a deeper level of awareness, engagement and participation, creating a sense of ownership.

Another challenge faced by the upland communities are the availability and ease of access to key services such as shops, public toilets, cafes, parking, and public transport. In order to visit these areas, there is a dependence on having access to a vehicle, therefore impacting the ability of some to visit the areas. Public transport was therefore in the top four reasons cited by the accommodation providers as a challenge to attracting guests to their accommodation. This was also often mentioned by visitors, though some were less concerned as they would travel to the areas by car anyway.

Although these are not issues that CUPHAT can address, the project has highlighted this as a key issue influencing tourism in these areas. It has also helped communities address this at a local level as well as providing a means to highlight this issue with the policy makers. There is also a conundrum here in trying to promote more regenerative tourism and sustainable transport in areas that can only be accessed by private car.

In Ireland, overseas visitors often rely on organised tours to visit places. Most tours only visit the main attractions and towns, so this is a barrier to increasing overseas visitors to these upland areas. In addition, in Wales many cruise ships come into Fishguard which is adjacent to the Mynydd Preseli area, people from the cruise ships often attend organised tours to St Davids, but there are not any tours into the upland areas.

The accommodation providers were asked whether they felt that CUPHAT had helped them to overcome any challenges or barriers. Half of the accommodation providers surveyed in the Cambrian Mountains and the Wicklow Mountains that were aware of CUPHAT felt that the project had helped or will help them to overcome challenges or barriers. However, in the Blackstairs Mountains and Mynydd Preseli, none of those providers that were initially aware of the project felt that it had helped/will help them to overcome challenges or barriers.

5.2.4 Enabling regenerative tourism

KEY IMPACT

CUPHAT has provided training, guidance and support to local businesses and communities to help them develop a regenerative approach to tourism in their coastal upland areas. This also gave businesses the confidence to progress their ideas.

The focus on improving local sustainable tourism by providing help and support for local businesses and communities was well recognised, with the surveys and interviews providing many positive reflections on the impact that CUPHAT had had in the areas to create more sustainable tourism. This is also shown in the assessment of the sustainability cross cutting theme. The response has also shown that there is more awareness and desire for not just sustainable tourism but to move towards a more regenerative tourism model in these areas building on the rich natural, historic and cultural heritage.

CUPHAT ran a course called 'Regenerative Tourism Programme for Microenterprise and Community Groups'. This was aimed at local businesses and communities. The five-week course encouraged them to think about how they could be more sustainable and provided training and new ideas around environmental improvements, sustainability, circular economy, funding opportunities, the value of local products, branding, and how to market their local heritage and culture. The course helped them to develop an action plan for their microenterprise or community project.

As well as practical advice the courses also gave people the support and confidence, they needed to progress their ideas. This created a sense of a local sustainable community which could work together to provide regenerative tourism.

As a result of the courses many local businesses are now trying to find new ways of linking into the regenerative tourism concept. This has included linking their tourism offer to health and wellbeing, mindfulness, or nature, using local produce or crafts, creating a more sustainable business model and communities and businesses working together to develop local infrastructure, keep the local culture alive, develop new ideas and best practise.

One of the aims of CUPHAT was to increase overseas visitors by 5%, but what's clear from the feedback is that it's also looking at making sure that the people who do come or the people who might come can get more out of their visits so that they then go home with a positivity that could rub off on somebody else. By highlighting the range of heritage on offer CUPHAT is helping to achieve this.

5.2.5 Heritage of the area can be used as a draw for visitors with better promotion

KEY IMPACT

CUPHAT has helped tourism businesses become more aware of the importance of the heritage of the coastal upland areas and how it can be used to, not only promote general tourism in the area, but also their own businesses.

As previously mentioned all four coastal upland areas have a wide range of heritage for visitors to explore and engage with. The surveys showed that when they are aware of it, the natural, cultural and historic heritage of an area is a major draw for visitors. CUPHAT has provided greater opportunities for improved promotion of the heritage of four coastal upland areas. In particular this has been/will be extremely beneficial to the smaller tourist businesses that might be off the beaten track, or more difficult to find out about for the majority of tourists.

In addition, the tourism businesses can use the heritage of the area to help promote their own businesses. In the accommodation providers survey 21% of the providers that had heard of the CUPHAT project, had changed their marketing strategies as a result of CUPHAT activities. This was often as a result of attending the courses which looked at branding, storytelling principles, marketing and marketing trends such as 'slow tourism' which could help them sell the heritage of the area more effectively.

5.2.6 Communities able to participate in cross border cooperation

KEY IMPACT

CUPHAT has enabled businesses and communities to participate in cross border cooperation resulting in raised awareness, learning and opportunities for joint working.

The communities who have been involved in the project have been able to benefit from cross border cooperation through project visits and other joint working. The tourism network created and supported through CUPHAT has also strengthened their ability to participate in cross border cooperation. This has raised awareness of each area and how others are dealing with similar issues in similar areas.

5.2.7 Tourism businesses networking with each other

KEY IMPACT

CUPHAT tourism network has connected people locally who can now work together to promote tourism in the area and promote and improve their own businesses.

Rural communities can thrive by co-creating and co-designing solutions to the challenges they face. Therefore, collaborations between tourism businesses, policymakers and the community

can help create opportunities by defining problems and overcoming barriers together. The networking opportunities provided through CUPHAT has created the conditions to achieve this. It has recognised that the communities can connect due not only to their geographical location and shared heritage but also their shared values, social networks and connections.

CUPHAT has raised awareness of other businesses within their local area and also in the other project areas. This was seen as a key outcome as it connected communities, organisations and businesses together so that they could jointly grow tourism in a sustainable way. This development of a supportive network across the CUPHAT area meant that the business and communities in both countries could see the similarities between the different upland areas, their communities, shared culture, challenges and opportunities for regenerative tourism.

5.2.8 Ireland Wales Co-operation Programme Priority Axis 3 Indicators

KEY IMPACT

CUPHAT project has contributed to the indicators in relation to priorities of the Ireland Wales Co-operation Programme.

The CUPHAT project has met the key priorities of the Ireland Wales Co-operation Programme, in particular the indicators in relation to Priority 3 i.e., “Cultural and Natural Resources and Heritage” which has the specific objective of sustainably realising the potential of natural and cultural assets in increasing visitor numbers to coastal communities.

Due to the timing of the evaluation in relation to the completion of the CUPHAT activity it’s too early to measure an actual increase in the number of visitors to the coastal communities. However, the surveys have shown the potential for an increase in visitors based on the area's natural and cultural assets and the surveys also showed that this potential was high provided the peoples are made aware of what’s on offer in these areas and there is appropriate infrastructure to support their visits. The historic, natural and cultural heritage of the areas were a key attraction and therefore could be a driver to economic growth in the 12 communities.

Table 16 shows how the outputs / outcomes of the CUPHAT project help to achieve the Ireland Wales Co-operation Programme indicators in relation to Priority Axis 3. It is likely that all these have been completed, the ongoing success of some will depend on legacy action after the funded project ends in August 2023.

Table 16 -Evaluation against the Ireland Wales Co-operation Programme Indicators

Indicator	Measurement unit	Target	CUPHAT activity outputs / outcome
Employment increase in supported enterprises	Full time equivalents	4 FTEs	2 in place and 2 planned / in progress.
Number of pilot projects completed	Completed pilot projects	4	4
Number of new tourism networks promoting cultural, natural or heritage assets	Cross-border networks	4	5 (Four new tourism networks in each of the four upland coastal areas and a cross border network)
Number of coastal communities participating in cross-border cooperation around cultural, natural or heritage tourism	Communities	12	12

5.3 Limitations

Whilst there is a good quantity and overall, a good quality of data available to inform this project evaluation, it is acknowledged that there have been specific limitations, outlined as follows:

- The COVID-19 pandemic impacted tourism in Wales and Ireland as it did elsewhere. This affected the ability to compare recent data and trends with data likely to be impacted by increased number of staycations. It is therefore difficult to provide a quantitative impact assessment of CUPHAT on visitor numbers.
- The limited time available for the delivery of the CUPHAT project resulted in a three-year project being delivered in 18 months. Community engagement takes a long time to develop i.e., to move the community from awareness - participation - engagement - collaboration. The shortened length of this project had meant that it has not had long enough to truly embed into the communities.
- This evaluation has been produced ahead of the end of project and specifically before the activities undertaken have had a chance to have an impact on the ground, as such it has been difficult to gather evidence on the impacts the project may have over the longer-term such as increasing numbers of overseas visitors and greater engagement with the heritage of the coastal upland areas. This limitation has been mitigated by examining the emerging outcomes and ongoing benefits and legacy of the project activity for the key tourism business in the areas as well as their potential impact on visitors.
- There is a lack of existing baseline data for the four specific coastal upland areas i.e., visitor number, length of stay, spend. Due to the timescale of the project and the timing of the evaluation, collecting further baseline data was a challenge.
- There were a number of limitations the visitor surveys:
 - Due to the timing of the evaluation, the online and face to face visitor surveys had to be undertaken from March to June, therefore outside of the main tourist season. If this

- had been carried out during the summer months, then a greater number of responses might have been expected.
- Despite taking a number of different approaches to reach out to visitors there was a very disappointing uptake for the online survey which resulted in only 2 online responses.
 - The incentive of entering a draw to win CUPHAT merchandise may not have been encouraged greater participation, it might have been useful to consider a more appealing incentive
 - The face-to-face surveys were carried out on weekdays during June. Although this approach was successful in and talked to a number of visitors it was only targeting those type of visitors who visit at that time of year, as such it missed out on family who would be more likely to visit during the school holidays.
- There were a number of limitations to the accommodation provider and business surveys:
 - Despite contacting over 400 accommodation providers, with numerous reminders and advertising via social media channel and promotion from some other tourist organizations only a small number completed the survey. The reasons for this particularly low response rate (6.8%) could be because they hadn't heard of the project so could not see the value of responding, timing of the survey at the start of the spring/summer season, reluctance of people to complete online surveys, time pressures, nature of the questions. An incentive of a CUPHAT product was used to encourage greater take up, however it might have been more successful to have an incentive that might have had a broader appeal, however due to funding rules this was not possible.
 - It was not possible to contact Airbnb accommodation.
 - There were a limited number of accommodation providers and tourism businesses that could be contacted in the Blackstairs area.
 - Despite contacting 35 businesses, with numerous reminders and advertising via social media channel only a small number were willing to be interviewed. The response rate was 20% so reasonable for a survey, however reasons it was not higher are thought to be the same as those listed above for the accommodation providers.
 - The incentive of entering a draw to win CUPHAT merchandise may not have been encouraged greater participation, it might have been useful to consider a more appealing incentive.
 - The number of people who attended the community celebration festivals towards the end of the project were low. The evaluation stand at the festival had hoped to gather views and thoughts of a wide range of business and community members that had been involved in CUPHAT, so the low turn impacted on this area of data collection.
 - The evaluation contract was limited to gathering views from visitor, accommodation provider and local tourism businesses. It did not collect specific views of those more directly involved in the project i.e., the CUPHAT project managers and team or from the various tourism organisations.
 - The limited response rates to the surveys (online and face to face) meant that it has not been possible to capture the broadest range of views, however those that have been gathered provide a good picture of the project, its journey and the final outcomes and impacts.

5.4 Lessons learned

In addition to the limitations that were outlined in section 4.3 there were a number of issues raised by participants in the surveys in relation to what CUPHAT could have done better and lessons learnt for future projects.

A number of respondents were disappointed that there was no funding for capital improvements, however it is noted that this was outside the scope of CUPHAT due to the funding restrictions. However, the project training included looking at funding and partnership opportunities, funding streams, how to approach funders and how to meet the specific criteria. The aim was to support the microenterprises or community projects with funding, rather than provide funding through the project. It could be that people's expectations could have been managed more effectively.

The key aspect highlighted that could have been done better was in relation to project communication and the following issues were raised:

- Communication was particularly slow at the start of the project and many people surveyed only found out about it by chance and often late in the day. One suggestion was that a website should have been developed sooner to enable communication earlier on in the project cycle or more local advertising for example in the Cambrian News, posters in the local town or outreach to groups such as the women's Institute, choirs and chapels.
- It was considered that marketing, publicity, promotion and advertising of courses and events could have been stronger, as well as communication within the wider community. For example, more notice was required to promote and advertise the CUPHAT events and festivals locally to encourage more attendees.
- Poor attendance at the festivals was also possibly due to being held on a weekday with more people likely to attend on a weekend due to work commitments during the week.

Along a similar theme to communication, was the need to enable better introduction of businesses. Whilst the diversity of businesses and speakers was welcomed it was mentioned that it would have been better to have everyone introduce themselves and their business at the start of events so that everyone had a better idea of who was in the room and a better understanding of each other's background.

The size of the group was also referenced by one participant who considered that it would have been better to treat groups separately so they could have focused on specific issues.

6.0 CONCLUSIONS AND RECOMMENDATIONS

6.1 CONCLUSIONS

This evaluation has demonstrated that overall, the CUPHAT project has met its objective “to increase and enhance tourism in the coastal uplands in four regions of Ireland and Wales through the development of a range of initiatives which were designed to stimulate interest in the four areas and add value to the visitor experience.” CUPHAT has also contributed to the Priority Axis 3 indicators of the Ireland Wales Co-operation Programme.

This evaluation has not only looked at the impact of CUPHAT but has also resulted in additional information to inform the baseline of information in the four coastal upland areas.

Effective community engagement takes time to embed and CUPHAT has had only a short time to develop with this three-year project being delivered within only 18 months. This has presented a challenge. However, the project has delivered against its objectives and initiated a series of activities that have the potential for long-lasting and significant impact. There are a number of key success stories that reflect the impact of CUPHAT, these are summarised as follows:

- CUPHAT has **raised awareness of the coastal upland areas** as places to visit and the role that the natural, cultural and historic heritage can have to encourage more visitors, including those from overseas. CUPHAT has helped businesses understand more about and have pride in their local heritage so that they can pass this on to visitors.
- Whilst it is too early to tell whether CUPHAT has definitively had a **positive impact on regenerative tourism** in the areas, there are undoubtedly many positive aspects of CUPHATs work that will very likely deliver a more regenerative approach to tourism in the four areas.
- CUPHATs focus on **working with microenterprises**, including the training programme and guidance it provided has given confidence to local tourism businesses and challenged them to think about how they could be more sustainable and encourage more visitors.
- The CUPHAT **marketing** website and strategy will provide greater opportunities for improved promotion of the areas, improving the visibility of the areas to visitors and helping them access information more easily. This will be particularly beneficial to the smaller tourist businesses and support a regenerative approach.
- CUPHAT has provided an opportunity for b2b **networking** that has not happened before. This has several benefits, including connecting local small diverse businesses, collaboration, creating a sense of community, developing joint plans for local facilities and developing new opportunities to encourage regenerative tourism.

The ongoing success for regenerative tourism will depend on a legacy of sustaining action into the future, beyond the project funding period which ends August 2023. Such actions require

that there is continuing support for the project areas to promote tourism, either through the specific continuation of the project's activities, or through additional support from government, whether this be through the provision of additional funding or through the development of a supportive policy framework.

6.2 RECOMMENDATIONS FOR LEGACY

CUPHAT has demonstrated that there is a continuing need to promote the four coastal upland areas for tourism on a wider scale than has happened previously. There has also been a strong recognition of the need to continue supporting the businesses and communities in order to fully achieve regenerative tourism. It's also important that the new website for the areas is promoted and kept relevant and updated in order to promote tourism. This needs facilitation.

Everyone involved in the surveys agreed of the need to ensure continued collaboration and engagement and the concern is how will this happen with the project coming to an end and "what happens next?", and the real test will be the sustainability of it into the future.

It has been recognised elsewhere in this report that delivering sustainability and community engagement takes time, CUPHAT has only had a limited amount of time to progress this and as such in order to not lose momentum, it would be best if some elements of the project could be continued.

CUPHAT has aimed to embed sustainability through the use of digital technologies. There is a Facebook group for the tourism network that will live on after the project and separately four 'Live like a local' community Facebook groups – one for each area. These can be used by local businesses and event's organisers to update what's on locally for tourists and they will survive beyond the project.

CUPHAT has been a catalyst that has brought communities and businesses together. So, to a certain extent it's now up to those communities to maintain those links and keep these going beyond the end of the project. However, its likely without the ongoing support this might not happen so this could be done either through a continuation of the project, if that were possible, or more likely through other funding, possibly Government, to ensure that the resources produced by CUPHAT, the advice and support given, and the networks created are sustained and extended into the future. Future work should also consider working closely with the tourism organisation already established in the areas such as Wicklow Tourism, Pentir Pumlumon and the Cambrian Mountains Initiative which could help progress the engagement.

The following quote sums this up.

"These projects come and then go – need something ongoing to keep up the momentum and continue the support - many small tourism businesses don't have the capacity to be able to take some of these things forward themselves as well as run their small businesses."

In addition, funding could be used to provide a tourism hub to ensure the continuation of sustainable regenerative tourism and provide constructive assistance to tourist providers. This would need paid staff to lead and build confidence, and to work with businesses and communities.

The development of a marketing strategy for small businesses is underway, with the 'Revive and Explore' brand for the coastal uplands that unites and represents the local businesses, making it easier to promote the areas online and through social media. This is currently being trialled but needs further funding to support the roll out of this over a longer period. The marketing should aim to target overseas visitors before they reach Ireland or Wales and more local visitors before they reach the specific areas so that they can plan to stay for longer than one or two days and preferably visit in the shoulder seasons and encourage people to visit out of the way destinations.

Further work could be progressed with tour companies and cruise ships, setting up links to encourage them to travel into these upland areas as part of their package, making the most of local knowledge that exists in the networks.

In addition, CUPHAT identified a number of issues that were outside of the scope of the project so further resourcing could be sourced to address accessibility issues in the areas for example develop effective transport links and associated infrastructure required for more sustainable tourism such as signage, car parking and public toilets.

A wider externalisation of the projects' influence on government policy to support further funding and more "boots/troops on the ground" (in Preseli) was also identified as being important to deliver sustainable tourism but that CUPHAT did represent a useful and worthwhile starting point for delivering change.

Towards the end of the CUPHAT project Aberystwyth University were progressing funding to extend the pilot work from CUPHAT into other areas through Agile Cymru funding to support community tourism networks along the Atlantic Celtic coast, this will take forward the CUPHAT work in the coastal upland communities.

In summary the recommendations based on the outcomes of this evaluation can be classified as being ones that reflect either the scoping of the project and its immediate legacy or the potential for scaling it geographically and are outlined as follows.

CUPHAT LEGACY RECOMMENDATIONS

Recommendation 1 – Ensure the effective dissemination and promotion of the CUPHAT website and marketing strategy.

Recommendation 2 – Explore opportunities for delivering a successful and sustainable legacy, such as using social media that can be run by the community for the community.

Recommendation 3 - Seek further funding to continue and build on the work with local communities, continuing the support and developing the regenerative approach to tourism.

This could include funding to provide ongoing support for the local tourism networks that have been set up in the four coastal upland areas and funding to support and promote the website.

SCALING RECOMMENDATIONS

Recommendation 4 – Seek funding to extend the pilot work from CUPHAT into other areas, for example current funding application to Agile Cymru to support community tourism networks along the Atlantic Celtic coast.

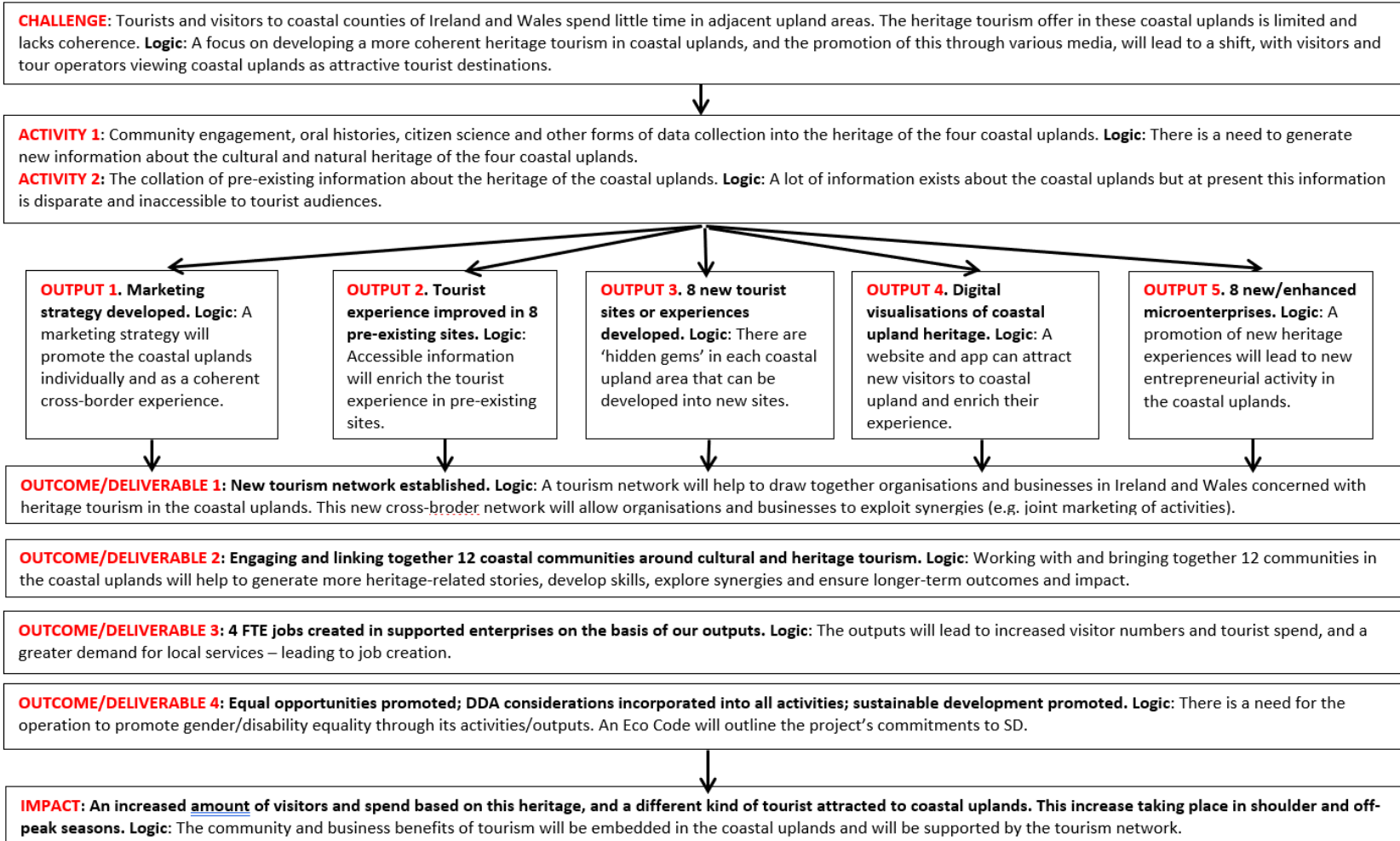
POLICY FRAMEWORK RECOMMENDATIONS

Recommendation 5 – Review the current policy framework regarding regenerative tourism in coastal upland areas with a view to target specific interventions and policy development.

Recommendation 6 – Disseminate the findings of CUPHAT to raise awareness of the potential for regenerative tourism and the need for new development plans and strategies in rural coastal upland areas.

APPENDICES

Appendix 1 – CUPHAT Logic Model from the CUPHAT Monitoring and Evaluation Plan



Appendix 2 – Face to Face Visitor survey findings

Question	Wales	Ireland																								
Where do you live (permanent residence)?	<table border="1"> <thead> <tr> <th data-bbox="412 400 593 507">Permanent Residence</th> <th data-bbox="593 400 887 507">Number of groups surveyed</th> </tr> </thead> <tbody> <tr> <td data-bbox="412 507 593 560">UK</td> <td data-bbox="593 507 887 560">13</td> </tr> <tr> <td data-bbox="412 560 593 632">Europe</td> <td data-bbox="593 560 887 632">2</td> </tr> <tr> <td data-bbox="412 632 593 715">Rest of the World</td> <td data-bbox="593 632 887 715">1</td> </tr> <tr> <td data-bbox="412 715 593 791">Ireland</td> <td data-bbox="593 715 887 791">1</td> </tr> <tr> <td data-bbox="412 791 593 831">Wales</td> <td data-bbox="593 791 887 831">3</td> </tr> </tbody> </table>	Permanent Residence	Number of groups surveyed	UK	13	Europe	2	Rest of the World	1	Ireland	1	Wales	3	<table border="1"> <thead> <tr> <th data-bbox="1254 400 1512 507">Permanent Residence</th> <th data-bbox="1512 400 1839 507">Number of groups surveyed</th> </tr> </thead> <tbody> <tr> <td data-bbox="1254 507 1512 560">Ireland</td> <td data-bbox="1512 507 1839 560">1</td> </tr> <tr> <td data-bbox="1254 560 1512 616">Wales</td> <td data-bbox="1512 560 1839 616">0</td> </tr> <tr> <td data-bbox="1254 616 1512 671">The rest of the UK</td> <td data-bbox="1512 616 1839 671">6</td> </tr> <tr> <td data-bbox="1254 671 1512 727">The rest of Europe</td> <td data-bbox="1512 671 1839 727">7</td> </tr> <tr> <td data-bbox="1254 727 1512 783">Rest of the World</td> <td data-bbox="1512 727 1839 783">9</td> </tr> </tbody> </table>	Permanent Residence	Number of groups surveyed	Ireland	1	Wales	0	The rest of the UK	6	The rest of Europe	7	Rest of the World	9
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If this is your first visit to Wales, what made you choose Wales and this area?	<ul style="list-style-type: none"> - Family were originally from here, scattering fathers' ashes. - Heard it was nice area x 2. - Heard about the Pembrokeshire coast and that its good for walking. - It's remoteness. 	<ul style="list-style-type: none"> - Heard it was nice place to visit x 4. - For the history, scenery and Guinness. - Wanted to visit for a long time x 3. - This specific area was enroute from Dublin to ferry at Rosslaire. - Ancestry - To visit sacred sites. 																								

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<p>What types of information sources did you or your party use to plan your trip to this area before you arrived?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 391 808 507" rowspan="2">Information sources</th> <th colspan="2" data-bbox="808 391 1189 430">Visitor responses</th> </tr> <tr> <th data-bbox="808 430 974 507">Number individuals</th> <th data-bbox="974 430 1189 507">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 507 808 584">Spoke to friends / family / colleagues</td> <td data-bbox="808 507 974 584">8</td> <td data-bbox="974 507 1189 584">40</td> </tr> <tr> <td data-bbox="409 584 808 624">Leaflets</td> <td data-bbox="808 584 974 624">1</td> <td data-bbox="974 584 1189 624">5</td> </tr> <tr> <td data-bbox="409 624 808 663">Guidebook</td> <td data-bbox="808 624 974 663">2</td> <td data-bbox="974 624 1189 663">10</td> </tr> <tr> <td data-bbox="409 663 808 703">Search engines (e.g. Google)</td> <td data-bbox="808 663 974 703">14</td> <td data-bbox="974 663 1189 703">70</td> </tr> <tr> <td data-bbox="409 703 808 743">Review site (e.g. Trip Advisor)</td> <td data-bbox="808 703 974 743">2</td> <td data-bbox="974 703 1189 743">10</td> </tr> <tr> <td data-bbox="409 743 808 783">Accommodation booking site</td> <td data-bbox="808 743 974 783">1</td> <td data-bbox="974 743 1189 783">5</td> </tr> </tbody> </table>	Information sources	Visitor responses		Number individuals	Percentage of visitors	Spoke to friends / family / colleagues	8	40	Leaflets	1	5	Guidebook	2	10	Search engines (e.g. Google)	14	70	Review site (e.g. Trip Advisor)	2	10	Accommodation booking site	1	5	<p data-bbox="1249 288 1742 352"> <ul style="list-style-type: none"> – On a work trip and added holiday on. – Reading a guide book. </p> <table border="1"> <thead> <tr> <th data-bbox="1249 391 1626 507" rowspan="2">Information sources</th> <th colspan="2" data-bbox="1626 391 2007 430">Visitor responses</th> </tr> <tr> <th data-bbox="1626 430 1792 507">Number individuals</th> <th data-bbox="1792 430 2007 507">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 507 1626 584">Spoke to friends / family / colleagues</td> <td data-bbox="1626 507 1792 584">15</td> <td data-bbox="1792 507 2007 584">65</td> </tr> <tr> <td data-bbox="1249 584 1626 660">Brochure from a national tourist board</td> <td data-bbox="1626 584 1792 660">1</td> <td data-bbox="1792 584 2007 660">4</td> </tr> <tr> <td data-bbox="1249 660 1626 700">Guidebook</td> <td data-bbox="1626 660 1792 700">3</td> <td data-bbox="1792 660 2007 700">13</td> </tr> <tr> <td data-bbox="1249 700 1626 777">Tourist Information Centre – via phone or email</td> <td data-bbox="1626 700 1792 777">2</td> <td data-bbox="1792 700 2007 777">9</td> </tr> <tr> <td data-bbox="1249 777 1626 817">Search engines (e.g. Google)</td> <td data-bbox="1626 777 1792 817">18</td> <td data-bbox="1792 777 2007 817">78</td> </tr> <tr> <td data-bbox="1249 817 1626 857">Tourism business website</td> <td data-bbox="1626 817 1792 857">5</td> <td data-bbox="1792 817 2007 857">22</td> </tr> <tr> <td data-bbox="1249 857 1626 933">National tourist board website</td> <td data-bbox="1626 857 1792 933">1</td> <td data-bbox="1792 857 2007 933">4</td> </tr> <tr> <td data-bbox="1249 933 1626 1010">Review site (e.g. Trip Advisor)</td> <td data-bbox="1626 933 1792 1010">4</td> <td data-bbox="1792 933 2007 1010">17</td> </tr> <tr> <td data-bbox="1249 1010 1626 1050">Accommodation booking site</td> <td data-bbox="1626 1010 1792 1050">1</td> <td data-bbox="1792 1010 2007 1050">4</td> </tr> <tr> <td data-bbox="1249 1050 1626 1090">Social media</td> <td data-bbox="1626 1050 1792 1090">2</td> <td data-bbox="1792 1050 2007 1090">9</td> </tr> </tbody> </table>	Information sources	Visitor responses		Number individuals	Percentage of visitors	Spoke to friends / family / colleagues	15	65	Brochure from a national tourist board	1	4	Guidebook	3	13	Tourist Information Centre – via phone or email	2	9	Search engines (e.g. Google)	18	78	Tourism business website	5	22	National tourist board website	1	4	Review site (e.g. Trip Advisor)	4	17	Accommodation booking site	1	4	Social media	2	9
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				<p>Other stated:</p> <ul style="list-style-type: none"> - Signs on the road (indicating a castle to visit) - Tour operator x3 - Taxi and private drivers x2 - Speaking to other people including other travelers - Maps x3 																								
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	To go sightseeing or to visit specific attractions	3	15	Sightseeing or to visit specific attractions	5	22		
	To take part in informal outdoor activities	7	35	Take part in informal outdoor activities	7	30		
	Other	1	5	Visit family and friends	6	26		
				Other	5	22		
What have you or are you doing during your visit to this area?	Activities		Visitor responses		Activities		Visitor responses	
			Number individuals	Percentage of visitors			Number individuals	Percentage of visitors
	To take part in informal outdoor activities		11	55	To take part in informal outdoor activities		13	57
	To take part in organised outdoor or sporting activities		1	5	Attended an event / concert / performance / sporting event		1	4
	Attended an event / concert / performance / sporting event		1	5	Enjoyed the landscape / countryside / beach		10	43
	Enjoyed the landscape / countryside / beach		17	85	Visited historical sites / cultural sites / religious sites		15	65
	Visited historical sites / cultural sites / religious sites		13	65	Sightseeing or visited specific attractions		13	65
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	Visited friends or family	2	10	Sightseeing or visited specific attractions	18	78																												
				Visited friends or family	7	30																												
				Attended a special event / celebration	1	4																												
				Engaged in business	1	4																												
				<p>Other stated:</p> <ul style="list-style-type: none"> - Eating out (x 5) pubs and relaxing - Shopping x2 - Music x2 - Cycling - Visiting places have been before to show the family. 																														
<p>What have you or are you visiting during your visit to this area?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 903 804 1062" rowspan="2">Places</th> <th colspan="2" data-bbox="804 903 1133 943">Visitor responses</th> </tr> <tr> <th data-bbox="804 943 965 1062">Number individuals</th> <th data-bbox="965 943 1133 1062">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1062 804 1129">Museum or heritage centre</td> <td data-bbox="804 1062 965 1129">2</td> <td data-bbox="965 1062 1133 1129">10</td> </tr> <tr> <td data-bbox="409 1129 804 1217">Castle or other historic attraction</td> <td data-bbox="804 1129 965 1217">11</td> <td data-bbox="965 1129 1133 1217">55</td> </tr> <tr> <td data-bbox="409 1217 804 1305">Nature-based attraction (e.g. gardens)</td> <td data-bbox="804 1217 965 1305">2</td> <td data-bbox="965 1217 1133 1305">10</td> </tr> </tbody> </table>			Places	Visitor responses		Number individuals	Percentage of visitors	Museum or heritage centre	2	10	Castle or other historic attraction	11	55	Nature-based attraction (e.g. gardens)	2	10	<table border="1"> <thead> <tr> <th data-bbox="1252 903 1615 1023" rowspan="2">Places</th> <th colspan="2" data-bbox="1615 903 2009 943">Visitor responses</th> </tr> <tr> <th data-bbox="1615 943 1807 1023">Number individuals</th> <th data-bbox="1807 943 2009 1023">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 1023 1615 1102">Museum or heritage centre</td> <td data-bbox="1615 1023 1807 1102">10</td> <td data-bbox="1807 1023 2009 1102">43</td> </tr> <tr> <td data-bbox="1252 1102 1615 1182">Art gallery or exhibition</td> <td data-bbox="1615 1102 1807 1182">3</td> <td data-bbox="1807 1102 2009 1182">13</td> </tr> <tr> <td data-bbox="1252 1182 1615 1337">Castle or other historic attraction (e.g. church, cathedral, monastery)</td> <td data-bbox="1615 1182 1807 1337">23</td> <td data-bbox="1807 1182 2009 1337">100</td> </tr> </tbody> </table>			Places	Visitor responses		Number individuals	Percentage of visitors	Museum or heritage centre	10	43	Art gallery or exhibition	3	13	Castle or other historic attraction (e.g. church, cathedral, monastery)	23	100
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	Scenic / steam / historic railway	5	25	Industrial heritage attraction (e.g. mine, mill, factory)	2	9																						
	None	5	25	Nature-based attraction (e.g. gardens)	12	52																						
				A location associated with TV, film or literature	1	4																						
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Have you seen or heard any advertising, marketing or publicity about the natural, historic or cultural heritage of the area that is further inland?	<table border="1"> <thead> <tr> <th rowspan="2"></th> <th colspan="2">Visitor responses</th> </tr> <tr> <th>Number individuals</th> <th>Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>0</td> <td>0</td> </tr> <tr> <td>No</td> <td>13</td> <td>65</td> </tr> </tbody> </table>				Visitor responses		Number individuals	Percentage of visitors	Yes	0	0	No	13	65	<table border="1"> <thead> <tr> <th rowspan="2"></th> <th colspan="2">Visitor responses</th> </tr> <tr> <th>Number individuals</th> <th>Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>5</td> <td>22</td> </tr> <tr> <td>No</td> <td>18</td> <td>78</td> </tr> </tbody> </table>				Visitor responses		Number individuals	Percentage of visitors	Yes	5	22	No	18	78
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To what extent would advertising/known about the natural and cultural heritage of the coastal upland area encourage you to	<table border="1"> <thead> <tr> <th rowspan="2">Likelihood</th> <th colspan="2">Visitor responses</th> </tr> <tr> <th>Number individuals</th> <th>Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td>Very likely</td> <td>8</td> <td>40</td> </tr> <tr> <td>Quite likely</td> <td>7</td> <td>35</td> </tr> </tbody> </table>			Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	8	40	Quite likely	7	35	<table border="1"> <thead> <tr> <th rowspan="2">Likelihood</th> <th colspan="2">Visitor responses</th> </tr> <tr> <th>Number individuals</th> <th>Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td>Very likely</td> <td>10</td> <td>43</td> </tr> <tr> <td>Quite likely</td> <td>10</td> <td>43</td> </tr> </tbody> </table>			Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	10	43	Quite likely	10	43
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visit, stay in or explore that area?	Neither likely or unlikely	3	15	Neither likely or unlikely	2	9		
	Quite unlikely	2	10	Quite unlikely	0	0		
	Very unlikely	0	0	Very unlikely	0	0		
If you were to visit the coastal upland area how long would you stay?	Length of stay		Visitor responses		Length of stay		Visitor responses	
			Number individuals	Percentage of visitors			Number individuals	Percentage of visitors
	Day visit (from staying elsewhere)		12	60	Day visit (from staying elsewhere)		9	39
	A few days and stay over night		4	20	a few days and stay over night		9	39
1 week		2	10	1 week		1	4	
If you were to visit the coastal upland area what time of year would you visit?	Time of year		Visitor responses		Time of year		Visitor responses	
			Number individuals	Percentage of visitors			Number individuals	Percentage of visitors
	Spring		16	80	Spring		14	61
	Summer		13	65	Summer		21	91
	Autumn		7	35	Autumn		11	48
Winter		4	20	Winter		8	35	

Question	Wales	Ireland																																								
<p>To what extent would the natural, historic and cultural heritage of this area encourage you to return to the area for another visit?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 352 645 472" rowspan="2">Likelihood</th> <th colspan="2" data-bbox="645 352 1182 392">Visitor responses</th> </tr> <tr> <th data-bbox="645 392 904 472">Number individuals</th> <th data-bbox="904 392 1182 472">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 472 645 512">Very likely</td> <td data-bbox="645 472 904 512">4</td> <td data-bbox="904 472 1182 512">20</td> </tr> <tr> <td data-bbox="409 512 645 552">Quite likely</td> <td data-bbox="645 512 904 552">9</td> <td data-bbox="904 512 1182 552">45</td> </tr> <tr> <td data-bbox="409 552 645 632">Neither likely or unlikely</td> <td data-bbox="645 552 904 632">5</td> <td data-bbox="904 552 1182 632">25</td> </tr> <tr> <td data-bbox="409 632 645 671">Quite unlikely</td> <td data-bbox="645 632 904 671">1</td> <td data-bbox="904 632 1182 671">5</td> </tr> <tr> <td data-bbox="409 671 645 711">Very unlikely</td> <td data-bbox="645 671 904 711">0</td> <td data-bbox="904 671 1182 711">0</td> </tr> </tbody> </table>	Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	4	20	Quite likely	9	45	Neither likely or unlikely	5	25	Quite unlikely	1	5	Very unlikely	0	0	<table border="1"> <thead> <tr> <th data-bbox="1252 352 1442 472" rowspan="2">Likelihood</th> <th colspan="2" data-bbox="1442 352 1872 392">Visitor responses</th> </tr> <tr> <th data-bbox="1442 392 1644 472">Number individuals</th> <th data-bbox="1644 392 1872 472">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 472 1442 512">Very likely</td> <td data-bbox="1442 472 1644 512">10</td> <td data-bbox="1644 472 1872 512">43</td> </tr> <tr> <td data-bbox="1252 512 1442 552">Quite likely</td> <td data-bbox="1442 512 1644 552">11</td> <td data-bbox="1644 512 1872 552">48</td> </tr> <tr> <td data-bbox="1252 552 1442 632">Neither likely or unlikely</td> <td data-bbox="1442 552 1644 632">2</td> <td data-bbox="1644 552 1872 632">9</td> </tr> <tr> <td data-bbox="1252 632 1442 671">Quite unlikely</td> <td data-bbox="1442 632 1644 671">0</td> <td data-bbox="1644 632 1872 671">0</td> </tr> <tr> <td data-bbox="1252 671 1442 711">Very unlikely</td> <td data-bbox="1442 671 1644 711">0</td> <td data-bbox="1644 671 1872 711">0</td> </tr> </tbody> </table>	Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	10	43	Quite likely	11	48	Neither likely or unlikely	2	9	Quite unlikely	0	0	Very unlikely	0	0
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<p>To what extent would advertising/knowing about the natural and cultural heritage of a similar area within the same country or an adjacent country encourage</p>	<table border="1"> <thead> <tr> <th data-bbox="409 820 600 940" rowspan="2">Likelihood</th> <th colspan="2" data-bbox="600 820 1016 860">Visitor responses</th> </tr> <tr> <th data-bbox="600 860 779 940">Number individuals</th> <th data-bbox="779 860 1016 940">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 940 600 979">Very likely</td> <td data-bbox="600 940 779 979">5</td> <td data-bbox="779 940 1016 979">25</td> </tr> <tr> <td data-bbox="409 979 600 1019">Quite likely</td> <td data-bbox="600 979 779 1019">7</td> <td data-bbox="779 979 1016 1019">35</td> </tr> <tr> <td data-bbox="409 1019 600 1099">Neither likely or unlikely</td> <td data-bbox="600 1019 779 1099">6</td> <td data-bbox="779 1019 1016 1099">30</td> </tr> <tr> <td data-bbox="409 1099 600 1179">Quite unlikely</td> <td data-bbox="600 1099 779 1179">2</td> <td data-bbox="779 1099 1016 1179">10</td> </tr> <tr> <td data-bbox="409 1179 600 1219">Very unlikely</td> <td data-bbox="600 1179 779 1219">0</td> <td data-bbox="779 1179 1016 1219">0</td> </tr> </tbody> </table>	Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	5	25	Quite likely	7	35	Neither likely or unlikely	6	30	Quite unlikely	2	10	Very unlikely	0	0	<table border="1"> <thead> <tr> <th data-bbox="1252 820 1442 940" rowspan="2">Likelihood</th> <th colspan="2" data-bbox="1442 820 1980 860">Visitor responses</th> </tr> <tr> <th data-bbox="1442 860 1756 940">Number individuals</th> <th data-bbox="1756 860 1980 940">Percentage of visitors</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 940 1442 979">Very likely</td> <td data-bbox="1442 940 1756 979">11</td> <td data-bbox="1756 940 1980 979">48</td> </tr> <tr> <td data-bbox="1252 979 1442 1019">Quite likely</td> <td data-bbox="1442 979 1756 1019">8</td> <td data-bbox="1756 979 1980 1019">35</td> </tr> <tr> <td data-bbox="1252 1019 1442 1099">Neither likely or unlikely</td> <td data-bbox="1442 1019 1756 1099">4</td> <td data-bbox="1756 1019 1980 1099">17</td> </tr> <tr> <td data-bbox="1252 1099 1442 1179">Quite unlikely</td> <td data-bbox="1442 1099 1756 1179">0</td> <td data-bbox="1756 1099 1980 1179">0</td> </tr> <tr> <td data-bbox="1252 1179 1442 1219">Very unlikely</td> <td data-bbox="1442 1179 1756 1219">0</td> <td data-bbox="1756 1179 1980 1219">0</td> </tr> </tbody> </table>	Likelihood	Visitor responses		Number individuals	Percentage of visitors	Very likely	11	48	Quite likely	8	35	Neither likely or unlikely	4	17	Quite unlikely	0	0	Very unlikely	0	0
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Very unlikely	0	0																																								
<p>What barriers would prevent you from</p>	<ul style="list-style-type: none"> - Lack of information and knowledge x 5 - Time x 3 	<ul style="list-style-type: none"> - Lack of public transport x 4 																																								

Question	Wales	Ireland
<p>exploring the natural, historic and cultural heritage of these areas?</p>	<ul style="list-style-type: none"> - No information boards. - Not being confident on where to go x 2 - Not knowing where to park - Safety of parking - Cost of parking - Parking for campervan - Park and ride - facilities Transport x 7 (need more tours / public transport) - Lack of confidence in driving on rural roads - Welsh signs (need to be in different font like in Ireland so stands out) - Lack of self-catering accommodation for 1 to 2 days - Difficulty of finding good hotels - Crowds - Lack of amenities and facilities x 3 - Mobility x 5 (limits type of walking possible) - Not being able to take dogs x 2 - Knowledge - Weather x 2 	<ul style="list-style-type: none"> - Availability of accommodation x 3 (“that we like the look of”, “difficult to find suitable sites for camper van anywhere in Ireland”) - Where we can take the children x 2 - Interest - Time x 4 (“Only so much can see in one visit so have to prioritise”) - Small roads being difficult to drive on in camper van and cycle on x 5 - Cost x 3 - Knowledge x 4 (“Generally visit what’s easy to find out about.” “Difficult to find out about many places as information is in many different places / website - not all in one place - therefore time consuming to research”, “Needs to be included in a tour package”, “Go where I already have been when growing up so places i already know or where my relatives know”) - Access/ mobility x 7 (“Areas need to be more accessible (e.g. railings) - need to be able to find out how accessible places are before visiting - does n’t seem to be much info on that”) - Lack of places to eat, stay and lack of things to do - Distance - Visiting to mainly spend time with family so that limits time to do other things x 2 - Depends on what there is on offer to see and do - if lots would stay longer x 2 - Language

Appendix 3 – Online visitor survey findings

Question	Wales		Ireland									
Where do you live (permanent residence)?	<table border="1"> <thead> <tr> <th>Permanent Residence</th> <th>Number of responses</th> </tr> </thead> <tbody> <tr> <td>UK (Wales)</td> <td>1</td> </tr> </tbody> </table>	Permanent Residence	Number of responses	UK (Wales)	1		<table border="1"> <thead> <tr> <th>Permanent Residence</th> <th>Number of responses</th> </tr> </thead> <tbody> <tr> <td>Rest of the World</td> <td>1</td> </tr> </tbody> </table>	Permanent Residence	Number of responses	Rest of the World	1	
Permanent Residence	Number of responses											
UK (Wales)	1											
Permanent Residence	Number of responses											
Rest of the World	1											
Which of these age bands do you fall into?	<table border="1"> <thead> <tr> <th>Age</th> <th>Number of responses</th> </tr> </thead> <tbody> <tr> <td>60-64</td> <td>1</td> </tr> </tbody> </table>	Age	Number of responses	60-64	1		<table border="1"> <thead> <tr> <th>Age</th> <th>Number of responses</th> </tr> </thead> <tbody> <tr> <td>40-44</td> <td>1</td> </tr> </tbody> </table>	Age	Number of responses	40-44	1	
Age	Number of responses											
60-64	1											
Age	Number of responses											
40-44	1											
Where did you stay the longest and what was the name of the town or village where you spent the majority of your stay	<table border="1"> <thead> <tr> <th>Area</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>Ceredigion</td> <td>Tregaron</td> </tr> </tbody> </table>	Area	Location	Ceredigion	Tregaron		<table border="1"> <thead> <tr> <th>Area</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>County Wicklow</td> <td>Lough Dan</td> </tr> </tbody> </table>	Area	Location	County Wicklow	Lough Dan	
Area	Location											
Ceredigion	Tregaron											
Area	Location											
County Wicklow	Lough Dan											
Was this your first visit to this area?	<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1</td> </tr> </tbody> </table>	Yes	No	0	1		<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> </tr> </tbody> </table>	Yes	No	1	0	
Yes	No											
0	1											
Yes	No											
1	0											

Question	Wales		Ireland	
		Day visitor to the area on over 20 occasions		
Which of the following best describes your party on this visit?	Party	Total	Party	Total
	Family – no children	1	Family – with older children	1
What types of information sources did you use to plan your trip before arrival?	Source	Type	Source	Type
	Online & offline sources	Leaflets Newspapers or magazines Map Google Online maps	Online sources only (e.g. websites)	Search engines (e.g. Google Regional or local authority website Accommodation booking site (e.g. booking.com) Social media (e.g. Facebook, Twitter, Instagram)
		1		1
During your trip to the area what offline and online				

Question	Wales	Ireland															
information sources did you use?	<table border="1"> <thead> <tr> <th>Source</th> <th>Type</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Online & offline sources</td> <td>Map Google Online maps</td> <td>1</td> </tr> </tbody> </table>	Source	Type	Total	Online & offline sources	Map Google Online maps	1	<table border="1"> <thead> <tr> <th>Source</th> <th>Type</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Online sources only (e.g. websites)</td> <td>Search engines (e.g. Google Accommodation booking site (e.g. booking.com)</td> <td>1</td> </tr> <tr> <td>Offline sources</td> <td>Advice from accommodation provider</td> <td>1</td> </tr> </tbody> </table>	Source	Type	Total	Online sources only (e.g. websites)	Search engines (e.g. Google Accommodation booking site (e.g. booking.com)	1	Offline sources	Advice from accommodation provider	1
Source	Type	Total															
Online & offline sources	Map Google Online maps	1															
Source	Type	Total															
Online sources only (e.g. websites)	Search engines (e.g. Google Accommodation booking site (e.g. booking.com)	1															
Offline sources	Advice from accommodation provider	1															
Have you seen or heard any advertising, marketing or publicity about the natural, historic or cultural heritage of the area?	<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> </tr> </tbody> </table> <ul style="list-style-type: none"> - Cambrian Mountains Dark Skies campaign - Ceredigion Eisteddfod tv programmes - Blogs - Articles - TV e.g. restoration of Mynachlog Fawr farmhouse 	Yes	No	1	0	<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1</td> </tr> </tbody> </table>	Yes	No	0	1							
Yes	No																
1	0																
Yes	No																
0	1																
What type of accommodation did you stay in during your visit?	<table border="1"> <thead> <tr> <th>Type</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Self-catering</td> <td>1</td> </tr> </tbody> </table>	Type	Total	Self-catering	1	<table border="1"> <thead> <tr> <th>Type</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Serviced</td> <td>1</td> </tr> </tbody> </table>	Type	Total	Serviced	1							
Type	Total																
Self-catering	1																
Type	Total																
Serviced	1																

Question	Wales		Ireland									
How did you book the accommodation?	<table border="1"> <thead> <tr> <th data-bbox="392 352 674 391">Method</th> <th data-bbox="674 352 1234 391">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="392 391 674 496">Online – 3rd party website</td> <td data-bbox="674 391 1234 496">1</td> </tr> </tbody> </table>	Method	Total	Online – 3 rd party website	1		<table border="1"> <thead> <tr> <th data-bbox="1234 352 1516 391">Method</th> <th data-bbox="1516 352 2072 391">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1234 391 1516 496">Directly with the provider (phone/email/provider's website)</td> <td data-bbox="1516 391 2072 496">1</td> </tr> </tbody> </table>	Method	Total	Directly with the provider (phone/email/provider's website)	1	
Method	Total											
Online – 3 rd party website	1											
Method	Total											
Directly with the provider (phone/email/provider's website)	1											
How long did you stay in the area?	<table border="1"> <thead> <tr> <th data-bbox="392 786 674 825">Length of stay</th> <th data-bbox="674 786 1234 825">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="392 825 674 930">3-4 days</td> <td data-bbox="674 825 1234 930">1</td> </tr> </tbody> </table>	Length of stay	Total	3-4 days	1		<table border="1"> <thead> <tr> <th data-bbox="1234 786 1516 825">Length of stay</th> <th data-bbox="1516 786 2072 825">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1234 825 1516 930">5-7 days</td> <td data-bbox="1516 825 2072 930">1</td> </tr> </tbody> </table>	Length of stay	Total	5-7 days	1	
Length of stay	Total											
3-4 days	1											
Length of stay	Total											
5-7 days	1											
How much did you pay per person per night for your stay in this area?	<table border="1"> <thead> <tr> <th data-bbox="392 1038 674 1077">Price</th> <th data-bbox="674 1038 1234 1077">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="392 1077 674 1182">£50</td> <td data-bbox="674 1077 1234 1182">1</td> </tr> </tbody> </table>	Price	Total	£50	1		<table border="1"> <thead> <tr> <th data-bbox="1234 1038 1516 1077">Price</th> <th data-bbox="1516 1038 2072 1077">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1234 1077 1516 1182">£75</td> <td data-bbox="1516 1077 2072 1182">1</td> </tr> </tbody> </table>	Price	Total	£75	1	
Price	Total											
£50	1											
Price	Total											
£75	1											

Question	Wales		Ireland									
<p>Approximately what percentage of your overall spend in the area did you spend on accommodation? (Please do not include travel costs into and out of the area)</p>	<table border="1"> <thead> <tr> <th data-bbox="409 316 674 421">Percentage</th> <th data-bbox="674 316 996 421">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 421 674 510">70%</td> <td data-bbox="674 421 996 510">1</td> </tr> </tbody> </table>		Percentage	Total	70%	1	<table border="1"> <thead> <tr> <th data-bbox="1252 316 1516 421">Percentage</th> <th data-bbox="1516 316 1839 421">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 421 1516 510">75%</td> <td data-bbox="1516 421 1839 510">1</td> </tr> </tbody> </table>		Percentage	Total	75%	1
Percentage	Total											
70%	1											
Percentage	Total											
75%	1											
<p>Which of these options best describes the reason for your trip to this area?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 639 674 745">Reason</th> <th data-bbox="674 639 996 745">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 745 674 850">To avoid the coronation</td> <td data-bbox="674 745 996 850">1</td> </tr> </tbody> </table>		Reason	Total	To avoid the coronation	1	<table border="1"> <thead> <tr> <th data-bbox="1252 639 1516 745">Reason</th> <th data-bbox="1516 639 1839 745">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 745 1516 850">Holiday</td> <td data-bbox="1516 745 1839 850">1</td> </tr> </tbody> </table>		Reason	Total	Holiday	1
Reason	Total											
To avoid the coronation	1											
Reason	Total											
Holiday	1											
<p>Which of these was the main reason for visiting this area?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 927 674 1032">Reason</th> <th data-bbox="674 927 996 1032">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1032 674 1179">To visit historical, cultural, religious sites</td> <td data-bbox="674 1032 996 1179">1</td> </tr> </tbody> </table>		Reason	Total	To visit historical, cultural, religious sites	1	<table border="1"> <thead> <tr> <th data-bbox="1252 927 1516 1032">Reason</th> <th data-bbox="1516 927 1839 1032">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 1032 1516 1179">To take part in informal outdoor activities</td> <td data-bbox="1516 1032 1839 1179">1</td> </tr> </tbody> </table>		Reason	Total	To take part in informal outdoor activities	1
Reason	Total											
To visit historical, cultural, religious sites	1											
Reason	Total											
To take part in informal outdoor activities	1											
<p>Which of the following did you do during your visit to</p>	<table border="1"> <thead> <tr> <th data-bbox="409 1254 1064 1361">Activity</th> <th data-bbox="1064 1254 1176 1361">Total</th> </tr> </thead> </table>		Activity	Total	<table border="1"> <thead> <tr> <th data-bbox="1252 1254 1906 1361">Activity</th> <th data-bbox="1906 1254 2018 1361">Total</th> </tr> </thead> </table>		Activity	Total				
Activity	Total											
Activity	Total											

Question	Wales	Ireland														
this area? Select all that apply	<table border="1"> <tr> <td data-bbox="412 284 1061 336">To enjoy the landscape/countryside/beaches</td> <td data-bbox="1061 284 1178 336">1</td> </tr> <tr> <td data-bbox="412 336 1061 389">Visit historical, cultural, religious sites</td> <td data-bbox="1061 336 1178 389">1</td> </tr> <tr> <td data-bbox="412 389 1061 427">Sightseeing or visiting specific attractions</td> <td data-bbox="1061 389 1178 427">1</td> </tr> </table>	To enjoy the landscape/countryside/beaches	1	Visit historical, cultural, religious sites	1	Sightseeing or visiting specific attractions	1	<table border="1"> <tr> <td data-bbox="1254 284 1904 336">Take part in informal outdoor activities</td> <td data-bbox="1904 284 2020 336">1</td> </tr> <tr> <td data-bbox="1254 336 1904 389">Visit historical, cultural, religious sites</td> <td data-bbox="1904 336 2020 389">1</td> </tr> <tr> <td data-bbox="1254 389 1904 427">Sightseeing or visiting specific attractions</td> <td data-bbox="1904 389 2020 427">1</td> </tr> </table>	Take part in informal outdoor activities	1	Visit historical, cultural, religious sites	1	Sightseeing or visiting specific attractions	1		
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Which of the following did you visit during your visit to this area?	<table border="1"> <thead> <tr> <th data-bbox="412 603 1061 710">Sites visited</th> <th data-bbox="1061 603 1178 710">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="412 710 1061 762">Museum or heritage centre</td> <td data-bbox="1061 710 1178 762">1</td> </tr> <tr> <td data-bbox="412 762 1061 801">Castle or other historic attraction</td> <td data-bbox="1061 762 1178 801">1</td> </tr> <tr> <td data-bbox="412 801 1061 839">Nature-based attraction</td> <td data-bbox="1061 801 1178 839">1</td> </tr> </tbody> </table> <ul style="list-style-type: none"> - Cors Carog - Ystrad Fflur Abbey - Monastery - Exhibition 	Sites visited	Total	Museum or heritage centre	1	Castle or other historic attraction	1	Nature-based attraction	1	<table border="1"> <thead> <tr> <th data-bbox="1254 603 1904 710">Sites visited</th> <th data-bbox="1904 603 2020 710">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1254 710 1904 762">Castle or other historic attraction (St Kevin's church)</td> <td data-bbox="1904 710 2020 762">1</td> </tr> <tr> <td data-bbox="1254 762 1904 801">Nature-based attraction</td> <td data-bbox="1904 762 2020 801">1</td> </tr> </tbody> </table>	Sites visited	Total	Castle or other historic attraction (St Kevin's church)	1	Nature-based attraction	1
Sites visited	Total															
Museum or heritage centre	1															
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Castle or other historic attraction (St Kevin's church)	1															
Nature-based attraction	1															
How likely would you be to recommend this area as a place to visit to a friend or relative?	<table border="1"> <thead> <tr> <th data-bbox="412 1070 1061 1177">Response</th> <th data-bbox="1061 1070 1178 1177">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="412 1177 1061 1230">Very likely</td> <td data-bbox="1061 1177 1178 1230">1</td> </tr> </tbody> </table>	Response	Total	Very likely	1	<table border="1"> <thead> <tr> <th data-bbox="1254 1070 1904 1177">Response</th> <th data-bbox="1904 1070 2020 1177">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1254 1177 1904 1230">Very likely</td> <td data-bbox="1904 1177 2020 1230">1</td> </tr> </tbody> </table>	Response	Total	Very likely	1						
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How likely would you be to return to																

Question	Wales		Ireland									
the area for another visit?	<table border="1"> <thead> <tr> <th data-bbox="407 316 1061 421">Response</th> <th data-bbox="1061 316 1176 421">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 421 1061 475">Neither likely nor unlikely</td> <td data-bbox="1061 421 1176 475">1</td> </tr> </tbody> </table>		Response	Total	Neither likely nor unlikely	1	<table border="1"> <thead> <tr> <th data-bbox="1249 316 1904 421">Response</th> <th data-bbox="1904 316 2018 421">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 421 1904 475">Neither likely nor unlikely</td> <td data-bbox="1904 421 2018 475">1</td> </tr> </tbody> </table>		Response	Total	Neither likely nor unlikely	1
Response	Total											
Neither likely nor unlikely	1											
Response	Total											
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To what extent would the natural, historic and cultural heritage of this encourage you to return to the area for another visit?	<table border="1"> <thead> <tr> <th data-bbox="407 569 1061 675">Response</th> <th data-bbox="1061 569 1176 675">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 675 1061 729">Probably</td> <td data-bbox="1061 675 1176 729">1</td> </tr> </tbody> </table>		Response	Total	Probably	1	<table border="1"> <thead> <tr> <th data-bbox="1249 569 1904 675">Response</th> <th data-bbox="1904 569 2018 675">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 675 1904 729">Very unlikely</td> <td data-bbox="1904 675 2018 729">1</td> </tr> </tbody> </table>		Response	Total	Very unlikely	1
Response	Total											
Probably	1											
Response	Total											
Very unlikely	1											
What barriers would prevent you from returning to this area for another visit in the future?	<table border="1"> <thead> <tr> <th data-bbox="407 858 1061 963">Barrier</th> <th data-bbox="1061 858 1176 963">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 963 1061 1018">None</td> <td data-bbox="1061 963 1176 1018">1</td> </tr> </tbody> </table>		Barrier	Total	None	1	<table border="1"> <thead> <tr> <th data-bbox="1249 858 1904 963">Barrier</th> <th data-bbox="1904 858 2018 963">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 963 1904 1018">The cost</td> <td data-bbox="1904 963 2018 1018">1</td> </tr> </tbody> </table>		Barrier	Total	The cost	1
Barrier	Total											
None	1											
Barrier	Total											
The cost	1											
To what extent would the natural and cultural heritage of this area encourage you to visit and explore the heritage of a similar area within the	<table border="1"> <thead> <tr> <th data-bbox="407 1112 1061 1217">Response</th> <th data-bbox="1061 1112 1176 1217">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 1217 1061 1272">Very likely</td> <td data-bbox="1061 1217 1176 1272">1</td> </tr> </tbody> </table>		Response	Total	Very likely	1	<table border="1"> <thead> <tr> <th data-bbox="1249 1112 1904 1217">Response</th> <th data-bbox="1904 1112 2018 1217">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 1217 1904 1272">Neither likely nor unlikely</td> <td data-bbox="1904 1217 2018 1272">1</td> </tr> </tbody> </table>		Response	Total	Neither likely nor unlikely	1
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Question	Wales	Ireland								
same country or an adjacent country?										
What barriers would prevent you from exploring the natural and cultural heritage of a similar area within the same country or an adjacent country?	<table border="1"> <thead> <tr> <th data-bbox="409 426 1061 531">Barrier</th> <th data-bbox="1061 426 1176 531">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 531 1061 587">None</td> <td data-bbox="1061 531 1176 587">1</td> </tr> </tbody> </table>	Barrier	Total	None	1	<table border="1"> <thead> <tr> <th data-bbox="1252 426 1904 531">Barrier</th> <th data-bbox="1904 426 2018 531">Total</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 531 1904 587">The cost</td> <td data-bbox="1904 531 2018 587">1</td> </tr> </tbody> </table>	Barrier	Total	The cost	1
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Appendix 4 - Accommodation provider survey findings – Wales

Question	Cambrian Mountains	Mynydd Preseli																																				
Where is your accommodation located?	<table border="1"> <thead> <tr> <th data-bbox="409 389 658 496">County</th> <th data-bbox="658 389 884 496">Community</th> <th data-bbox="884 389 1178 496">Number</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 496 658 552">Dyfed</td> <td data-bbox="658 496 884 552">Llanafan</td> <td data-bbox="884 496 1178 552">1</td> </tr> <tr> <td data-bbox="409 552 658 620">Ceredigion</td> <td data-bbox="658 552 884 620">Tregaron</td> <td data-bbox="884 552 1178 620">4</td> </tr> <tr> <td data-bbox="409 620 658 699">Ceredigion</td> <td data-bbox="658 620 884 699">Llanfihang-el-y Creuddyn</td> <td data-bbox="884 620 1178 699">2</td> </tr> <tr> <td data-bbox="409 699 658 778">Ceredigion</td> <td data-bbox="658 699 884 778">Devils Bridge</td> <td data-bbox="884 699 1178 778">1</td> </tr> <tr> <td colspan="2" data-bbox="409 778 884 818" style="text-align: right;">Total</td> <td data-bbox="884 778 1178 818">8</td> </tr> </tbody> </table>	County	Community	Number	Dyfed	Llanafan	1	Ceredigion	Tregaron	4	Ceredigion	Llanfihang-el-y Creuddyn	2	Ceredigion	Devils Bridge	1	Total		8	<table border="1"> <thead> <tr> <th data-bbox="1252 389 1456 496">County</th> <th data-bbox="1456 389 1738 496">Community</th> <th data-bbox="1738 389 2018 496">Number</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 496 1456 552">Pembrokeshire</td> <td data-bbox="1456 496 1738 552">Gwaun Valley</td> <td data-bbox="1738 496 2018 552">1</td> </tr> <tr> <td data-bbox="1252 552 1456 620">Pembrokeshire</td> <td data-bbox="1456 552 1738 620">Pontfaen</td> <td data-bbox="1738 552 2018 620">1</td> </tr> <tr> <td data-bbox="1252 620 1456 699">Pembrokeshire</td> <td data-bbox="1456 620 1738 699">Rosebush</td> <td data-bbox="1738 620 2018 699">1</td> </tr> <tr> <td data-bbox="1252 699 1456 778">Pembrokeshire</td> <td data-bbox="1456 699 1738 778">Eglwysrwrw</td> <td data-bbox="1738 699 2018 778">1</td> </tr> <tr> <td colspan="2" data-bbox="1252 778 1738 818" style="text-align: right;">Total</td> <td data-bbox="1738 778 2018 818">4</td> </tr> </tbody> </table>	County	Community	Number	Pembrokeshire	Gwaun Valley	1	Pembrokeshire	Pontfaen	1	Pembrokeshire	Rosebush	1	Pembrokeshire	Eglwysrwrw	1	Total		4
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Are you aware of the CUPHAT project?	<table border="1"> <thead> <tr> <th data-bbox="409 930 618 1037">Yes</th> <th data-bbox="618 930 900 1037">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1037 618 1093">4</td> <td data-bbox="618 1037 900 1093">4</td> </tr> </tbody> </table>	Yes	No	4	4	<table border="1"> <thead> <tr> <th data-bbox="1252 930 1456 1037">Yes</th> <th data-bbox="1456 930 1738 1037">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 1037 1456 1093">1</td> <td data-bbox="1456 1037 1738 1093">3</td> </tr> </tbody> </table>	Yes	No	1	3																												
Yes	No																																					
4	4																																					
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1	3																																					

Question	Cambrian Mountains					Mynydd Preseli				
What is the main type of accommodation that you offer at this site?	Serviced	Self-catering	Camping & caravanning	Hostel/bunkhouse	Other	Serviced	Self-catering	Camping & caravanning	Hostel/bunkhouse	Other
	1	5	0	2	0	1	3	0	0	0
	1 site which classified as a hostel/bunkhouse also offered a shepherd hut(s), camping and caravanning and self-catering accommodation.					1 site which classified as self-catering, also offered service accommodation.				
What was your average room occupancy last calendar year (2022), and how does this compare to pre-Covid levels in 2019 and your prediction for 2023?		Average room occupancy in 2022 (%)	Average occupancy compared to 2019	Prediction of overall average occupancy in 2023, compared to 2022		Average room occupancy in 2022 (%)	Average occupancy compared to 2019	Prediction of overall average occupancy in 2023, compared to 2022		
	1	15%	At a very similar level	At a very similar level	1	30%	11-25% decrease	26-50% decrease		
	2	21%	51+% decrease	11-25% increase	2	50%	6-10% decrease	At a very similar level		
	3	72%	6-10% decrease	1-5% increase	3	48%	11-25% decrease	11-25% decrease		
	4	-	-	1-5% increase	4	50%	51% + increase	1-5% increase		
	5	27%	11-25% increase	6-10% increase						
	6	50%	6-10% decrease	11-25% decrease						

Question	Cambrian Mountains				Mynydd Preseli			
	7	14%	11-25% increase	1-5% increase				
	8	25%	At a very similar level	11-25% increase				
What proportion of guests in 2022 were not residents of the UK and how do you predict the average occupancy for overseas visitors will change in 2023 compared to 2022?		Total number of visitors in 2022 (adults: children)	Proportion of overseas visitors in 2022	Prediction of average occupancy for overseas visitors in 2023 compared to 2022		Total number of visitors in 2022 (adults: children)	Proportion of overseas visitors in 2022	Prediction of average occupancy for overseas visitors in 2023 compared to 2022
	1	80:5	20%	At a very similar level	1	unknown	unknown	6-10% decrease
	2	22:0	0	6-10% increase	2	70:18	4%	At a very similar level
	3	Unknown	5%	6-10% increase	3	195:4	2%	11-25% decrease
	4	-	-	1-5% increase	4	495:30	3%	At a very similar level
	5	Unknown	15%	At a very similar level				
	6	150:0	0	At a very similar level				
	7	818:10	1%	1-5% increase				

Question	Cambrian Mountains				Mynydd Preseli														
	8	30:0	0	1-5% increase															
What was the average length of stay of each guest/visiting party during the last calendar year?	<table border="1" data-bbox="409 448 837 788"> <thead> <tr> <th data-bbox="409 448 837 501">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 501 837 539">1.8 nights</td> </tr> <tr> <td data-bbox="409 539 837 577">6 nights</td> </tr> <tr> <td data-bbox="409 577 837 616">1.5 nights</td> </tr> <tr> <td data-bbox="409 616 837 638">-</td> </tr> <tr> <td data-bbox="409 638 837 676">5 nights</td> </tr> <tr> <td data-bbox="409 676 837 715">7 nights</td> </tr> <tr> <td data-bbox="409 715 837 753">2 nights</td> </tr> <tr> <td data-bbox="409 753 837 788">2.5 nights</td> </tr> </tbody> </table>				Responses	1.8 nights	6 nights	1.5 nights	-	5 nights	7 nights	2 nights	2.5 nights	<table border="1" data-bbox="1252 448 1680 644"> <thead> <tr> <th data-bbox="1252 448 1680 501">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 501 1680 539">7 nights</td> </tr> <tr> <td data-bbox="1252 539 1680 577">5 nights</td> </tr> <tr> <td data-bbox="1252 577 1680 616">2 nights</td> </tr> <tr> <td data-bbox="1252 616 1680 644">3 nights</td> </tr> </tbody> </table>	Responses	7 nights	5 nights	2 nights	3 nights
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How many days was the accommodation open in 2022?	<table border="1" data-bbox="409 844 837 1184"> <thead> <tr> <th data-bbox="409 844 837 896">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 896 837 935">12 months</td> </tr> <tr> <td data-bbox="409 935 837 973">6.5 months</td> </tr> <tr> <td data-bbox="409 973 837 1011">12 months</td> </tr> <tr> <td data-bbox="409 1011 837 1034">-</td> </tr> <tr> <td data-bbox="409 1034 837 1072">11 months</td> </tr> <tr> <td data-bbox="409 1072 837 1110">3.5 months</td> </tr> <tr> <td data-bbox="409 1110 837 1149">11.5 months</td> </tr> <tr> <td data-bbox="409 1149 837 1184">6 months</td> </tr> </tbody> </table>				Responses	12 months	6.5 months	12 months	-	11 months	3.5 months	11.5 months	6 months	<table border="1" data-bbox="1252 844 1680 1040"> <thead> <tr> <th data-bbox="1252 844 1680 896">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 896 1680 935">12 months</td> </tr> <tr> <td data-bbox="1252 935 1680 973">12 months</td> </tr> <tr> <td data-bbox="1252 973 1680 1011">7 months</td> </tr> <tr> <td data-bbox="1252 1011 1680 1040">11 months</td> </tr> </tbody> </table>	Responses	12 months	12 months	7 months	11 months
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Question	Cambrian Mountains				Mynydd Preseli			
How many full-time/part-time employees do you have?	Full-time		Part-time		Full-time		Part-time	
	0 0 0 0 0 0 0 0 0	0 2 0 2 0 1 0 0 2	1 0 0 0 0	4 0 0 0 0				
Please rank these methods for marketing your accommodation from most successful (1) to least successful (6) *Top 3 included here		1	2	3		1	2	3
	1	Online – third party website	Online – private website	In print - newspaper	1	Online – third party website	Online – private website	In print - newspaper
	2	Online – third party website	Online – private website	Word of mouth	2	Online – third party website	Online – private website	Word of mouth
	3	Online – private website	Online – third party website	In-print - magazine	3	Online – third party website	Online – private website	Word of mouth
	4	Word of mouth	Online – third party website	Online – private website	4	Online – private website	Online – third party website	Word of mouth
	5	Online – private website	Word of mouth	Online – third party website				

Question	Cambrian Mountains				Mynydd Preseli									
	6	Online – third party website	Word of mouth	Online – private website										
	7	Online – private website	Online – third party website	In-print - magazine										
	8	Online – third party website	Online – private website	Social media										
<p>Have you changed your marketing due to any activities within CUPHAT?</p>	<table border="1"> <thead> <tr> <th data-bbox="407 715 1016 762">Yes</th> <th data-bbox="1016 715 1167 762">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 762 1016 1342"> <p>1</p> <ul style="list-style-type: none"> - More Welsh on website - Increased content on website - Better marketing planning – thinking more strategically - The action plan including an elevator pitch has been valuable and influenced our marketing approach - Pushed us to produce more business cards - Ireland trip made us think more about attracting international visitors - Became aware of other local tourism businesses and added them to our website to encourage guests to book for a longer stay </td> <td data-bbox="1016 762 1167 1342"> <p>7</p> </td> </tr> </tbody> </table>				Yes	No	<p>1</p> <ul style="list-style-type: none"> - More Welsh on website - Increased content on website - Better marketing planning – thinking more strategically - The action plan including an elevator pitch has been valuable and influenced our marketing approach - Pushed us to produce more business cards - Ireland trip made us think more about attracting international visitors - Became aware of other local tourism businesses and added them to our website to encourage guests to book for a longer stay 	<p>7</p>	<table border="1"> <thead> <tr> <th data-bbox="1249 715 1469 762">Yes</th> <th data-bbox="1469 715 1677 762">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 762 1469 842"> <p>0</p> </td> <td data-bbox="1469 762 1677 842"> <p>4</p> </td> </tr> </tbody> </table>		Yes	No	<p>0</p>	<p>4</p>
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Question	Cambrian Mountains	Mynydd Preseli																												
<p>If you market your accommodation online through a third-party website, please provide the name of the agency</p>	<table border="1"> <thead> <tr> <th data-bbox="409 624 591 671"></th> <th data-bbox="591 624 1137 671">Agency</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 671 591 751">1</td> <td data-bbox="591 671 1137 751">Airbnb, Independent Hotels</td> </tr> <tr> <td data-bbox="409 751 591 831">2</td> <td data-bbox="591 751 1137 831">West Wales Holiday Cottages</td> </tr> <tr> <td data-bbox="409 831 591 911">3</td> <td data-bbox="591 831 1137 911">In synch</td> </tr> <tr> <td data-bbox="409 911 591 991">4</td> <td data-bbox="591 911 1137 991">Sykes Holiday Cottages</td> </tr> <tr> <td data-bbox="409 991 591 1070">5</td> <td data-bbox="591 991 1137 1070">-</td> </tr> <tr> <td data-bbox="409 1070 591 1150">6</td> <td data-bbox="591 1070 1137 1150">Farm Stay, Independent Cottages, DogFriendly</td> </tr> <tr> <td data-bbox="409 1150 591 1230">7</td> <td data-bbox="591 1150 1137 1230">Airbnb</td> </tr> <tr> <td data-bbox="409 1230 591 1305">8</td> <td data-bbox="591 1230 1137 1305">Booking.com, Airbnb, hostunusual.com, ToWanderUK</td> </tr> </tbody> </table>		Agency	1	Airbnb, Independent Hotels	2	West Wales Holiday Cottages	3	In synch	4	Sykes Holiday Cottages	5	-	6	Farm Stay, Independent Cottages, DogFriendly	7	Airbnb	8	Booking.com, Airbnb, hostunusual.com, ToWanderUK	<table border="1"> <thead> <tr> <th data-bbox="1252 624 1433 671"></th> <th data-bbox="1433 624 1980 671">Agency</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 671 1433 751">1</td> <td data-bbox="1433 671 1980 751">Booking.com</td> </tr> <tr> <td data-bbox="1252 751 1433 831">2</td> <td data-bbox="1433 751 1980 831">Sykes Holiday Cottages</td> </tr> <tr> <td data-bbox="1252 831 1433 911">3</td> <td data-bbox="1433 831 1980 911">West Wales Holiday Cottages</td> </tr> <tr> <td data-bbox="1252 911 1433 986">4</td> <td data-bbox="1433 911 1980 986">Group Accommodation</td> </tr> </tbody> </table>		Agency	1	Booking.com	2	Sykes Holiday Cottages	3	West Wales Holiday Cottages	4	Group Accommodation
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		links, other areas (e.g. Snowdonia/Brecon Beacons) are a bigger draw, Short season due to wet winter weather	4	Cost of marketing, remoteness, cost of living / fuel																
	3	None – doing ok due to unusual business model, with only volunteers meaning low costs and low prices																		
	4	Getting our name out there																		
	5	Having a known area (e.g. National Park status), no definitive map of the CM area																		
	6	The weather – even though those that come nearly always have great weather																		
	7	Updating websites																		
	8	Reaching the target customer for our bespoke experience																		
What barriers do you think prevent guests from staying longer in the area?	<table border="1"> <thead> <tr> <th data-bbox="407 935 593 986"></th> <th data-bbox="593 935 1234 986">Barriers</th> </tr> </thead> <tbody> <tr> <td data-bbox="407 986 593 1273">1</td> <td data-bbox="593 986 1234 1273">Although the location is excellent for peace and quiet and for a few walks, the area is not full of tourist attractions or major summits for walkers. Those that are walking the Cambrian Way or cycling long distances, move on quickly. Out of season, people only want to be away from home for a weekend.</td> </tr> <tr> <td data-bbox="407 1273 593 1353">2</td> <td data-bbox="593 1273 1234 1353">No shops in Devils Bridge, no public transport</td> </tr> </tbody> </table>			Barriers	1	Although the location is excellent for peace and quiet and for a few walks, the area is not full of tourist attractions or major summits for walkers. Those that are walking the Cambrian Way or cycling long distances, move on quickly. Out of season, people only want to be away from home for a weekend.	2	No shops in Devils Bridge, no public transport	<table border="1"> <thead> <tr> <th data-bbox="1249 935 1435 986"></th> <th data-bbox="1435 935 2072 986">Barriers</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 986 1435 1066">1</td> <td data-bbox="1435 986 2072 1066">Money</td> </tr> <tr> <td data-bbox="1249 1066 1435 1145">2</td> <td data-bbox="1435 1066 2072 1145">No idea</td> </tr> <tr> <td data-bbox="1249 1145 1435 1225">3</td> <td data-bbox="1435 1145 2072 1225">-</td> </tr> <tr> <td data-bbox="1249 1225 1435 1305">4</td> <td data-bbox="1435 1225 2072 1305">Not sure</td> </tr> </tbody> </table>			Barriers	1	Money	2	No idea	3	-	4	Not sure
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	3	Remoteness – 30 mins drive from nearest shops	
	4	Distance from large cities	
	5	People love ‘paid for’ attractions, which we aren’t blessed with. Few indoor activities off season and few all day attractions which cater for young children	
	6	Finances – Most guests stay 6-7 nights max	
	7	Poor transport system	
	8	Guests booking through websites such as booking.com do not see the content on our website/social media. People from outside the CM (and even locals), do not have images.info about what a great destination it is (e.g. landscape, eateries, local food & drink producers, craft, outdoor activities, cultural visits etc.).	

Question	Cambrian Mountains	Mynydd Preseli																		
<p>Has CUPHAT helped overcome any challenges or barriers or can you foresee that it will in the future?</p>	<table border="1" data-bbox="409 316 1189 368"> <thead> <tr> <th data-bbox="409 316 1016 368">Yes</th> <th data-bbox="1016 316 1189 368">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 368 1016 443">1</td> <td data-bbox="1016 368 1189 443"></td> </tr> </tbody> </table> <p data-bbox="409 443 1016 1018"> Networks have raised awareness about what is available to visitors. History and culture is a strand that has been addressed to some extent and will be interesting to see if this can develop in the future if funding can be accessed for heritage/history trails. Modern technology made accessing information easier with QR codes and wi-fi being available in visitor experiences. E.g. Llanfihangel Church – improved access to medieval tower through access on online resources with wifi Participants on the Ireland learning visit and the microenterprise course have had the space to think and come up with suggestions that might not have otherwise arisen </p>	Yes	No	1		<table border="1" data-bbox="1249 316 1680 443"> <thead> <tr> <th data-bbox="1249 316 1469 368">Yes</th> <th data-bbox="1469 316 1680 368">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 368 1469 443">0</td> <td data-bbox="1469 368 1680 443">4</td> </tr> </tbody> </table> <p data-bbox="1249 483 2072 555"> *1 respondent said they have only just been made aware of CUPHAT through survey </p>	Yes	No	0	4										
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<p>Are potential overseas visitors more likely to visit the area now than they were in the past and is this due to the work of CUPHAT?</p>	<table border="1" data-bbox="409 1054 1097 1209"> <thead> <tr> <th data-bbox="409 1054 542 1129">Yes</th> <th data-bbox="542 1054 678 1129">Probably</th> <th data-bbox="678 1054 831 1129">Maybe</th> <th data-bbox="831 1054 956 1129">No</th> <th data-bbox="956 1054 1097 1129">Don't know</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1129 542 1209">1</td> <td data-bbox="542 1129 678 1209">1</td> <td data-bbox="678 1129 831 1209">1</td> <td data-bbox="831 1129 956 1209">3</td> <td data-bbox="956 1129 1097 1209">2</td> </tr> </tbody> </table>	Yes	Probably	Maybe	No	Don't know	1	1	1	3	2	<table border="1" data-bbox="1249 1054 2056 1185"> <thead> <tr> <th data-bbox="1249 1054 1460 1107">Yes</th> <th data-bbox="1460 1054 1664 1107">Maybe</th> <th data-bbox="1664 1054 1861 1107">No</th> <th data-bbox="1861 1054 2056 1107">Don't know</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 1107 1460 1185"></td> <td data-bbox="1460 1107 1664 1185">1</td> <td data-bbox="1664 1107 1861 1185"></td> <td data-bbox="1861 1107 2056 1185">3</td> </tr> </tbody> </table>	Yes	Maybe	No	Don't know		1		3
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	<div data-bbox="412 280 1176 360" style="border: 1px solid black; padding: 5px;"> Patchwork of fields, hedges, lanes, tracks, bridleways and footpaths that are distinctive to this area of Wales </div>	
How would you describe the cultural/historic heritage of your local area?	<div data-bbox="412 624 1176 671" style="border: 1px solid black; padding: 5px; text-align: center;"> Responses </div> <div data-bbox="412 676 1176 1353" style="border: 1px solid black; padding: 5px;"> <p>Evidence of human habitation from ancient times to more recent e.g. standing stones, hill forts, Roman remains of buildings, roads.</p> <p>Sites of early Christian worship, medieval churches, Strata Florida Abbey, mining</p> <p>Local shows including the 'tent' section: garden produce, cooking, crafts etc.</p> <p>Choirs</p> <p>Sheepdog trials</p> <p>Sheep shearing</p> <p>Local mart</p> <p>Cymraeg</p> <p>Rich</p> <p>Dylanwad yr Iaith a diwylliant Cymraeg</p> <p>Welsh speaking area x 2</p> <p>Hafod estate</p> <p>Mining and farming heritage</p> <p>Historic universities</p> <p>Steam railway</p> </div>	<div data-bbox="1254 624 2018 671" style="border: 1px solid black; padding: 5px; text-align: center;"> Responses </div> <div data-bbox="1254 676 2018 751" style="border: 1px solid black; padding: 5px;"> <p>Very interesting</p> <p>Strong x 2</p> </div>

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Do you have any links with any natural, cultural or historic heritage site providers in your local area?	<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>3</td> <td></td> </tr> <tr> <td>Links to local medieval church and other providers listed on website</td> <td></td> </tr> <tr> <td>Provide info on walking/cycling trails, museum, steam railway, kite centre, hafod, mining, cader idris</td> <td>5</td> </tr> <tr> <td>Volunteer at Tregaron Heritage Centre</td> <td></td> </tr> </tbody> </table>	Yes	No	3		Links to local medieval church and other providers listed on website		Provide info on walking/cycling trails, museum, steam railway, kite centre, hafod, mining, cader idris	5	Volunteer at Tregaron Heritage Centre		<table border="1"> <thead> <tr> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>1 (walking guide for North Pembrokeshire Tours)</td> <td>3</td> </tr> </tbody> </table>	Yes	No	1 (walking guide for North Pembrokeshire Tours)	3																										
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Question	Cambrian Mountains		Mynydd Preseli									
<p>Do you provide any information or promotional material about the natural, cultural or historic heritage of your local area to your guests?</p> <p>If yes, in what format and what different types do you provide?</p>	<table border="1"> <thead> <tr> <th data-bbox="405 316 1037 363">Yes</th> <th data-bbox="1037 316 1184 363">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 363 1037 767"> <p>8</p> <p>Printed publications x 8, word of mouth x 4, website x 3, electronic via email x 4</p> <p>Leaflets of local walks and attractions (x 5), books on the local area, map of local ruins, Pentir Pumlumon leaflets, links to websites x 2, bespoke OS maps, Guest information booklet, pre-arrival info email</p> </td> <td data-bbox="1037 363 1184 767"> <p>0</p> </td> </tr> </tbody> </table>	Yes	No	<p>8</p> <p>Printed publications x 8, word of mouth x 4, website x 3, electronic via email x 4</p> <p>Leaflets of local walks and attractions (x 5), books on the local area, map of local ruins, Pentir Pumlumon leaflets, links to websites x 2, bespoke OS maps, Guest information booklet, pre-arrival info email</p>	<p>0</p>		<table border="1"> <thead> <tr> <th data-bbox="1247 360 1706 408">Yes</th> <th data-bbox="1706 360 2000 408">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 408 1706 703"> <p>3</p> <p>Printed publications x 3 Word of mouth x 2 Electronic via email x 1 Other (OS maps, photos, provider's own printed notes, leaflets x 2 and Coast to Coast newspaper x 2)</p> </td> <td data-bbox="1706 408 2000 703"> <p>1</p> </td> </tr> </tbody> </table>	Yes	No	<p>3</p> <p>Printed publications x 3 Word of mouth x 2 Electronic via email x 1 Other (OS maps, photos, provider's own printed notes, leaflets x 2 and Coast to Coast newspaper x 2)</p>	<p>1</p>	
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<p>Do you offer anything else that would help your guests to engage with the natural, cultural heritage of your local area?</p>	<table border="1"> <thead> <tr> <th data-bbox="405 820 1037 868">Yes</th> <th data-bbox="1037 820 1184 868">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 868 1037 1054"> <p>2</p> <p>Links to providers where guests can book tours, outdoor activities etc Guided walks, cycles</p> </td> <td data-bbox="1037 868 1184 1054"> <p>6</p> </td> </tr> </tbody> </table>	Yes	No	<p>2</p> <p>Links to providers where guests can book tours, outdoor activities etc Guided walks, cycles</p>	<p>6</p>		<table border="1"> <thead> <tr> <th data-bbox="1247 820 1706 868">Yes</th> <th data-bbox="1706 820 2000 868">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 868 1706 1054"> <p>1</p> <p>(Personally guided walks and plentiful advice on where guests might wish to go and what to see)</p> </td> <td data-bbox="1706 868 2000 1054"> <p>3</p> </td> </tr> </tbody> </table>	Yes	No	<p>1</p> <p>(Personally guided walks and plentiful advice on where guests might wish to go and what to see)</p>	<p>3</p>	
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Question	Cambrian Mountains		Mynydd Preseli	
Has CUPHAT helped you to provide further information about your local and cultural heritage to your guests?	Yes	No	Yes	No
	1	7	0	4

Appendix 5 – Accommodation provider survey findings – Ireland

Question	Wicklow Mountains			Blackstairs Mountains																																												
Where is your accommodation located?	<table border="1"> <thead> <tr> <th data-bbox="409 395 595 504">County</th> <th data-bbox="595 395 887 504">Community</th> <th data-bbox="887 395 1180 504">Number</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 504 595 555">Kildare</td> <td data-bbox="595 504 887 555">Castledermot</td> <td data-bbox="887 504 1180 555">1</td> </tr> <tr> <td data-bbox="409 555 595 627">Wicklow</td> <td data-bbox="595 555 887 627">Askanagap</td> <td data-bbox="887 555 1180 627">1</td> </tr> <tr> <td data-bbox="409 627 595 707">Wicklow</td> <td data-bbox="595 627 887 707">Laragh / Glendalough</td> <td data-bbox="887 627 1180 707">2</td> </tr> <tr> <td data-bbox="409 707 595 786">Wicklow</td> <td data-bbox="595 707 887 786">Shillelagh</td> <td data-bbox="887 707 1180 786">4</td> </tr> <tr> <td data-bbox="409 786 595 866">Wicklow</td> <td data-bbox="595 786 887 866">Glenmalure</td> <td data-bbox="887 786 1180 866">1</td> </tr> <tr> <td data-bbox="409 866 595 946">Wicklow</td> <td data-bbox="595 866 887 946">Tinahely</td> <td data-bbox="887 866 1180 946">2</td> </tr> <tr> <td data-bbox="409 946 595 1026">Wicklow</td> <td data-bbox="595 946 887 1026">Rathdangan / Kiltegan</td> <td data-bbox="887 946 1180 1026">1</td> </tr> <tr> <td data-bbox="409 1026 595 1106">Wicklow</td> <td data-bbox="595 1026 887 1106">Dunlavin</td> <td data-bbox="887 1026 1180 1106">1</td> </tr> <tr> <td colspan="2" data-bbox="409 1106 887 1142">Total</td> <td data-bbox="887 1106 1180 1142">13</td> </tr> </tbody> </table>			County	Community	Number	Kildare	Castledermot	1	Wicklow	Askanagap	1	Wicklow	Laragh / Glendalough	2	Wicklow	Shillelagh	4	Wicklow	Glenmalure	1	Wicklow	Tinahely	2	Wicklow	Rathdangan / Kiltegan	1	Wicklow	Dunlavin	1	Total		13	<table border="1"> <thead> <tr> <th data-bbox="1252 395 1458 504">County</th> <th data-bbox="1458 395 1740 504">Community</th> <th data-bbox="1740 395 2022 504">Number</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 504 1458 555">Carlow</td> <td data-bbox="1458 504 1740 555">Rathanna</td> <td data-bbox="1740 504 2022 555">1</td> </tr> <tr> <td data-bbox="1252 555 1458 627">Carlow</td> <td data-bbox="1458 555 1740 627">Monaughrim</td> <td data-bbox="1740 555 2022 627">1</td> </tr> <tr> <td colspan="2" data-bbox="1252 627 1740 667">Total</td> <td data-bbox="1740 627 2022 667">2</td> </tr> </tbody> </table>			County	Community	Number	Carlow	Rathanna	1	Carlow	Monaughrim	1	Total		2
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Total		2																																														
Are you aware of the CUPHAT project?	<table border="1"> <thead> <tr> <th data-bbox="409 1254 618 1359">Yes</th> <th data-bbox="618 1254 900 1359">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1254 618 1359"></td> <td data-bbox="618 1254 900 1359"></td> </tr> </tbody> </table>			Yes	No			<table border="1"> <thead> <tr> <th data-bbox="1252 1254 1458 1359">Yes</th> <th data-bbox="1458 1254 1740 1359">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 1254 1458 1359"></td> <td data-bbox="1458 1254 1740 1359"></td> </tr> </tbody> </table>			Yes	No																																				
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Question	Wicklow Mountains					Blackstairs Mountains				
	8		5			1		1		
What is the main type of accommodation that you offer at this site?	Serviced	Self-catering	Camping & caravanning	Hostel/bunkhouse	Other	Serviced	Self-catering	Camping & caravanning	Hostel/bunkhouse	Other
	5	8	0	0	0	1	1	0	0	0
	1 serviced accommodation provider also offered self-catering accommodation 1 self-catering provider also offered glamping									
What was your average room occupancy last calendar year (2022), and how does this compare to pre-Covid levels in 2019 and your prediction for 2023?		Average room occupancy in 2022 (%)	Average occupancy compared to 2019	Prediction of overall average occupancy in 2023, compared to 2022			Average room occupancy in 2022 (%)	Average occupancy compared to 2019	Prediction of overall average occupancy in 2023, compared to 2022	
	1	54%	At a very similar level	6-10% decrease		1	60%	At a very similar level	At a very similar level	
	2	69%	6-10% increase	6-10% increase		2	30%	6-10% decrease	26-50% decrease	
	3	65%	6-10% decrease	11-25% decrease						
	4	40%	11-25% increase	11-25% increase						
	5	70%	At a very similar level	6-10% increase						

Question	Wicklow Mountains				Blackstairs Mountains																			
	6	52%	11-25% increase	11-25% increase																				
	7	67%	At a very similar level	At a very similar level																				
	8	72%	11-25% decrease	11-25% decrease																				
	9	64%	1-5% increase	6-10% increase																				
	10	65%	At a very similar level	At a very similar level																				
	11	71%	6-10% decrease	At a very similar level																				
	12	80%	1-5% increase	6-10% increase																				
	13	65%	26-50% decrease	26-50% decrease																				
What proportion of guests in 2022 were not residents of the UK and how do you predict the average occupancy for overseas visitors will change in 2023 compared to 2022?	<table border="1"> <thead> <tr> <th data-bbox="405 1038 506 1222"></th> <th data-bbox="506 1038 696 1222">Total number of visitors in 2022 (adults: children)</th> <th data-bbox="696 1038 934 1222">Proportion of overseas visitors in 2022</th> <th data-bbox="934 1038 1196 1222">Prediction of average occupancy for overseas visitors in 2023 compared to 2022</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 1222 506 1295">1</td> <td data-bbox="506 1222 696 1295">150:120</td> <td data-bbox="696 1222 934 1295">40%</td> <td data-bbox="934 1222 1196 1295">6-10% decrease</td> </tr> </tbody> </table>					Total number of visitors in 2022 (adults: children)	Proportion of overseas visitors in 2022	Prediction of average occupancy for overseas visitors in 2023 compared to 2022	1	150:120	40%	6-10% decrease	<table border="1"> <thead> <tr> <th data-bbox="1247 999 1391 1222"></th> <th data-bbox="1391 999 1568 1222">Total number of visitors in 2022 (adults: children)</th> <th data-bbox="1568 999 1805 1222">Proportion of overseas visitors in 2022</th> <th data-bbox="1805 999 2060 1222">Prediction of average occupancy for overseas visitors in 2023 compared to 2022</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 1222 1391 1295">1</td> <td data-bbox="1391 1222 1568 1295">600:0</td> <td data-bbox="1568 1222 1805 1295">10%</td> <td data-bbox="1805 1222 2060 1295">At a very similar level</td> </tr> </tbody> </table>					Total number of visitors in 2022 (adults: children)	Proportion of overseas visitors in 2022	Prediction of average occupancy for overseas visitors in 2023 compared to 2022	1	600:0	10%	At a very similar level
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Question	Wicklow Mountains				Blackstairs Mountains			
	2	83:31	80%	6-10% increase	2	40:5	-	1-5% increase
	3	350:0	-	At a very similar level				
	4	450:4	98%	11-25% increase				
	5	-	90%	6-10% increase				
	6	-	60%	26-50% increase				
	7	90:10	75%	6-10% decrease				
	8	600:20	75%	11-25% decrease				
	9	158:17	85%	6-10% increase				
	10	-	70%	At a very similar level				
	11	1130:110	99%	At a very similar level				
	12	435:0	28%	1-5% increase				
	13	339:201	-	11-25% decrease				

Question	Wicklow Mountains	Blackstairs Mountains				
<p>What was the average length of stay of each guest/visiting party during the last calendar year?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 316 837 363">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 363 837 837"> 10.5 nights 5.5 nights 4.5 nights 2 nights 1 night 1 night 1 night 2 nights 3 nights 7 nights 1 nights 4 nights 2 nights </td> </tr> </tbody> </table>	Responses	10.5 nights 5.5 nights 4.5 nights 2 nights 1 night 1 night 1 night 2 nights 3 nights 7 nights 1 nights 4 nights 2 nights	<table border="1"> <thead> <tr> <th data-bbox="1252 316 1680 363">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 363 1680 443"> 2 nights 2 nights </td> </tr> </tbody> </table>	Responses	2 nights 2 nights
Responses						
10.5 nights 5.5 nights 4.5 nights 2 nights 1 night 1 night 1 night 2 nights 3 nights 7 nights 1 nights 4 nights 2 nights						
Responses						
2 nights 2 nights						
<p>How many days was the accommodation open in 2022?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 893 837 941">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 941 837 1329"> 12 months 8.5 months 8.5 months 10 months 6 months 9 months 8.5 months 12 months 7.5 months 12 months 7 months </td> </tr> </tbody> </table>	Responses	12 months 8.5 months 8.5 months 10 months 6 months 9 months 8.5 months 12 months 7.5 months 12 months 7 months	<table border="1"> <thead> <tr> <th data-bbox="1252 893 1680 941">Responses</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 941 1680 1021"> 8 months 10 months </td> </tr> </tbody> </table>	Responses	8 months 10 months
Responses						
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Responses						
8 months 10 months						

Question	Wicklow Mountains	Blackstairs Mountains																																		
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How many full-time/part-time employees do you have?	<table border="1"> <thead> <tr> <th data-bbox="409 624 815 671">Full-time</th> <th data-bbox="815 624 1218 671">Part-time</th> </tr> </thead> <tbody> <tr><td>0</td><td>2</td></tr> <tr><td>0</td><td>0</td></tr> <tr><td>0</td><td>0</td></tr> <tr><td>2</td><td>2</td></tr> <tr><td>18</td><td>14</td></tr> <tr><td>5</td><td>1</td></tr> <tr><td>0</td><td>0</td></tr> <tr><td>0</td><td>0</td></tr> <tr><td>1</td><td>0</td></tr> <tr><td>1</td><td>3</td></tr> <tr><td>20</td><td>40</td></tr> <tr><td>2</td><td>0</td></tr> <tr><td>0</td><td>2</td></tr> </tbody> </table>	Full-time	Part-time	0	2	0	0	0	0	2	2	18	14	5	1	0	0	0	0	1	0	1	3	20	40	2	0	0	2	<table border="1"> <thead> <tr> <th data-bbox="1252 624 1657 671">Full-time</th> <th data-bbox="1657 624 2058 671">Part-time</th> </tr> </thead> <tbody> <tr><td>2</td><td>2</td></tr> <tr><td>0</td><td>0</td></tr> </tbody> </table>	Full-time	Part-time	2	2	0	0
Full-time	Part-time																																			
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20	40																																			
2	0																																			
0	2																																			
Full-time	Part-time																																			
2	2																																			
0	0																																			
Please rank these methods for marketing your accommodation from most	<table border="1"> <thead> <tr> <th data-bbox="409 1222 488 1270"></th> <th data-bbox="488 1222 779 1270">1</th> <th data-bbox="779 1222 969 1270">2</th> <th data-bbox="969 1222 1176 1270">3</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 1270 488 1361"></td> <td data-bbox="488 1270 779 1361"></td> <td data-bbox="779 1270 969 1361"></td> <td data-bbox="969 1270 1176 1361"></td> </tr> </tbody> </table>		1	2	3					<table border="1"> <thead> <tr> <th data-bbox="1252 1222 1319 1270"></th> <th data-bbox="1319 1222 1621 1270">1</th> <th data-bbox="1621 1222 1812 1270">2</th> <th data-bbox="1812 1222 2018 1270">3</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 1270 1319 1361">1</td> <td data-bbox="1319 1270 1621 1361">Online – private website</td> <td data-bbox="1621 1270 1812 1361">Word of mouth</td> <td data-bbox="1812 1270 2018 1361">Online – third party website</td> </tr> </tbody> </table>		1	2	3	1	Online – private website	Word of mouth	Online – third party website																		
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Question	Wicklow Mountains				Blackstairs Mountains			
successful (1) to least successful (6) *Top 3 included here	1	Online – third party website	Online – private website	In print - newspaper	2	Online – third party website	Online – private website	In print - newspaper
	2	Online – third party website	Online – private website	Word of mouth				
	3	Online – third party website	Word of mouth	Online – private website				
	4	Online – third party website	Online – private website	Word of mouth				
	5	Online – third party website	In print - newspaper	Online – private website				
	6	Online – third party website	Online – private website	In print - magazine				
	7	Online – third party website	Online – private website	In print - newspaper				
	8	Online – third party website	Local community network	Word of mouth				
	9	Online – third party website	Online – private website	Word of mouth				

Question	Wicklow Mountains				Blackstairs Mountains															
	10	Online – private website	Online – third party website	Word of mouth																
	11	Online – private website	Word of mouth	Online – third party website																
	12	Word of mouth	Online – private website	Local community network																
	13	Online – private website	Word of mouth	Online – third party website																
Have you changed your marketing due to any activities within CUPHAT?	<table border="1"> <thead> <tr> <th data-bbox="405 770 1016 818">Yes</th> <th data-bbox="1016 770 1167 818">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 818 1016 967">2 More use of Instagram and greater efforts put in to better market the business</td> <td data-bbox="1016 818 1167 967">11</td> </tr> </tbody> </table>				Yes	No	2 More use of Instagram and greater efforts put in to better market the business	11	<table border="1"> <thead> <tr> <th data-bbox="1247 770 1469 818">Yes</th> <th data-bbox="1469 770 1677 818">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 818 1469 898">0</td> <td data-bbox="1469 818 1677 898">2</td> </tr> </tbody> </table>		Yes	No	0	2						
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Yes	No																			
0	2																			
If you market your accommodation online through a third-party website, please provide the name of the agency	<table border="1"> <thead> <tr> <th data-bbox="405 1074 591 1121"></th> <th data-bbox="591 1074 1137 1121">Agency</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 1121 591 1201">1</td> <td data-bbox="591 1121 1137 1201">Airbnb, Shamrock Cottages</td> </tr> <tr> <td data-bbox="405 1201 591 1281">2</td> <td data-bbox="591 1201 1137 1281">Airbnb, Donedeal, Imagine Ireland</td> </tr> <tr> <td data-bbox="405 1281 591 1361">3</td> <td data-bbox="591 1281 1137 1361">Airbnb</td> </tr> </tbody> </table>					Agency	1	Airbnb, Shamrock Cottages	2	Airbnb, Donedeal, Imagine Ireland	3	Airbnb	<table border="1"> <thead> <tr> <th data-bbox="1247 1074 1431 1121"></th> <th data-bbox="1431 1074 1977 1121">Agency</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 1121 1431 1201">1</td> <td data-bbox="1431 1121 1977 1201">-</td> </tr> <tr> <td data-bbox="1247 1201 1431 1281">2</td> <td data-bbox="1431 1201 1977 1281">Airbnb</td> </tr> </tbody> </table>			Agency	1	-	2	Airbnb
	Agency																			
1	Airbnb, Shamrock Cottages																			
2	Airbnb, Donedeal, Imagine Ireland																			
3	Airbnb																			
	Agency																			
1	-																			
2	Airbnb																			

Question	Wicklow Mountains		Blackstairs Mountains
	4	Airbnb, WicklowWay.com	
	5	-	
	6	-	
	7	Airbnb	
	8	Airbnb	
	9	Booking.com, Airbnb	
	10	Airbnb, Sykes Holiday Cottages	
	11	Ireland's Blue Book	
	12	-	
	13	Business Fairy	
If you market your accommodation in print, please provide the name of the publication	No responses		No responses

Question	Wicklow Mountains	Blackstairs Mountains																								
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	13	Lack of good restaurants										
Has CUPHAT helped overcome any challenges or barriers or can you foresee that it will in the future?	<table border="1"> <thead> <tr> <th data-bbox="405 1066 1016 1114">Yes</th> <th data-bbox="1016 1066 1184 1114">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 1114 1016 1332"> 4 - Hope it will help in future - By meeting other local business owners, this network will provide new opportunities for business </td> <td data-bbox="1016 1114 1184 1332"> 9 </td> </tr> </tbody> </table>		Yes	No	4 - Hope it will help in future - By meeting other local business owners, this network will provide new opportunities for business	9	<table border="1"> <thead> <tr> <th data-bbox="1247 1038 1469 1086">Yes</th> <th data-bbox="1469 1038 1680 1086">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1247 1086 1469 1166">0</td> <td data-bbox="1469 1086 1680 1166">2</td> </tr> </tbody> </table>		Yes	No	0	2
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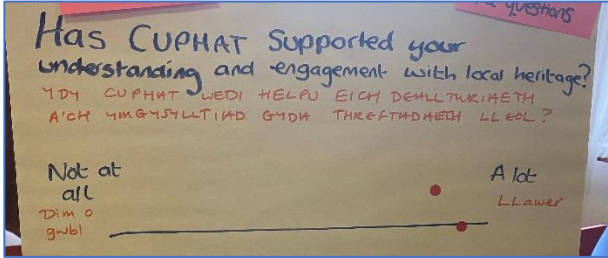
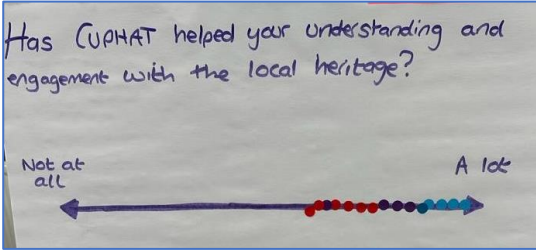
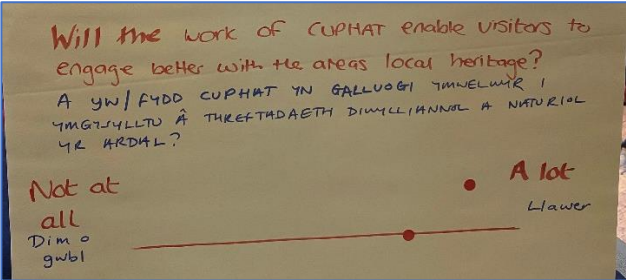
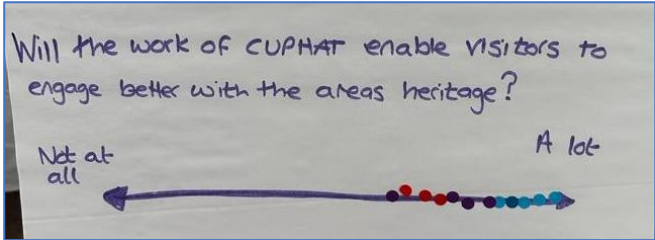
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<p>Do you provide any information or promotional material about the natural, cultural or historic heritage of your local area to your guests?</p> <p>If yes, in what format and what different types do you provide?</p>	<table border="1"> <thead> <tr> <th data-bbox="405 802 904 850">Yes</th> <th data-bbox="904 802 1182 850">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="405 850 904 1286"> <p>12</p> <p>Printed publications x 11 E.g leaflets and lists of attractions, written researched info, local history book, maps, walking routes</p> <p>Electronic via email x 1 E.g. information booklet</p> <p>Word of mouth x 7 E.g. story telling,</p> </td> <td data-bbox="904 850 1182 1286"> <p>1</p> <p>(there is no material on historic heritage available)</p> </td> </tr> </tbody> </table>		Yes	No	<p>12</p> <p>Printed publications x 11 E.g leaflets and lists of attractions, written researched info, local history book, maps, walking routes</p> <p>Electronic via email x 1 E.g. information booklet</p> <p>Word of mouth x 7 E.g. story telling,</p>	<p>1</p> <p>(there is no material on historic heritage available)</p>	<table border="1"> <thead> <tr> <th data-bbox="1245 893 1715 941">Yes</th> <th data-bbox="1715 893 2000 941">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1245 941 1715 1198"> <p>1</p> <p>Printed publications, word of mouth</p> <p>E.g. Information on walks, heritage sites, wildlife</p> </td> <td data-bbox="1715 941 2000 1198"> <p>1</p> </td> </tr> </tbody> </table>		Yes	No	<p>1</p> <p>Printed publications, word of mouth</p> <p>E.g. Information on walks, heritage sites, wildlife</p>	<p>1</p>
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Question	Wicklow Mountains	Blackstairs Mountains								
<p>Do you offer anything else that would help your guests to engage with the natural, cultural heritage of your local area?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 316 1037 363">Yes</th> <th data-bbox="1037 316 1158 363">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 363 1037 655"> <p>5</p> <ul style="list-style-type: none"> - Guided pilgrim walks - Work with the INS and all local racecourses - Guided tour of local area - Farm tours on farming in Irish history - Storytelling / recounting personal experiences </td> <td data-bbox="1037 363 1158 655"> <p>8</p> </td> </tr> </tbody> </table>	Yes	No	<p>5</p> <ul style="list-style-type: none"> - Guided pilgrim walks - Work with the INS and all local racecourses - Guided tour of local area - Farm tours on farming in Irish history - Storytelling / recounting personal experiences 	<p>8</p>	<table border="1"> <thead> <tr> <th data-bbox="1252 316 1695 363">Yes</th> <th data-bbox="1695 316 2000 363">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 363 1695 475"> <p>1</p> <p>(Guided tours)</p> </td> <td data-bbox="1695 363 2000 475"> <p>1</p> </td> </tr> </tbody> </table>	Yes	No	<p>1</p> <p>(Guided tours)</p>	<p>1</p>
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<p>Has CUPHAT helped you to provide further information about your local and cultural heritage to your guests?</p>	<table border="1"> <thead> <tr> <th data-bbox="409 711 629 759">Yes</th> <th data-bbox="629 711 837 759">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="409 759 629 842"> <p>3</p> </td> <td data-bbox="629 759 837 842"> <p>10</p> </td> </tr> </tbody> </table>	Yes	No	<p>3</p>	<p>10</p>	<table border="1"> <thead> <tr> <th data-bbox="1252 711 1469 759">Yes</th> <th data-bbox="1469 711 1677 759">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="1252 759 1469 842"> <p>1</p> </td> <td data-bbox="1469 759 1677 842"> <p>1</p> </td> </tr> </tbody> </table>	Yes	No	<p>1</p>	<p>1</p>
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<p>1</p>	<p>1</p>									

Appendix 6 – Responses to the evaluation questions at the CUPHAT festivals

The responses to the exercises are outlined for the flip chart questions and the survey responses for both countries

Flip chart exercise questions	Wales	Ireland
<p>What difference has CUPHAT made to Tourism in the area?</p>	<ul style="list-style-type: none"> • Opportunity to network, make connections to help promote tourism and local rural businesses. • Hopefully more people will get to know about this region. • Helping focus in improving existing businesses, tourist outlets and organisations to promote the area. • Excellent networking with CUPHAT beneficiaries. • Future plans for festival and joint events. 	<ul style="list-style-type: none"> • Fantastic volume of tourists to the South East. • Raised awareness of possible tourist projects. • Engagement with groups outside our own areas and with Wales.
<p>Has CUPHAT supported your understanding and engagement with local heritage?</p>	 <p>Has CUPHAT Supported your understanding and engagement with local heritage? YDY CUPHAT WEDI HELPŪ EICH DEMLLTKIŪETH A'ICH YMGŪYLLTUŪ GYDA THREFTADAETH LLŪOL? Not at all (Dim o gwbl) ————— A lot (Lawer)</p>	 <p>Has CUPHAT helped your understanding and engagement with the local heritage? Not at all ————— A lot</p>
<p>Will the work of CUPHAT enable visitors to engage better with the areas local heritage?</p>	 <p>Will the work of CUPHAT enable visitors to engage better with the areas local heritage? A YW/AYDD CUPHAT YN GALLUOGŪ YMMŪELWYR I YMGŪYLLTUŪ A THREFTADAETH DIMŪLLIANNŪL A NATŪRIŪL YR ARDAL? Not at all (Dim o gwbl) ————— A lot (Lawer)</p>	 <p>Will the work of CUPHAT enable visitors to engage better with the areas heritage? Not at all ————— A lot</p>

Appendix 7 – Summary of the Festival Survey responses

Question	Wales	Ireland
Business type	1 community member 12 local businesses	2 community members. 4 local businesses.
Can the CUPHAT objectives help deliver sustainable tourism in this area?	<p>Responses:</p> <ul style="list-style-type: none"> • Yes - 10 • Not sure - 2 • No answer - 1 <p>Additional comments:</p> <ul style="list-style-type: none"> • Especially with continuation the project would be great. • I've forgotten what the objectives are but I'm sure they will be achieved. • It can but it needs time to have sustainability recognised. • If it can influence Welsh Government Policy • It can, but the funding will end and what happens then? • We need 'boots/troops' on the ground in Preseli" • Connecting organisations and businesses together in collaboration is a great way to grow tourism in a sustainable way. 	<p>Responses</p> <ul style="list-style-type: none"> • Yes – 6 <p>Additional comments:</p> <ul style="list-style-type: none"> • CUPHAT encouraged participants to think about how they could make their tourist business sustainable. CUPHAT helped bring awareness and attention about other alternative businesses across the areas.
Name one positive thing that CUPHAT has done?	<ul style="list-style-type: none"> • Given me confidence to develop and establish a hamper business, confidence to speak publicly and contribute my views within the group. • Formed networks and relationships, a network family! • Bringing people together. • Enabled me to connect with other local small businesses. • Provided an opportunity for diverse organisations to come together. • Networking - continued opportunities to develop ideas and joint working. • Created an awareness of the strengths (and weaknesses) in 	<ul style="list-style-type: none"> • Raise awareness. • Provided foundations and support for businesses. • Bringing local businesses together to collaborate and gave good guidance on direction for a sustainable business in tourism. • Specific to small local business which are at the heart of regenerative tourism, encompasses environmental, climate issues, local products and culture. • Created an inclusive and supportive network amongst the participants. Also clearer achievable ways to connect with businesses in the area.

	<p>the approach to tourism here and in Ireland.</p> <ul style="list-style-type: none"> • Citizen / Community Science. • Provides a platform to inform Welsh Government Policy. • Brought tourism businesses together through networking. • Engaged with what's going on in Ireland and allowed us to learn from what they do and how they do things. • Great links made with Ireland, BUT even more importantly with/within Preseli and the Cambrian Mountains. • Made connections. 	
<p>Name one thing that CUPHAT could have done better?</p>	<ul style="list-style-type: none"> • A little more notice e.g. CUPHAT festival, not enough time to promote and advertise. • Communication, amalgamating some meetings. • More advertising, especially events. • Marketing the events and festivals could be stronger. Maybe not a weekday for a community event, it does not suit people who are working. Much more would be likely to attend on a weekend. • Communication with wider community. • Promotion of events and courses. • Publicity of events. • Engaging the ordinary, uninvolved population. • Influence Welsh Government Policy re Tourism. • Got the message out better and engaged people, especially in the early days. I didn't learn of it until a chance encounter in October 2022 and have been heavily involved since. • Have more time to achieve it's goals. • More time. • More promotion within the community. • More diversity of businesses and speakers. 	<ul style="list-style-type: none"> • Continue the work re walking trails and develop horse trails • Big group at the beginning - would have been better to treat groups separately so they could have focused on specific issues. • Needed a longer time period. • When first met as a group it would have been nice to have everyone introduce themselves and their business at the start so that we had a better idea of who was in the room. • Build website as part of the project to enable communication earlier on in the project cycle . • More of an introduction to each other at the start of the programme. It would have been great to have a better understanding of each other's background and story from the first session.

<p>What did you get out of your involvement with CUPHAT?</p>	<ul style="list-style-type: none"> • Getting to know other businesses. • Focus, action plan, networking. • A sense of community and belonging. • I have focused on the aim of my business, connected with multiple stakeholders. • Connections with other businesses, wider understanding of Cambrian mountains area and what can be achieved through positive co-operation. • Opportunity to sit and think about business development. Critical comments to assist action plan. Other members to work with. • A very helpful course & some confidence about what I'm doing. • Interest and information. • Networking • Learnt a lot from learning how others do things, and also learning of other things going on locally. • It will hopefully increase footfall at our business. • Getting more people engaged. • Increased visitor numbers and possibilities. • Linked with some useful organisations & other businesses. • Made me think deeper about our story" 	<ul style="list-style-type: none"> • Knowledge. • Met with different businesses as part of the workshops which was useful to network. • Collaboration with other local tourism businesses • Forming links which helped with promotion. Contact through the network. Access to other networks which previously did not come together. • A clear, concise and varied approach to making my business strategy, aims and achievements. Mary was particularly good at guiding me through this process.
<p>What difference has CUPHAT / will CUPHAT make to tourism in the area?</p>	<ul style="list-style-type: none"> • If everyone within the groups promote the area within their business, it should attract more people to the area. • Will bring businesses and communities together. • Given an identity to rural businesses • Hopefully the project will encourage more tourism to the area. • It's questionable. That all depends on the legacy after the project ends. Is what has been established sustainable? 	<ul style="list-style-type: none"> • Not sure yet • Enable me to write a 5 year plan which help with long term planning for the business • Increased the visibility of the region for tourists • Currently the network has been weak • Small companies have less resources and time to engage. • Wicklow tourism are focused on bigger companies and don't offer much. • It will make smaller, sustainable focused businesses more visible to tourists. It will

	<ul style="list-style-type: none"> • More businesses working collaboratively. • It will help individual businesses to make headway and engage with other businesses to network. • Create greater interest in heritage and environment • Watching with interest • Hopefully more signage at historical/prehistoric sites to engage visitors. • It could encourage more people to come and have more diverse engagement. • Greater pride in the Preseli area and links into Pembrokeshire. • Create a strong network of collaborators to create growth in the tourism sector. 	<p>also create a stronger, supportive network of start ups now that they have been introduced through the programme.</p>
Has CUPHAT supported your understanding and engagement with local heritage?	<p>Responses</p> <ul style="list-style-type: none"> • Yes – 13 <p>Additional comments:</p> <ul style="list-style-type: none"> • Te sessions within the 6 weeks have been excellent. • But I did not know about today until last minute. • Local heritage has been set in wider context. Cwmystwyth has got a strong feeling of heritage, even my property has a history file from it's foundations onwards. 	<p>Responses</p> <ul style="list-style-type: none"> • Yes – 6 <p>Additional comments:</p> <ul style="list-style-type: none"> • The course provided some useful information • developed understanding of certain areas i.e. biodiversity and citizen science • As a participant who is relatively new to Wicklow, I have gained a much more informed understanding of the diverse local history and cultural hubs in the area.
Has /will CUPHAT enable visitors to engage with the area's cultural and natural heritage?	<p>Responses</p> <ul style="list-style-type: none"> • Yes – 6 • Hope so - 6 <p>Additional comments:</p> <ul style="list-style-type: none"> • More people are aware now of the areas heritage, as a result of being part of CUPHAT. • It will if there is a strong legacy provided. Good foundations need to be laid before the end of the project. • It would be good if CUPHAT can influence Welsh Gov / Visit Wales to cover the Preseli Mountains(Not just Brecon Beacons / Snowdonia)" 	<p>Responses</p> <ul style="list-style-type: none"> • Yes – 4 • Hope so - 1 <p>Additional comments:</p> <ul style="list-style-type: none"> • Has helped businesses understand the positive things they have so that they can maximize their potential and pass this on to visitors. • With a good website, comms and practical marketing strategy. • As a participant I have been introduced to a variety of tourist hubs and businesses – such as waking tours, bespoke

	<ul style="list-style-type: none"> • We need to get our act together as a local group in order to make things happen. 	<p>accommodation etc. The concluding pitch presentation definitely indicated that there would be more engagement.</p>
<p>What more needs to be done to support sustainable / regenerative tourism in the area?</p>	<ul style="list-style-type: none"> • Promoting the area on a national level in terms of what we have to offer. • The Welsh government and local authorities need to change their policies or tourism will be ruined and damaged. • It would be great if the programme were able to continue as it feels that this is just the beginning. • Promote the region to wider visitors. • A hub needs to be developed to ensure the continuation of sustainable regenerative tourism to provide constructive assistance to tourist providers. • Ensure that the resources used are sustained / extended into the future. • Effective transport links & infrastructure. • We really need a central hub / tourist info office based centrally in the Preseli e.g. at Tafarn y Bwlch. • Get ourselves together as a local group so that we can get the word out and work together better. • Paid staff to lead and build confidence, and to work with businesses and communities. • More Diversity. • More support for microbusinesses. • More collaboration. 	<ul style="list-style-type: none"> • Easier to find resources either online or through social media • Ongoing engagement to keep the process going • Continued collaboration with other local tourism business and support • Support, marketing strategy for small businesses, a slogan that unites and represent the local businesses. • Probably more funding for small businesses or event for small tourist, regenerative businesses could network and communicate.