



Feasibility Study & Business Case:

## Developing the ex-FCW building at Bwlch Nant yr Arian into a resource for the Cambrian Mountains



Resources  
FOR CHANGE

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## INTRODUCTION

In 2020 *Ceredigion County Council* (acting on behalf of the *Cynnal Y Cardi Local Action Group*) and Natural Resources Wales (NRW) commissioned R4C to explore the range of feasible options for developing the potential of the ex-FCW (Forestry Commission Wales) building at Bwlch Nant yr Arian.

The building has been vacant for a number of years. Located at a strategically important location in the Cambrian Mountains and benefiting from a fantastic setting, it is owned and managed by National Resources Wales (NRW).

The aim of this project was to undertake a feasibility study to inform the future development of this important building and develop an outline business plan for the preferred option. Any proposed redevelopment of the building would need to deliver a sustainable income sufficient to cover upkeep and maintenance, staffing and running costs and a surplus to be reinvested in the area over the long term. In addition, the redevelopment should enable at least one of:

- Increased awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion;
- Opportunities for the local economy;
- A resource for local people and visitors such as for health, wellbeing, education and enjoyment.

**Note:** *The consultation underpinning this plan reflect the thoughts and opinions of the respondents, which might not always be factually correct. However, such instances can give valuable insight. e.g., if a number of residents identify the need for a specific facility or activity that already exists, it highlights a lack of local knowledge about the availability of current provision.*

## METHODOLOGY

Our aim was to undertake an inclusive and collaborative process, enabling all stakeholders to have their say and play an active part in decision making.

For the initial community and stakeholder consultation an online bilingual survey was set up targeting local communities, businesses and organisations that benefit from the site, promoted through local networks and social media. It was open for a month between April and May 2021 and received 224 responses. Covid-19 restrictions meant that we couldn't approach visitors directly at BNYA, which is why the survey was exclusively conducted online. Deio Jones visited the site with the site managers to get acquainted with the site, and also visited during the Bank Holiday weekend to experience the site as a visitor. (*Appendix A*)

Two separate online workshops were held with engaged stakeholders to validate the findings and develop initial ideas and proposals which formed our 'long list' of options. Also, as a result of these an additional short survey was conducted over the August Bank Holiday to target visitors/tourists who were a missing audience from the initial survey. (*Appendix A*)

In response to this initial work, key criteria were developed and agreed with stakeholders against which we scored the proposals on the long list in an Options Appraisal exercise. This was done collaboratively with stakeholders online in an interactive workshop, and the results informed the shortlisted development options that addressed the needs and benefits identified by the stakeholders. (*Appendix B*).

The preferred option was developed by combining the shortlisted elements into a package that addressed the needs and delivered the benefits identified by users and stakeholders, while ensuring the development would be financially sustainable and align with the local & regional strategic and legislative context. We also produced case studies of similar developments to learn from their experiences and validate our own proposals (*Appendix C*).

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THE SITE

Located on the A44 between Aberystwyth and Llangurig, Bwlch Nant yr Arian is popular with local residents and visitors alike. The current facilities are managed by NRW and located on a dramatic hilltop, straddling the boundary between the lowlands and uplands and offers commanding views of both Cardigan Bay and the Cambrian Mountains.

The current visitor centre overlooks a small lake and is the starting point for the numerous trails that snake through the surrounding landscape. Remnants of the lead mining industry are still visible along the trails but today bilberry and heather cover the hills between the areas of forest. The surrounding woodland is a working forestry and broadleaf trees have recently been planted on the site to replace harvested timber.

BNYA is renowned for the dramatic daily spectacle of feeding the red kites, as well as the range of waymarked trails for walkers, mountain bikers, runners, and horse riders. There is also a skills park with a purpose-built track for mountain bikers to practice their technique.

The location on the A44 means there is plenty of tourism and visitor flow through, offering potential to explain the Cambrian Mountains and its importance as the source of the country’s two main rivers, the Severn and the Wye, as well as other key aspects such as its part in ecosystem services through carbon sink, timber and meat production, education, activities, health and wellbeing.

The A44 also connects two of the three routes of ‘The Wales Way promoted by Visit Wales:’ ‘The Coastal Way’ and the ‘Cambrian Way.’ This should provide opportunities for both promotion and funding for the new development, especially if it enables Bwlch Nant yr Arian to develop as a key anchor point to promote increased dwell times and spend or helps to extend the regular season.

CURRENT FACILITIES

The current facilities at Bwlch Nant yr Arian are focused around the existing Visitor Centre. This timber building overlooking the lake contains a café with both indoor and outdoor seating, and a gift shop. There is some interpretation of the natural environment, including live feed from an owl box camera. The building also includes toilet facilities and the NRW staff offices.

Around the building there is additional outdoor seating and two children’s play areas, one for toddlers and the ‘Dizzying Heights’ play area for older children. There is a bike wash station, and parking for around 50 vehicles (plus overflow) located between the current Visitor Centre and the ex-Forestry Commission Building which is currently unused.

This area is the starting point for all the wide range of waymarked trails and features that are listed below. There are interpretation boards dotted around, especially along the wheelchair accessible ‘Barcud Trail’ which goes round the lake and leads to a bird hide behind the red kite feeding area.

Trails	Name	Distance	Grade
Walking	Barcud Trail	1.2km	Accessible
	Miners Trail	2.4km	Moderate
	Ridgetop Trail	5km	Moderate
Running	Y Llo	5km	Moderate
	Y Fuwch	10.4km	Strenuous
Biking Skills Park	Arian Trail	7.9km	Forest Road
	Melindwr Trail	5km	Blue / moderate
	Pendam Trail	10.2km	Red / Difficult
	Summit Trail	18.5km	Red / Difficult
	Syfydrin Trail	36km	Black / Severe
	Skills Park	-	3x Mixed loops
Bridleway	Mynydd March	10.7km	-
Orienteering	X 4 Courses	-	Various

## CURRENT VISITOR PROFILE

According to the 'Wales Visitor Survey' conducted by Beaufort Research in 2019 (Appendix D), the majority of visitors to BNYA are domestic visitors (Wales:79%; UK 21%), visiting as part of a day trip (89%).

Of those day visitors, 81% visited more than 11 times annually (62% +20 annual visits), suggesting a significant majority are local visitors. This is reflected in our own Stakeholder & Community Survey (Appendix A) where 97% of respondents lived locally (45% within 5 miles; 52% within 25 miles), 62% visited at least monthly, and an impressive 96% had previously visited within the last 3 years.

Interestingly 14% of visitors had found the site in passing on route to another destination, suggesting that a relatively high number of 'non-local' visitors hadn't planned their visit beforehand.

The 'Wales Visitor Survey' also noted that most visitors to BNYA were Families with young children (36%), followed by couples (19%) and friends (18%). Overall, higher proportions of middle-aged people aged 35-54 visited BNYA (49%) compared to the overall Wales average at NRW sites (39%).

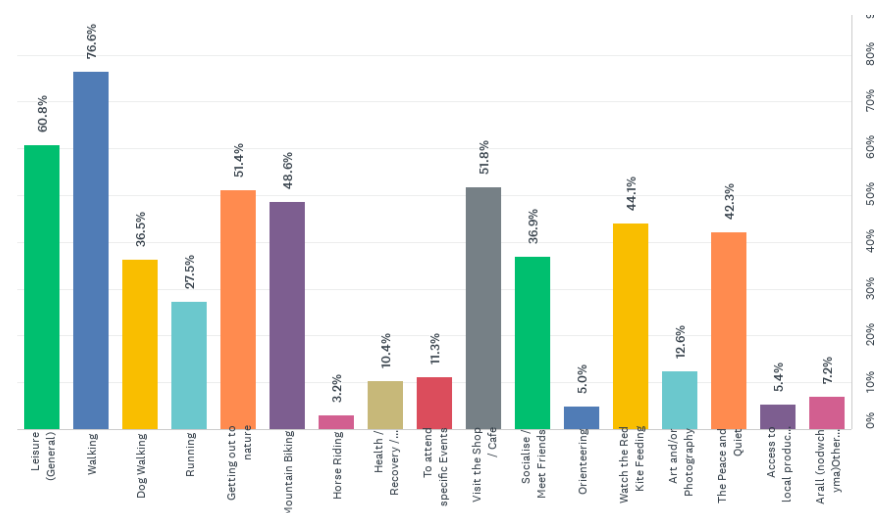
Visitor spend is also slightly higher than other NRW sites £65.66. However, BNYA attracted a higher proportion of C2DE visitors (35%) than the average across NRW sites and Wales as a whole. This suggests a mix of higher and lower spending individuals; however the figures could be distorted by the fact that the majority of visitors live locally.

55% of visitors are Welsh speakers, highlighting the importance of bilingual provision of interpretation, signage, and services. The data from our Stakeholder & Community Survey (Appendix A) indicates that respondents tend to visit all year round, although there is a noticeable reduction of visitors in the winter months. The majority (84.1%) arrive by car, which was expected due to its location. However over 10% cycle, with a smaller number of walkers and horse riders. Only 2 arrived by public transport highlighting the current lack of infrastructure.

## CURRENT ACTIVITY

Bwlch Nant yr Arian attracts visitors who participate in a wide range of activities, unsurprisingly focused on leisure and the natural environment. The most popular activity identified by our respondents is 'walking', while 'getting out to nature', 'mountain biking,' 'watching the Red Kite feeding,' and 'the peace and quiet' all feature prominently. The site is popular with dog walkers and runners, and also used by a small number of horse riders.

A significant number note that visiting the shop/café and socialising are also key reasons for visiting. Just over 10% of respondents identify Health/Recovery/Recuperation, attending events, and Art & Photography as reasons for visiting.



Of the 'other' respondents, 6 referred to bringing children and grandchildren up to play in the woods or the park, while picking bilberries and bringing up visitors also featured a couple of times each. Teaching, swimming, and green-laning were also mentioned.

## THE EX- FORESTRY COMMISSION WALES BUILDING

The ex-Forestry Commission Wales (ex-FCW) building currently stands empty. It is a unique wood cladded building situated on the brink of a sheer drop and commanding spectacular views along the Melindwr Valley towards Ceredigion Bay.



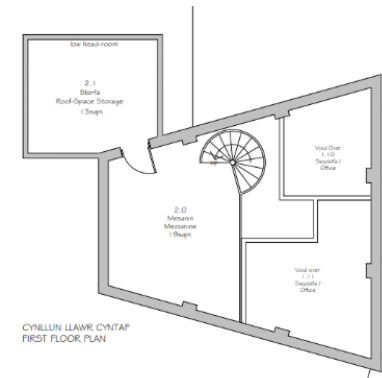
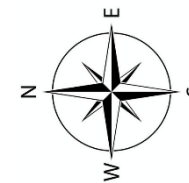
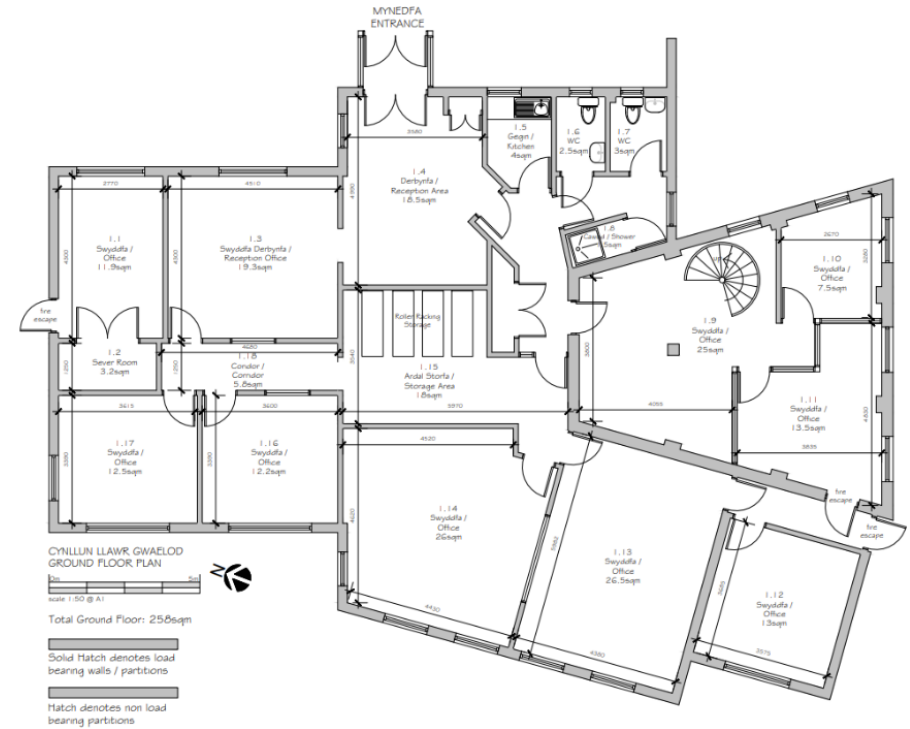
It's easily accessible from the existing carpark and has been unused (apart from as storage space) since NRW relocated their visitor services into the Main Visitor Centre and a small office space around a decade ago (the main staff resource that were based there were relocated to the new WAG office in Aberystwyth). However, the building has been maintained and heated during this time and according to a recent structural survey (*Appendix E*) is in relatively good condition apart from a small annexe on the South-Western side which is recommended for demolition. This demolition would enable the expansion of the current outdoor decking space (which needs renovating).

The building still has connected and functioning electricity, water, and drainage. Located next to the main entrance there is a small fitted and functioning kitchen, two toilets, and a shower. The existing layout is mostly created by non-load bearing partition walls, which provides significant scope and flexibility to open up and alter the space to create to accommodate the new development.

The southern side of the building has a mezzanine floor, this provides additional floorspace but unfortunately does not have disabled access.

### THE OPPORTUNITY

The building is currently an underused asset that has the potential to significantly improve and/or diversify the services and facilities available for both local community users and visitors alike. It also has the potential to showcase and interpret the wider landscape of Ceredigion and the Cambrian Mountains.



(Current Floor Plan: Catalina Architecture)



## THE CASE FOR CHANGE

This section presents the case for change. The local priorities, opportunities, current issues that need addressing, the potential benefits and impact, and finally the existing capacity to deliver these changes. *See Appendix A for more details.*

### PRIORITIES: WHAT DO LOCAL COMMUNITIES & CURRENT USERS WANT TO SEE?

It's key that any future development provides benefits that are needed and demanded by local communities. Through our consultation (*See Appendix A*) individuals, stakeholders, and current users have identified their priorities for any future development at BNYA. These are:

1. A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
2. A new development should preserve and/or promote awareness of the local environment.

These were identified as more pressing than *'Increasing awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion,'* and creating new *'opportunities for the local economy'*. In the following workshops, local stakeholders also agreed that:

- The facility should cater for and improve the offer for local people and organisations. However, there should be a balance that recognises the importance of the visitor economy to the region, and this needs to be a reflected in a sustainable and appropriate attraction that respects the nature of the site as opposed to 'mass tourism.'
- Any visitor attraction should aim to attract 'high value' visitors interested in the core environmental, historic, cultural, and outdoor activities elements.
- The development should aim to promote health & wellness benefits for local residents and visitors alike. And although economic development is also desirable, it shouldn't be to the detriment of the other elements.
- Enabling the hosting of a social events programme for families would be a positive.

## ADDRESSING CURRENT WEAKNESSES

Regarding the issues that could be addressed by a new development in the disused building, additional indoor and outdoor seating and eating areas is one possibility. The lack of a community events space was mentioned many times, as was the lack of educational space, interpretation of the area's nature and heritage, and a lack of indoor/wet weather activities.

There is a lack of showering and bathroom facilities, which the bikers would appreciate and potentially allow them to stay longer on site or in the area if they could get cleaned up, increasing their potential to spend locally. A number also mentioned the lack of bike (and motorised wheelchair) hire facilities, and a repair/equipment store, with some referencing Coed y Brenin as an example.

**Note:** *There were numerous other issues identified related to the wider BNYA site but that aren't relevant to the re-development of the building under consideration e.g. shared routes, parking issues etc. These are documented in Appendix A.*

## OPPORTUNITIES FOR BUILDING ON CURRENT STRENGTHS

Unsurprisingly the majority identified the Activity Trails (Walking, Running and Biking), and the natural environment – with the Red Kites a recurring theme, alongside the spectacular views and landscape. Developing a facility that added value and improved these experiences would be a positive development.

Accessibility for all ages, ability, and mobility also came through strongly, as did the location, and the peace and tranquillity of the area and the desire not to spoil this with overdevelopment or overcrowding. The Café/Shop was also seen as a strength by some, although others wanted the café improved, and some seemed unaware of the existence of the current shop and availability of local products!!

There were also quite a few comments about the good and safe facilities for children, and the potential the site has as an educational resource.

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## AN OPPORTUNITY TO DELIVER LOCAL BENEFITS

There is a strong desire amongst current users to improve the facilities without changing the nature of the site, so there is a strong case for any new development to increase and enhance these existing and appreciated benefits. When exploring current benefits, *'enjoyment and having fun'* came out top alongside *'improved physical health'*. These were followed by *'relaxation'* and *'improved mental health.'* Nearly half recognised *'re-connecting with nature'* as a benefit, with a third identifying the *'social benefits'* of the site.

Local businesses who engaged with the consultation noted that they currently/could benefit directly from BNYA. Nearly half of these noted the potential to sell services or products on site. Over a quarter noted that visitors to BNYA stay at their accommodation, and another 21% stated that the visitors also visit their own establishments. A number also noted that they use (or could use) the facilities at BNYA to provide experiences for their visitors/clients.

Of the benefit they could derive from a new development, the overwhelming majority noted the general benefits of promoting the area to visitors, 40% noted the benefit of selling their products, and over 30% saw benefits from signposting visitors to their businesses. Using the facilities was another potential benefit.

There were also over twenty organisations that identified themselves as currently using BNYA to provide services to the community. Most were engaged with health & wellbeing (including therapy, social care and youth services), or education. Others included an activity provider and conservation organisations.

The majority identified the educational value of the site, the natural environment, and the range of activities as the reason they used (and their users benefited) from the site. Other specific reasons for using the site with their clients included the café and the accessibility of the disabled toilets and other facilities. When asked what developments would benefit them (and their clients) as a service provider, an educational classroom space and/or an indoor space they could hire were the most popular comment.

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## OPPOSED DEVELOPMENTS

The most fiercely opposed developments are anything that harmed the natural environment (or the view), anything that was overly commercial, or a development that disturbed the peace and tranquillity (through noise/light etc).

Also near the top of the list was anything that encouraged more off-roading activities and motorised vehicles. Alongside any attraction that brought masses of additional visitors to the site, with both pressures on parking, increased traffic, and protecting the character of the site key themes in this regard.

There was some opposition to anything perceived as an 'un-natural' or over-development. As well as private developments that do not benefit the public/community, and housing/holiday lets.

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## CAPACITY FOR CHANGE

As the current managers of the overall site, NRW have the capacity to drive forward and develop any potential development. There are other partners such as Ceredigion County Council who would also be able to provide additional support through a partnership approach to the development.

There is potential to lease the building, or parts of it, to a tenant organisation or business to provide services to visitors. Or as a base for local enterprise. This arrangement would need to be managed.

The long-term management of the asset will be an additional burden on the current management team at NRW. The cost of any significant additional demands on staff time and/or resources will need to be provided for through developing new income streams, or by working with a partner / tenant to staff the facility during opening hours.



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## GOVERNANCE OPTIONS

There are three potential options to govern a newly developed facility:

- 1) **NRW:** The facility is managed by NRW as part of the wider site. This would ensure uniform management across the entire site and avoid potential conflict. NRW retain all the income to reinvest in the site, and also facilitate the sharing of resources. However it would place additional burden on existing capacity and could limit the available capital funding for the development.
- 2) **An External Partner:** The management of the facility is leased out to an external organisation who take over the running of the facility and pay NRW an annual fee. This would ease the burden on NRW's capacity; however it could lead to potential conflict of interest if the external partner pursued their own objectives (e.g. to drastically increase visitor numbers to boost profitability) and make the cohesive development of BNYA as a sustainable destination more complicated.
- 3) **A new 'not for profit' organisation:** A new 'not for profit' organisation is established specifically to develop the new facility, with NRW and local partners / stakeholders represented on the board. The main benefit of this arrangement would be to open up new avenues for 3<sup>rd</sup> sector grants & capital funding, which NRW as an organisation would not be eligible for. However the predicted income isn't enough to fund a new post to manage it, so a management agreement will likely be required with NRW.

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## OUR RECOMMENDATION

Our recommendation at this stage is that you continue with the current arrangements (Option 1) with NRW collaborating with local partners to drive the development forward in a direction that works for them as an organisation and the wider aims for the site. As plans are developed further and if NRW's status is a hindrance to funding the development, then potentially setting up an arm's length 'not for profit' organisation or trust as a development vehicle should be explored. We recommend that this only be considered if NRW believe it will work within their existing organisational structure.

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## STRATEGIC CONTEXT

This section summarises the National and Regional strategic context for a development at BNYA. Aligning with these will help deliver wider goals and strengthen the case for support from public sector funders and local authorities.

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### NATIONAL

A key outcome of **Future Wales: The National Plan 2040** is '*A Wales where people live in vibrant rural places with access to homes, jobs and services.*' It states that '*The culture, heritage and environment of Wales will play a positive, modern role in the economy by attracting the interest and expenditure of tourists.*'

The Economic Action Plan '**Prosperity for All**' identifies *Tourism* as one of the four foundation sectors to focus on, alongside *food, retail, and care*. It also highlights the need to embrace regional differences and opportunities and collaborate with local partners to deliver better outcomes.

BNYA is a valuable natural resource, and potential support and funding will in part be driven by the Welsh Government's focus on '*Sustainable Management of Natural Resources*' as laid out in the '**Environment (Wales) Act.**' In the context of a potential redevelopment of the ex-FCW building, any development that delivers economic (tourism, economic growth etc) and/or social (education, community facilities etc) benefits by sustainably capitalising on and conserving/enhancing the natural environment will be seen as a good example of this approach.

A development at BNYA would also be in a position to contribute towards some of the seven 'Wellbeing Goals' of the **Well-being of Future Generations (Wales) Act 2015**, depending on the preferred option taken forward. Any development that directly or indirectly provides new employment opportunities, economic growth, and/or education opportunities through sustainable means will contribute to the goal of *A Prosperous Wales.* While maintaining or enhancing the local environment contributes to *A Resilient Wales.*

A project that encouraged increased participation in physical activities such as walking, running or biking would contribute to 'A Healthier Wales,' and along with promoting heritage and culture delivers on the goal of 'A Wales of Vibrant Culture and Thriving Welsh Language.' Improved community facilities would contribute to 'A Wales of Cohesive Communities,' and taking a long-term sustainable approach contributes to 'A Globally Responsible Wales.'

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## REGIONAL

The **Ceredigion Local Development Plan (LDP) 2007-22** informs development in Ceredigion, and many of its objectives are relevant to any development at BNYA including 'To promote a sustainable, diverse and progressive rural economy for the benefit of Ceredigion and its local communities' (Ob2); 'To encourage and promote a year round sustainable, environmentally friendly tourism sector ... that caters for a wide range of markets and provides a range of facilities for all seasons (Ob4); 'To enhance and help ensure the provision and protection of an appropriate level of and access to education, health, cultural, social, recreational, community, sport and leisure facilities and services' (Ob7); 'To prevent loss of and enhance biodiversity and its connectivity across Ceredigion... whilst improving the enjoyment and understanding of biodiversity by encouraging access to sites of conservation interest; providing their ecological integrity can be safeguarded' (Ob12).

Policy LU17 addresses Tourism Facilities/Attractions, stating they have adequate accessibility, will be supported if they widen the tourism base, benefit the wider community, include environmentally friendly measures [e.g. small-scale green energy generation], provide wet weather activities. It also states that 'Development proposals that would have a significantly adverse effect on the amenity, setting and characteristics of existing tourism resources will not be permitted.'

Policy LU22 addresses community provision, and amongst other things emphasises consideration of multi-use facilities. It states that 'For communities to

*be sustainable there needs to be a range of community facilities and services available in terms of places to work, live, shop, socialise and also areas available for recreation, sporting activity, open space, education [...] and health care.'*

Policies DM03 and DM04 emphasises the need for developments to provide opportunities & infrastructure for sustainable modes of transport.

Ceredigion's Economic Strategy - **Boosting Ceredigion's Economy: A Strategy for Action 2020-35** - sets out how stakeholders will work together towards achieving strong, sustainable and more resilient economic growth for Ceredigion, created and shared by all.

Outlining its key Principles and Drivers, it states that 'the strategy is driven by the opportunities that exist to grow the economy,' and at a small scale such an opportunity exists at BNYA.

'Protecting, and enhancing our landscape, biodiversity and further reducing the damaging causes of climate change' is a core principle, as is 'the need to protect and enhance our cultural uniqueness and identity and help to boost the resilience and growth of the Welsh language.' Again BNYA provides the opportunity to contribute to deliver in these areas.

There are also opportunities to contribute to the key priorities of the strategy:

- People: Through developing an asset that makes the area a better place for people to live, work, and grow.
- Place: Through enhancing the facilities of BNYA's green spaces, contribute to local place plans, and create a vibrant space for visitors and events.
- Enterprise: Provide infrastructure for small business to establish, specifically in the visitor economy.
- Connectivity: Improve digital connectivity and promote and encourage walking, cycling, and low carbon transport.

## A NEW DEVELOPMENT: IDENTIFYING POTENTIAL OPTIONS

The initial proposals received via the community consultation were refined into a long list through a couple of stakeholder workshops. These were assessed against set criteria agreed with local stakeholders through an options appraisal process (See Appendix B) to identify the ones with the greatest potential to address local needs and deliver the desired benefits.

### THE LONG LIST

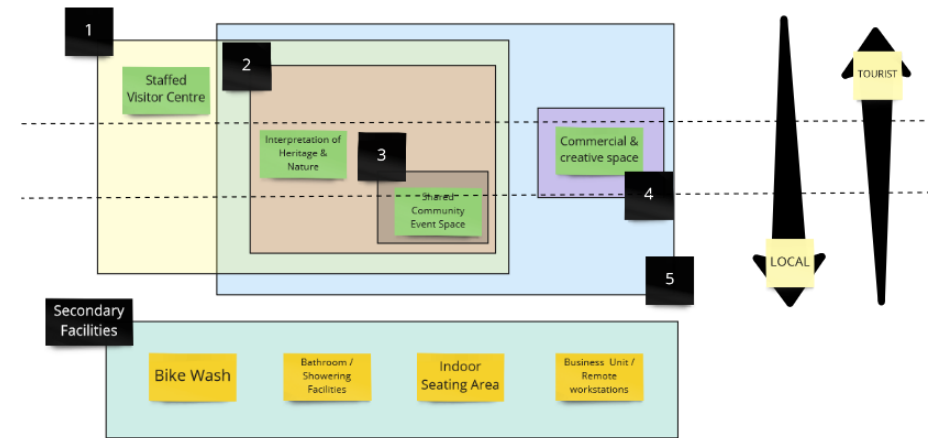
The initial long list of individual proposed facilities was as follows:

Ranking	Proposal	Ranking	Proposal
1	Shared Community / Event / Education Space	=9	Outdoor Equipment Store
2	Health & Wellbeing Facility	=9	Business Units
3	Interpretation of Nature & Heritage	=9	Indoor Exercise Area
4	Arts & Crafts Centre	=12	Visitor Centre
5	Bike Hire / Fixing (& cleaning)	=12	Additional Indoor Seating
6	Bathroom / Shower Facilities	=12	Other Attraction / Facility
=7	Indoor Children Play Area	Additional	Static Bikes
=7	Bespoke Educational Facility	Additional	VR Headset / Displays & Drone footage

### THE SHORTLIST

To deliver the desired benefits, the proposed development will need to combine some of these proposed facilities into a collective package that's financially sustainable in the long term and feasible within the scope of the building.

We have identified a number of potential combinations that we believe are worth exploring further regarding their viability and financial sustainability. These are listed and illustrated in the schematic opposite:



1. A staffed visitor centre promoting the site and the wider region and including interpretation of local nature & heritage and a multi-use communal space.
2. A scaled down and un-staffed facility combining interpretation of local heritage & nature of both BNYA and the wider region, with a multi-use communal space.
3. A large multi-use communal space, which would also leave scope for most if not all the secondary facilities if desired.
4. An Arts and Crafts centre, which could include artist studios, retail outlets, office space for local business, and gallery space.
5. A multifaceted and flexible facility, which would combine commercial space (e.g. retail, small business, resident artist etc), local heritage & nature interpretation, with a multi-use communal space.

Also listed are secondary facilities identified as being small enough in scale, that could be provided alongside the main development within the scope of the current building. They would deliver benefits for specific groups/audiences as part of the main development, providing added value.

• Bike Wash (outdoor)	• Bathroom / Showering Facilities
• Indoor Seating Area	• Remote workstations

## IDENTIFYING A PREFERRED CHOICE

When considering the preferred choice for the development of the building from the shortlisted options, we based our thinking on the following:

### DELIVERING LOCAL PRIORITIES

As identified in the case for change (page 7), which were:

1. A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
2. A new development should preserve and/or promote awareness of the local environment.

### FINANCIAL SUSTAINABILITY

There needs to be relative certainty that the preferred development would be able to generate enough regular income to sustain itself in the long-term.

### RESILIENCE AND FLEXIBILITY

Following on from the financial sustainability, we believed that multiple sources of income would be preferable and provide a more resilient business plan. We also considered the flexibility of the building to adapt to changing local needs and demands over time.

### THE STRATEGIC CONTEXT

To secure support and funding, the development needs to align with local policies and priorities, specifically the Ceredigion LDP (page 9). This calls for multi-use facilities, all-season tourism facilities, providing access to local services and employment opportunities in rural areas, providing educational, cultural & recreation opportunities, and avoiding adversely affecting existing tourism sites.

### ASSUMPTIONS

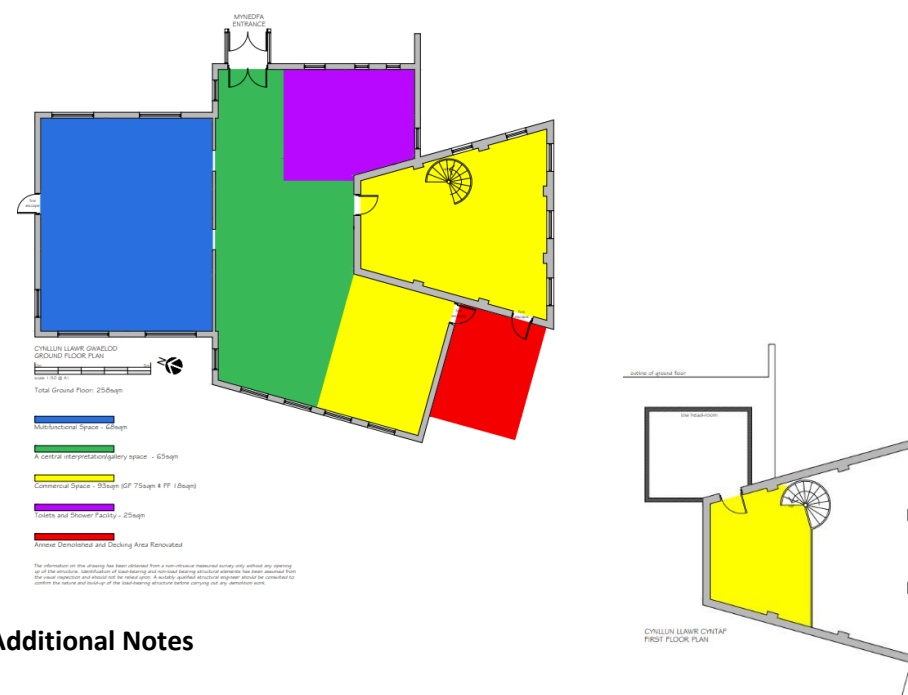
We have made a series of assumptions to underpin our thinking and financial modelling. If circumstances change and these need to be reviewed, it's important that the financial projections are also updated to ensure the proposal is still viable.

- Initial capital works would be funded by NRW, partners, and/or grant funding (so no income generation required to cover these costs).
- Cleaning is carried out under a central NRW contract, additional costs estimated at £500 per month (exact figures unavailable).
- Based on Current usage across the site, the running costs of the new facility energy etc is estimated at £4,000 per annum
- Based on current costs of £500 per annum for ongoing maintenance, we've estimated £5000 to reflect the increased use.
- The cost to NRW of employing an additional full-time member of staff would be £36,000 including on costs.
- Cost of interpretation design estimated at £20k, and installation at £1,500 per square meter.
- Satellite / 5G internet coverage costed at £2,000 installation and £100/month
- Based on similar units on the market within 40 miles of Aberystwyth (Jan 2022), a commercial unit rented out as an Artist Studio or Office space would generate around £9.50 / square feet per annum.
  - We've allowed for a period to find a suitable tenants ad estimated: 50% occupancy after 6 months, 75% occupancy after 12 months, 100% occupancy after 18 months.
- A multi-use community/education space would be available 50 weeks a year, and eventually bring in £11,920 per annum based on the following usage within 3 years:
  - Hired out for ½ day @£80 (1<sup>st</sup> Year: once a week, 3<sup>rd</sup> year twice a week)
  - Hired out for a day @£150 (1<sup>st</sup> year: once a month, 3<sup>rd</sup> year: twice a month)
- A remote working station would be accessed 8 hours per week at £5 per hour, generating £2,000 per annum
- A keypad lock (or similar) would enable 'out of hours' access for any tenants or community organisations, decreasing burden on NRW staff.

## THE PROPOSED OPTION

The proposed option to take forward is for a mixed development comprising a multiuse community/educational space, interpretation of the site and wider area, and toilet and shower facilities. It also includes a space that could either be hired out as a workshop or office space, giving you flexibility to adapt to demands and opportunities. Details outlined below, illustrated by the colour coded floorplans and the financial projections on the following page.

- A **multifunctional space** for use and hire by community and educational organisations providing the most called for services & benefits as a meeting/event/classroom/conference space. Located in the northern wing and boasting spectacular views down the valley to the coast from the large floor to ceiling windows. 68m<sup>2</sup> providing space for 60 seated (auditorium style) and accessible through side door. *[Blue]*
- A **central interpretation/gallery space** providing information on the wider site, wildlife, history and culture. We recommend that it includes interactive and visual elements, including videos and games, providing a wet weather attraction for all ages. At 65m<sup>2</sup> it provides a large welcoming space for the public from the main entrance, and leads through to the windows offering glorious views down the valley. *[Green]*
- **Commercial Space:** Some of this area is separated from the public areas by a solid block wall, providing security and minimising noise. Potential for retail units, office space, or arts & crafts space. It's also accessible through a side door providing easy access for tenants. The mezzanine floor could be used for meetings / as a workshop, but access is limited to the less able. Total 93m<sup>2</sup> (1000 square feet) plus storage. *[Yellow]*
- **Toilets and Shower facility:** comprising of 4WC (1 disabled) & sink, plus 2/3 showers. It utilises the existing water and drainage connection and located by the entrance to avoid carrying mud and dirt through the facility. (+25m<sup>2</sup>) *[purple]*



### Additional Notes

- A 'Bike Wash' facility could be included on the outside of the shower block, provided drainage mitigated any runoff to the watercourse
- Annex *[Red]* to be demolished and existing decking area renovated and expanded in its place providing additional seating (optional covering canopy).
- Satellite/5G internet connection established for both new development and existing visitor centre: enabling connectivity for office space & remote working
- Remote working station could be in office space or in the existing café, cost would be for the WiFi connectivity not the desk.



## THE RATIONALE

It seems unlikely a proposed new development could generate the £36,000 surplus required to fund a new full-time post, which rules out a staffed visitor centre at this stage as it would be too much of a risk. This element could potentially be trialled with volunteers, and by trialling other income generating measures e.g. booking local activities on behalf of providers, you could sustainably build up the income to a level that might potentially finance a part time/seasonal post.

A retail of Arts & Crafts business in the commercial space would undoubtedly attract new visitors and provide an additional element to the site. However, with so much of the current footfall local there's a risk that it wouldn't be enough to support a commercial retail venture. Providing a flexible commercial space that could also be an office mitigates the risk, providing a backup plan to ensure that there is an income stream to cover the running costs of the facility.

The interpretation element ties in with and adds value to the existing destination, whilst also providing an all-season educational visitor attraction, especially if combined with a retail or a commercial 'arts & crafts' enterprise. The multi-use community/education space provides for the main local needs including an indoor classroom space, generating income and could also be used as a gallery space.

Finally, the showers provide improved facilities for the cyclists. Improving this element of the attraction and would enable people to stay in the area longer and go on to other attractions afterwards, therefore increasing lengths of stays and opportunities for local spend.

The demolished Annex means the existing decking can be renovated and expanded, providing (potentially covered) outdoor seating in the most spectacular part of the site.

## CAPITAL COSTS

Based on the 2020 report by Roberts Building Consultants and interpretation estimates by Minerva Heritage, outline capital costs are as follows.

Element	Cost
Partial Demolition (Annex), renovation, and extension to entrance:	£350k - £650k
Design Interpretation Space: £20k	£20k
Install Interpretation @£1,500 per m <sup>2</sup> :	£135k
Mobile / Satellite Broadband	£2,000

**Note:** These are estimations and due to the rapidly changing market new quotations will need to be sourced when detailed plans are drawn up

## 3-YEAR FINANCIAL PROJECTIONS FOR PREFERRED OPTION – SUMMARY

3 Year Financial Projection - A Summary			
	1st Year	2nd Year	3rd Year
<b>Income</b>			
Commercial Unit 2	£2,376.00	£8,316.00	£9,504.00
Multiuse Space	£5,960.00	£8,940.00	£11,920.00
Remote Working WiF	£2,000.00	£2,000.00	£2,000.00
<b>Total</b>	£10,336.00	£19,256.00	£23,424.00
<b>Expenditure</b>			
Utilities	£4,000.00	£4,000.00	£4,000.00
Maintenance	£5,000.00	£5,000.00	£5,000.00
Internet	£1,200.00	£1,200.00	£1,200.00
Cleaning	£18,000.00	£6,000.00	£6,000.00
	£0.00	£0.00	£0.00
<b>Total</b>	£16,200.00	£16,200.00	£16,200.00
<b>Balance</b>	<b>-£5,864.00</b>	<b>£3,056.00</b>	<b>£7,224.00</b>



### 3-YEAR FINANCIAL PROJECTIONS – DETAILED

3 Year Financial Projection												
	1st Year				2nd Year				3rd Year			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Income</b>												
Commercial Space	£0.00	£0.00	£1,188.00	£1,188.00	£1,782.00	£1,782.00	£2,376.00	£2,376.00	£2,376.00	£2,376.00	£2,376.00	£2,376.00
Multiuse Space	£1,490.00	£1,490.00	£1,490.00	£1,490.00	£1,490.00	£2,980.00	£1,490.00	£2,980.00	£2,980.00	£2,980.00	£2,980.00	£2,980.00
Remote Working WiFi	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00
<b>Total</b>	£1,990.00	£1,990.00	£3,178.00	£3,178.00	£3,772.00	£5,262.00	£4,366.00	£5,856.00	£5,856.00	£5,856.00	£5,856.00	£5,856.00
<b>Expenditure</b>												
Utilities	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00
Maintenance	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00	£1,250.00
Internet	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00	£300.00
Cleaning	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00	£1,500.00
<b>Total</b>	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00	£4,050.00
<b>Balance</b>	<b>-£2,060.00</b>	<b>-£2,060.00</b>	<b>-£872.00</b>	<b>-£872.00</b>	<b>-£278.00</b>	£1,212.00	£316.00	£1,806.00	£1,806.00	£1,806.00	£1,806.00	£1,806.00

#### Notes

We have been conservative with the income figures and used hire rates that are lower than NRW's at their other sites but are similar to other centres such as the Elan Valley Visitor Centre.

Finally, although not included in the calculations, the potential surplus indicated by these projections suggests that a junior part-time / seasonal post could potentially be financed over the busy summer months to engage with visitors (or to work with schools during quiet winter months)

*The table opposite show current (January 2022) rates for renting commercial units within 40 miles of Aberystwyth. We have used these to estimate the £9.50 / square foot per annum rate for the proposed commercial units at BNYA*

*\*1 square meter = 10.76 square feet*

Location	Type	Monthly	Annual	Annual / square foot
Carmarthen	Office	£563.00	£6,750.00	£4.91
Welshpool	Office	£833.00	£10,000.00	£5.08
Carmarthen	Office	£545.00	£6,550.00	£5.60
Llanbrynmair	Light Industrial	£87.50	£1,050.00	£7.50
Porthmadog	Office	£487.50	£5,850.00	£8.47
Aberystwyth	Retail	£2,500.00	£30,000.00	£9.75
Carmarthen	Office	£416.00	£5,000.00	£12.00
Aberystwyth	Retail	£700.00	£8,400.00	£12.00
Carmarthen	Office / Retail	£625.00	£7,500.00	£15.00
Carmarthen	Commercial	£438.00	£5,250.00	£16.30
Cardigan	Office (Fully Serviced)	£1,000.00	£12,000.00	£19.20
Aberystwyth	Retail	£2,916.00	£35,000.00	£24.93
Aberystwyth	Retail	£800.00	£9,600.00	£32.00
Aberystwyth	Retail	£2,666.00	£32,000.00	£36.28

## IMPLEMENTATION PLAN

The brief implementation plan below is intended as a guide to highlight the key steps you will need to take to develop and deliver the proposal outlined in this study:

1. Present the proposals to the community: carrying on the collaborative and inclusive process to present the proposals and receive feedback before making your intentions public.
2. Engage Partners & Relevant Bodies: Engage any potential delivery partners at the beginning. We'd also recommend getting pre-application planning advice to identify any issues and get the Planning Authority engaged early.
3. Identify potential funding sources and develop a simple fundraising strategy to give you a clear plan of action.
4. Decide if a new arm's length 'not for profit' organisation would benefit the development of the facility and acquiring of capital funding.
5. Secure any required permissions and licences (including planning permission for 'change of use' for commercial activity).
6. Prepare and submit the funding applications. It's likely that not all will be successful so you might want to apply to different funders, secure private investment, or give yourself time in your schedule to re-submit applications if required.
7. Commission an architect to produce detailed architectural plans of the development, and an updated costed schedule of works.
8. Commission an interpretation specialist to work with you to develop the new interpretation space and interactive displays.
9. Identify and cost additional elements (e.g. internet connection, multimedia equipment etc)
10. Commission Contractors to undertake the structural re-development of the building
11. Commission an interpretation specialist to install the new interactive exhibitions and displays

12. Furnish and decorate the building according to the demand (e.g. retail or office space)

**Note:** *It's likely that the process will be split into separate Development (1-8) & Delivery (9-11) phases, with separate rounds of funding required for each. Some funders will have additional requirements as part of their application process.*

## DELIVERY MODEL

We believe that this development should initially be led by NRW, to ensure the new facility is managed in line with the existing ethos and nature of the wider site.

If it becomes apparent that NRW can't access enough available funding to deliver the project, then a 'not for profit' organisation or trust could be set up as a vehicle to develop the facility.

However, if this is the case it's still likely that the facility will have to be managed by NRW in the long term (potentially through a management agreement). This is because the facility is unlikely to generate enough income for the new organisation or partner to fund a dedicated staff member to manage the bookings for the multi-use community & education space, the lease of commercial space, activities, and maintenance. As NRW have similar systems in place at other sites such as Coed y Brenin and Garwnant, we believe this should be within their capacity as long as they are compensated for the extra work.

## CONCLUSION

We believe there is significant potential for this new development at Bwlch Nant yr Arian, and that substantial local and regional benefits can be provided by redeveloping this underused asset.

We have been conservative in our financial projections, and are confident that the proposals are viable as long as the assumptions hold true.

# APPENDIX A: COMMUNITY & STAKEHOLDER CONSULTATION

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## PURPOSE

To inform the Feasibility Study into the potential future development of the ex FCW building at Bwlch Nant yr Arian (BNYA), an online survey was prepared to capture the views, priorities and ideas of local communities and stakeholders. This was followed up by two stakeholder workshop, to discuss the findings of the survey and verify our findings.

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## METHODOLOGY

A bilingual survey was set up on the online platform 'SurveyMonkey,' and the link was distributed through the contacts and networks of partners and identified stakeholders, and also shared widely on social media. It was open for an initial two-week period in April 2021, which was extended for another two weeks into May following interest from the Cambrian News, to allow readers time to respond.

The survey included questions for the general public, as well as specific sections for businesses and service providers who currently use or benefit from the site.

Follow up discussions were held with 11 stakeholders in two separate stakeholder workshops. They were held remotely, one in the morning and one in the evening to allow people to attend around work.

Covid-19 restrictions meant that we couldn't approach visitors directly at BNYA, which is why the survey was exclusively conducted online. Deio Jones visited the site with the site managers to get acquainted with the site, and also visited during the Bank Holiday weekend to experience the site as a visitor.

It was decided that input from tourists were missing, so we conducted an additional short survey during the August Bank Holiday

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## NOTES

Not all respondents answered every question, and some commented on the site in general rather than the building in question. These responses were included as they give valuable context, and also provide data for the project team regarding other future developments. Some responses were move under a different heading where it was obvious that they had been entered in the incorrect section to ensure views were correctly represented.

## EXECUTIVE SUMMARY

Unsurprisingly given the nature of the site, leisure activities and the varied and peaceful natural environment are the main factors attracting visitors to BNYA. However, it is also important to recognise the social side BNYA as a place where friends and families meet up.

Although a relatively low percentage specifically identified Health / Recovery / Recuperation as a reason to visit the health and wellbeing benefits (both mental and physical) of the site are obviously significant, and BNYA is an important local asset in this regard and a potential area to expand on going forward.

Given the site's reputation as a Red Kite feeding centre, the opportunities for engaging with nature, and the numerous interpretation boards along the lakeside trail, it's striking that only 12% see any educational value in visiting. This could be an aspect to explore further regarding the natural and industrial heritage of the area. Similarly, Art and Photography and specific events are also potential areas for growth if the objective is to attract new visitors at different times of the year.

Although all presented options were seen as positive, there was stronger support for a development that provided a resource for local people & visitors and preserving & promoting awareness of the natural environment, as opposed to attracting more visitors, facilitating economic growth, or promoting the region's cultural heritage.

This was reflected by the data regarding the preferred purpose of a new development, where it was clear that 'encouraging more local people to visit' is a much more pressing priority than 'attracting additional tourists to the area'. While also implying that both 'improving the current provision' and 'providing more diverse activities/services', which both score highly, should be geared towards benefiting local people and current users.

We could also read that the relative low scoring for promoting Cambrian Mountains businesses and activities along with a lack of desire to attract new

tourists (and to a lesser extent – expanding the season), suggests that the respondents are leaning towards a development that promotes health & wellbeing benefits for local residents rather than boosting the local economy. This reinforced later by a strong opposition to a purely commercial development that negatively impact the current site.

Unsurprisingly the trails, the natural environment, and peace and tranquillity were seen as current strengths to build on, along with accessibility for all (which could also be improved) and a safe environment for children. Weaknesses which this development could feasibly address included a lack of indoor seating area, community or educational space, interpretation of the area's nature & heritage, and lack of indoor/wet weather activities. Lack of shower facilities and bike hire/store were also mentioned repeatedly.

A third of respondents proposed a Shared Community Events / Educational Space that could host indoor activities and be rented out to local groups and activity providers. A Dedicated Educational Facility, Interpretation of the Local Nature and Heritage, an Outdoor Equipment Store/Bike Hire, and an Arts/Crafts/Local Produce Centre were also popular suggestions.

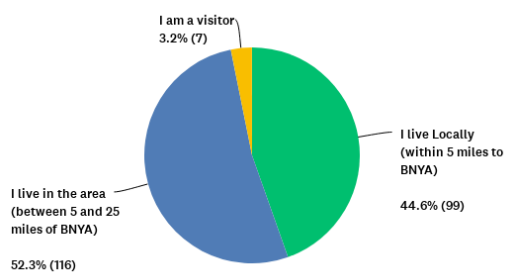
The most fiercely opposed developments were anything that harmed the natural environment (or the view), anything that was overly commercial, or a development that disturbed the peace and tranquillity. Also, near the top of the list was anything that encouraged more off-roading activities and motorised vehicles, alongside any attraction that brought masses of additional visitors to the site.

Potential Benefits for local business were mainly from promoting the area and attracting visitors, with further benefits from selling products, and from the use of the on-site facilities. Local Service Providers also valued the health & wellbeing and educational benefits of the site, alongside accessibility. And an indoor space to hire was the development most felt would be beneficial to them.

# EXPLORING THE DATA

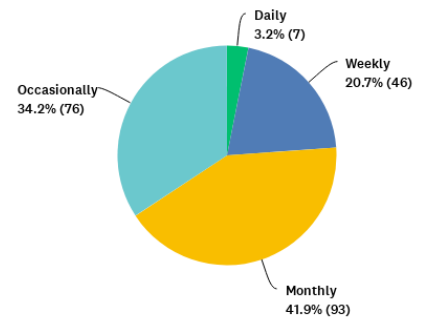
## THE RESPONDENTS: WHO VISITS, AND WHEN

A total of 224 individuals responded to the online survey, and the majority of them were local. 44.6% stated that they lived within 5 miles of BNYA, and a further 52.3% within 25 miles. Only 3.2% were 'visitors' from further afield.



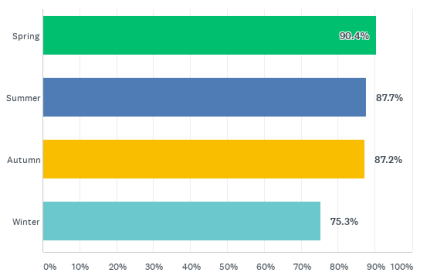
Which of the following best describes you?

Two thirds of the respondents visit the site at least once a month (pre Covid), including 20.7% who visit weekly and 3.2% who visit daily.



How often do you and/or family visit Bwlch Nant yr Arian?

A huge 96.4% of respondents also noted that they had visited the site within the past 3 years (this relatively long period was used to take account of the Covid restrictions since early 2020).

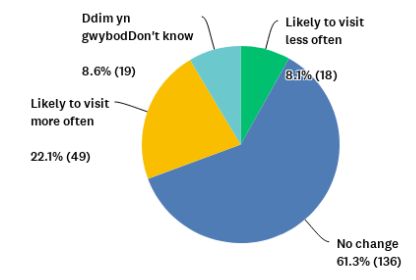


Do you tend to visit at specific times of the year?

The data also shows that the respondents tend to visit all year round, although there is a noticeable reduction of visitors in the Winter Months. The majority (84.1%) arrive by car, which was expected due to its location. However over 10% cycle, with a smaller number of walkers and horse riders. Two respondents noted that they arrive by public transport

It is also worth noting that although the majority (61.3%) indicated that the Covid-19 pandemic is unlikely to change how often they are likely to visit the site in the future, 22.1% state that they are likely to visit more often compared to just 8.1% who stated the opposite. This is in line with anecdotal evidence across the UK that people have been 're-discovering' nature during the lockdown periods, and if that trend holds it could indicate towards a modest increase in the number of visits over the next few years.

Is the Covid-19 pandemic likely to change how often you visit in the future?



As this feasibility study is looking at what developments could provide benefits locally and regionally in Ceredigion and the Cambrian Mountains Region, we can therefore be confident that the views expressed in this survey are representative of local stakeholders and current users of the site.

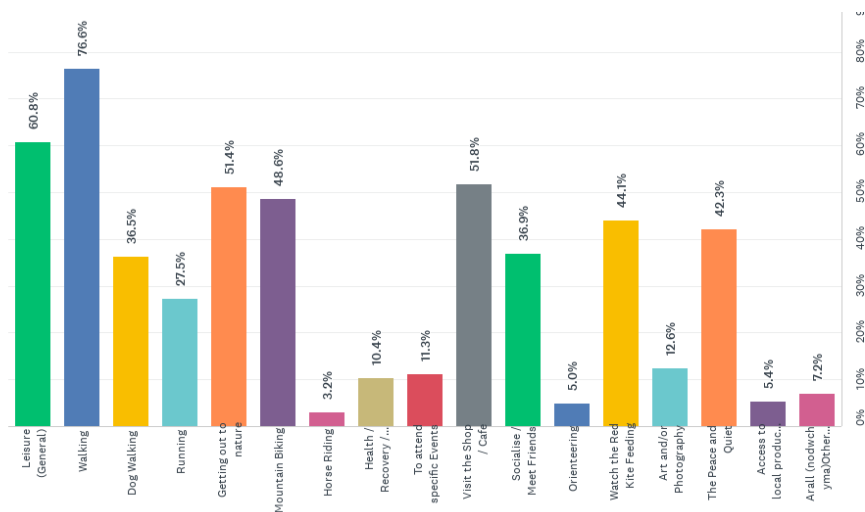
However, the downside is that there is relatively little data on those who do not currently visit the site, and what would be required to attract new users or those currently excluded.



## WHY DO PEOPLE VISIT?

Bwlch Nant yr Arian attracts visitors who participate in a wide range of activities, unsurprisingly focused on leisure and the natural environment. The most popular activity identified by our respondents is walking, while 'Getting out to Nature', Mountain Biking, Watching the Red Kite Feeding, and 'The Peace and Quiet' all feature prominently. The site is popular with dog walkers and runners, and also used by a small number of horse riders.

A significant number note that visiting the shop/café and socialising are also key reasons for visiting. Just over 10% of respondents identify Health/Recovery/Recuperation, attending events, and Art & Photography as reasons for visiting.

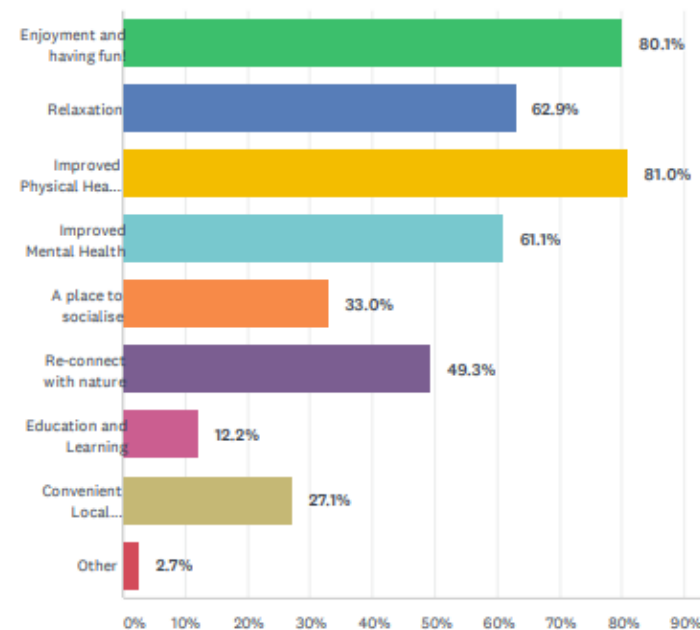


Of the 'other' respondents, 6 referred to bringing children and grandchildren up to play in the woods or the park, while picking bilberries and bringing up visitors also featured a couple of times each. Teaching, swimming, and 'green-laning' were also mentioned.

## THE BENEFITS PEOPLE GAIN

Alongside the activities that attract people, we also explored the benefits that people gain from visiting BNYA. 'Enjoyment and having fun' came out top alongside 'Improved Physical Health'. Followed by 'Relaxation' and 'Improved Mental Health.' Nearly half recognised 're-connecting with nature' as a benefit, with a third identifying the social benefits of the site.

While just over a quarter of respondents identified the benefit of the local facility, only 12% identified the 'educational' value of the site. The 'other' category includes reference to a business benefit.



*"It's a lovely walk for people with mobility issues when the path around the lake is in good condition - I can go with my mum (in her 80s with Parkinson's) and even in winter she can walk there, and it feels like you are out in the proper countryside - and get a cup of tea too!!"*

## PRIORITIES – WHAT KIND OF DEVELOPMENT DO PEOPLE WANT TO SEE?

This section explored what kind of development do people feel would be most beneficial. The four options explored are based on the original brief, which identifies that any development should enable at least one of the following:

1. A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
2. Increased awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion.
3. Opportunities for the local economy.

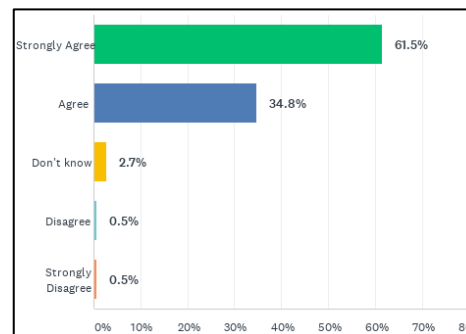
And given the nature of the site, we also included a fourth option:

4. A new development should preserve and/or promote awareness of the local environment.

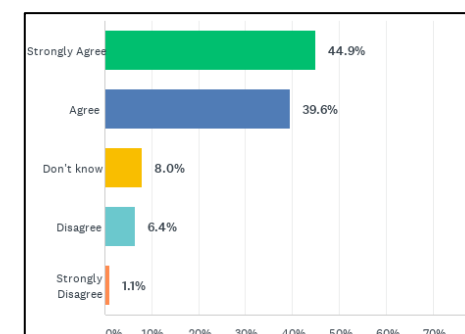
We recognise that this can be a tricky subject to explore through a questionnaire, because all four options are positive developments which individually would be likely to gain public support. So, we asked the question in two different ways.

When we asked the respondents to select their response to the four options from 'Strongly Agree' to 'Strongly Disagree' (see opposite), unsurprisingly the responses we're overwhelmingly positive towards all four options.

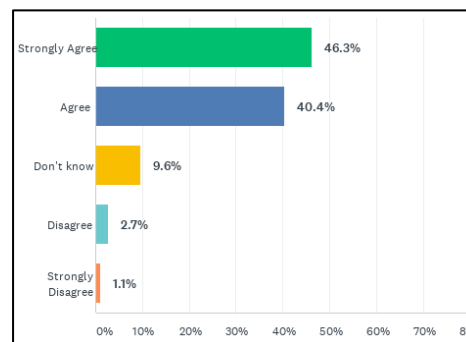
Having said that, there is a noticeably stronger support for options 1 and 4. Both with regards to those who 'Strongly Agreed,' and the overall positive responses which are over 95% in comparison to around 85% for the other two.



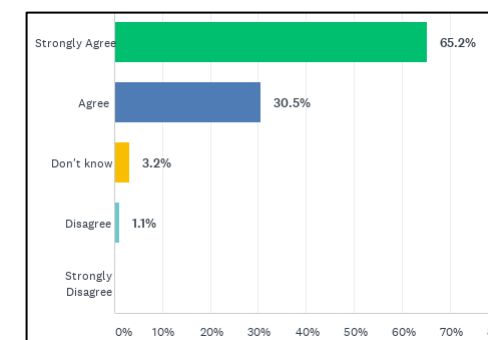
*A new development should provide a resource for local people and visitors such as for health, wellbeing, education and/or enjoyment.*



*A new development should preserve and/or promote awareness of the cultural heritage of the Cambrian Mountains and Ceredigion*



*A new development should promote awareness of the local area to attract visitors: creating opportunities for the local economy and/or local businesses.*



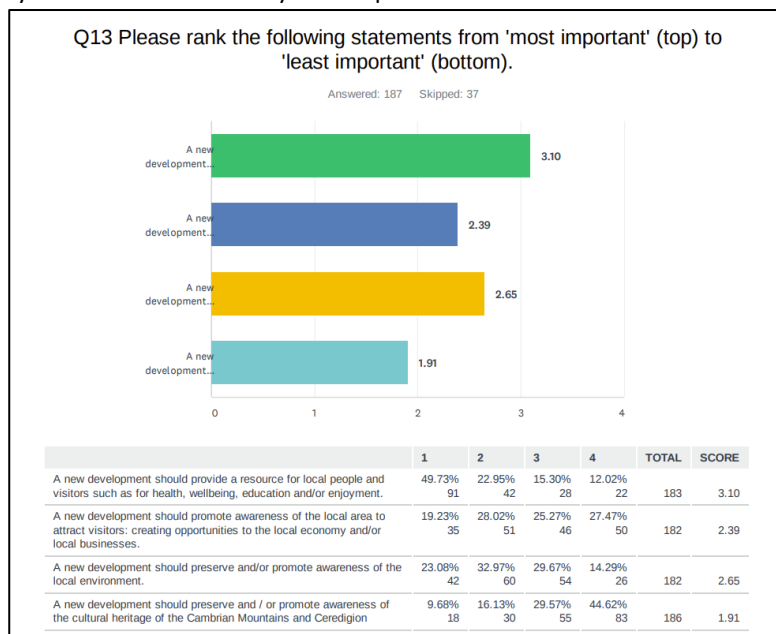
*A new development should preserve and/or promote awareness of the local environment.*

We also asked the respondents to 'rank' the options in the order they feel were most important. This forces people to prioritise even if they are supportive of all options on the table.

The table below shows the average score of each option (where the option ranked top scored '4' and the lowest ranked scored '1'), and this validates the results of the previous set of questions, which identified the same two options as priorities:

- A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
- A new development should preserve and/or promote awareness of the local environment.

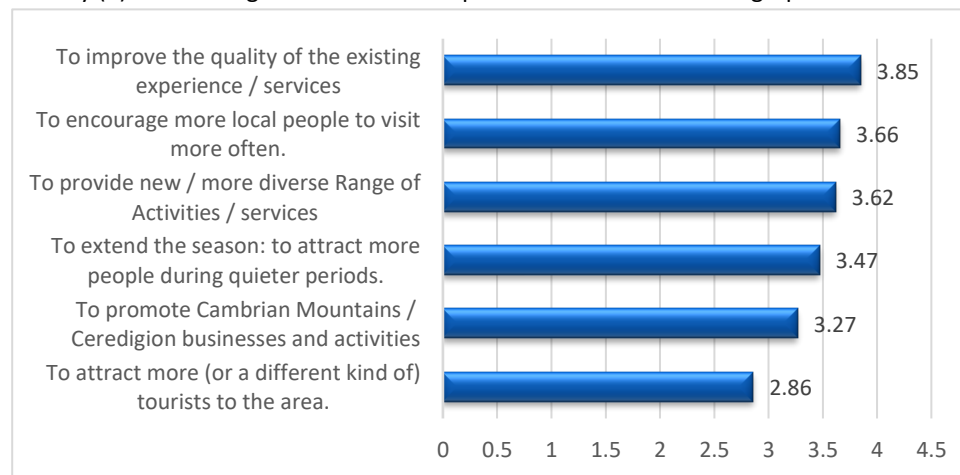
A closer look at the data shows that nearly 50% ranked 'A resource for local people and visitors such as for health, wellbeing, education and enjoyment' as their number one priority. More than double any other option.



- In the stakeholder workshops the vast majority agreed that these two elements should be prioritised.

## THE PURPOSE OF A NEW DEVELOPMENT

To gain a better understanding of what the preferred purpose of the new facility should be, we asked the respondents to score six different potential purposes identified by the project board between what should be considered the Highest Priority (5) and Lowest Priority (1). The average scores for each option are illustrated in the graph below:



As you can see, there was no stand-out preferred purpose, so we explored these further in the stakeholder workshops. After a lively discussion, some key themes emerged:

- The facility should cater for and improve the offer for local people and organisations. However there should be a balance that recognises the importance of the visitor economy to the region, and this needs to be reflected in a sustainable and appropriate attraction that respects the nature of the site as opposed to 'mass tourism.'
- Any visitor attraction should aim to attract 'high value' visitors interested in the core environmental, historic, cultural, and outdoor activities elements.
- The development should aim to promote health & wellness benefits for local residents and visitors alike. And although economic development is also desirable, it shouldn't be to the detriment of the other elements.
- Enabling the hosting of a social events programme for families would be a positive.

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## BUILDING ON OUR STRENGTHS

We asked the respondents to identify the main strengths that we could build on at BNYA. Unsurprisingly the majority identified the Activity Trails (Walking, Running and Biking), and the natural environment – with the Red Kites unsurprisingly a common theme, and the spectacular views and landscape.

Accessibility for all ages, ability, and mobility also came through strongly, as did the location, and the peace and tranquillity of the area and the desire not to spoil this with overdevelopment or overcrowding. The Café/Shop was also seen as a strength by some, although others wanted the café improved, and some seemed unaware of the existence of the current shop and availability of local products!!



There were also quite a few comments about the good and safe facilities for children, and the potential the site has as an educational resource.

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## ADDRESSING THE WEAKNESSES

A wide range of different things were identified as in need of improvement on the site, although the most popular answer was Nothing or N/A! It's also worth mentioning that although there was a wide range of comments, there were only a few that came up repeatedly.

The café was mentioned most, with most referencing slow service and lack of table space (indoor and out) at busy times, and some commenting on the range/quality of the food [Note: *The survey was undertaken at a time café was operating at limited capacity & service due to Covid-19 restrictions, which could have potentially affected the results*]. Parking was mentioned with comments ranging from lack of space, having to pay, and issues with parking meters.

Shared cycling/walking routes were identified by some as risky, while many would like longer more diverse trails, dedicated horse-riding trails, and links to surrounding communities / wider rights of way networks. Better accessibility, for both facilities and a wider range of trails was also raised by some, and the scarce public transport links were also mentioned.

Some mentioned the need to restore the woodland after the trees were harvested. Issues with off roaders and dog fouling were also identified.

Regarding the issues that could be addressed by a new development, additional indoor and outdoor seating and eating areas is one possibility. The lack of a community events space was mentioned many times, as was the lack of educational space, interpretation of the area's nature and heritage, and a lack of indoor/wet weather activities.

There is a lack of showering and bathroom facilities, which the bikers would appreciate and potentially allow them to stay longer on site or in the area if they could get cleaned up. A number also mentioned the lack of bike (and motorised wheelchair) hire facilities, and a repair/equipment store, with some referencing Coed y Brenin as an example.

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## PROPOSED DEVELOPMENTS

We gave the respondents an opportunity to put forward their own suggestions on the kind of developments they'd like to see. By far the most common suggestion put forward by nearly a third of people, was for a **shared community events or educational space** that could host indoor activities and be rented out to local groups and activity providers.

A dedicated **Education Facility** and the **Interpretation of Local Nature and Heritage** were the next most popular proposals. Similarly popular were an **Outdoor Equipment Shop and Bike Hire Facility** (including E-Bikes and Motorised Wheelchairs), and an **Arts/Crafts/Local Produce Centre**, with suggestions different suggestions selling, exhibiting, and creative workshops.

Developing **Accommodation** was proposed many times in different guises, from a bunkhouse/hostel to rural retreats, and one suggested a spa! A bigger **Café/Bar/Restaurant** facility was proposed by many, as was a **visitor centre** type development to **promote the local area, businesses and activities**.

And the final themes cropping up multiple times included an **Indoor Children's Play Area, Unspecified Attractions/Activities** – mostly indoor and different to the current offering, **Bathroom and Showering Facilities** for bikers [and presumably runners], a **Health & Wellbeing Facility**, and **Business Units** including Office Space, Workshops, and Remote Working stations.

Other proposals mentioned once or twice included:

- Dry Ski Slope
- Zip Line
- Farmers Market / Pop-up stall (idea for communal space?)
- Indoor Exercise Area
- Bike Cleaning Facility
- Indoor Football/Rugby/Sport Pitch
- Indoor Seating Area

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## OPPOSED DEVELOPMENTS

We also asked the respondents about what kind of developments they'd be strongly opposed to, and why.

The most fiercely opposed developments were anything that **harmed the natural environment** (or the view), anything that was **overly commercial**, or a development that **disturbed the peace and tranquillity** (through noise/light etc).

Also near the top of the list was anything that encouraged **more off-roading activities and motorised vehicles**. Alongside any **attraction that brought masses of additional visitors to the site**, with both pressures on parking, increased traffic, and protecting the character of the site key themes in this regard.

There were some opposition to anything perceived as an **'un-natural' or over-development**. As well as **Private Developments** that do not benefit the public/community, and **housing/holiday lets**.

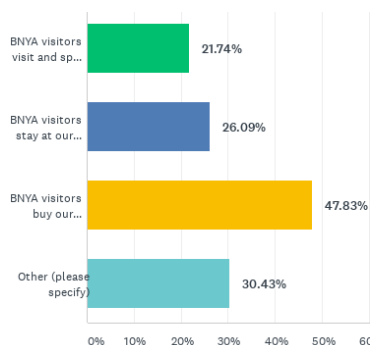
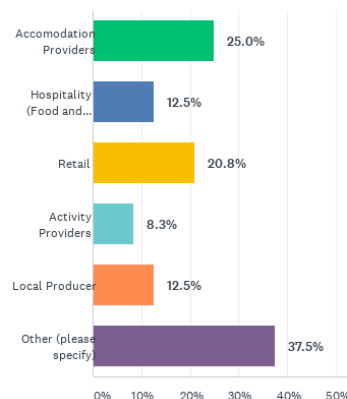
For the record, opposition was also noted by one or two respondents to the following:

- Commercial Office Spaces
- More cycling facilities / tracks
- Another shop
- Anything unsustainable
- Single use development
- Exhibition/education space (static – no repeat visits)
- Chain Stores/Fast Food
- Non-Welsh Focused development
- Anything that increased carpark size (attracting larger visitor numbers)
- Planting of more conifer trees.



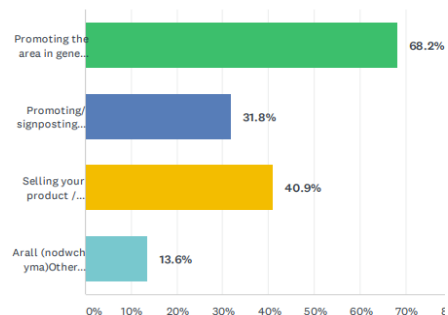
## POTENTIAL BENEFITS FOR BUSINESS

Of the respondents that noted that they work for or own local businesses, 13 noted that they currently benefit from BNYA, and 10 that they potentially could in future. There was a fair distribution of sectors as illustrated here, with the 'other' section including crafts, photography and therapeutic businesses, as well as government and educational organisations and an environmental charity.



When asked how they (or they could) benefit from BNYA, nearly half noted the potential to sell services or products. Over a quarter noted that visitors stay at their accommodation, and another 21% stated that the visitors also visit their own establishments. Of the 'Other' category, half noted that they use (or could use) the facilities at BNYA.

Of the benefit they could derive from a new development, the overwhelming majority noted the general benefits of promoting the area to visitors, 40% again stated the benefit of selling their products, while over 30% saw benefits from signposting visitors to their businesses. Using the facilities was another potential benefit identified in the 'Other' category.



## POTENTIAL BENEFITS FOR SERVICE PROVIDERS

There were over 20 organisations that identified themselves as currently using BNYA to provide services to the community. Most were **Health & Wellbeing** related (including therapy, social care and youth services), or **Educational**. Others included an activity provider and conservation organisations

The majority identified the **educational value** of the site, the **natural environment**, and the **range of activities** as the reason the used (and their users benefited) from the site. Other reasons for using the site included the **café** and the **accessibility of the disabled toilets and other facilities**.

When asked what developments would benefit them as a service provider, an **educational classroom space** and/or an **indoor space they could hire** was the most popular comment. There were individual comments about improving the toilets (open all year), bike hire, café improvements, bike hire, and potential for open water swimming in the lake.





## THE LONG LIST

At the stakeholder workshops we discussed all the proposed developments put forward in the online survey. The participants were then given the opportunity to vote anonymously for each proposal, with the understanding that every proposal that received a single vote would be included on the long list to be explored further.

In addition to the above, the following proposals were put forward at the stakeholder workshops and will be included on the long list:

- Static bikes with power indicators (e.g. cycling to power household appliances)
- Virtual Reality displays/headsets so people with limited mobility (or non-bikers) can experience:
  - The mountain bike trails
  - The natural environment (Also an educational tool)
  - 3D Drone footage of the site
- Dark Sky Observatory

The results are displayed and summarised opposite:

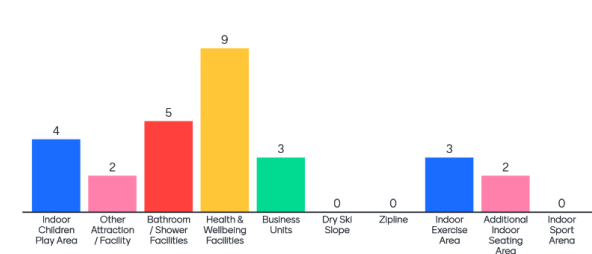
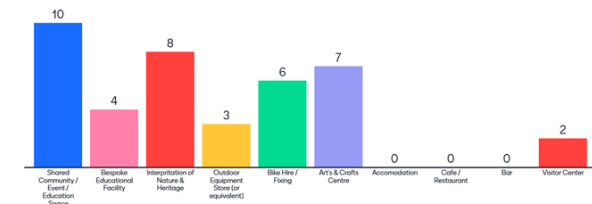
### A NOTE ON THE DISCARDED OPTIONS:

- The Dry Ski Slope, Zipline, and Indoor Sport Arena were deemed unrealistic or unsuited to the nature of the site.
- Accommodation was considered to be a guaranteed income generator, and the location is perfect for it. However, it would displace business from local providers, and mean that the development would not benefit the vast majority of visitors.
- The Café/Restaurant option was seen as displacing business from the current café, and that any such development should be a development of the existing facilities.
- A bar was seen as unsuitable, and despite the spectacular location it would change the peaceful and quiet environment that is so cherished by visitors.

## THE LONG LIST

Ranking	Proposal	Ranking	Proposal
1	Shared Community / Event / Education Space	=9	Outdoor Equipment Store
2	Health & Wellbeing Facility	=9	Business Units
3	Interpretation of Nature & Heritage	=9	Indoor Exercise Area
4	Arts & Crafts Centre	=12	Visitor Centre
5	Bike Hire / Fixing (& cleaning)	=12	Additional Indoor Seating
6	Bathroom / Shower Facilities	=12	Other Attraction / Facility
=7	Indoor Children Play Area	Additional	Static Bikes
=7	Bespoke Educational Facility	Additional	VR Headset / Displays & Drone footage

### Dewiswch y syniadau dylir eu hystyried ymhellach (Rhest Hir) /// Choose the proposals that should be explored further (Long List)



# APPENDIX B: OPTIONS APPRAISAL

## A BRIEF INTRODUCTION AND CONTEXT

This document outlines the options appraisal process that we undertook as part of the wider Feasibility Study into developing the old Forestry Commission Building at Bwlch Nant yr Arian.

### THE PROCESS SO FAR:

- i) The initial community and user consultation identified a range of issues that the development could address, opportunities that could be capitalised on, and what benefits could be delivered to local communities and visitors alike.
- ii) These proposals were developed further through a couple of stakeholder workshops, to form a 'long-list' of potential options.
- iii) An additional online survey of visitors over the August Bank Holiday was conducted in an attempt to address the fact that the majority of respondents to the initial consultation had been local, a weakness identified in the stakeholder workshop.

### PURPOSE

The purpose of an options appraisal is to narrow down a range of options (the long list) and produce a recommendation for which one(s) should be pursued further (shortlist).

An Options Appraisal is a method not a science, and by its very nature can be subjective. This is why all stakeholders who registered an interest in participating in the process we're invited to the workshop, so that the broadest possible range of views and opinions were consulted.

Many options appraisals are focused on identifying a single preferred option. However, in this case due to the nature of the site, building, and context, it is clear that the final outcome will be a combination of some of the proposals put forward to create a viable, beneficial, and sustainable asset at Bwlch Nant yr Arian.

## METHODOLOGY

This exercise is designed as a framework to consider (and score) the proposals on the 'long-list' against a set of key criteria. These criteria were weighted according to the priorities and identified by stakeholders in the earlier work:

1. A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
2. A new development should preserve and/or promote awareness of the local environment.
3. Opportunities for the local economy.
4. Increased awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion.

Financial sustainability was also considered with the highest priority weighting.

In line with our collaborative approach to the process, an interactive online stakeholder workshop was held. During the first section the key criteria, scoring, and weighting framework were agreed. In the second section, the stakeholders scored the proposals and the average scores for each element was recorded to give an overall stakeholder score.

The R4C consultants scored these elements separately. Both scores were then aggregated to give a final score for each element. This was to highlight and challenge where there were major differences that would warrant further discussion and/or led to significantly differing results. As it happens, this wasn't the case.

Once scored, the proposals we're ranked from the highest scoring to the lowest to identify the most beneficial and sustainable options. The scoring framework and scoring matrix are noted at the end of this document.

This was then taken as the basis for identifying different development options, which would address the needs and deliver the benefits identified by stakeholders.

## THE LONG LIST

At the stakeholder workshops we discussed all the proposed developments put forward in the online survey. The participants were then given the opportunity to vote anonymously for each proposal, with the understanding that every proposal that received a single vote would be included on the long list to be explored further.

In addition to the above, the following proposals were put forward at the stakeholder workshops and will be included on the long list:

- Static bikes with power indicators (e.g. cycling to power household appliances)
- Virtual Reality displays/headsets so people with limited mobility (or non-bikers) can experience:
  - The mountain bike trails
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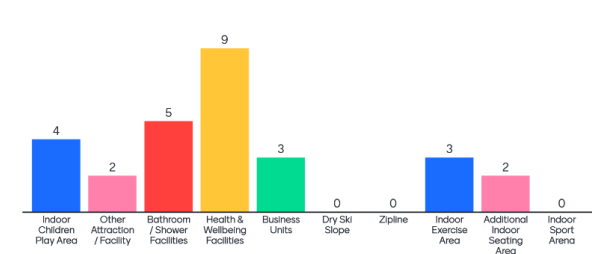
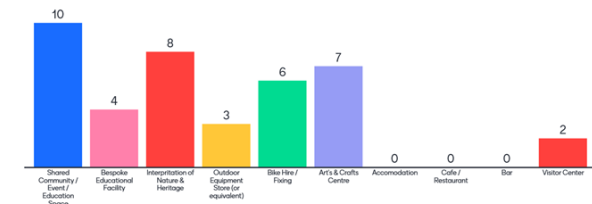
### A NOTE ON THE DISCARDED OPTIONS:

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## THE LONG LIST

Ranking	Proposal	Ranking	Proposal
1	Shared Community / Event / Education Space	=9	Outdoor Equipment Store
2	Health & Wellbeing Facility	=9	Business Units
3	Interpretation of Nature & Heritage	=9	Indoor Exercise Area
4	Arts & Crafts Centre	=12	Visitor Centre
5	Bike Hire / Fixing (& cleaning)	=12	Additional Indoor Seating
6	Bathroom / Shower Facilities	=12	Other Attraction / Facility
=7	Indoor Children Play Area	Additional	Static Bikes
=7	Bespoke Educational Facility	Additional	VR Headset / Displays & Drone footage

### Dewiswch y syniadau dylir eu hystyried ymhellach (Rhest Hir) /// Choose the proposals that should be explored further (Long List)



## THE OUTCOMES

The options appraisal process identified the comparative strengths of the individual proposals as indicated in the table below:

Rank	Proposal	Definition
1	Interpretation of Nature & Heritage	An interactive exhibition interpreting the local nature, history, and heritage of the area.
2	Visitor Centre	A staffed visitor centre welcoming visitors and providing information for the site & wider area. Also promoting businesses.
3	Arts & Crafts Centre (Including Retail)	Gallery space, base for artists, retail units.
4	Shared Community event/ education space	A multifunctional space that could be used and hired out for community events, education purposes, activities, etc
5	Bespoke Education Facility	A dedicated and equipped education facility for schools and universities to use.
6	Indoor/outdoor exercise area	An indoor 'gym,' although some suggested this could be an outdoor facility.
7	Bike Hire / Fixing	A business where bikes could be hired out to visitors and fixing damaged bikes.
8	Business Unit / Remote Workstations	Small, networked areas for individuals to be able to work remotely from BNYA
9	Outdoor Equipment Store	An outdoor equipment store, similar to Beics Brenin at Coed y Brenin.
10	Indoor Children's Play Area	An indoor play area, initially described as a 'soft play' but open to interpretation.
11	Indoor Seating Area	Additional covered seating for visitors
12	Bathroom / Showering Facilities	For bikers and walkers, similar to Coed y Brenin.
13	Bike Wash	Facility for visitors to wash their bikes before leaving (outside).
<p><b>Key:</b></p> <p><b>Green:</b> Shortlisted</p> <p><b>Orange:</b> Potential Secondary Facilities</p> <p><b>Red:</b> Discarded</p>		

## DEVELOPING A SHORTLIST

The objective of the exercise is to identify a combination of different elements that work together within the scope of the building to offer a viable and sustainable asset that benefits local communities and visitors alike.

### RATIONALISING THE RESULTS

We believe the top four ranked proposals (in green) are proposals that not only address the needs identified by the stakeholders but could also complement each other. For example, the visitor centre at Elan Valley includes an interactive exhibition of local heritage, a shop selling some local produce, and a networked multi-functional space for hire by community group and organisations.

There are a number of other proposals (in red) that scored lower and fail to make the cut. This is not to say that elements of these can't be catered for to address the needs of stakeholders. For example, a 'bespoke educational facility' was a concept of a kitted out indoor classroom, potentially with an employed education officer. However, the education establishments that responded to the consultation noted that a multi-use space to hire would address their needs.

A bespoke indoor exercise area would be of limited use to the casual day visitor, although an 'outdoor gym' type facility could be developed elsewhere on site. Fitness classes could be accommodated in a multi-use space. An indoor play area was initially proposed as an all-weather attraction, so incorporating 'interactive play' elements in any interpretation facility would seem a logical step to take. The bike hire/outdoor equipment store has been explored in the past, but there was limited appetite by local businesses due to worries about year-round viability.

Finally, there are some proposals (in orange) that that by their scale and nature scored low in this appraisal. However, they would offer specific and tangible benefits to certain visitors. These could be valuable 'secondary facilities' that add value to the main proposals and provide a more rounded package that maximises benefits to different audiences.

## A 'SHORTLIST'

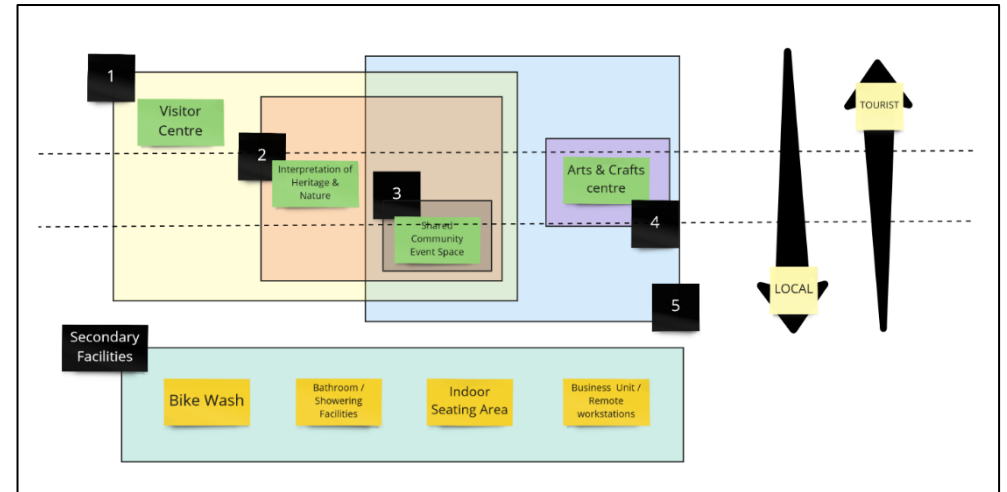
We have identified a number of potential combinations that we believe are worth exploring further regarding their viability and financial sustainability. These are listed here and illustrated in the diagram opposite:

6. A staffed visitor centre promoting the site and the wider region and including interpretation of local nature & heritage and a multi-use communal space.
7. A scaled down and un-staffed facility combining interpretation of local heritage & nature of both BNYA and the wider region, with a multi-use communal space.
8. A large multi-use communal space, which would also leave scope for most if not all the secondary facilities if desired.
9. An Arts and Crafts centre, which would include artist studios, a retail outlet and gallery space.
10. An Arts and Crafts centre, which would combine artist studios (potentially retail) and gallery space with a multi-use communal space.

The diagram also indicates if the individual elements are likely to benefit local communities, visitors, or both.

Also listed are secondary facilities identified as being small enough in scale, that could be provided alongside the main development within the scope of the current building. They would deliver benefits for specific groups/audiences as part of the main development, providing added value.

- Bike Wash (outdoor)
- Bathroom / Showering Facilities
- Indoor Seating Area
- Remote workstations



## NEXT STEPS

If the Steering Group are happy with exploring these options further, we suggest the following next steps:

- An outline assessment on the likely financial implications of the different elements (costs & income).
- Establish which combinations can feasibly be accommodated within the scope of the building (*This will require a measured floorplan which has not been provided as there wasn't one in the surveyor's report. If you don't have one on file, we'll try and get a local surveyor to come up and draw one up if we can accommodate it into the original budget*).
- Identify a preferred option
- Develop a detailed feasibility assessment for the proposed option.



## OPTIONS APPRAISAL FRAMEWORK – SCORING & WEIGHTING

This is the agreed options appraisal framework.

Key Criteria	Elements	Score	Weighting
A resource for local people and visitors such as for health, wellbeing, education and enjoyment.	Would enable or promote health & wellbeing	1-5	x2
	Would enable or support education and learning	1-5	x2
	Would support leisure and enjoyment	1-5	x2
	Would be attractive and/or beneficial for local people	1-5	x2
	Would be attractive and/or beneficial for visitors / tourists?	1-5	x2
	Would support the hosting of a social events programme for families?	1-5	x2
A new development should preserve and/or promote awareness of the local environment.	Would increase awareness of the local environment	1-5	x1.75
	Would have a negative effect on the local environment*	1-5	x1.75
	Would have a detrimental effect on the nature of the site*	1-5	x1.75
Opportunities for the local economy.	Would attract new visitors to the area	1-5	x1.5
	Would encourage longer visitor stays	1-5	x1.5

	Would attract 'high value visitors' interested in the core environmental, historic, cultural and outdoor activities sector.	1-5	x1.5
Increased awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion.	Would promote awareness of the landscape & cultural heritage of Ceredigion & Cambrian Mountains.	1-5	x1.25
Financial Sustainability	Would Generate Revenue	1-5	x2
	Would likely have a significant running / maintenance cost*	1-5	x2
	Would this proposal require an additional staff presence?		x2
	Could this proposal be facilitated in the existing visitor centre?		x2

*Note: Scores for the elements noted with a (\*) were reversed to ensure positive outcomes scored higher.*

### WEIGHTING EXPLAINED

As alluded to in the methodology, a sliding scale of weighting was attributed to each Key Criteria, reflecting the priorities identified by stakeholders.

1. A resource for local people and visitors such as for health, wellbeing, education and enjoyment.
2. A new development should preserve and/or promote awareness of the local environment.
3. Opportunities for the local economy.
4. Increased awareness of the landscape, nature, and cultural heritage of the Cambrian Mountains and Ceredigion.

Financial viability was given equal weighting to the top priority as the sustainability of any new asset is crucial.

## SCORING MATRIX

The matrix below shows how the Stakeholder Panel and R4C scored the different elements. The bottom line indicates the average scores that informed the options appraisal outcome by ranking the options on the long list.

	Shared Community event/ education space		Interpretation of Nature & Heritage		Arts & Crafts Centre (Including Retail)		Bike Hire / Fixing		Bike Wash		Bathroom / Showering Facilities		Indoor Childrens Play Area		Bespoke Education Facility		Outdoor Equipment Store		Business Unit / Remote Workstations		Indoor/outdoor exercise area		Visitor Centre		Indoor Seating Area	
	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C	S'holder	R4C
Would enable or promote health & wellbeing	4	4	3.6	3.5	3.6	3.5	4.1	3.5	2.6	2.5	3.4	3.5	3.4	3.5	2.9	3	3.3	3.5	3.8	3	4.6	5	3.7	3	3	2.5
Would enable or support education and learning	3.9	4.5	3.9	4.5	3.6	3.5	2.8	1.5	1.4	1	1.8	1.5	3	3	4.4	5	2.9	2.5	2.5	1.5	3.3	2.5	4.1	4.5	2.7	2
Would support leisure and enjoyment	3.8	4	3.5	4.5	3.9	4	4.4	4.5	3.4	3.5	3.6	4	3.7	4.5	2.7	2.5	3.9	4	3.5	3	4.6	4	4.3	4.5	3.7	3
Would be attractive and/or beneficial for local people	4	4.5	3.9	4	4.4	4	3.9	3.5	2.9	3.5	3.4	4	3.9	4	2.7	3.5	3.6	4	3.7	3.5	4.4	4.5	4.1	3.5	3.7	3.5
Would be attractive and/or beneficial for visitors / tourists?	3.3	2.5	4.1	4.5	4.3	4.5	4.3	4	3.5	4	3.9	4.5	4.1	4	2	2	3.6	4	3.7	4	4.4	3.5	4.3	5	3.3	3.5
Would support the hosting of a social events programme for families?	3.6	4.5	3.4	3	3.5	3	3.1	2.5	1.5	1	2	1.5	3.1	2.5	3.7	4	3	1.5	1.8	1	4	3	3.7	3.5	2.8	3.5
Would increase awareness of the local environment	3.1	3	4.3	5	3.1	2.5	2.6	2	1.8	1.5	1.9	1.5	2.1	2.5	4.1	4.5	2.7	2.5	2.7	1.5	2.9	1.5	4.4	4.5	1.5	1.5
Would have a negative effect on the local environment*	4.2	5	4.7	5	4.7	4.5	3.9	4	3.2	3	3.6	4.5	4	3.5	4.6	4.5	4.2	3	4.2	4	4.1	4	4.1	3.5	5	5
Would have a detrimental effect on the nature of the site*	4.2	5	4.9	5	4.6	4	4	4	3.7	4.5	3.6	4.5	3.4	3	4.6	4.5	4.2	2.5	4.2	4	4.4	4	4	3.5	5	5
Would attract new visitors to the area	2.6	3	3.3	4	3.9	4.5	3.7	3.5	2.3	2.5	3.3	3	4	4	3	3	3.8	4	3.5	3.5	4	3.5	4.7	4.5	2.5	1.5
Would encourage longer visitor stays	2.4	2.5	3.5	4	3.4	3.5	3.6	4	2.5	3	3.6	4	4.3	4	3.3	3	3.5	3	4	3.5	3.7	3	4.2	4	2.8	2.5
Would attract 'high value visitors' interested in the core environmental, historic, cultural and outdoor activities sector.	2.8	2	3.5	4	3.5	3.5	3.3	4	2.4	3	3.1	3	2.3	2	3.7	4	3.7	4	3.8	4	3.6	2	4.3	4	2.3	2
Would promote awareness of the landscape & cultural heritage of Ceredigion & Cambrian Mountains.	3.1	3	4.4	5	3.5	3.5	2.7	2	1.6	1.5	1.5	1.5	1.8	2	3.8	4	2	1.5	3	2	2.9	1.5	4.8	5	2.3	1.5
Would Generate Revenue	3.4	3.5	2.8	2	4.1	5	4	4.5	2.8	3	3	3	3.3	4	3.3	4	4.2	5	3.8	3.5	3.3	3.5	3.3	3	2	1
Would likely have a significant running / maintenance cost*	3.2	4	3.2	3.5	2.9	2	2.1	1.5	2.9	3.5	2.6	2.5	1.7	1.5	3.2	3	2.2	2.5	2.8	4	2.4	2.5	1.7	1	3.7	4.5
Would this proposal require an additional staff presence?	2	3	2	2.5	1.4	1	1.1	1	2.9	3	1.7	2.5	1	1.5	1.5	1.5	1.5	1	2	3	2.3	2.5	1	1	2.3	3
Could this proposal be facilitated in the existing visitor centre?	2.7	3	2.2	2.5	2.6	2.5	2.9	2.5	1.1	2	1.7	3	3	3	2.7	3	2.5	2.5	2.7	3	2.6	3	3	3	1.8	2.5
Total (weighted) scores	95.5	104.75	103.275	112.5	103.675	99.875	94.85	88.25	72.825	79.375	80.2	85.25	88.375	89.25	95.425	100.625	93.225	86.375	93.125	88.625	103.125	89.25	106.675	103.125	86.4	84
<b>Total (weighted) score</b>	<b>100.13</b>		<b>107.89</b>		<b>101.78</b>		<b>91.55</b>		<b>76.10</b>		<b>82.73</b>		<b>88.81</b>		<b>98.03</b>		<b>89.80</b>		<b>90.88</b>		<b>96.19</b>		<b>104.90</b>		<b>85.20</b>	
<b>Ranking</b>	<b>4</b>		<b>1</b>		<b>3</b>		<b>7</b>		<b>13</b>		<b>12</b>		<b>10</b>		<b>5</b>		<b>9</b>		<b>8</b>		<b>6</b>		<b>2</b>		<b>11</b>	

# APPENDIX C: CASE STUDIES

### THE ELAN VALLEY

A short drive from Rhayader in Mid Wales, the Elan Valley is a picturesque landscape of reservoirs, lakes, and forests. Most of this landscape is part of the Elan Estate, covering 72 square miles and managed by the Elan Valley Trust on behalf of Dwr Cymru. The Trust's objectives are to promote conservation, appropriate public access and disseminate information about the estate.

This is a popular destination for visitors, who come to see the spectacular architecture of the dams, the beautiful and tranquil scenery, and walk or cycle through the wider estate.

### THE VISITOR CENTER

The Visitor Centre is located below the spectacular Caban Coch Dam, four miles South West of Rhayader on National Cycle Route 81. And the 18-mile Elan Valley Trail runs from Rhayader, past the visitor centre, and up to Craig Goch Dam.

There is a café and gift shop, outdoor play area, toilet facilities, and ample parking. Meeting rooms with internet connection and wifi are available for hire, and there is a (soon to be relocated) heritage exhibition.

The Heritage exhibition tells the story of the reservoir network, the construction of the dams, and local heritage. There is also interpretation of the water cycle, local nature, and a BBC film about Caban Coch Dam featuring Iolo Williams.



### ACTIVITIES

The Elan Rangers run a number of organised events, including tours of the Dam itself and nature and forestry focused activities. In August 2021 there were adverts on the community notice board for activities and surveys focused on bogs, meadows and heathland habitats. School visits are also hosted at the centre.

There is a bike hire service run by the Rangers from the Visitor Center, offering both regular and electric road bikes. The area is also Wales' only designated Dark Skies Park, which draws visitors for stargazing and other events.

There are over 180km of leafleted and waymarked walking routes on the Estate, with a short nature trail adjacent to the Visitor Center, and 20 interpretation panels dotted around.

The area is also renowned for Mountain Biking, although this was not evident by the profile of visitors in the carpark on the day we visited, and is not what draws the majority of visitors to the area. Angling is also popular along the rivers and reservoirs, and there are potential plans to develop watersport activities in the future.



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## FACILITIES AND ATTRACTIONS

- Café
- Gift Shop
- Interactive Heritage Exhibition & Film
- Meeting Rooms with internet connectivity
- Toilet facilities
- Bike Hire (including e-bikes)
- Outdoor Play Area
- Large Parking Area
- Accommodation (Off site)
- Weddings

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## OTHER

The Trust manages a number of self-catering cottages, and these are dotted around the large estate. There is also the 'Lodge' in Cwm Elan village which is a larger building that can be rented out to groups and businesses for residential events.

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## LEARNING FOR BWLCH NANT YR ARIAN

It shares a number of common facilities with BNYA including a Café, Gift Shop, Outdoor Children's Playing Area, and Public Toilet Facilities.

Both Sites are gateways to biking and walking routes on a larger estate and both have nature trails and outdoor interpretation panels. However, at the Elan Valley Centre they also have an interactive indoor exhibition depicting the heritage and history of the site alongside information on local wildlife.

Cycle hire has been proposed in Bwlch Nant yr Arian, and it seems to be a popular and sustainable model here and is run internally by the trust's own rangers. However, the difference is that they are road bikes to traverse the gently sloping, paved, and mostly traffic free routes and quiet country lanes. It's a quiet scenic bike ride targeted at visitors and families who visit and decide a bike ride would be a good way to see the valley, which is different to the mountain biking on offer in BNYA and has different considerations regarding safety and maintenance.

Flexible space is available to hire in the form of meeting rooms, and these facilitate other activities such as school group visits. This is relevant to proposals we've had at BNYA, and it's clear by the emphasis on good internet/network connections on the website that this is an important feature.



*The Community Noticeboard*



### THE LOCATION

Coed y Brenin was Britain's first purpose-built mountain biking centre, and is still regarded as one of the sport's top destinations. Located on the A470 between Dolgellau and Trawsfynydd, it covers 13.9 square miles (9000 acres) of rocky terrain and woodland around the valleys of the rivers Mawddach, Eden, Gai and Wen.

The site is managed by Natural Resources Wales, and is situated on National Cycle Route 82.

### THE VISITOR CENTER

The new £1.6m visitor centre opened in 2006. The centre is the hub and for all activities on the site, although walkers can also access routes from satellite car parks. It includes a gift shop and cafe, with indoor and outdoor seating. There is also an outdoor children's play area.

'Beics Brenin' are located in the visitor centre, and as well as stocking clothing and equipment for outdoor activities, they provide mountain bike hire and also run bike skills training and coaching. There are changing rooms and shower facilities, and a large accessible carpark.



There are also conference facilities for up to 80 participants, which includes Free Wi-fi, conference call facilities, screen and projector with sound system, and a multi-media touch screen

### ACTIVITIES

The main draw for visitors are the outdoor activities, and the whole site is geared towards this. There are eight purpose-built mountain bike trails that start from the visitor centre and range from easy trails for families and beginners to technical routes for expert riders. There is also a skills area where you can develop your riding techniques.

There are five running trails ranging from one mile to half marathon distance, and three walking trails including a short wheelchair accessible option. Two Geocaching trails and four orienteering trails.

There are also children's play areas, a café and plenty of picnic tables. There is also nature walks along the Eden walk for children to follow, and there are some community activities taking place including a regular pilates class. Coed y Brenin Visitor Centre holds the Visit Wales Gold Award for attractions that make an exceptional effort to create an enjoyable and memorable experience for visitors.





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## FACILITIES AND ATTRACTIONS

- Café
- Gift Shop
- Bike Store & Hire Facility
- Multimedia Conference Facility
- 8 Mountain Bike Trails
- 5 Running Trails
- 3 Hiking Trails (including 1 wheelchair accessible)
- 2 Geocaching Trails
- 4 Orienteering Trails
- Large car park

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## OTHER

Coed y Brenin is also part of the 'National Forest' scheme, alongside BNYA. This scheme and branding will be developed much further over the next decades alongside a national forest path, with the intention of eventually replicating the success of the Wales Coastal Path inland.

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## LEARNING FOR BWLCH NANT YR ARIAN

The site shares a number of similar facilities with BNYA, specifically the café, gift shop outdoor play area. BNYA also has a number of biking, walking and running trails, although there are less of them and therefore not as much variety for regular visitors. Coed y Brenin also has the prestige of being recognised as one of the nation's top mountain biking destinations.

The mountain biking and other outdoor activities are undoubtedly the main attraction here, whereby at BNYA this element sits alongside the natural environment & wildlife as the main draws. There are definitely learning that can be drawn upon, and the showers and bike hire facilities are two obvious examples of how the offer at BNYA could be improved. Courses could also be provided, but it's difficult to gauge if the footfall is there to make these commercial ventures (coaching & hiring) financially viable.

However there needs to be consideration of the long-term effect on the nature of the site, and the danger of tipping the balance between the activities and environmental elements to far so that BNYA loses the peaceful tranquil environment that it is valued for. Coed y Brenin attracts a lot more visitors, and development in this direction would have to be accommodated within the scope of current facilities (especially parking) which are already at capacity. The fact that something could be done doesn't necessarily mean that it should!

The conference / multipurpose facility is another interesting feature that has been proposed in BNYA. Although the space at BNYA is smaller, it is possible that combined with the educational aspect university & community classes/events, that there could be enough demand to make this kind of facility sustainable and income generating. NRW manage both sites, so the figures will be available to scrutinise when the business plan is developed.

THE LOCATION



Located in on the Kent and East Sussex border, Bedgebury Pinetum is home to the largest pinetum in the world and is important globally for species conservation, scientific advancement and the understanding of conifers. The site was established jointly between the Forestry Commission and the Royal Botanic Gardens at Kew in 1924.

This offers a stunning setting for peaceful walks and picnics. The Bedgebury visitor centre and café has wonderful views across a lake to the Pinetum.

The wider Forest has miles of family cycling and mountain biking, walking and running trails, as well as a Go Ape tree top adventure and an adventure play trail including a Gruffalo.

THE VISITOR CENTRE

The visitor centre was opened in 2006 as part of a £2.26M scheme supported with £1.1M from Sport England. Focussed on active recreation, the centre acts as a central point to hire bikes, enjoy the café, take a shower after exercise or undertake education in a classroom space.

The centre is complemented with a natural play area, surfaced walking and bike trails through the Forest and equestrian trails. There is some interpretation in the centre relating to Forestry and the Pinetum.



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## ACTIVITIES

In addition to managing and maintaining the site, Forestry England provide an education offer for schools and colleges.

Their operation is supported by key partners including Go Ape who operated the tree top adventure attraction, Quench Cycles who operate the bike hire offer and the Friends of Bedgebury Pinetum who are a volunteer-led charity who maintain a support membership scheme and promote the Pinetum.

Bedgebury is largely understood by its visitors as a place for recreation, emphasising active play, though work is now ongoing to develop the heritage offer linked to the Pinetum further.

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## FACILITIES AND ATTRACTIONS

- National Pinetum, over 12,000 trees
- 3 walking trails and 3 cycling trails
- 4 orienteering trails and waymarked running trails
- Go Ape
- Horse riding
- Play areas
- Bike hire and shop
- Bedgebury café
- Trumper hire
- Dogs and assistant dogs welcome

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## OTHER

Bedgebury plays host to popular outdoor Festivals and events including Forest Live (a Forest music festival) and Christmas at Bedgebury (an illuminated winter woodland walk) which draw thousands of additional visitors specifically for those events. These are significant earners for the site.



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## LEARNING FOR BWLCH NANT YR ARIAN

Echoing Bwlch Nant Yr Arian, Bedgebury has a very well-developed and popular cycling offer supported by a quality café, toilets and play areas. The success of this has drawn in additional delivery partners, expanding the offer further.

However, Bedgebury is a good example where the development of recreation has pushed the site to visitor capacity at weekends and school holidays. This popularity has also undermined awareness of the site's status as an internationally significant natural heritage site. There is now a concerted effort to readdress this balance by developing the heritage offer in time for the Pinetum's centenary in 2025.

Bwlch Nant Yr Arian should consider the impact of strategic decisions regarding the development of recreation versus heritage and how to best to balance the needs of the two. The potential for themed one-off events could also be explored to attract a large and different audience.

## DYFI WILDLIFE CENTRE

This new wildlife centre is currently being developed and is not open to the public yet. It's based between Machynlleth and Eglwysfach, at the site of the current Dyfi Ospreys Project. It's a

The 2-storey timber framed building has recently been erected, and it contains a reception, shop, café and interpretation area on the ground floor. On the second floor is a 100-seater venue gallery / exhibition space, a classroom, and an office for staff and volunteers.

Accessibility is also a strong feature, with the presence of a lift and overall design making the whole facility accessible for all.

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### LEARNING FOR BWLCH NANT YR ARIAN

There are striking similarities between both the sites and the proposed facilities at the Dyfi Wildlife Centre and Bwlch Nant yr Arian.

Their shop and café replicate the existing facilities at BNYA, while proposed the multipurpose community space at BNYA would double as both an Indoor Classroom and event space as required.

The Dyfi Wildlife Centre also has a dedicated interpretation space, which presumably will build on the Dyfi Ospreys Project (live nest cams, etc), and showcase the wider Cors Dyfi Wildlife Reserve.

Although their scope is not as wide due to the lack of outdoor activity provision compared to BNYA, their focus on community and volunteer involvement could be something to be explored further at BNYA. This could support additional educational and engagement activities, and/or support the staffing of the new development at BNYA during busy periods.

APPENDIX D:  
BEAUFORT RESEARCH  
REPORT  
WALES VISITOR SURVEY 2019

(Available on Request from Natural Resources Wales)

APPENDIX E:  
ROBERTS BUILDING  
CONSULTANTS STRUCTURAL  
REPORT & FEASIBILITY (2021)

(Available on Request from Natural Resources Wales)