



BLAENAU FFESTINIOG COMMUNITY DESTINATION PLAN



Y Moelwyni, Kyffin Williams

Developed by:

Mari Beynon Owen

Julia Thomason, Julia Thomason Associates

Rob Chambers, Chambers Conservation

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1 Executive Summary

Executive Summary

This Community Destination Plan complements the development of the Slate Landscape of North West Wales's World Heritage Site Nomination; it has the following two objectives:

- To increase awareness, pride and understanding of the rich heritage of the slate industry;
- To promote the social and economic regeneration of the area.

The development of this Plan has itself been informed by extensive primary and secondary research, which has included:

- A document and data review of Blaenau Ffestiniog's demography and economic profile, strategic context, regeneration projects and visitor/ tourism profile.
- Detailed assessments of the town's infrastructure, services, community provision, visitor offer and historic built environment – some of which has included audit work from the perspective of a 'secret visitor';
- An assessment of Blaenau Ffestiniog's key strengths and weaknesses, as well as the challenges and opportunities presented;
- Identification of potential funding sources to inform the prioritisation/ viability of projects;
- Conclusions and recommendations in which we identify themes for the development of Blaenau Ffestiniog, as well as potential projects and next steps, in order to get prioritised projects underway.

The Plan is accompanied by an Action Plan, which sets out and prioritises ongoing, proposed and potential projects, alongside requisite resources, timescales, project lead and potential partners; this document is a working document and will be updated regularly and reviewed annually by Gwynedd Council and its stakeholders. Projects have been identified in consultation with the community and stakeholders.

The **key findings of our secondary research** can be summarised as:

- The Welsh Index of Multiple Deprivation shows that income, health, housing, community safety and access to services are issues in Blaenau Ffestiniog, but that the physical environment compares favourably to the rest of Wales. Data gathered from the 2011 census shows that there are higher than average levels of unemployment and that home and car ownership are lower than average in most areas of Blaenau Ffestiniog.
 - Three key regeneration projects have been delivered in Blaenau Ffestiniog since 2013 and tangible changes to the town centre and outdoor sector have been achieved as a result.
 - An online survey (as part of the development of Gwynedd's Destination Management Plan) highlighted that visitor and public facilities, including quality visitor attractions; access to infrastructure and services, including parking; tourist friendly engagement; and shops/ shopping opportunities were all issues that should be addressed.
 - 2016 was the most successful year to date for Gwynedd's tourism sector, with expenditure reaching over £1 billion, visitor numbers of over 7 million and an increase in spending outside the summer months.
 - Visitors are attracted to Gwynedd for its landscape, countryside and beach, as well as its extensive outdoor activities. 82% of visitors were highly satisfied with their visit and 98% reported that they were likely to return to Gwynedd.
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The **key findings of our primary research** can be summarised as:

- There is an overall feeling that regeneration and economic development should be re-focused to create new opportunities in the town of Blaenau Ffestiniog for its own people, rather than a sole focus only on tourism as an income generator. In addition, the following priorities for development were identified:
 - Further improve the townscape and provide a more inclusive visitor experience
 - Create new opportunities to interpret the town's social and cultural history
 - Capitalise on the development of the new station/transport hub
 - Further develop small scale businesses in the tourism sector which are not dependent on huge capital investment
 - Encourage small businesses to engage in town improvement activity and joint marketing initiatives
 - Ensure that Blaenau Ffestiniog benefits from any increased activity in respect of the world heritage status bid process.
- Blaenau Ffestiniog has the highest number of social enterprises per head in Wales, who together employ approximately 150 people and deliver a range of activities; they work together to achieve the overall aim of enhancing the area's environmental, economic, social and cultural development.
- Whilst there is a commendable breadth of visitor activities in the town and surrounding area, there is limited information on the history and significance of its buildings and no invitation to explore the town, exacerbated by limited orientation/ signposting and the town's topography. The town centre itself appears tired and dilapidated with many empty shops and a number of large buildings in disrepair.
- Visitor reviews present a mixed reception to Blaenau Ffestiniog; positive reviews cite the area's authenticity, diversity and proximity to the hills; negative reviews cite the lack of tourist information and 'grittiness'.
- The outcomes of our SWOT analysis (informed by findings of primary and secondary research) form our **conclusions**, which are based on the following themes as regeneration priorities:
 1. Skills development, capacity building, training and talent attraction/ retention
 2. Interpretation of the town's social and cultural identity
 3. Events (opportunities)
 4. Tourism Product, visitor facilities and experience
 5. Develop, support and encourage small scale businesses
 6. Town centre improvements
 7. Infrastructure, linkages and orientation
 8. Community development and regeneration opportunities
 9. Buildings and the built environment.

The report **recommends** the following projects for further consideration:

- A concept proposal plan for establishing new access routes/ network of paths to link Blaenau Ffestiniog with its quarries
- Development of interpretation resources/ signage to orientate visitors and interpret historic buildings
- Research the potential provision of visitor services at the new train station;
- Undertake a feasibility study for permanent provision of interpretation services;
- Ensure the development of the new train station is a catalyst for the projects;
- Explore proposed built environment projects and prioritise on community regenerative and funding potential.

2 Introduction

This Community Destination Plan has been developed to complement the development of the Slate Landscape of North West Wales World Heritage Site Nomination in order to increase awareness, pride and understanding of the rich heritage of the slate industry and to promote the social and economic regeneration of the area.

Known as the ‘town that roofed the world’ or ‘city of slates’; by 1901 Blaenau Ffestiniog had become the highest populated settlement in Meirionnydd and the second largest in north Wales. At one point more than 4,000 men worked in local slate quarries and in order to provide transportation for the slate products and to service the growing local population, three railway branches (the London North West Railway, the Great Western Railway and the Ffestiniog Railway) were built from different directions to reach Blaenau Ffestiniog.

Dol Wen Hydro Power Station was built to provide electricity for the local quarries in 1899 and in May 1902 Blaenau Ffestiniog became the first town in Britain to have street lighting that used electricity generated by the power of water.

In 1963, Ffestiniog Power Station was opened at Tanygrisiau and was the first pumped storage power station in Britain and the largest in Europe at the time. Oakeley Quarry became the largest underground slate workings in the world; it still has around 50 miles of railway track in its various underground levels.

Following the decline of the slate industry and closure of some of the quarries and mines, the town suffered economic misfortune and high levels of unemployment and deprivation that are still prevalent today. However, the town has since seen the establishment of a number of visitor attractions, and tourism is now the town’s most significant industry and largest employer as Blaenau Ffestiniog establishes itself as one of the UK’s premier destinations for outdoor activities and adventure aligned with a rich culture, language and heritage.

3 Demography and Economic Profile

The total population of Blaenau Ffestiniog is 4,876; however, Blaenau Ffestiniog falls into three ward areas (which are commensurate with Lower Super Output Areas) – Bowydd and Rhiw; Diffwys and Maenofferen; and Teigl. In order to provide an overview of the economic context of Blaenau Ffestiniog it is necessary to analyse data (source: census 2011) from each ward, which is presented individually in Appendix 1; we provide a summary here:

- Blaenau Ffestiniog’s population has similar levels of economically active and inactive people as Gwynedd and all Wales.
 - However, there are higher levels of unemployment in Bowydd and Rhiw (11%) and Diffwys and Maenofferen (10%) than Teigl (7%), which is similar to the averages for Gwynedd (5.5%) and Wales (6.5%).
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- The overall area has higher levels of people who are long term sick/ disabled than the Gwynedd average (12.5%), but is comparable to the Wales average (18%).
- A higher number of people (aged 16+) in Diffwys and Maenofferen (30%) do not have qualifications than average (23% for Gwynedd and 26% for Wales), but the other two areas are similar to the average.
- Property ownership is higher than average (66% for Gwynedd and 68% for Wales) in Teigl (75%) and lower than average in Bowydd and Rhiw (63%) and Diffwys and Maenofferen (64%); these levels are reflected proportionately in the number of households that rent privately and socially.
- There is a significantly higher than average proportion of households who do not have a car than average (21% for Gwynedd and 23% for Wales) in Diffwys and Maenofferen (37%) and Bowydd and Rhiw (31%); however, Teigl (23%) is similar to the average.
- All three areas have similar levels of health to the averages for Gwynedd and Wales.
- Both Diffwys and Maenofferen (18%) and Bowydd and Rhiw (19%) have lower than average levels of professional and managerial social class (27% for both Gwynedd and Wales) and have considerably higher levels of part/ unskilled members of the community (38% and 33% respectively) than average (26% for Gwynedd and 29% for Wales); the proportions of skilled members of the community and students in both areas is comparable to the averages.
- The proportions of professional/ managerial and skilled members of the community in Teigl are similar to the averages for Gwynedd and Wales however, there are slightly higher numbers of part/ unskilled members of the community (33%) and slightly lower than average numbers of students (12%) than average.

The main employers in the town include:

- Welsh Slate – Welsh Slate/Breedon owns several quarries in Blaenau Ffestiniog and employs 170 people across its sites in North Wales. It is felt that the WHS bid is likely to increase the profile of Welsh Slate's high quality product and thereby have a positive impact on its commercial operation.
- Metcalfe Catering – manufacturers and distributors of food preparation equipment;
- Llechwedd/ Slate Mountain – a visitor attraction that interprets Blaenau Ffestiniog's history of slate quarrying;
- Zip World – underground and above ground adventure centre for adults and children that includes zip wires and enormous trampolines;
- Cwmni Bro Ffestiniog – the thirteen members of the Cwmni Bro Ffestiniog network together employ approximately 150 people.
- Rehau – a manufacturing plant in Blaenau Ffestiniog that produces PVC-U windows and door systems; the company operates throughout Europe.
- First Hydro – Ffestiniog Power Station, located in Blaenau Ffestiniog generates enough electricity (via its four generating units) to supply the entire power needs of North Wales for several hours.

The Welsh Index of Multiple Deprivation

The Welsh Index of Multiple Deprivation (WIMD) 2014 is the official measure of relative deprivation for small areas in Wales; these are called Lower Super Output Areas (LSOAs) and have an average population of 1,600 people. Because all LSOAs have around the same population it is easier to carry out comparative analysis. The Index is presented as a set of ranks; rank 1 reflects the most deprived area and rank 1909 reflects the least deprived area,

which allows us to know which areas are more (or less) deprived than others, but not by how much.

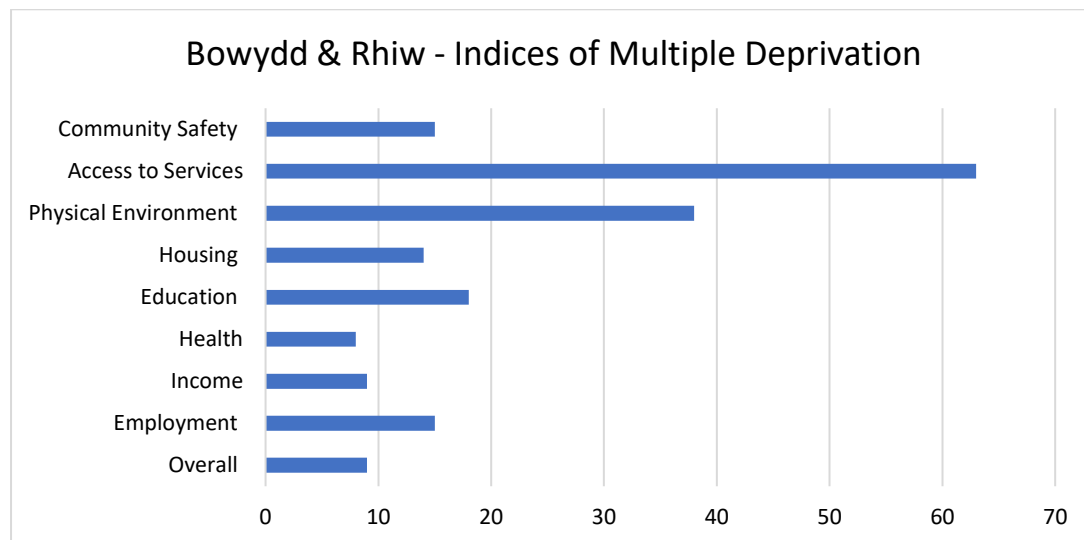
In Appendix 1 we provide data that shows how the three LSOAs in Blaenau Ffestiniog compare to other areas across Wales and within Gwynedd; the table shows, for example that income, health, housing and community safety are issues in all three LSOAs, however it also shows that the physical environment compares favourably in all three LSOAs to areas in the rest of Wales.

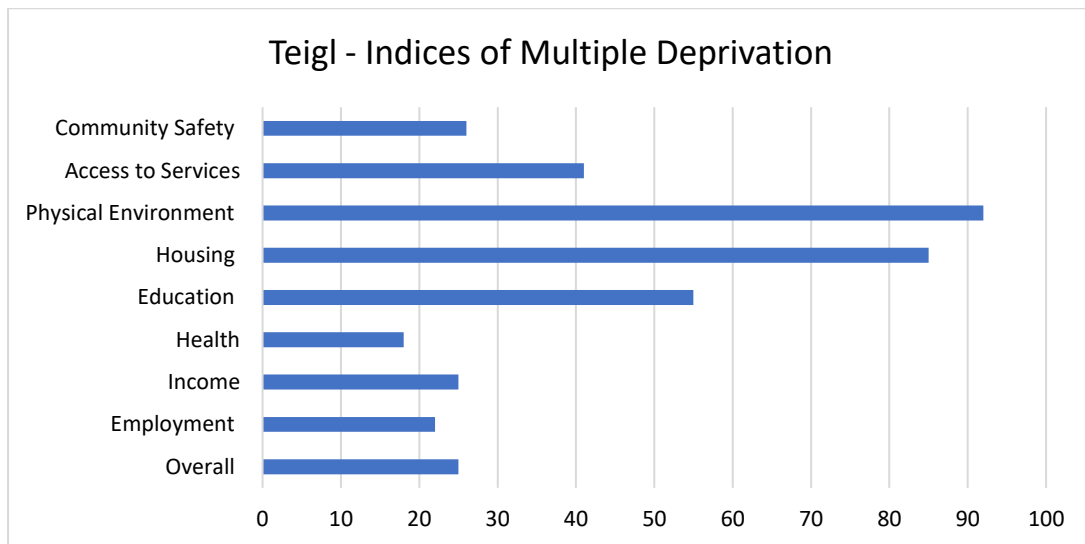
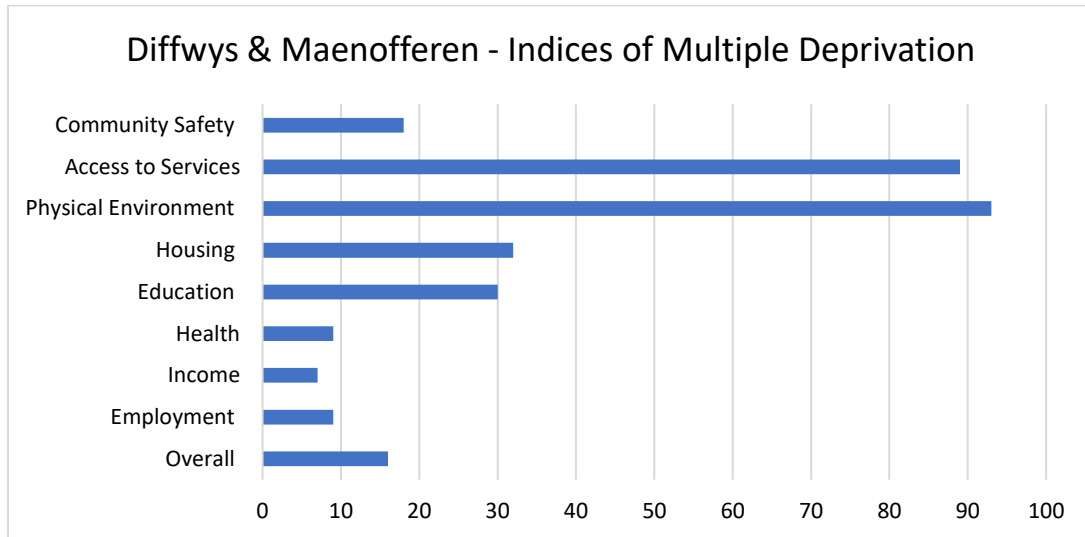
The data shows that Teigl is the least deprived (although it is still within the top 50% of the most deprived LSOAs in Wales overall) of the three LSOAs and that Diffwys and Maenofferen and Bowydd and Rhiw have similar levels of deprivation across the range of indicators. It is interesting to note however that Teigl ranks as the most deprived (in the top 20% of Wales) of the three LSOAs for access to services.

Ranking of LSOAs in Gwynedd

The following charts show how each area ranks within Gwynedd against individual indicators. As we set out above, the data is presented in a reverse index, i.e. the lower the score the higher the deprivation level and vice versa – the higher the score the lower the deprivation level; for example the chart below shows that Bowydd and Rhiw has a low ranking for overall deprivation, which means that it is amongst the most deprived (overall) in Gwynedd.

The charts allow us to understand how the deprivation levels in the three LSOAs of Blaenau Ffestiniog compare to the rest of Gwynedd.





4 Strategic Context

The strategic context for the area is detailed in the separate *Strategic Context for the Slate Area* document; in summary, these are the policies which currently influence activities in the Blaenau Ffestiniog area:

National:

- Wellbeing for Future Generations Act; Welsh Government
- Tourism 2020; Welsh Government
- The Wales way; Visit Wales
- Themed Years; Visit Wales
- Light Springs through the Dark: A Vision for Culture in Wales; Welsh Government
- Historic Environment Strategy for Wales; Cadw
- Inspire Our Strategy for Creativity and the Arts in Wales; Arts Council Wales

Regional / County:

- Gwynedd Council Plan 2018-2023; Gwynedd Council
- Gwynedd Council Improvement Plan 2018 – 2023; Gwynedd Council
- Gwynedd Council Wellbeing Statement; Gwynedd Council
- Gwynedd Council Arts Plan; Gwynedd Council
- Regional Skills and Employment Plan; North Wales Regional Skills Partnership
- Gwynedd Destination Management Plan 2013-2020; Gwynedd Council
- The Snowdonia National Park Management Plan; SNPA

Local:

- Our Local Economies; Cwmni Bro Ffestiniog
- Wales Slate World Heritage Site Nomination 2016 – 2020 Economic Plan; Gwynedd Council

5 Regeneration Projects

Blaenau Ffestiniog Town Regeneration Project 2013

The Blaenau Ffestiniog Town Regeneration Project, which received £4.5m ERDF funding was centred on putting Blaenau Ffestiniog back on the map and ensuring that the town is a great place to live and visit. The project endeavours to protect the unique culture and heritage of the town and maximise its potential using its most important assets – its people, language and landscape.

Key achievements delivered by the project include:

- Artistic installations centred around the slate heritage
- Shop front improvement grants
- Marketing campaign ‘Blaenau Ffestiniog – From the Rock’;
- New businesses in the town centre
- Training and skills development opportunities for NEETS;
- The creation of over 22 jobs; and
- The creation of five short-term apprenticeships

The project delivered tangible change to the town centre and attracted significant inward investment; prior to the investment visitors were spending an average of **27 pence per head** (source: Regenerating Blaenau Ffestiniog Case Study); in 2016 visitors were spending an average of **£25 per head** (source: inews.co.uk).

Antur Stiniog Downhill Trails 2014

Antur Stiniog was established in 2007 with the aim “To develop the potential of the Outdoor Sector in the Ffestiniog area in a sustainable and innovative way for the benefit of the local residents and economy”. As part of a wider adventure activities project for South Gwynedd, Antur Stiniog formed part of the Eryri Centre of Excellence ERDF project worth £4.6m.

The project included the development of downhill bike trails, an information centre with café and bike hire facility, and a purpose built uplift road. Antur Stiniog is regarded as one of the best downhill biking centres in the UK and has hosted many prestigious events and featured in a number of high profile television programmes and adverts.

It was estimated in the Project Evaluation Report that visitors to Antur Stiniog generated net additional spend of £542,049 p/a in the local economy.

Our Heritage, Llechwedd 2015

Llechwedd benefitted from approximately £65,000 of investment from the Cadw Heritage Tourism project, part-funded through the European Regional Development Fund through the Welsh Government. The investment included new interpretation panels, building improvements, voiceover and new lighting for the underground tours.

6 Visitor/ Tourism profile

Here we provide a summary of the profile of visitors to Gwynedd in order to better understand the type of visitors Blaenau Ffestiniog currently attracts and can hope to attract, as well as visitor motivations and expectations.

Gwynedd Destination Management Plan 2013-2020

The main aims of the Gwynedd Destination Management Plan 2013-2020 are:

- to extend the tourism season,
- to increase visitor spend,
- to improve the quality of the visitor experience,
- to improve integration of tourism with other aspects of life,
- to enhance the natural, built and cultural environment,
- to build and maintain quality public infrastructure and amenities,
- to provide well paid, year-round quality jobs and skills development.

The Destination Management Plan carried out an online survey and whilst the findings relate to Gwynedd as a whole the majority of issues raised are pertinent to Blaenau Ffestiniog; the following can be noted as key issues to address:

- Better visitor facilities
 - Better public facilities, e.g. visitor superstructure such as holiday accommodation and dedicated activities
 - Infrastructure elements including roads and other public spaces,
 - Quality visitor attractions,
 - Parking provision,
 - Better local services,
 - More tourist friendly engagement,
 - Improved shops and shopping opportunities
-

Any tourism developments in the Blaenau Ffestiniog are should take the aims and issues noted above into consideration, in order to ensure that any projects at a local level feed into the strategic priorities of the Destination Management Partnership.

Wales Visitor Survey, 2013; visitor needs

A survey undertaken in 2013 on visitor needs (as part of the Wales Visitor Survey) found the following **key findings**:

- Day trip planning is minimal; 69% interviewed day visitors to Wales reported that they did not use any information to plan their trip to Wales.
- 57% of UK staying visitors used online information to plan their visits, compared to 18% that used offline sources, however many participants expressed the importance of printed material during their visit; 38% of UK staying visitors to Wales used offline sources during their trip, compared to 17% who used online sources.
- The most fundamental influences on attracting new visitors to a region are recommendations and experiences of friends / relatives / colleagues
- Local people, especially accommodation providers, play a very important role in influencing visitors where to go. Their advice is sought and trusted more than online reviews because they live there, and so many visitors use local knowledge to verify their list of planned activities, or seek new ideas.

It is clear that both online and offline marketing material/ information is important for visitors and these findings are important to consider when reviewing Blaenau Ffestiniog's online presence and profile, as well as when planning future marketing campaigns and the development of promotional/ printed material, for example, the possibility of establishing an Ambassador's scheme could be explored, through which local people act as Ambassadors/ guides/ information sources for visitors.

Wales Visitor Survey, 2016

The 2016 Wales Visitor Survey, undertaken by Beaufort Research, reported the following **key findings on Gwynedd's visitor profile**:

- The majority of visitors to Gwynedd live in England (60%),
- higher than average proportion of staying visitors in Gwynedd and is much higher than the all Wales proportion (37%) of visitors from the rest of the UK
- approximately a third (37%) of visitors live in Wales compared to 59% of overall visitors to Wales; 3% live abroad, compared to 4% of the all Wales average
- Gwynedd attracts a higher proportion of more affluent ABC1¹ visitors (48%) compared to all Wales sites (32%).

¹ ABC1 and C2DE are approximated social grades; the six categories (A, B, C1, C2, D and E) and is a socio economic classification produced by the UK Office for National Statistics. The categories break down as follows:

AB – higher and intermediate managerial, administrative, professional occupations

C1 – supervisory, clerical, junior managerial, administrative, professional occupations

C2 – skilled manual occupations

DE – semi skilled and unskilled manual occupations, unemployed and lowest grade occupations.

- The survey found that over a third of visitors (35%) to Gwynedd visit with children (the majority of whom are younger children)
- Just under a third of visitors (30%) are couples
- The significant majority (71%) of visitors (who were interviewed) to Gwynedd were on a day trip, which is substantially lower than the all Wales average of 88%.
- The vast majority of staying visitors lived in England (82%) and the average number of nights stayed in Gwynedd was 5.8, which compares to 6.0 across Wales

Motivations for visiting and activities undertaken:

- A greater proportion of visitors to Gwynedd (73%) cited that their reason for visiting was to enjoy the landscape/ countryside/ beach than for all Wales (56%).
- Visitors to Gwynedd were also much more likely to have come to take part in outdoor activities compared to all sites in Wales (41% compared to 25% respectively)
- The three most popular activities, each undertaken by around a third of visitors to the region, were visiting the beach (34%), general sightseeing (33%) and visiting country parks (31%).

Satisfaction with the overall experience, revisiting and recommending:

- In general, visitors to Gwynedd were highly satisfied with their visit to Wales, with over eight in ten (82%) awarding a score of 9 or 10 (out of 10) for Wales overall as a place to visit.
- Visitors' trips to/ in Wales exceeded expectations for just over a third of visitors to Gwynedd - 37% reported that their trip was better than expected
- Almost all visitors to Gwynedd reported that they were likely to return to Wales in the future (98%); 92% of whom said they would definitely visit again, while 6% said they would probably visit again.

Visitor numbers and the associated economic impact

The tourism sector in Gwynedd in 2016 had its most successful year to date (2016 being the most recent set of data available); tourism expenditure in the local economy reached over £1 billion. As well as increases in peak season visitor numbers, there was an increase in visitor spending outside of summer months – the period October to April showed a substantial increase in expenditure compared to previous years.

Over 7 million people visited Gwynedd in 2016, which marked an increase of 3.2% on the previous year; 3.5 m of these visitors were staying visitors (an increase of 5.5% on 2015), the remaining 3.6 m were day visitors.

In terms of economic impact, direct expenditure reached £0.75 billion in 2016 (an increase of 4.7% on the previous year), which resulted in an economic impact of just over £1 billion (a 4.5% increase on 2015). Direct employment (FTEs) through tourism was 12,725 in 2016 (an increase of 1.6% on 2015); and total employment (FTEs) reached 15,557 (an increase of 2.1% on the previous year). (Source: STEAM data).

Visitor attractions and sites in Blaenau Ffestiniog received the following visitor numbers in 2018:

- Llechwedd Adventure Activities – 180,000
- The Ffestiniog Railway – 113,000
- Llechwedd Heritage – 45,000

(Visitor numbers for Antur Stiniog Downhill trails and Zip World are not yet available)

7 Infrastructure and Services

Bus: Blaenau Ffestiniog has 25 bus stops which offer services to Caernarfon, Criccieth, Dolgellau, Harlech, Llandudno, Llan Ffestiniog, Penrhyndeudraeth, Porthmadog, Portmeirion, Pwllheli and Tan-y-Bwlch, as well as many other villages en route. There is a private shuttle bus service which takes Ffestiniog Railway passengers to Llechwedd during peak season. The X1 public bus also stops at the entrance.

Train: Blaenau Ffestiniog is served daily by six trains to and from Llandudno on the Conwy Valley Line (Transport for Wales service). The town is also served by the Ffestiniog Steam Railway, which is fully operational between April and October. Passengers can connect with the Welsh Highland Railway at Porthmadog. A new station is planned for Blaenau Ffestiniog, following investment by Transport For Wales.

Road/ Parking: Blaenau Ffestiniog is situated on the A470 road, which is the main north to south route between Cardiff and Llandudno. The town has two public car parks with 197 spaces; in addition there is limited restricted parking on the main street for short stays.

Wi-Fi / Mobile networks: Free public wi-fi is available at Blaenau Ffestiniog library, and in a number of businesses throughout the town. There is a proposed plan to install free public wi-fi in partnership with Ffestiniog Town Council in Blaenau Ffestiniog and Llan Ffestiniog.

8 Consultation

Previous Public Consultations

A great deal of consultation has been undertaken in Blaenau Ffestiniog over recent years, particularly around the Town Centre Improvement Scheme. Here we provide a brief summary of what this previous consultation has told us.

The Ffestiniog Planning for Real Project, 2000

Whilst we acknowledge that this consultation was carried out a number of years ago we have included a summary of its key findings as many remain relevant today.

The Ffestiniog Planning for Real project was carried out to inform the development of a Community Action Plan that set out the improvements that the community wanted to see

to the environment, community facilities, tourism/leisure attractions, housing provision, the economy, roads and public transport, and in community safety.

The consultation events were attended by approximately 400 people and around 2,700 views were registered via cards and a further 2,100 via the wallboards. A pin-based voting system was used to identify and develop themes mainly around community facilities, leisure and tourism and the local environment.

The most popular suggestions focussed on recreational uses, for example a motorbike track, skateboard/ rollerblading park, mountain bike trails, community safety issues, for example police foot patrols, security cameras, car crime; and on local concerns such as keeping post offices open and dog fouling. The model also identified where people felt action was needed, for example the Market Hall and Diffwys Square and Manod Road, Dolrhedyn and Cae Bryn Coed in Llan Ffestiniog.

The Town Centre Improvement Project, 2007

In 2007 a series of nine community consultation events were undertaken, as well as detailed consultations with stakeholders and access groups to inform the development of the Town Centre Improvement Project.

The key findings from these consultations included:

- 71% of businesses felt Blaenau Ffestiniog was a poor retail location;
- There was a high percentage of empty units;
- A general lack of shops or offer;
- A high number of young people leaving the town; and
- A need to maximise tourism potential.

Town Centre Assessment Study, 2009

A Town Centre Assessment was undertaken in 2009 to assess *the current strengths and weaknesses of the area and commercial development opportunities for the town.*"

Consultation with traders was undertaken to inform the study; key findings included:

- When traders were asked about the strengths of Blaenau Ffestiniog the quality of the environment, the availability of car parking and other strengths were identified at approximately 33% each.
 - When traders were asked about the weaknesses of Blaenau Ffestiniog 40% identified a poor range/ quality of leisure and entertainment facilities; 45% identified a poor range/ quality of shops; and 7.5% identified poor quality premises as a weakness.
 - 65% of traders in Blaenau Ffestiniog had no plans to re-invest in their property; 25% wished to re-fit, extend or improve their premises; and 10% wished to relocate to new premises within the town centre.
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Overall, 38% of occupiers in Blaenau Ffestiniog responded to the questionnaire survey. Key points made included:

- High unemployment levels have had an adverse impact on spending in the town; more local jobs are needed in the town;
- More support is needed for local businesses; and
- More tourist attractions are needed to bring more visitors to the town.

Our consultation

Blaenau Ffestiniog has an extremely well established network of social enterprises, community organisations and cultural groupings. During our initial consultations with these organisations we were advised of significant consultation fatigue in the town due to extensive previous consultation exercises in support of various initiatives that have been planned/ delivered during recent years and a resulting barrier to general consultation/ information gathering exercises.

We therefore decided to undertake comprehensive consultation with local stakeholders in order to better understand the local context and priorities and to review current and emerging proposals with a view to identifying suitable projects that will be focussed on be and supported by the town. We recommend that Gwynedd Council tests the ideas for these projects (listed in the accompanying Action Plan) with the wider community once ideas are sufficiently developed to enable constructive discussion.

We have consulted with the following local stakeholders:

- Antur Stiniog;
- Blaenau Bendigedig;
- Cellb/ Gwallgofiaid;
- Chamber of Commerce and Tourism;
- Cwmni Bro Ffestiniog;
- Cymdeithas Hanes Bro Ffestiniog;
- Cyngor Tref Ffestiniog;
- Llechwedd Slate Caverns;
- Welsh Slate/ Breedon;
- Y Dref Werdd.

The findings of our consultation

Here we summarise the principal issues in terms of community development that were identified as part of our consultations.

There is an overall feeling that regeneration and economic development should be re-focused to create new opportunities in the town of Blaenau Ffestiniog for its own people, rather than a sole focus only on tourism as an income generator.

Skills development, capacity building and talent attraction/ retention - the development work being undertaken by Cwmni Bro focuses on access to skills and identifying new employment and business opportunities, particularly for young people so that they can live and work in Blaenau, irrespective of the tourism industry; this should be furthered.

Small businesses; support and development - the main focus of Welsh Government investment has been/ is on large capital projects which bring significant employment opportunities; it was expressed that support should be given to smaller enterprises and more sustainable local businesses.

Town centre improvement - it was suggested that small businesses should do more themselves to improve the main street. It was noted that whilst there is growing demand for shop premises in Blaenau Ffestiniog there is a lack of supply as many owners who have retired still live above their shops.

The proposed new railway station building (for both the Ffestiniog Railway and mainline railway) will provide a new focus for the town and prompt a reassessment of the flow of traffic and people through the town, presenting opportunities to maximise benefit for the town.

The built environment - the development of new facilities and use of old vacant buildings should be considered in the context of delivering benefit to the local community.

Interpretation of the town's social history and cultural identity - concern was expressed by members of Cymdeithas Hanes Bro Ffestiniog that the work they undertake to interpret the local history is at risk, due to visitor attractions that interpret only one aspect of the local heritage, for example Llechwedd which interprets the industrial heritage but does not consider the social and cultural heritage of the town and its people. It was also emphasised that many other quarries (Manod, Maenofferen, Cwm Orthin) played a significant part in the industrial revolution but there is very limited interpretation of their roles.

The society's main aim is to secure a new, permanent home for its exhibition which would extend both its operation (it could be open for longer periods of the year) and its exhibition spaces. It is very keen to commission a feasibility study to assess location; interpretation materials; collection management; staffing and future funding opportunities.

Tourism and visitor facilities - Cymdeithas Hanes Bro Ffestiniog is developing plans for part of its exhibition to be housed in the Antur Stiniog building, where there is an information centre/ café/ shop and which is open all year round. Another possible option that should be explored is the potential for an interpretation space to be incorporated as part of the new station building.

Infrastructure and linkages - it is evident from our consultations that there is a great deal of concern about the lack of connectivity between Llechwedd Slate Caverns/ Zip World and the town itself, which is exacerbated by the access arrangements and lack of infrastructure between the Llechwedd site and the town; it is possible to visit the attractions without

seeing Blaenau Ffestiniog and the associated economic impact of Zip World primarily benefits the accommodation sector in the outlying areas.

Consequently a perceived division between the community and the Llechwedd site has emerged and the community feel that there is insufficient and a disproportionately low emphasis placed on the significant industrial and social heritage of the slate industry, which is particularly pertinent given its role in establishing the town as a thriving hub. There is a feeling that the once vibrant buildings are becoming neglected as the focus shifts up the hill to Llechwedd; this perceived division could lead to resentment from the community and become more entrenched, if not carefully managed.

The opportunity to (re)create a new network of access routes and interpretation spots for use by visitors and townspeople was identified and the potential for reinstating the old footpaths used by quarrymen to open up the access routes between the town and Llechwedd and reinstate part of the town's heritage. This issue of connectivity was addressed in Cyngor Tref Ffestiniog's recent (unsuccessful) bid to Arloesi Gwynedd Wledig's Unique Streets scheme, which included several ideas about improving the linkages, particularly around the lack of signage to direct visitors who arrive at the rail and bus station.

The theme of the quarrymen's routes was picked up by Cellb/ Gwallgofiaid as a potential creative project. The research element of identifying the old footpaths and inclines has been carried out in conjunction with the local history society and Ffestiniog Town Council, encouraging further informal and intergenerational consultation by the community itself. Using existing maps and visuals for proposed new pathways/ access points, they will map the old quarrymen's paths; discover how they got to work; hear stories and anecdotes; learn path names; and also to understand how young people today move around their town.

Through our consultation the following priorities for development were identified:

- Further improve the townscape and provide a more inclusive visitor experience
 - Create new opportunities to interpret the town's social and cultural history
 - Capitalise on the development of the new station/transport hub
 - Further develop small scale businesses in the tourism sector which are not dependent on huge capital spending
 - Encourage small businesses to engage in town improvement activity and joint marketing initiatives
 - Ensure that Blaenau Ffestiniog benefits from any increased activity in respect of the world heritage status bid process
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9 **Community Audit**

In order to better understand Blaenau Ffestiniog's provision for its residents and its visitor offer we have carried out a community audit, by which we mean an external audit of Blaenau Ffestiniog as a community.

Community Representation

In this section we summarise the community facilities and organisations that operate in Blaenau Ffestiniog, in order to provide an overview as to the provision for the local community.

Ffestiniog Town Council – the Ffestiniog area represents Blaenau Ffestiniog together with the village of Llan Ffestiniog. The population of the area is 4,875 (2011 census), which makes Ffestiniog Town Council the third largest council within Gwynedd (behind Bangor and Caernarfon). There are 16 councillors representing five wards: Tanygrisiau, Bowydd and Rhiw, Diffwys and Maenofferen, Conglywal, Cynfal and Teigl.

Cwmni Bro Ffestiniog – an association of thirteen community enterprises, which deliver a range of activities to enhance the area's environmental, economic, social and cultural development: Antur Stiniog; Barnardos; Cyfeillion Croesor; Cellb/Gwallgofiaid; Opra Cymru; Deudraeth Ltd; GISDA; Seren cyf; Pengwern Cymunedol; Trawsnewid; Y Dref Werdd; and Ysgol y Moelwyn/ Y Ganolfan.

Together they deliver a range of activities that include running hotels, shops, restaurants, a leisure centre, an arts and craft centre, mountain biking, allotment provision, opera, river cleansing, working with adults with additional needs and youth work and have the overall aim to enhance the area's environmental, economic, social and cultural development.

The area boasts the highest number of social enterprises per head in Wales and between them members employ approximately 150 people. A recent analysis of the economic effects of the enterprises found that a high percentage of their income is generated through trading. Furthermore, it was shown that the income to a large extent, was retained/ reinvested in the local area; 98 pence of every pound awarded through grants or loans is spent locally, mainly on wages, and 53% of the £1.5 million that is spent on salaries is retained locally and reinvested in the local economy.

The following community organisations are active in Blaenau Ffestiniog:

- Blaenau Ymlaen
 - BROcast Ffestiniog;
 - Chamber of Commerce and Tourism;
 - Cyfeillion Cwm Orthin;
 - Men's Sheds and Craft Shed;
 - Merched y Wawr: Blaenau Ffestiniog/Llan Ffestiniog;
 - Snowdonia Society;
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- WI: Blaenau Ffestiniog/Llan Ffestiniog;
- Y Ganolfan/ Ysgol y Moelwyn.

The following cultural and heritage organisations are active in the town:

- Cellb/Gwallgofiaid;
- Côr y Brythoniaid;
- Côr y Moelwyn;
- Cymdeithas Hanes Bro Ffestiniog;
- Oakeley Band.

The following cultural and arts venues operate in the town:

- Bridge Café;
- Blaenau Ffestiniog Library/Canolfan Maenofferen;
- Cellb/Cinema and bar;
- Melin Pant yr Ynn/Falcon Hildred.

10 **Visitor assessment**

In this section we assess Blaenau Ffestiniog's visitor offer in order to better understand the challenges and opportunities for the future development of the town.

Essentially the town centre is focussed along Church Street and High Street and these streets form the main thoroughfare through the town. The buildings are predominantly stone built with slate roofs, typical of this part of North Wales and are generally in good order. Pavements are generally narrow, which can cause pedestrians to step into the street at busy times and there is little greenspace or planting to soften the somewhat austere environment.

Arrival

General impression: the paved area in front of the Diffwys car park, which incorporates the different coloured slates is attractive and together with the slate pillars contribute to the sense of arrival.

By rail/bus: on arrival at the railway/ bus hub in the town centre there is no directional signage/ visitor orientation or information panels. There is however a sign for the shuttle bus to Llechwedd Caverns (which only operates in peak season).

By car: on arrival by car at the main Diffwys Carpark there is clear signage into the town and to other features such as the town walks. It is however, difficult to negotiate the main street by car due to its narrowness; the lack of parking spaces makes quick access to shops/ cafes problematic, especially for the elderly/ physically disabled who may not be able to walk far from the car park.

Walking: Town trails are signed from the main Diffwys Carpark. Guided walks in the town and further afield can be downloaded from the Blaenau Ffestiniog website (www.blaenauffestiniog.org); these are clear and also contain some information about historical features and social history.

It's also possible to download a pdf and MP3 guide to the Poetry Trail – a series of inscriptions in the pavement along the High Street. This provides an insight into local cultural references; Welsh language and poetry. The Snowdonia Slate Trail goes through the centre of the town and there is some interpretation information on its website.

Visitor Information: orientation/ signage/ tourist information

Aside from one information panel (see below), there is no information available in the town centre on the history and geography of the town, for example, significant buildings; attractions; interesting features or a topographical area map.

The sole information panel in the town is located in front of the Antur Stiniog building (directly opposite the station forecourt area), which operates as an information centre. The staff are helpful and knowledgeable about the town and area. Information leaflets /attractions info are available in the cafe area. The bookshop also sells local guides.

Facilities

Public conveniences: the Diffwys Carpark toilets are housed in an attractive building, the former rail terminus for the quarry railway, the interior is imaginatively decorated with interesting graphics, which portray the town and the wider area to the visitor by depicting the slate landscape and Welsh language on the walls.

Cafes/restaurants: there is a limited choice of cafes/restaurants; mainly fast food outlets which are closed at lunchtime [in the winter].

The Quarryman restaurant/bar: is located close to the rail station in an old bank building and is slate themed with examples in the beer garden of slate furniture and also a small retail outlet. Food and service is adequate.

Ty Gorsaf: conveniently located at the entrance to the rail/ bus station; offers pub food menu, although during the Easter holidays the kitchen was closed for refurbishment prior to the summer season.

Antur Stiniog café: offers a good selection of cakes and coffee, but no hot snacks.

Y Gorlan: very friendly café in the main street; home cooked food and cakes, open for lunch.

The Town Centre

Aside from the public art features previously described, the main street gives an overall impression of being tired and dilapidated; there are many empty shops and a number of large buildings that are in a state of disrepair, which include the Market Hall; pubs; and the old Woolworths building.

There is little information about the history and significance of the town's buildings; there is no invitation to explore the town itself, which is exacerbated by the town's topography – visitors need to be made aware of what is on offer at the other end of the High Street, or they may not be sufficiently motivated to walk the distance. Because of the terrain there are few places to see the town in its entirety and appreciate the dramatic location, a lack of information increases the risk that these spots will be missed by visitors.

Visitor Attractions and Activities

We have identified the following **visitor attractions** in the town and local area:

- **It's a Small World** - indoor activities centre
- **Llechwedd Slate Caverns** - guided tours of Deep Mine (the deepest part of the site), which interpret the Victorian heritage of the mines. Llechwedd Slate Caverns are listed as one of the top ten places to visit by North Wales Tourism.
- **Zip World** - opened in 2014, offers three adventure experiences : Zip World Titan; Bounce Below, an underground net adventure; The Caverns - visitors fly, climb and traverse their way on zip lines, rope bridges, via ferrata and tunnels. Zip World has plans for another major attraction in 2020.
- **Go Below** – satellite of Go Below Conwy Falls, offers underground adventures in Cwm Orthin mine.
- **Ffestiniog Railway** - takes passengers on a spectacular 13 and a half mile journey from the mountains of Blaenau Ffestiniog and a 700 foot descent into Porthmadog, where passengers can connect with the Welsh Highland Railway.
- **Snowdonia Slate Trail** – an 85 mile walking trail around the slate quarries, which passes through Blaenau Ffestiniog. The trail was developed recently with the support of several local partners.
- **Antur Stiniog Downhill trails** - operates seven downhill mountain bike trails on the Llechwedd site and an uplift service. Recently received Visit Wales funding to develop three new bike trails.

We have identified the following **cultural and heritage activities and sites** in the town and local area:

- **Cymdeithas Hanes Bro Ffestiniog** - holds an exhibition of artefacts, stories and photographs over the summer months in Ty Mawddach on the High Street
 - **Cellb** - bar, café, hostel and cinema; also hosts local artists' exhibitions and the Blaenau Art Group.
 - **Town Poetry trail** – local sayings, unique quarry terms, historical references and quotations from local artists, poets, writers, musicians, are inscribed in the streetscape, reflecting Blaenau Ffestiniog's dynamic history and unique cultural identity.
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- **Guided walks** – MP3 guides can be downloaded from the Visit Blaenau Ffestiniog website, www.blaenaufffestiniog.org
- **Melin Pant-yr-Ynn** - Grade II listed, earliest surviving slate mill in Blaenau Ffestiniog now occupied by artist Falcon D Hildred, open to the public during the summer months by appointment only. Exhibition of watercolours portraying the historic town, quarries and dramatic landscape; also offers workshops and courses.
- **David Nash** – internationally renowned artist, lives and works here; occasionally hosts an Open Studio.
- **Canolfan Maenofferen** – library service and gallery space for exhibitions.

We have identified the following **events that are delivered** in the town and local area:

- **Events** : Victorian Weekend - Ffestiniog Railway, Oct; Ras y Moelwyn - fell race, May; Slate Festival, special event held in 2018, including Gwyl Car Gwyllt, Welsh indie music festival; 5/6 July 2019 event.

Accommodation provision

Accommodation listed in Blaenau Ffestiniog and the local area includes:

- six B&Bs;
- three bunkhouses;
- four guest houses;
- six self-catering lodges accommodating up to five people (glamping);
- one hostel;
- three hotels;
- one inn; and
- 24 self-catering units.

Accommodation in the actual town is limited, but provision in the local area (within a ten mile radius) is more substantial; the addition of a four star hotel (which will open to the public in 2020) will complement Blaenau Ffestiniog's accommodation offer.

A bedstock survey is currently underway and this section will be updated once the findings are available.

Blaenau Ffestiniog's online profile

The website www.blaenaufffestiniog.org is dedicated to Blaenau Ffestiniog, its history, development and offer. It is a useful resource, particularly as a starting point for undertaking research, and is very clear and informative; however, the website doesn't seem to have been recently updated, which undermines its credibility.

Aside from this website, there is limited information available on the town, its offer and facilities. This is clearly an important consideration, particularly given the findings of the Visitor Needs Survey (which we have outlined above) and contrasts with the established and significant online presence of the town's visitor attractions, such as Llechwedd, Antur Stiniog

and Zip World. This contrast reinforces the perceived separation of the town from the visitor attractions – an enhanced online profile for the town could increase visitor numbers to Blaenau Ffestiniog.

Visitor reviews

As well as providing a useful source of information for potential visitors (particularly online reviews), visitor reviews can provide constructive guidance for improvement. We have analysed a sample of positive, negative and mixed reviews of Blaenau Ffestiniog and incorporated our findings in the SWOT analysis that follows. These reviews raise some valuable points for consideration and enable us to better understand how visitors and potential visitors perceive Blaenau Ffestiniog; we provide a brief summary of the reviews:

A positive reviewer noted that it is a ‘wonderful and diverse area’ (letter to Gwynedd Council) that suits all ages. The fact that it is Welsh speaking and ‘very Welsh’ has been noted as positive by a number of reviewers, presumably because it brings distinction and authenticity, in fact it has been described as offering an ‘unusual and authentic’ experience (Trip Advisor). Another reviewer states that the town ‘has a lot of industrial heritage ruins and architecture, the railway, the caverns etc.’ (Trip Advisor).

The local walks and hills, as well as their accessibility from the town are positively received and the location is noted as being excellent for walking or touring and that transport by car is not necessary; the local landscape is also positively reviewed, although the influence of the manmade elements on the landscape are noted as being appealing to some and not to others.

The area’s heritage and authenticity is highlighted by one reviewer, who went on to write that the area has: ‘amazing walks and views, Forests, lakes, waterfalls and rivers to name a few. For outdoor pursuits, Blaenau Ffestiniog is hard to beat. From quiet woodland walks to strenuous mountain hikes, there is something for everyone.’ (Trip Advisor).

Negative reviews have specified that a lack of tourist information in the town means that it can be challenging to discover what is on offer and that a lack of parking spaces and cafes/restaurants limits dwell time. One reviewer feels that it’s a working town and doesn’t have a ‘holiday vibe’; it has been described as ‘too gritty for a holiday destination’ (Trip Advisor). It has also been described as ‘one of the most shambolic tourism experiences to be found anywhere in the UK’ (Trip Advisor), given the lack of facilities and information.

A relatively diplomatic review states that the town is ‘like Marmite. Those who ‘get’ the town love it, those who don’t, don’t’ (Trip Advisor).

11 Historic Built Environment Assessment

We have carried out built heritage assessments, to which the following selection criteria have been applied:

Statutory protection:

- Listed buildings (by grade, I, II*, II).
- Scheduled Monuments.
- Buildings and features within Conservation Areas.

‘At risk status’:

- As defined by Cadw’s buildings at risk register (BAR) for each individual area. Classifications as follows:
 - At Risk
 - Vulnerable
 - Not at Risk
- Based on a brief inspection from external (noting if uses are apparent whether the building or feature appears derelict or vulnerable).

Context in terms of slate industry heritage:

- Importance in the context of the slate industry heritage of the area (albeit the scope of work does not allow for heritage assessments or research on individual buildings or sites).
- Feedback from the consultation process on the perceived local significance of a building, feature or site.
- Providing a representative selection of the buildings which supported the slate industry and their communities.

Regenerative and interpretive potential:

- Potential of an individual building or site to contribute to the regeneration of the area, provide significant interpretive potential or other opportunity.

Our findings are set out in full in Appendix 3; a summary of prioritised built environment projects, together with our recommendations is set out in section 13 (conclusions and recommendations).

12 Key Challenges and Opportunities

It is evident from our consultation and research that there are some fundamental challenges facing Blaenau Ffestiniog which must be addressed in order for the town to maximise the benefits that will arise from the World Heritage nomination; here we summarise the key challenges that we identify for the town and the opportunities that would enable the town to address these.

SWOT Analysis

The following SWOT analysis assesses Blaenau Ffestiniog from the perspectives of both visitors and community members and summarises the strengths, weaknesses, opportunities and threats of its visitor offer and provision for its residents:

STRENGTHS	WEAKNESSES
<p>COMMUNITY</p> <ul style="list-style-type: none"> • Long established local history society. • Strength of community, identity, Welsh language, literature and music • Strong sense of civic pride • Very strong community/ social enterprise network (co-ordinated by Cwmni Bro Ffestiniog) • Energetic group of relatively young people actively engaged in local community 	<p>COMMUNITY</p> <ul style="list-style-type: none"> • Conservative approach to interpretation means that local people are not engaging with their heritage • Limited access to investment and capital funding for smaller businesses in the tourism sector
<p>TOURISM</p> <ul style="list-style-type: none"> • Unique and accessible culture • Sense of place/ Welsh language/ authenticity of a rural Welsh community • Outstanding landscape and scenery • Well- established tourist attractions associated with slate heritage sites: Llechwedd; Ffestiniog Railway • Good base for walking/ cycling breaks • High quality adventure sports facilities and associated events • Destination for both activity and for peace and quiet • Location on main north/south route (A470) – convenient to Mid and North West Wales 	<p>TOURISM</p> <ul style="list-style-type: none"> • Lack of interpretation resources and signage to facilitate visiting the town and promoting architectural/social heritage • Whilst the Tourist Information in the Antur Stiniog shop is a valuable resource it is not obvious to visitors, a well signed Tourist Information hub would be advantageous • Limited choice of cafes/ restaurants/ shops in town centre and no cluster of distinctive shops – weak retail offer. • Dependence on lower cost self-catering sector, a lack of high quality serviced accommodation
<p>BOTH TOURISM AND COMMUNITY</p> <ul style="list-style-type: none"> • Good public transport infrastructure – bus, rail. • Improved public realm as result of recent town centre improvement. • Unique historic features/ architecture. • Strong track record of festival/events organisation • Tourism trade brings associated visitor spend 	<p>BOTH TOURISM AND COMMUNITY</p> <ul style="list-style-type: none"> • Lack of overall vision for interpretation strategy – visitor orientation/ townscape improvement • Issue around long term sustainability re: interpretation (costs, staffing, curation, conservation policies) • Dependence on seasonal tourism sector • Need for better tourism/ public facilities • Lack of available parking spaces is a barrier to visitors/ residents spending more time in the town itself. • Poor visitor pedestrian circulation through/ around the town resulting in a lack of cohesion • Poor evening/ night time economy • Large number of vacant properties • No clear link between Llechwedd site and the town • Perception/ image of the town •

OPPORTUNITIES	THREATS/ CHALLENGES
<p>COMMUNITY</p> <ul style="list-style-type: none"> • A new sense of ownership of industrial, social and cultural heritage and scope to increase participation by young people in heritage activities • Create opportunities to improve skills and access to training • Better partnership working between sectors and opportunity for more co-ordinated marketing. • Increased footfall in the town centre and associated visitor spend 	<p>COMMUNITY</p> <ul style="list-style-type: none"> • Local legacy is dependent on the commitment of volunteers • Difficult to attract young people to become involved in heritage sector • Economic sustainability and general decline of towns in rural areas • Uncertain economic and political climate • Talent attraction/ retention (especially young people)
<p>TOURISM</p> <ul style="list-style-type: none"> • Located on the A470, the main north-south route and its strategic position to Snowdonia National Park and other destinations • Wales Way: new family of three strategic routes – the Cambrian Way; the Coastal Way; and the North Wales Way developed by Visit Wales – a significant opportunity to promote Blaenau Ffestiniog as a destination for walkers. • Snowdonia Slate Trail: enhanced marketing and promotional activity; opportunity to develop amenities for walkers in the area. • To create new routes and pathways to re-connect the town with its quarries • Visit Wales themed years • New interpretation strategies to enhance the visitor offer • Develop quality accommodation offer for range of budgets 	<p>TOURISM</p> <ul style="list-style-type: none"> • Ownership of the interpretation of local heritage lies with national institutions • Issue of long-term sustainability re: interpretation (costs, staffing curation and conservation policies)
<p>BOTH TOURISM AND COMMUNITY</p> <ul style="list-style-type: none"> • World Heritage Site nomination • Capitalise on new transport hub facilities that may be provided by investment in Ffestiniog station (interpretation facilities, visitor orientation/ sense of place) • Develop small scale tourism attractions and facilities • Development of year round outdoor tourism – associated economic impact • Retail offer based on local products • Wide range of events – visitors/ residents 	<p>BOTH TOURISM AND COMMUNITY</p> <ul style="list-style-type: none"> • The operational and financial challenge of providing new ways to enable visitors to move around the town • Timeframe of new station development and co-ordination of potential provision and facilities • Resilience/ willingness/ capacity of small businesses to develop their business models in response to new tourism/ market trends – potential repercussions on sustainability • Limited availability of shop premises in town centre

	<ul style="list-style-type: none"> • Continuing decline of the quality of the public realm and town centre if no action is taken. • Competition from larger town centres, e.g. Porthmadog and other rural/ outdoor tourism destinations
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We assess the key strengths, weaknesses, opportunities and threats in more detail in the following section.

13 Conclusion and recommendations

Following our consultation and research, which includes our community audit and visitor assessment, together with our consideration of the challenges and opportunities for the town, we have identified the following themes as regeneration priorities for Blaenau Ffestiniog:

1. Skills development, capacity building, training and talent attraction/ retention
2. Interpretation of the town's social and cultural identity
3. Events (opportunities)
4. Tourism product, visitor facilities and experience
5. Develop, support and encourage small scale businesses
6. Town centre improvements
7. Infrastructure, linkages and orientation
8. Community development and regeneration opportunities
9. Buildings and the built environment.

We investigate in more details below the challenges and opportunities identified in these themes, and our Action Plan sets out in more detail proposed and potential projects that address these challenges and respond to opportunities.

Skills development, capacity building, training and talent attraction/ retention

Lack of facilities and investment in the town together with a poor evening/ night time economy makes it challenging to attract / retain young people (as well as, of course visitors). The suggestions we make below regarding boosting visitor numbers are applicable for addressing talent attraction and retention; a vibrant town centre and evening economy is essential for both.

It is clear that the focus of the development work undertaken by Cwmni Bro Ffestiniog (on access to skills and identifying new employment/ business opportunities) is important and valued, particularly by young people; this work should remain a priority to promote opportunities in Blaenau Ffestiniog irrespective of the tourism industry.

There is a real opportunity to encourage, through schemes such as the Wales Slate young ambassadors' programme and traditional skills project, a new interest amongst young people

in their industrial, architectural, social and cultural heritage; this is crucial in terms of the long term sustainability of the projects proposed and the overall aim of regenerating the community. We propose that sharing knowledge and skills, inter-generational working and promoting a sense of 'future' heritage, should inform the development of these projects.

Interpretation of the town's social and cultural identity

Blaenau Ffestiniog benefits from a strong and active community and the input of relatively young people, which, if appropriate measures are taken to invest in skills development and capacity building, could provide a legacy for safeguarding the unique social and industrial heritage of the town; reinforced by the well-established local history society.

A key challenge is presented by the lack of interpretation, both for visitors and the local community, many of whom are not engaging with their heritage. There is an issue around the long-term sustainability of interpretation, particularly regarding maintenance costs, staffing, archiving, curation and conservation policies.

The History Society is keen to carry out a feasibility study to assess location; interpretation materials; collection management; staffing and future funding opportunities, with a view to securing a permanent home for its exhibition and interpretive content. This should be considered, together with the possibility of alternative venues that could include the Antur Stiniog building and the new station building.

It is evident that there is both the demand and desire in Blaenau Ffestiniog to improve the provision of interpretation services, which are currently delivered on a voluntary and temporary basis by a team of highly knowledgeable and dedicated individuals. There is a clear sense that the community wishes to regain ownership of its social history which thrived as a result of the industrial revolution, and it is important that this aspiration informs the emerging interpretation strategy.

A cohesive interpretation strategy across all slate communities that form part of the World Heritage Site is being developed by Gwynedd Council on behalf of a range of stakeholders. It builds on local knowledge and the unique features of each area in order to create a unified and compelling narrative. The strategy will shape the provision of sustainable, innovative and diverse interpretation services in response to the aspirations of the community and the requirements of the visitor.

Events (opportunities)

The town (and local area) hosts a wide range of successful events, which presents opportunities throughout the year to attract visitors to the town and generate visitor spend; these opportunities should be maximised by communicating and promoting the town's offer and facilities.

There are also significant opportunities to build on existing events, as well as to develop new events. There is also scope to link with regional, national and international events in order to promote and enhance the area further.

Tourism Product, visitor facilities and experience

There is ample opportunity to attract visitors who are walking / cycling in the area to stay in/ eat in/ drink in/ use the town's facilities, or to market the town as a base for walking / cycling breaks. Investment in quality accommodation (of all budgets) and a more extensive café / restaurant offer would service an increased tourist market and facilitate increased tourist activity throughout the year.

Anecdotal evidence suggests that the development of the Snowdonia Slate Trail (which passes through the town centre) has had a positive impact in terms of destination marketing and diversifying the visitor profile; there are plans to upgrade parts of the trail, but this will be dependent on further funding. An enhanced town centre and accommodation offer would service walkers as they pass through the town.

Develop, support and encourage small scale businesses

It is paramount that Blaenau Ffestiniog benefits from any increased activity in respect of the world heritage status and consequently, all large scale investment in the area should be capitalised.

A priority and focus of previous investment has been/ is on the creation of employment opportunities that are generated by large capital projects, however it is clear that more support is required by smaller enterprises and sustainable local businesses (for example lack of space is a challenge for small business seeking premise in the town centre); Gwynedd Council/ agencies should develop, support and encourage small businesses in response to identified needs and empower and support small businesses to engage in town improvement activity and joint marketing initiatives.

Town centre improvements

Improvements to the town centre and an enhanced accommodation/ food and drink sector would enable the town to benefit from the high visitor numbers to local attractions and help to erode the division between the town and the Llechwedd site that has arisen due to this physical separation and lack of co-ordinated marketing; improved partnership working between the town's stakeholders would help with the latter.

As we set out above small businesses should be supported with advice and guidance as well as grant/loan funding to contribute to town centre improvements, particularly on the main street. The lack of available retail/ town centre space for small businesses should be explored in order to combat the high proportion of empty shop units.

Infrastructure, linkages and orientation

The lack of connectivity between Llechwedd and the town means that visitors can (and do) visit the visitor attractions at Llechwedd without visiting the town; this needs to be addressed in order for the town to benefit from visitor spend and the associated economic impact. Consequently, there is a perceived division between Llechwedd and the town and this perception needs careful management in order to avoid it becoming more entrenched; the opportunity to reinstate a network of footpaths and routes along the old footpaths used by quarrymen would reconnect the town with its quarries, enable visitors and residents to move between the two with relative ease and reinstate part of the town's heritage.

The new station development (for both the Ffestiniog Railway and mainline railway) presents a significant opportunity and steps should be taken to work proactively with the Ffestiniog Railway to maximise benefit for the town. The premises could, for example include space for interpretation/ exhibition and visitor orientation and the development will present an opportunity to review the flow of people and traffic through the town. At the very least, the new station will bring people to Blaenau Ffestiniog, the challenge will be to attract them into the town and to generate visitor spend; signage and visitor information will be essential.

Community development and regeneration opportunities

There is a feeling that regeneration and economic development should be re-focused to create new opportunities in the town of Blaenau Ffestiniog for its own people, rather than a sole focus on tourism as an income generator. The development of new facilities and use of old vacant buildings should be considered in the context of delivering benefit to the local community.

Buildings and the built environment

There are many significant buildings and built features which merit further consideration in terms of renovation, re-use and regeneration potential. More information and an initial assessment, subject to further discussion with the relevant conservation organisations and officers, can be found in the accompanying Historic Built Environment Opportunities Study (Appendix 3)

Through a review of both protected (i.e. listed or scheduled) heritage sites and those not currently afforded that protection, a number of key potential projects have emerged. These are not necessarily just the most significant sites, but those which balance significance (in the context of the slate industry) with the potential to provide significant community regeneration outcomes. All projects are included in the attached Action Plan.

The highest priority sites have been identified (using the selection criteria that we set out above) and are listed in priority order in the Action Plan:

1. Maenofferen Quarry. A group of buildings, including the g II* listed mill, of the highest significance in the context of slate industry heritage, and at risk (priority: high).
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2. Linking Llechwedd to the town, encompassing the significant group of listed buildings at Llechwedd sidings, the potential redevelopment of the station and its significant interpretive opportunities (priority: medium).
3. Gelli Farm. A non-listed building, but one which speaks volumes about pre- industrial Blaenau and the site of one of the earliest quarries in 1760. It provides a small-scale project, perhaps for tourist accommodation (significantly lacking in Blaenau) combined with heritage interpretation of the early quarries/pre- industrial Blaenau (priority: high).
4. Former Diffwys Station and the inclines. The inclines, combined with the tips, are the most prominent feature of slate industry archaeology in the centre of town. Providing access could be a rich heritage experience as well as linking to Maenofferen Quarry (see 1. Above) and Llechwedd quarry on foot, by bike or Car Gwylt experience (see main report) (priority: medium/ high).
5. Capel Manod and 62-64 Manod Road are key listed buildings at risk and could provide a combination of interpretation (slate industry community) and perhaps further accommodation to support the heritage operation (priority: medium).
6. Maenofferen Quarry (see 1. Above) and Llechwedd quarry on foot, by bike or Car Gwylt experience (see main report) (priority: medium).

These nine identified themes feed into the strategic economic priorities developed by the Wales Slate Economic Task Force, which are:

- Contributing to the skills and education of our young people and lifelong learning
- Creation of sustainable and high-value employment opportunities
- Improving destinations
- Ensuring a unified story and narrative
- Improving our communities and sense of pride in our communities
- Promoting and safeguarding our unique industrial heritage, culture, language and local landscapes for all

14 Potential sources of funding

We have identified the following potential sources of funding; we set these out in more detail in the accompanying funding document (alongside other, smaller funding streams), which we will consider alongside the development of our proposed projects:

- North Wales Growth Bid
 - Rural Futures
 - Tourism Investment Support Scheme (TISS)/ Micro Small Business Fund (MSBF)
 - Development of a Visitor Giving Scheme
 - Lottery Funding:
 - National Lottery Awards for All
 - People and Places (Medium and Large Grants)
 - Rural Programme Round 2
 - The Heritage Fund (previously HLF)
 - Rural Development Programme/ Arloesi Gwynedd Wledig (LEADER)
 - The Architectural Heritage Fund
 - The Empty Homes Programme
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- Vacant Homes Assistance Grants
- Welsh Government Regeneration

15 **Next Steps**

Ongoing, proposed and potential projects are listed in the Action Plan. Following discussions with community organisations and stakeholders, we believe that the following projects merit further consideration and reflect the aspirations to enhance the community and capitalise on new regeneration opportunities:

- Develop a concept proposal plan for establishing new access routes and a network of paths to link the town with the quarries and introduce interpretation spots for visitors and residents;
- Develop interpretation resources and signage to orientate visitors and interpret historic buildings;
- Research the potential provision of visitor services at the new train station;
- Undertake a feasibility study for permanent provision of interpretation services in the town centre;
- Ensure that the community can capitalise on the development of the new train station as an important catalyst for the projects proposed, providing an opportunity to improve the visitor experience;
- The proposed built environment projects should be explored on a project by project basis and prioritised by their impact on community regeneration (refer to the matrix) and likelihood of securing funding.

These priority projects have been identified in consultation with the local community and stakeholders, however their implementation and prioritisation in the accompanying Action Plan will be subject to an appropriate lead body being identified and funding secured to undertake identified tasks. The Action Plan will be reviewed annually by Gwynedd Council and key stakeholders.

Appendix 1 Ward areas data

The following table (source: census data, 2011) shows the sectors in which the economically active members of the communities are employed; in the main part the proportions are similar across the sectors, however there are some notable differences. Employment is higher in construction but lower in wholesale and retail and education in Bowydd and Rhiw; employment is higher in public administration and defence in Diffwys and Maenofferen; and employment is lower in accommodation and food services and public administration and defence in Teigl.

The highest three sectors of employment are health and social work; wholesale and retail; and construction; the lowest sector is agriculture, forestry and fishing.

The following table shows the sectors in which the economically active residents of Blaenau Ffestiniog are employed:

Table showing sectors in which residents are employed:

Industry of employment	Bowydd & Rhiw	Diffwys & Maenofferen	Teigl	Average
Agriculture, Forestry & Fishing	1.3%	0%	1.4%	0.9%
Mining, Quarrying, Energy & Water	7.4%	7.6%	8.3%	7.8%
Manufacturing	8.8%	7.1%	8.6%	8.2%
Construction	13.3%	9.6%	8.6%	10.5%
Wholesale & Retail	11.4%	13.1%	12.4%	12.3%
Transport & Storage	4.0%	4.1%	3.0%	3.7%
Accommodation & Food Services	9.3%	9.4%	8.0%	8.9%
Communication, Finance & Property	2.2%	2.4%	3.5%	2.7%
Professional, Scientific & Technical	3.0%	2.4%	3.4%	2.9%
Administrative & Support Services	4.0%	4.3%	3.4%	3.9%
Public Administration & Defence	4.0%	5.5%	3.5%	4.3%
Education	7.9%	10.6%	11.4%	10%
Health & Social Work	18.1%	18.2%	19.7%	18.6%
Other	5.4%	5.7%	5.0%	5.4%

Appendix 2 List of individuals/organisations consulted

- Antur Stiniog
- Blaenau Bendigedig
- Cellb/ Gwallgofiaid
- Chamber of Commerce and Tourism
- Cwmni Bro Ffestiniog
- Cymdeithas Hanes Bro Ffestiniog
- Cyngor Tref Ffestiniog
- Llechwedd Slate Caverns
- Welsh Slate/ Breedon
- Y Dref Werdd

Appendix 3 : Historic Built Environment Opportunities Study [Sheets 1 – 7]
