Gnoll Estate Country Park Accommodation Masterplan Final Report

Prepared by

Planning Solutions Consulting Limited

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Executive summary

"I have used and visited the Gnoll for the last 30+ yrs with my children and hoping to bring my grandchildren in the future. Still enjoy the walking, feeding the ducks/swans and the Parkrun each Saturday so important for my health and wellbeing as I get older fantastic park and an asset to NPT, would choose to visit here for family picnics more so than travelling to Swansea or Gower. We even have an annual car parking pass such value for money. Thank you" A quote from a respondent to the online survey.

The main focus of this commission for Planning Solutions Consulting Limited has been to assess the opportunity to introduce a form of overnight visitor accommodation within Gnoll Estate Country Park. Secondly, we have also developed a visitor experience action plan to enhance the wider country park, which builds on the successful work carried out by the Parks & Cemeteries Department.

Gnoll Estate Country Park is an award-winning park which is managed by Neath Port Talbot County Borough Council. The park is located on the urban fringe of Neath and provides an important recreational resource for members of the local community – from the family market through to people attending events and Parkrun.

The parkland covers approximately 219 acres. As part of a former country estate, there are distinct zones of landscape character including woodland, an 18th century parkland and attractive lake areas. The country park incorporates a range of key built facilities: a café with a new external covered area, two children's play areas (including accessible play) water cascades, the ruins of Gnoll House (including the cellars), an established network of trails and a nine-hole golf course. It is estimated that annual visitor numbers are approximately 420,000 visits.

Importantly, the Woodland Trust has acquired an adjacent farm which will be replanted to create a new and attractive woodland, along with pastures alongside the existing ancient woodland. It is envisaged that people visiting the Woodland Trust site will use the car park within the country park, which will generate additional revenue in terms of car parking fees and secondary spend in catering. Currently, the number of visitors who will be attracted to the Woodland Trust site remains unknown.

As part of our study, a module of community research was carried out with a questionnaire promoted online by Neath Port Talbot County Borough – this generated 818 responses which demonstrates a very strong level of engagement with the park among local people. The full results of the survey are set out in the report, but below we highlight some key findings:

- High level of local usage with 71% of respondents living within 20-minutes of the country park

- 46% of visitors visit at least once a week (some 18% of responds visit several times a week)

- 77% of visitors stay between 1 and 4 hours with only 1% of visitors spending less at 30-minutes on site

Alongside the online survey a number of workshops were hosted at Gnoll Estate Country Park. These were attended by Councillors, staff at the Country Park, Officers within the Council, the Friends Group, representatives from the Woodland Trust and a representative from Parkrun. It was recognised that future development initiatives will need to maintain a careful balance between the qualities which make Gnoll Estate Country Park a special place to visit and the need to generate additional income. It was highlighted that the catering offer could be enhanced and the introduction of appropriate visitor accommodation was broadly supported.

The market catchment for the short breaks market is strong in terms of the overall headline figure. Some 3.8 million (3,861,962) live within the 2-hour drivetime catchment of the country park but it is recognised that there are some pockets of deprivation. Tourism plays an important role within the economy of the County Borough and the latest research data shows overall growth in tourist numbers between 2007 and 2018. The majority of visitors are day visitors.

A number of leisure sites – from Rother Valley Country Park through to the Eden Project in Cornwall have, as a later phase of development invested in onsite overnight visitor accommodation. The Council has identified a preferred development site which incorporates the former Ranger's Cottage and adjacent yard area.

A range of accommodation options were identified, including:

- Conversion of the former Ranger's cottage
- Bunkhouse
- Cluster of high-quality self-catering lodges
- Cluster of seasonal yurts or other temporary 'glamping' structures such as pods or wooden tents
- Seasonal camping field
- Floating structure
- One-off design led intervention
- Touring caravan site

For each type of accommodation use a description was set out, referencing an example in the market place and identifying the associated pros and cons.

A weighted scoring matrix with a range of criteria was used to assess the options and the lead option to emerge centred on developing a cluster of 12-high quality wooden pods, with ensuite shower and toilet facilities.

Subject to refurbishment costs the conversion of the former Ranger's Cottage into a high-quality self-catering accommodation unit would form part of the overall accommodation package.

Based on an eight-month season, (March through to October), a three-year outline trading profile was prepared for the wooden pods. Please see table on the following page.

Different occupancy levels were identified which increased from 30% in March to 70% in August, the peak month. The occupancy model shows a cautious level of year-on-year growth. To achieve the occupancy levels and to reduce the level of risk it is recommended that the Council works with a third-party booking agency to help drive sales during the early years of operation. The tariff being achieved during the peak month of August is shown at £78 per night.

PSC
Experts in visitor experiences

Income	Year One	Year Two	Year Three
Pods	80,642	83,899	87,289
Total income	**80,642**	**83,899**	**87,289**
Costs			
Agency (75% of bookings via agency in Yr1 falling to 60% by Yr3)	15,120	13,634	13,093
Cleaning and linen	7,464	7,614	7,766
Waste collection (allocated minimum sum asssumes part of Gnoll CP)	500	515	530
Central admin support (bookkeeping / bookings etc)	4,032	4,195	4,364
Maintenance (and one off additional expenditure in Year Five required)	11,000	11,330	11,670
Utilities	4,354	4,441	4,530
Insurance (assumes bolted on to Council policy)	2,500	2,575	2,652
Marketing (part of wider country park initiatives)	2,500	2,575	2,652
Grounds maintenance	1,500	1,545	1,591
Fire maintenance / H&S	1,000	1,030	1,061
Bank / online booking charge	500	600	700
Staff (additional resource meet and greet)	8,100	8,343	8,593
Other	2,419	2,517	2,619
Total costs	**60,990**	**60,914**	**61,823**
Profit / (loss) before EBITDA	**19,651**	**22,986**	**25,466**

A sensitivity analysis has been carried out based on increasing and reducing occupancy levels by 10%. Please see table below.

10% increase in occupancy levels being achieved

Revenue / Costs	Year One	Year Two	Year Three
Income	88,706	92,289	96,018
Costs	64,329	64,154	65,060
Profit / (loss) before EBITDA	**24,376**	**28,136**	**30,958**

10% decrease in occupancy levels being achieved

Revenue / Costs	Year One	Year Two	Year Three
Income	72,577	75,509	78,560
Costs	57,651	57,673	58,586
Profit / (loss) before EBITDA	**14,926**	**17,836**	**19,974**

The prioritised visitor experience development plan was informed by the site review, strategic context, market assessment, consultation and direct primary research with members of the local community. The visitor research highlighted-specific elements of the visitor experience within Gnoll Estate Country Park which could be enhanced. Please see the table below:

Facility / service	High priority (%)	Essential (%)	Desirable (%)	Not needed (%)	Would not like to see (%)
New play area	14	11	37	34	4
Scultpure trail	13	6	51	25	5
Play trail	22	11	52	12	3
Indoor play	15	14	32	28	10
Enhance café	21	26	40	12	1
Additional interpretation	6	5	26	48	5
Improved signgage	9	8	36	44	3
Dedicated BBQ area	13	10	38	25	15
Outdoor cinema	17	14	40	19	10
Enhanced focus on conservation / environment	32	30	32	6	0
More information on the history of the site / local area	28	24	37	10	1
Rowing boats for hire	20	13	41	15	11
Festivals / events	19	22	36	15	8

The action plan sets out individual initiatives, along with a rationale, indicative capital costs, impact (both financial and impact on the visitor experience), priority and staff resource implications.

Individual actions were categorised as follows:

- Enhancing the sense of welcome and car parking
- Improving the quality of the catering offer to maximise spend
- Interpretation
- The play and activity experience
- Events
- Other initiatives
- Market

Please note that since submitting the Draft (9th March 2020), the COVID-19 pandemic has had a significant impact on the tourism and day leisure marketplace.

1.0 Introduction

1.1 The brief

Planning Solutions Consulting Limited has been commissioned to work with Neath Port Talbot County Borough Council to carry out an assessment to identify if there is an opportunity to introduce overnight visitor accommodation within Gnoll Estate Country Park, a popular country park managed by the Council.

Whilst it is recognised assessing the opportunity to introduce visitor accommodation is the main focus of our work, we have also included an action plan to enhance the wider offer in the country park.

1.2 Report structure

The report is structured as follows:

Section Two – provides a review of the current offer at Gnoll Estate Country Park and a summary SWOT analysis has been used to identify key strengths, weaknesses, threats and opportunities. This includes summary information from the online visitor survey which generated 818 responses. A commentary on the accommodation development site has also been provided.

Section Three – sets out the wider strategic context particularly in terms of the national tourism strategy, the Destination Management Plan, Planning Policy and wider context about some of the challenges country parks are facing across the UK.

Section Four – sets out the key findings from the consultation exercise and also the primary research among users of Gnoll Estate Country Park.

Section Five – the market assessment has analysed the demographic profile of residents living within the 0 to 120 and 120 to 180-minute drivetime profiles. The drivetime catchments have been extended as the main focus is to identify the market size and characteristics in respect of overnight accommodation uses. We have set out the competitive landscape in terms of the provision of self-catering accommodation within the locality but also the offer at other recreation sites. The tourism market has also been reviewed alongside trends within the accommodation sector. A summary market SWOT has been produced.

Section Six – two case examples have been reviewed for Under The Thatch and the Cwmcarn Camping Pods.

Section Seven – the options assessment sets out a long-list of potential visitor accommodation uses. For each use we provide a description, reference example(s) and the associated pros / benefits and cons / constraints. We also set out the potential fit with Gnoll Estate Country Park. A weighted scoring matrix has been used to assess the options. For the preferred development scenario, we set out an indicative capital cost.

Section Eight – considers the financial and operational elements including producing an occupancy model and three-year trading profile for the accommodation project. A sensitivity analysis based on occupancy levels has also been prepared. Wider impacts related to the accommodation project are also considered.

Section Nine - sets out an action plan to support the development of the wider country park. This provides a description of the initiative, the indicative capital cost and whether it is a 'low', 'medium' or 'high' priority intervention.

Interventions have been considered using the following categories:

- Enhancing the sense of welcome and car parking
- Catering
- Interpretation
- Play and adventure activities
- Events (including activities)
- Other initiatives
- Marketing
- Resources

Section Ten – sets out the concluding remarks.

1.3 Methodology

Our approach has involved background research including site visits, review of the existing offer, a market review (demographic data, tourism trends and competitive landscape with a focus on visitor accommodation), a review of case examples, consultation and analysis based on our consultancy experience.

We have used our sister company's operational experience of managing a number of visitor attractions and other leisure businesses (including visitor accommodation) to help inform our work. These include:

- CONKERS (www.visitconkers.com), a 120-acre discovery park in the National Forest

- Cotswold Country Park & Beach (http://www.cotswoldcountryparkandbeach.com/)

- Kent Life, a 28-acre heritage park and farm attraction (http://www.kentlife.org.uk/)

- The National Brewery Centre in Burton, Staffs (www.nationalbrewerycentre.co.uk)

- Springfields Adventure Land an adventure experience in Springfields Retail Park in Lincolnshire https://www.springfieldsadventureland.co.uk/)

- The Royal Esplanade Hotel, on the Isle of Wight, which also incorporates a luxury self-catering cottage (https://www.royalesplanadehotel.co.uk/)

2.0 Site review and SWOT analysis

2.1 Site review

Location and access

Gnoll Estate Country Park is an attractive country park which is located on the urban fringe of Neath. The main area of the country park has two vehicle access points but there are also a number of other informal access points.

Macro access via the M4 is good and Neath is served by a mainline train station which is within walking distance of the country park. The country park is also served by the First Cymru routes 153, X4 and X5 from Neath, Swansea and Port Talbot.

The Sustrans NCN route 47 passes directly through the park at its northern edge (past Mosshouse Wood).

Landscape and topography

The parkland covers approximately 219 acres. As part of a former country estate the landscape is attractive and there are distinct zones of landscape incorporating woodland, an 18th century landscaped parkland and lake areas.

The plan below provides an overview of the country park (the area within the red boundary line).

The topography throughout the country park is varied, which helps to create distinct zones. Some parts could present some difficulties for visitors with mobility issues, although there is a well-used pathway around the main lake and trampers are available to hire from the visitor centre.   There are specific health walking routes around the country park and a wildlife walk.

Open parkland through to woodland

Given the size and topography of the site, there are locations within the country park where as a visitor you feel that you can get away from it all.   There are also attractive long-distance views from parts of the country park, all of which positively to the overall visitor experience.

A wilderness / getting away from it all feeling in some parts of the country park

There are also four lakes at different levels / tiers. Three of these are large waterbodies and add positively to the visitor experience. The main water feature is located adjacent to the visitor centre and creates a panoramic background. The most stunning and unique aspects is the cascade.


A range of attractive and stunning water features (top left cascade and other are the reservoir and overflow)

Key visitor facilities

Key visitor facilities include (please also see the map on the following page):

- A visitor centre with café, public toilets and meeting facilities along with the former Head Ranger's office. The meeting room is separated from the café space by a flexible wall and during peak periods this space is used by café customers (the café reaches capacity on peak days). It is recognised that there are opportunities to enhance the café operation

- The visitor centre also incorporates office space

- There has been recent investment in creating a covered external canopy and space adjacent to the café which incorporates solar panels

- A nine-hole golf course, incorporating a foot golf offer, which has limited use. During peak periods fairways one and two are used for overflow car parking

- Two impressive water cascades

- Two children's playgrounds, which are fenced (a traditional playground with accessible play and adventure playground)

- A network of trails with variety of surface material

- The ruins of the former Gnoll House, Icehouse and Cellars (the Cellars are not currently accessible to the general public (a promotional video has been produced and this is shown within the café)

- A number of events are staged throughout the year, including a popular fun fair, run by an external partner

- Successful Parkrun offer, with 3,500 people registered for the Gnoll Parkrun

Play area with accessible play features located adjacent to the visitor centre / cafe

A large visitor centre with covered outdoor space

Future development plans include improving access to the café, helping to link it to the external covered space which will provide additional covers.

It should be recognised that there has been a programme of investment within Gnoll Estate Country Park and this is set out below:

- External space outside of the café has been created with a seating area (solar panels have also been introduced)
- Improvements to the café experience (e.g. introduction of chip and pin payment system, new furniture and free WIFI)
- TV conference facility introduced within the meeting room
- Foot Golf introduced
- Development of events offer, particularly during busy peak periods
- Development of accessible play
- Successful weekly Parkrun events
- Introduction of a nature trail
- Enhanced social media and online presence

Heritage features

The main heritage features relate to the ruins of Gnoll House, Icehouse, the Cellars and Walled Garden. The country park has a Grade II* listing on the Cadw Glamorgan Register of Parks and Gardens of Special Historic Interest in Wales. It is recognised that some of the heritage features are in a poor state of repair.

The House forms part of the rich cultural, social and economic history of Neath, however, there is only limited interpretation provided about these key features (and wider features) within the country park. Although the Council has invested in the production of short promotional films, which will be displayed on television screens within the café.

The heritage features add a distinct element to the visitor experience

Events

At a micro (individual attraction) level, a strong events programme helps to:

- Increase footfall (and repeat visits)
- Help the site to gain a higher profile
- Engage with new audiences (and encourages repeat visits by refreshing the offer)
- Increase income generating opportunities (including secondary spend)
- Generates PR opportunities

Gnoll Estate Country Park runs a programme of events through the main season from Easter through to the end of August.

The events booked by a third party include: magic shows, fundays, donkey rides, pirate shows and dinosaurs in the park. The third party also runs a fair ground type facility during the main season, which generates a direct rental stream for the Council.

Whilst there is no income generated directly from the Council managed events there is secondary spend in terms of car parking and catering income. The events are promoted on Facebook and via an events brochure.

Running a programme of events is key to raising awareness of Gnoll Estate Country Park and importantly it helps to create another reason to visit, particularly for local residents.

Parkrun is also hosted at the country park every Saturday and Junior Parkrun on Sundays.

Car parking

There are 209 formal car parking spaces which are served by three pay and display car parking machines. The main display and pay car parking area is located adjacent to the visitor centre building and at the southern entrance there are further car parking spaces which are currently not covered by the pay and display policy.

The main car park regularly reaches capacity during the summer months and fairways one and two on the golf course are used as overflow car parking (this can be impacted on by periods of poor weather). During periods when the overflow space is utilise this requires a staff resource to manage. The site can accommodate approximately 800 cars on a peak day (including significant overflow car parking).

It is not known what the level of leakage is from car parking receipts of people parking without paying. Parking Officers are used to govern the car park.
During 2019 car parking charges are:

- £2.60 - Half day (up to 4 hours)
- £3.60 - All day
- An annual pass is available at £53

The tariffs are based on dwelltime and represent very good value for money in respect of a day out. There may be an opportunity to review the tariff / dwelltime structure.

Car parking income has increased from £50,238 in 2014/15, £72,539 in 2015/16, £76,009 in 2016/17 to £80,784 in 2017/18 and £81,468 in 2018/19. It should be noted that there are limited direct ‘costs’ against the car parking income when compared to activities such as catering and in-house managed events.

Woodland Trust

The Woodland Trust manages 1,276 sites that cover over 23,580 hectares of land. The Woodland Trust has acquired an adjacent farm which will be replanted to create a new and attractive woodland, with pastures and an existing ancient woodland offer. The site covers 95 hectares.

We set out below an aerial view showing the Woodland Trust's adjacent landholding in relation to the country park. The presence of the Woodland Trust on the adjacent land will almost double the publicly accessible area and the Trust is keen to work in partnership with NPTCBC.

Source: NPTCBC / Woodland Trust

This project will form the largest new woodland site as part of the Welsh Government's PLANT! Scheme, which will see 150,000 trees being planted, one for every child born or adopted annually in Wales.   This will create national media coverage and help to encourage people to visit the site.   There are some 8,000 Woodland Trust members within an hour of the site.

Initial information sets out the Trust's ambitions for the adjoining site, which include incorporating new permissive public access adjoining the country park (along the eastern boundary), the installation of a new raised footbridge leading to a view point and interpretive feature with panoramic views across the Vale of Neath.   The Trust's aim is to incorporate relatively informal recreation through waymarked trails, running routes and access for all abilities where possible. The Woodland Trust will also be looking to demolish buildings onsite which are considered unsafe and upgrade other buildings on the site for the benefit of biodiversity through the creation of hibernacula for bat and owl species in the area. Currently, there are no plans to introduce car parking on the site.

It is envisaged that people visiting the site will use the car park within the country park (generating revenue in terms of car parking fees and secondary spend in respect of the catering).

It is proposed that the site will formally open to the public in 2021, subject to agreement with the local authority. Source: Invitation Background - New woodland site - The Woodland Trust and discussions with the Woodland Trust.

Currently, no formal visitor modelling to identify future visitor numbers has been carried out. The Trust will be installing counters to identify the number of informal users and this along with data from existing sites they manage will be used to forecast potential visitor numbers.

This will present a number of opportunities in respect of generating additional revenue in the country park.

The Trust will also be carrying out a programme of community engagement.

Visitor numbers

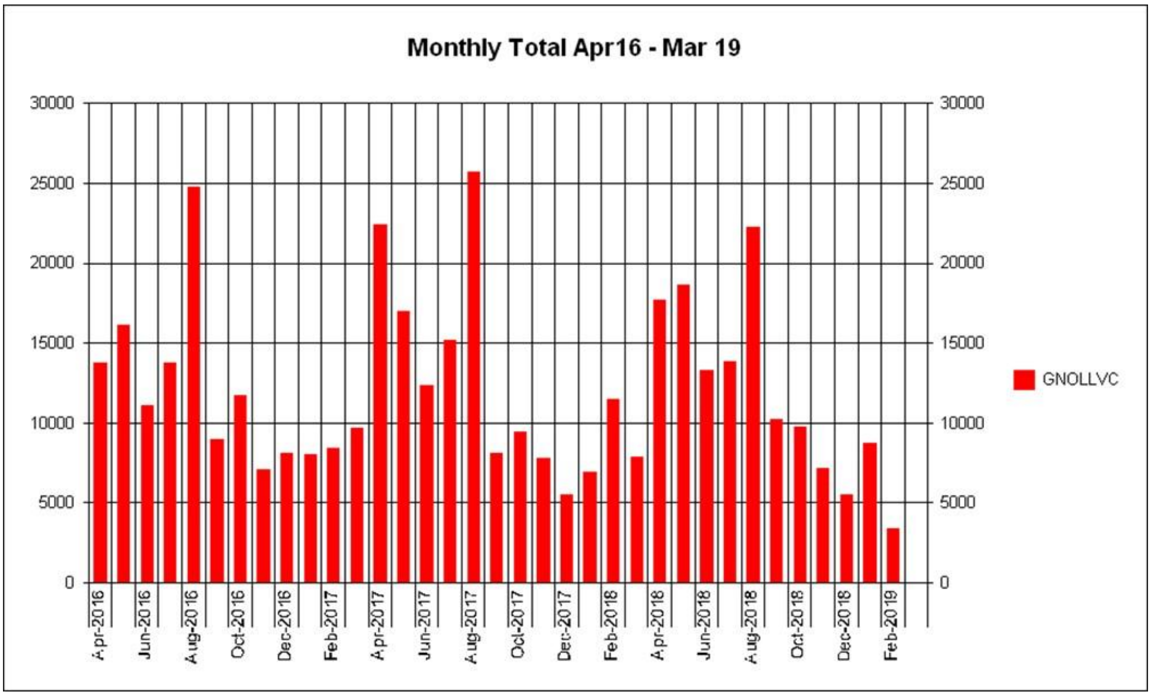
To date is has not been possible to fully identify visitor numbers to the country park as they are not collected and there are no counters at the main entry points to the country park. Also, as there are multiple entry points, this makes it difficult to identify annual visitor numbers accurately. It is estimated that annual numbers are approximately 420,000 visits in total.

In the chart on the following page we set out visitor numbers to the visitor centre.

Year	Visitor numbers to the Visitor Centre
2006 Total	148,538
2007 Total	161,898
2008 Total	153,842
2009 Total	170,050
2010 Total	181,732
2011 Total	167,672
2012 Total	149,422
2013 Total	157,992
2014 Total	143,283
2015 Total	155,291
2016 Total	152,044
2017 Total	149,535
2018 Total	144,627

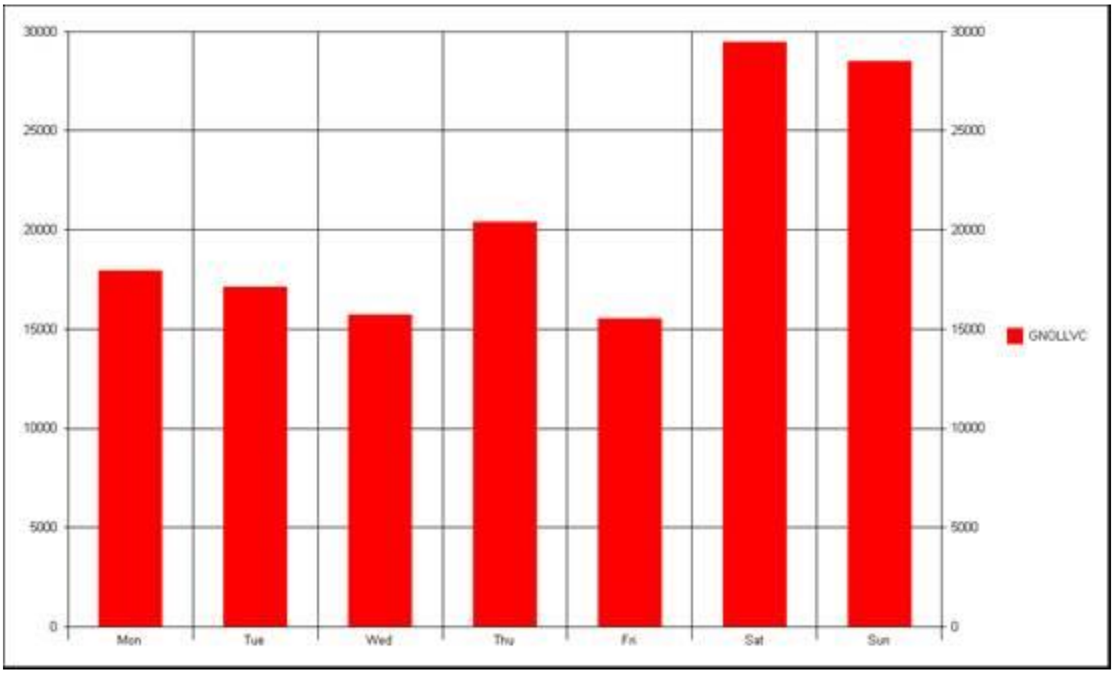
The chart below shows the monthly breakdown of visitors who use the visitor centre (please note March 2019 figures are not available and the figures for February 2019 are only for a part of the month).

As would be expected, the summer month of August is the busiest month of the season followed generally by April (Easter holidays) and May (half term). Clearly the wetter / colder months of October through to February are quieter because of the lack of indoor facilities. This is not unexpected as the majority of country parks are focussed on the external environment.



Source: NPTCBC

In respect of the visitor centre, as would be expected, the most popular days are Saturday and Sunday, with a relatively even spreadsheet throughout the weekdays (apart from Thursday). The figures are from 2018.



Source: NPTCBC - 2018 by Day of Week (Ref: GNOLLVC05)

Visitors to Gnoll Estate Country Park

A module of primary research has been carried out to support the development action plan for Gnoll Estate Country Park. The research questionnaire was promoted by Neath Port Talbot County Borough and generated a very good level of responses (818). The questionnaire was available in English and Welsh Language. Please note figures have been rounded.

Reasons for visiting Gnoll Estate Country Park

To walk and enjoy the natural setting is the main reason why 41% of respondents visit the country park and in terms of the future development action plan it will be important to ensure future interventions do not impinge negatively on the natural setting. To walk the dog and use the play areas are also important attractors. Parkrun is another key attractor and with the development of the adjacent woodland this may present further opportunities to engage with the 'running' market place. It is interesting to note that for only 1.5% of visitors the main reason they visit is the café. Please note people attending the fair or coming for a picnic generated a response of less than one percent.

Main reason for visiting Gnoll Estate Country Park	%
To walk / enjoy the natural setting	41%
To walk the dog	25%
To use one of the play areas	12%
To take part in Parkrun or Junior Parkrun	7%
To attend an event	4%
To meet friends and family	3%
To exercise	3%
To watch the wildlife	2%
To use the cafe	1.5%
To cycle - using your own bike	0.9%
To picnic	0.5%
To go to the fair	0.2%

Gnoll Estate is a popular country park, with a high level of repeat visits and this is highlighted in the table below, which shows 46% of respondents visit at least once a week.

Frequency of visits	%
Every day	4%
Several times a week	18%
Once a week	24%
Once a month	27%
Less than once a month	14%
2 to 3 times a year	13%
I've only ever visited once	Less than 1%

In terms of dwelltime, less than 1% of respondents visit for less than 30-minutes. The majority (54%) stay for between 1 and 2 hours and only 2% stay for more than 4 hours (although this is likely to be impacted on the time of year when the survey was carried out – January 2020). However, it does highlight a potential opportunity to revisit the current car parking tariffs.

Dwelltime	%
Up to 30-minutes	1%
31 to 60-minutes	19%
1 to 2-hours	54%
2 to 4-hours	23%
More than 4 hours	2%

Group size

In terms of group size, this is mixed and set out below. More than half of visitors are in groups of two or three.

Group size	%
1	9%
2	34%
3	22%
4	23%
5+	11%

Age breakdown

35% of visitors are aged 50 and above with 10% aged 65 and over. The core family market place of respondents aged 25 to 49 represents 60% of people (see Table below).

Age	%
16 to 24	5%
25 to 29	10%
30 to 34	13%
35 to 39	14%
40 to 49	23%
50 to 64	25%
65 years and above	10%

Journey times to reach Gnoll Estate Country Park

Similar to other country parks, visitors are generally drawn from the local residential population base, with 71% of respondents living within 20-minutes of Gnoll Estate Country Park and 88% within 30-minutes of the country park.

Time taken to reach the country park	%
Less than 10 minutes	34%
11 to 20 minutes	37%
21 to 30 minutes	17%
31 to 40 minutes	5%
41 to 60 minutes	3%
More than 60 minutes	3%

Other

- 72% of respondents travel to the country park by car, encouragingly 27% walk to the country park and 1% use a bike (less than 1% use public transport.)

- 69% of respondents who answered the survey were female and 14% of respondents have either a long-term disability or health problem.

- 50% of respondents believe their fitness levels are either very good (18%) or good (32%). 38% feel they are average, 9% below average and 3% unfit.

- 73% of respondents are in employment (51% in fulltime employment, 16% are part-time, 6% are self-employed). 15% of respondents are retired, 4% homemakers, 3% students, 2% unable to work, 2% are carers and 1% are unemployed.

Marketing

There is an events brochure and the park does have a dedicated website and a facebook page. However, it is recognised that currently there are no dedicated available marketing resources (staff / budget) to promote Gnoll Estate Country Park. There is a need to invest in the marketing of the country park.

The overall visitor experience

We set out below a review of comments on both Trip Advisor and Facebook (taken from the latest reviews). A mixed range of comments have been generated on both Trip Advisor and Facebook. As can be seen the play generated a range of positive comments but the café and in particular the car parking generated mixed responses.

Trip Advisor
Name of Site: Gnoll Estate Country Park

Areas of the visitor experience	Example quotes (positive and negative)	Comments (on first 5 pages)			Comments
		Positive	Negative	Mixed response (positive and negative points)	
General comments		41	1	8	Majority of positive comments, few mixed reviews and only 1 negative comment.
Specific to facilities					
Toilets					No comments
Play	'The children's play area has swings and roundabouts plus ones for children with special needs' 'The "pirate" play area kept the young ones entertained for a good while' 'Lovely play park for children' 'Two great play parks' 'Well maintained play area for the little ones and older children' 'Great play area now extended with a new playground extension' 'The park for the younger children is excellent and so	10			The children's playground received mostly positive comments, many praised the accessibility for disabled children and the variety of play equipment. No negative comments.

	good to see it so disabled friendly’				
Catering	‘Cafe is ideal for an ice cream or tea/coffee other snacks plus they provide duck feed so the kids can feed the ducks’ ‘The cafe is fantastic’ ‘Lovely café’ ‘The cafe was lacklustre and could do with a makeover’ ‘No thanks, not for me. I shall look for places where pets are welcome’ ‘Dirty eating area with rubbish bins fully loaded. Tables were not cleaned frequently’	5	3		The café received mixed comments, some visitors enjoyed the café and the food whereas some felt that the café was due an upgrade or should be cleaned more frequently and that dogs should be allowed in the café.
Car parking	‘Parking is cheap’ ‘Plenty of parking’ ‘My only criticism is I think you should be allowed to pay for less than 4 hours at £2.60’ ‘The price of the car park is quite expensive if you only want to visit for a short while’ ‘I think £2 for parking is a lot as it is not employing anyone to take your money’	3	6		The car park received mostly negative reviews, many believed parking is overpriced, not enough disabled spaces and that there should be an employee working in the car park. On the other hand, some visitors commented that there was plenty of parking spaces at a reasonable price.

	'The only thing is there is not much disabled parking, would be good if there were more spaces' 'There is a large car park, with charges. Sadly, this stops me going as often as I used to when the car park was free'				
General appearance	'Well maintained with plenty of space to walk, ride and run' 'Very picturesque across the lake with multiple places to sit and take it all in' 'The park is very well maintained, and very clean' 'Beautiful grounds' 'The edge near the housing estate was somewhat scruffy and neglected' 'Where sign boards exist, they are dirty and partly unreadable'	7	3		The general appearance of the park received mostly positive reviews, many commented on the cleanliness, good maintenance and natural beauty of the park. Some visitors however suggested the need for a clean up of the park stating that parts of the park are 'scruffy' and 'dirty'.
Events	'Every Saturday morning there's a free timed 5k parkrun event. fully organised, with staff and marshals all around the course' 'The temp fairground for the summer was a great	5			The park's events received all positive reviews, the Saturday morning 5k Park Run, summer fairground and the annual vintage car show were

	success, the children loved it' 'They always have something on during school holidays' 'There is always something to do whether it's free activities including free circus workshop, free shows/Pantos' 'Went to see the annual vintage car show lots to look at'				mentioned within the positive reviews.
Other	'There was no information about the area' 'Lack of signage makes it difficult to find things' 'Caters for disabled' 'Accessible with a wheelchair' 'The park is suitable for wheelchair or motorised chair use' 'The area was well suited to wheelchair users with wide push button opening doors and good space between tables.' 'It's perfect for all ages, all disabilities'	5	2		Many positive reviews discussed how suitable the park is for disabled access. There were however two comments about the lack of signage around the park.

Quality of service	'AMAZING lovely staff, great atmosphere' 'Visit the cafe where you will find a very friendly member of staff' 'The lady in the cafe, very surly and unfriendly'	2	1		The quality of service within the café received two positive reviews where visitors enthusiastically praised the quality of service and one negative review for a particular member of staff.

Facebook

Areas of the visitor experience	Example quotes (positive and negative)	Comments			Comments
		Positive	Negative	Mixed response	
General comments		7		1	Mostly positive comments, limited quantity of reviews on the Gnoll Estate Country Park Facebook page.
Specific to facilities					
Toilets					No comments
Play					No comments
Catering	'Good cafe also on site'	1			Only one positive comment on the café.
Car parking					No comments
General appearance	'Had a great day beautiful place'	1			One comment regarding attractive appearance of the park.

Events	'Plenty of fun activities daily'	1			One comment regarding a good selection of daily activities within the park.
Other	'I walked approx 2miles earlier this evening with my two dogs without seeing a 'doggie poo' bin'		1		One negative comment regarding lack of bins for dog waste which could result in a decrease of positive comments on the park's appearance and cleanliness
Quality of service	'What polite staff at the cafe. Very helpful and went out of their way to help us'	1			One comment on a positive experience with a polite, helpful member of staff within the park's café.

From the visitor survey respondents were asked to rate the different facilities within the country park and the results are set out below.

A number of facilities generated good scores and the overall profile is positive. There is an opportunity to improve the elements highlighted as either average or poor. Interestingly, 36% of respondents felt car parking was either good or very good and only 18% felt it was either poor or very poor. Although in the comment sections within the overall survey there were a number of negative comments raised about car parking charges which some believe need to be *"at a sensible price to encourage people to visit".*

The café received a number of different comments, but overall it was felt that there is an opportunity to enhance the catering offer. *"The cafe staff are brilliant but really struggle on very busy days. So much so that we no longer visit on busy days as the staff simply cannot manage. Especially when they are single manned which is very often!! No other cafe elsewhere is ever single manned… Reintroduce Sunday dinners in the cafe…part time member of staff in the cafe to help with cover at lunch periods."*

Facilities	Very good	Good	Average	Poor	Very Poor	Didn't see / use
Car parking	10%	28%	26%	10%	9%	18%
Visitor information and signposting	6%	31%	34%	11%	4%	14%
Interpretation	5%	25%	30%	6%	3%	31%
Accessibility	15%	47%	24%	4%	2%	9%
Footpaths and trails	20%	50%	22%	5%	2%	1%
Seating	14%	36%	32%	10%	3%	6%
Café	11%	26%	28%	14%	8%	13%
Toilets	8%	27%	31%	15%	6%	13%
Play	17%	40%	20%	3%	1%	20%
Events	12%	30%	23%	8%	3%	24%
Provision of litter / dog bins	11%	33%	33%	8%	4%	12%
General cleanliness	20%	50%	25%	4%	2%	1%

Potential location for the overnight visitor accommodation

The Parks' Team has identified an area which could be used as a base for overnight accommodation within Gnoll Estate Country Park. This area is the former service yard of approximately, 3,455 square metres which is split over two levels. The space also incorporates a number of different built structures, many of which are in a poor state of repair.

The opportunity also incorporates the former Ranger's Cottage, which is in need of refurbishment. In respect of the former Ranger's Cottage the Council has prepared an estimate in respect of making the cottage good for use as a holiday cottage. Costs are estimated in the region of £216,000 (please see Appendix One). The Ranger's Cottage could alternatively be let as a residential unit on a long leasehold basis.

Former Ranger's Cottage with attractive views across the water from the bedroom

The site has a number of key strengths:

- High degree of privacy (partially surrounded by a high wall)
- Relatively flat areas
- Assumes adequate services are available (given cottage located on site and private residential property within 250 meters)
- The development site is reached by a very attractive route which passes the lower level pond
- Separate vehicular access
- There is an adjacent area which could potentially be used for guest car parking
- The cottage overlooks an attractive waterbody
- Within walking distance of the visitor centre / café

The development site is also home to a range of different buildings formerly used for storage. These are generally in a poor state of repair and the reinstatement costs involved to turn them into, for example, a shower / block and social space are likely to be prohibitive.

Mixed cluster of buildings – generally in a poor or very poor state of repair

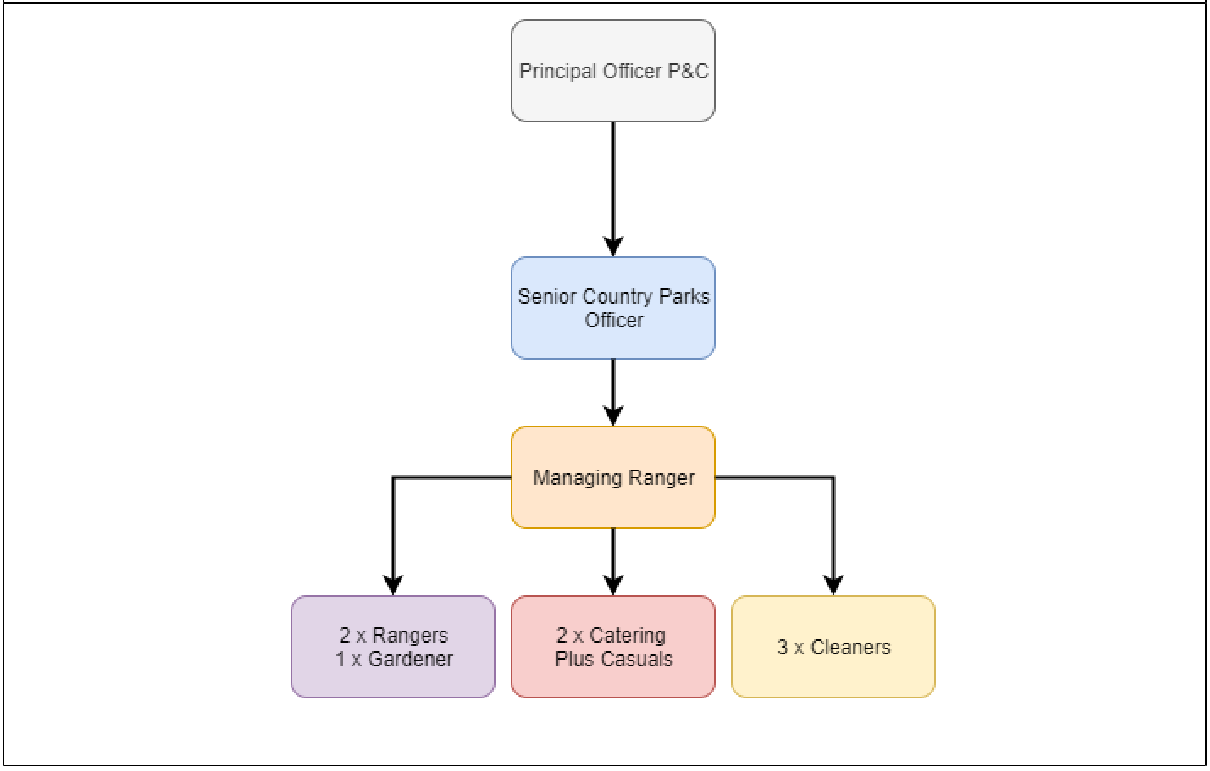
We understand that 'Potting Shed' cannot be removed.

Financials (income / expenditure)

Staffing

We set out below the current staffing model.

Organisational Chart



The current operation is run on a very lean staffing structure.

Country park

We set out below a table showing the financial position of the country park over a three season period – 2016/17 to 2018/19.

The overall level of revenue support required has increased from £101,000 to £155,000. The highest figure recorded in 2018/2019 is mainly due to a contract cost of £42,216 whereas for the previous two years the annual cost was less than £5,000. Staff costs have also increased over the three-year period, which was due to an internal review of staffing.

Cost / income centres	2016/17	2017/18	2018/19
Costs			
Employees	85,794	116,985	126,139
Premise expenses	26,848	25,575	20,749
Supplies and services	25,197	25,447	68,581
Transport and plant	4,653	14	2
Support services	48,958	33,121	38,056
Total expenditure	191,451	201,140	253,527
Income	90,221	107,555	98,276
Transfer from reserves	163	0	0
Net position	**-101,067**	**-93,585**	**-155,252**

During 2016/17, a cleaning recharge cost of £27,951 was included within the financial information. This recharge was not repeated during the latter two years. The higher supplies and services cost in 2018/2019 relates to expenditure on the Moss House Dam Culvert.

During 2018/19 no allowance was made for a recharge for insurance costs – the previous two years a charge of just under £4,000 was allocated. Although during 2018/19 there was a charge for miscellaneous insurance charges.

Catering

We set out below an overview of the catering financial position over the last three years. Staff costs have been significantly reduced from £109,000 to £78,000 during the 2018/2019 season. Although this is mainly related to payments made in 2016 / 2017 of £22,000 for sick pay, redundancy and early retirement payments (these high costs were not repeated again).

Income has only increased by £5,000 over the three-year period.

Cost / income centres	2016/17	2017/18	2018/19
Employees	109,473	76,796	77,742
Supplies and services	78,450	73,086	80,769
Support services	1,518	1,518	-
Total expenditure	**189,441**	**151,400**	**158,511**
Income	**167,839**	**173,542**	**173,122**
Transfer from reserves	16,430	-	-
Net position	**- 5,172**	**22,143**	**14,612**

As a percentage of income, wage costs have varied from 65.23% in 2016/17 to 44.25% in 2017/18 and 44.91% in 2018/19. We would usually expect wage costs to be nearer 35% of income, but the higher staff costs are due to the use of casuals which have a high cost.

As a percentage of income, the purchase of food-stocks has varied from 41.9% in 2016/17 to 39.3% in 2017/18 and 43.0% in 2018/19. We would usually expect direct food costs to be between 35% and 40%.

The average catering spend per head of visitors to country park is approximately 41p.

2.2 Summary SWOT analysis

Below we set out a summary SWOT analysis, which identifies the key strengths, weaknesses, opportunities and threats.

Strengths	Weaknesses
• Existing throughput of visitors • Attractive wider country park with impressive water features • Varied topography and landscapes help to create zones of use • Neath Train Station is within walking distance of the country park	• Limited staffing resource available • No dedicated specialist marketing staff are employed and no real marketing budget • Limited menu offer within the café and limited staff • Look and feel of café detracts from its potential

• Lean staffing profile helping to create a stronger financial position (but staff are stretched) • Heritage features add to creating a 'sense of place' • Large-café with meeting room (although offer could be improved) • Former Ranger's cottage could lend itself to holiday lets (depending on final refurbishment cost) • Dedicated and private area available to introduce overnight visitor accommodation • Proximity to M4 linking through to conurbations of Bristol and via M5 to Birmingham • Established programme of events	• No real data available in respect of visitors to the wider country park • Heritage remains hidden • Limited interpretation of heritage and natural environment is available for visitors • Low awareness of the country park outside of the immediate local area • Some paths / areas of the parkland could be enhanced (it is recognised that there are limited staff resources available)
Opportunities	**Threats**
• Potential to introduce low key waterbased activities (in lake /reservoir adjacent to visitor centre) • Improve visitor centre catering provision (and overall experience through décor, introduction of wood burning stove) • Introduce small indoor play equipment within the café space (for use during the winter period)	• No marketing support / resource secured and allocated to the country park • Not able to secure investment to enhance visitor offer (leading to a decline in visitor numbers) • Further investment in other attractions e.g. Margam Country Park and Afan Forest could draw visitors away from Gnoll Estate Country Park

• Introduce overnight visitor accommodation • Increase car parking provision • Consider introduction of ANPR car parking system (long-term) to maximise income from the car park • Consider revision to car parking tariff structure • Partnership opportunities with Woodland Trust and potential benefits from national marketing reach of Woodland Trust • A hidden 'gem' waiting to be discovered (when compared to Margam Country Park)	• Further cuts to staffing could impact on the quality of the offer within the country park • Further cuts to the budget for the overall country park

3.0 Strategic context

In this section of the report we review key strategic policies and set out the potential implications for Gnoll Estate Country Park.

3.1 Prosperity for All: economic action plan

Under the new Wales Economic Strategy, Welsh Government has committed to support the four 'foundation' sectors of the Wales economy – tourism, food, retail and care - acknowledging that for some parts of Wales the foundation sectors are the local economy. The Plan notes: "Our foundation sectors will draw on opportunities that our unique historic and natural heritage provides and promote and protect these precious assets…..Tourism and food: we work directly with individual businesses and the sector more broadly on issues as diverse as marketing, skills, facilities, delivering major events and product quality. We will build on our work with the sectors." The plan also notes that the connections between the foundation sectors and quality of place have important economic impacts.

The plan commits WG to promoting Wales through:

- Building on the unified brand for Wales as a place in which to invest, work, live, visit and study
- Deploying tourism campaigns as the main flag carrier for the promotion of Wales in the UK and internationally
- Deploying the cultural offer in support of the promotion of Wales' economic and commercial interests and building the country's image abroad.

3.2 National Tourism Action Plan

As part of its evidence base for the new national Tourism Action Plan (Welcome to Wales: Priorities for the Visit Economy 2020 - 2025), which was recently launched, Visit Wales has identified:

- Growth in overall tourism value from £4.5bn to £6.3bn (up to 2017)
- Overnight tourism on course to meet the 29% cash growth target
- 127,000 employed (in 2017) - but falling from 2015
- GVA growing faster than the overall economy average (6% in 2016) but per hour values below Wales average

Particular challenges remaining around:

- Over- reliance on regular repeat visitors from the UK and under-performance in new and overseas markets
- Per trip spend below UK average – with no real growth since 2012
- Seasonality of visits
- Impact / timing of Brexit

The ambition in WTW is 'to grow tourism for the good of Wales'. In contrast to pure economic targets the goals for WTW will be **economic growth**, **environmental sustainability**, **social and cultural enrichment**, **health benefits**, **satisfaction of visitors and locals**. The core Wales offer is defined as Outstanding Natural Landscapes, Creative Culture and Epic Adventure.

Visit Wales is encouraging the sector to combine a l**ocal-first focus in terms of 'sense of place', culture, community engagement and benefit, local supply chains, home-grown skills and businesses** with a 'world' perspective in terms of breadth of vision, quality comparisons, welcome, environmental awareness.

In terms of Visit Wales own investment key priorities will be around 4 core areas of activity:

- Great Products and Places
- Quality Visitor Experiences – including the destination management 'basics'
- An innovative Cymru / Wales Brand
- An engaged and vibrant sector

Success will be measured through 'hard' volume and value data, but also through perception and awareness analysis and contributions to well-being indicators. Development and consolidation of the 'This is Wales/ Gwlad Gwlad' Brand will continue. The brand objectives are to:

- Elevate our status
- Surprise and inspire
- Change perceptions

- Do good things

- Be unmistakably Wales

To reinforce this brand development Visit Wales has provided focused leadership for marketing and product development in terms of themed 'Years of…' with '…Outdoors' planned for 2020/2021.

3.3 Our Valleys, Our Future

Our Valleys, Our Future Delivery Plan sets the programme and actions to contribute to the three over-arching priorities for the Valleys Regional Park:

1. Good quality jobs and skills to do them
2. Better public services
3. My local community – Valleys Regional Park

The initial Delivery Plan (November 2017) included 12 areas for action relating to town centres, renewable energy, tourism and the physical environment. *"The £7m investment will start to connect Valleys with high-quality walking trails and cycle routes. It will support the development of a high-quality network of uplands, woodlands, nature reserves, country parks, rivers, reservoirs and canals, as well as heritage sites and connect them with our towns and villages."*[1]

A number of visitor sites have secured investment, including:

- Parc Brynbach - enhancements to the bunkhouse and visitor centre along with a new play offer
- Bryngarw Country Park - investment in a new education centre and developing interpretation within the park
- Ynysangharad War Memorial Park - provision of charging facilities and improving the paths and lighting
- Dare Valley Country Park - development of the accommodation product and cycling offer
- Parc Slip
- Cwmcarn Forest - investment in a joint lifelong learning space along with investment in interpretation and discovery trails
- Cyfarthfa Park - developing a catering offer targeting both members of the local community and visitors

[1] https://gov.wales/newsroom/people-and-communities/2018/first-valleys-regional-park/?lang=en

- Blaenavon World Heritage Centre - with a focus on improving the interpretative experience Caerphilly Castle to support Cadw's investment plan for this important tourism and heritage resource
- Parc Penallta - linked to the development of a visitor centre

It should also be noted that one of the key elements of the Valleys Regional Park is to provide opportunities for individuals to improve their health and wellbeing, social cohesion, increase people's knowledge and care of their environment and increase the economic value of recreation.

3.4 Shaping NPT – Neath Port Talbot Council Corporate Plan

"Since 2010, £84 million has been cut from the Council's revenue budget, with further cuts anticipated…"

The Council's Corporate Plan[2] sets out local priorities for the County Borough has been updated and sets out the priorities for the Council. It should be recognised that the operating environment remains challenging – reducing resources, deprivation along with poverty, increasing demand for services and some uncertainty surrounding Brexit. The Plan also recognises the role which tourism can play "we established a new Tourism Unit to focus on promoting and ensuring good visitor experiences in our key visitor destinations." There is a commitment in the plan to develop and promote the local tourism sector.

Importantly, the plan highlights that the Council is adopting a more commercial outlook in respect of its tourism / leisure services. For example, the development of a new commercial business plan for Margam Country Park. The Plan also mentions a need to "further develop the commercial potential at Margam Park." Developing new sources of income will continue to be an important driver of the local authority's operating model.

A further Council priority is to implement new ways of working, particularly to re-define the relationship and collaboration with external stakeholders so that all communities, whether in towns or rural areas, are sustainable, resourceful and vibrant.

3.5 Neath Port Talbot Destination Plan

The current Neath Port Talbot Destination Management Plan was launched in 2015 and runs until 2020. It is a business plan for building and managing the visitor economy for the county. The document captures and presents the information, learnings and priority actions to grow and develop the local visitor economy. The DMP is likely to be up-dated in line with new priorities and the needs of the tourism industry in the county.

[2] Shaping NPT: Neath Port Talbot Corporate Plan 2019-2022

Some of the key messages in the Plan and subsequent consultation with the tourism industry include:

- The need to increase the number of the higher spending visitors who are looking for new and varied experiences
- Converting day visitors to overnight staying tourists
- The need to strengthen the year-round appeal and accessibility of places to visit
- The need to ensure that the area attracts and invests in new high-profile product development in particular in the valleys areas in order to future proof the tourism economy and attract new visitor markets, high quality accommodation and attractions are specifically highlighted in the Destination Management Plan
- Improve the quality of existing visitor experiences through the development of a distinct sense of place

The area's natural environment, coupled with strong elements of cultural and industrial heritage, are the County Borough's main strengths as a tourist destination.

3.6 Planning context

The Local Development Plan (2011-2026) for Neath Port Talbot County Borough Council was adopted January 2016 and it runs between 2011 and 2026. The local development plan sets out a framework for development within the County Borough.

> "Attractions in the urban areas such as the Gnoll Country Park, Margam Country Park, Aberdulais Falls and Aberafan Seafront will contribute to the tourism economy and support tourism in the valley areas by promoting Neath Port Talbot as an inclusive tourism destination.
>
> A wide range of visitor attractions and areas of natural beauty present opportunities for Neath Port Talbot to continue to build on its tourism industry. The LDP acknowledges this and seeks to support the industry by **taking a more flexible approach to new tourism proposals** and resisting where possible the loss of existing facilities. Rheola has been allocated for a new tourism development providing holiday accommodation and ancillary facilities to attract visitors to the area.
>
> The Afan Valley offers a range of adventure sports, in particular mountain biking, with facilities and recent investment from the Cognation project resulting in the Afan Valley receiving national recognition as a mountain bike destination, providing world class trails. **Accompanied by Afan Forest Park Centre, Glyncorrwg Ponds and its**

links with Margam Park, the area has become the main tourist attraction in Neath Port Talbot, with an increase in visitor numbers which has in turn seen the development of small scale accommodation in the area.

The Vale of Neath has become an important tourist destination, with the Waterfall Country and Neath Canal seeing increased visitors and opportunities for growth. In addition, the Swansea, Dulais and Amman Valleys present opportunities with tourist attractions in these areas and also their close proximity to the Brecon Beacons National Park.

Linked to tourism, the strategy supports enhancements in leisure and open space provision for visitors and residents alike. Walking and cycling is promoted and facilities enhanced with the creation of the Amman Valley Cycle Track and Afan Valley Trail which links Aberafan Seafront to the Afan Valley, enhancing tourism facilities and improving connectivity between areas."

The LDP recognises the important role which tourism plays in the economy of Neath Port Talbot and that Gnoll Estate Country Park has a role (along with Afan Park and Margam Country Park) in developing the tourism economy.

Alongside the role which country parks and forest recreation sites play in the tourism economy it is also important to note that they have a role to play with the health and wellbeing of the community by offering opportunities from physical activity through to reducing social isolation through the provision of meeting and interacting with people.

Interestingly, the Local Development Plan has allocated Rheola Estate, Glynneath as a tourism led development opportunity: Policy TO 3 Tourism Led Regeneration Scheme "Land is allocated for the re-development of an area of brownfeld land at the Rheola Estate, Glynneath. This tourism led development will comprise up to 100 units of holiday accommodation." It will be important to keep a watching brief on this opportunity.

As Appendix Two we set out further policy information in respect of the Local Development Plan.

3.8 Country parks sector

Whilst it is noted the important role which the introduction of high-quality overnight visitor accommodation and enhancement of the existing visitor experience at Gnoll Estate Country Park can play a role in helping to deliver key strategic outcomes, it is also important to note that the country parks sector is not without its own challenges. Namely these relate to:

Balancing the books

Whilst country parks, parks and green spaces make significant positive contributions to communities it is recognised that these are not a statutory service and therefore the sector has been particularly hard hit. The State of UK Public Parks report (2016) noted "funding to parks and park services has significantly reduced over the decade, over 90% park managers report their maintenance budgets have fallen in the past three years and even more expect their funding will continue to be cut."   This has impacted on the ability of some parks to maintain their competitive edge.

The financial future for local authorities remains challenging and the Council will continue to experience pressure on its resources. As a non-statutory service, 'parks' and 'greenspace's will inevitably face pressure to retain a robust commercial edge.   Similar to many Councils budgets are being squeezed and this could impact on the development of new projects and maintenance of existing sites. At the same time there is a recognition that there is a need to invest within the offer at Gnoll Estate Country Park to ensure that it maintains its competitive edge.

Maintaining a competitive edge

The Council strives to provide high quality facilities and public access to open spaces where appearance, cleanliness and infrastructure are well maintained. The quality of the parks is linked fundamentally to the quality of the visitor experience. It is important, therefore, Council continues to invest in enhancing quality, to continue to provide the high standards which visitors now expect from facilities and to increase the range of facilities on offer.

However, retaining a high-quality experience and maintaining access to open spaces needs to be balanced with the need to build new markets and increase commercial activities (maximise revenue generation without impacting on the quality which make Gnoll Estate Country Park a special place to visit).

Changing consumer expectations

Competition for leisure facilities within the sub-region is extensive. In our own operational experience, we are seeing several emerging trends. One is related to the whole notion of 'seeking a bargain' and looking for the best deal out in the market has led to customers seeking discount admission prices – which has seen the growth of Groupon, Wowcher and other specialist discount sites.   The second trend is related to increasing expectation of a high-quality experience in the leisure market place.

Clearly, Gnoll Estate Country Park is well positioned to take advantage of the first trend (with very low economic barriers to access).   The action plan will help to target investment to improve the wider visitor experience.

Capital funding

It is interesting to note that the market place has been distorted by the introduction of new funding streams. For example, *"over ten years between 1996 and 2006, HLF delivered more than £538m of grant funding to over 220 individual parks. With increasing demand, the programme gained additional funding for England from Big Lottery Fund and by the start of 2014 over £700m in total has been invested in public parks since the start of the first programme"* (source: State of the UK Public Parks, 2014).

3.8 What does this mean for Gnoll Estate Country Park?

- It will be important for the interventions at Gnoll Estate Country Park to demonstrate that they contribute to economic growth (including improving the 'bottom line', placemaking and job creation

- It will be important for the new visitor accommodation to demonstrate that it helps to promote the core brand values set out above. This becomes more important if target funding is to be sourced in part from VisitWales.

- Additionally, enhancement of the existing visitor offer at the country park will provide further opportunities to encourage people to become more active – with associated health and wellbeing benefits. Some initiatives to improve the offer at Gnoll Estate Country Park will benefit local residents as well as visitors.

- The provision of new high-quality accommodation will help to deliver wider economic benefits and add to the profile of Neath Port Talbot as a destination. Additionally, the introduction of accommodation at the Country Park will further demonstrate the Council's commitment to developing the tourism product and also that they are an innovative and forward-looking Council.

- The County Borough Council faces a challenging financial operating environment which could impact on the development of capital projects and the maintenance of leisure sites (which are a non-statutory service).

- The development of Gnoll Estate Country Park responds well to the income generating / commercial drive which the Council is pursuing.

4.0 Consultation and primary research

4.1 Stakeholder consultation

A number of workshop sessions were held with a range of individuals as part of preparing the outline action plan for Gnoll Estate Country Park. These included Councillors, staff at the Country Park, Officers within the Council, the Friends Group, Woodland Trust and Park Run (please see Appendix Three for a list of consultees). **We set out the key themes to emerge directly from participants involved in the consultation.** It was emphasised that the country park has a good reputation locally.

Maintaining a careful balance

It is recognised that the country parks are facing continuing financial pressures and there is a clear driver to increase visitor numbers and income. However, at the same time there is a need to ensure the drive for commercialisation does not negatively impact on the quality of the overall visitor experience. There is a need to respect why people like and visit the country park in the first place.

Meeting different needs

Gnoll Estate Country Park is a local facility and the needs of the local users should be considered as part of the development plan. At the same time, it was felt through the introduction of visitor accommodation the country park will be able to draw in visitors from further afield.

Events do work well at the park with ease of access and proximity to the town as well as M4.

Car Parking

It was felt that the way the current pricing is structured that there is an issue particularly for visitors who stay for a short period of time.

There is an issue related to managing the car park on busy days (including Parkrun) which draws Rangers away from their everyday tasks. An issue has been raised in respect of the reliability of the car parking payment machines, which leads to staff being abused and the time taken to pay is excessive (even though a third payment machine has been introduced). All of which impact negatively on the visitor experience. However, with the installation of the new payment machines it is hoped that any downtime will decrease.

There is a requirement to look at the pricing structure, the approach to payment and the introduction of additional permanent car parking spaces. Overall the car parking charge is price sensitive given the proximity to locally deprived areas within the County Borough. Although the introduction of additional hard standing car parking space would need to be carried out once the claw back period in respect of the Ryder Cup Funding has expired.

There is also a need to manage the charging policy at the lower entrance. Interestingly, the annual season ticket of £53 is higher than for Margam, but the daily tariffs are considerably lower.

It will be important to get the messaging right in terms of how Council uses income raised from car parking to re-invest into park operation.

The café

The café faces a number of challenges from the limited kitchen facilities/space and limited staff at peak periods. This impacts on the food which can be served and also leads to visitors queuing at certain times.

There is some competition from Fun Days but this mostly helps reduce pressure on café service.

The café could benefit from a re-branding possibly linking it to the heritage of the park.

Park ranger resources

It is recognised through the consultation that the park is under resourced in terms of the number of ranger staff.   The reduction in the number of park rangers is affecting park appearance and operation, although it should be recognised that the park has maintained its Green Flag award.

Events

Events outside of the main Easter and summer periods offers an opportunity to extend the season and suggestions included introducing a Winter Wonderland type of experience and a temporary ice rink.

In respect of activities and events hosted at Gnoll Estate Country Park there is the opportunity to work with third party 'licensees' in respect of small, low key activities.   This could include making areas with the country park available for hire for such activities as tai chi and yoga which could generate additional income directly (via a license fee) and indirectly (via car parking tariffs and secondary spend within the café).

There is the possibility to expand Fun Days with a programme for schools' packages in the three weeks before summer holidays – could include older children with exercises such as raft building etc.

Parkrun has been a great success (3,500 registrations, more than half from postcode areas SA10 and SA11. Also important for mental aspects – more than 20 volunteers every week.

Visitor accommodation

The development of appropriate overnight visitor accommodation was broadly supported and was seen as a positive step for the country park. Due to the high outline costs to refurbish the former Ranger's Cottage into a high-quality self-catering offer and alternative would be a low-spec refurbishment and let the cottage to a member of staff, who could help oversee a visitor accommodation offer at the country park.

Heritage remains hidden

It was felt (particularly by the Friends) that the heritage remains hidden within Gnoll Estate Country Park. An option to consider is cellars could be opened up and weekly tour could be run by the Friends' organisation (although the resources of the Friends are limited).

The Friends Group

The Friends Group is predominately made up of older adults and it was felt that a younger Friend Group who could support the Rangers with physical tasks would be very beneficial.

Working with the Woodland Trust

The opportunities presented by the adjacent Woodland Trust are positive:

- Increase in visitor numbers
- Income generation potential – car parking and also secondary spend in the café
- Use of Woodland Trust Volunteers
- Market profile / reach of the Woodland Trust is significant
- Woodland Trust could provide expertise in terms of woodland management across the country park

The Woodland Trust will not have visitor services so there is a strong opportunity for shared use at the visitor centre. There is also potential to extend the offer e.g. wildlife camera images shown in the visitor centre to create a further point of interest.

5.0 Market assessment

5.1 Demographic profile

In terms of exploring the opportunities to introduce overnight visitor accommodation at Gnoll Estate Country Park, it is important to understand the residential population living within the 120-minute drivetime contour (the short break market place). It is important to note that the UK marketplace is witnessing a growth trend for people going on short breaks (and longer breaks) closer to home. We have commissioned two drivetime profile reports for the 0 to 120 and 121 to 180-minute profiles. [3]

Headline profile

Within the 120-minute drivetime contour the population reaches just over 3.8 million (3,861,962) residents and within the 121 to 180-minute doughnut the figure is over 6.4m residents. The residential population within the overall 180-minute contour is 10.3 million, which reaches past Birmingham to the north east, Reading in the east and Exeter in the south west of England.

Drivetime contour	Population
0 to 120	3,861,962
121 to 180	6,415,678
Total	**10,277,640**

If the M4 relief road is developed in the future this will help to improve how far you can travel (within the same time) along the M4 which will extend the size of the market (i.e. you will be able to travel further within the same drivetime). Please see Appendix Four: how drivetimes are calculated.

[3] All demographic data and maps supplied by CACI: Crown copyright 2013. Source: Office for National Statistics licensed under the Open Government Licence v.3.0. © Crown Copyright. Data supplied by National Records of Scotland. Source: NISRA : Website: www.nisra.gov.uk Contains Ordnance Survey data © Crown copyright and database right 2013

Economic activity

We set out in the table below the economic activity in respect of both drivetime profiles.

Economic Activity	0 to 120 minutes			121 to 180 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
Economically active	1,925,942	67.9	96	3,295,659	70.6	**101**
- Employee full-time	1,058,563	37.3	96	1,829,480	39.2	**102**
- Employee part-time	404,806	14.3	97	660,005	14.1	**103**
- Self employed	252,326	8.9	100	461,578	9.9	**104**
- Unemployed	114,520	4.0	99	191,069	4.1	93
- Fulltime student economically active	95,727	3.4	100	153,527	3.3	95
Economically inactive	909,258	32.1	**105**	1,371,773	29.4	97
- Retired	424,700	15.0	**103**	654,834	14.0	**101**
- Full-time student economically inactive	165,287	5.8	94	269,114	5.8	100
- Carer (looking after home or family)	108,749	3.8	95	195,691	4.2	98
- Long term sick or disabled	154,026	5.4	**101**	160,979	3.4	81
- Other economically inactive	56,496	2.0	**105**	91,155	2.0	90
Unemployed aged 16-24	35,137	1.2	**107**	53,640	1.1	93
Unemployed aged 50-74	20,374	0.7	**106**	37,423	0.8	98
Unemployed: never worked	16,980	0.6	**110**	30,170	0.6	92
Long-term unemployed	44,444	1.6	**108**	75,959	1.6	94
All people aged 16 to 74	**2,835,200**			**4,667,432**		

Within the immediate 120-minute drivetime contour the representation of residents who are economically active is slighted below the index figure by 4%, for the 121 to 180-minute doughnut this is broadly in line with the index figure (just 1% above).

In terms of unemployment for both profiles encouragingly the representation of residents are below the index figure by 1% and 7%.

Within the immediate drivetime contour the representation of residents who are economically inactive is 5% higher than the index figure. This is particularly pronounced for residents who are categorised as unemployed aged 16 to 24 (7% higher), unemployed aged 50 to 74 (6% above), unemployed never worked (10% higher) and long-term unemployed (8% higher). The converse is true for residents living within the 121 to 180 minute drivetime profile where the same categorises are all below the index figure.

Age profile

In the table below, we set out the breakdown of the age of residents living within both drivetime profiles.

Population by Age	0 to 120 minutes			121 to 180 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
0-4	229,259	5.9	96	394,668	6.2	100
5-7	126,622	3.3	96	222,465	3.5	**102**
8-9	80,562	2.1	97	140,747	2.2	**102**
10-14	222,525	5.8	100	382,266	6.0	**103**
15	46,643	1.2	99	81,569	1.3	**104**
16-17	95,860	2.5	100	164,638	2.6	**104**
18-19	105,659	2.7	**105**	170,224	2.7	**102**
20-24	269,835	7.0	**103**	423,759	6.6	97
25-29	247,816	6.4	94	404,234	6.3	92
30-44	748,511	19.4	95	1,275,667	19.9	97
45-59	762,496	19.7	**101**	1,254,174	19.5	100
60-64	245,604	6.4	**105**	393,845	6.1	**101**
65-74	359,419	9.3	**107**	580,891	9.1	**104**
75-84	227,798	5.9	**106**	372,251	5.8	**104**
85-89	61,836	1.6	**110**	101,442	1.6	**108**
90+	31,517	0.8	**108**	52,838	0.8	**109**
Total population	**3,861,962**			**6,415,678**		

The representation of young children (aged 5 to 9) are either slightly below or slightly above the index figure across both drivetime profiles. Across both drivetime profiles for the core family market (adults aged 25 to 44) the findings are mixed. For example, the representation of adults aged 30 to 44 within the 120-minute drivetime contour are 5% below the index figure, whereas the representation of adults aged 25 to 29 within the 121 to 180-minute drivetime profile are 3% below the index figure.

Across both drivetime profiles there is a high representation of older adults, for all age brackets of residents aged 60 and over.

Social grade

The table below shows a breakdown of the social grade.

Social Grade	0 to 120 minutes			121 to 180 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
AB: Higher/intermediate managerial /admin / professional	247,551	20.9	94	470,013	24.5	**110**
C1: Supervisory, clerical, jr managerial/admin/professional	359,642	30.3	98	574,162	30.0	97
C2: Skilled manual workers	259,406	21.9	**105**	409,849	21.4	**103**
DE. Semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers	318,763	26.9	**104**	460,564	24.1	93

The representation of residents from the AB (higher/intermediate managerial /admin / professional) within the immediate drivetime contour is below the index figure by 6%, however, for the 121 to 180-minute drivetime profile the figure is some 10% above the index figure.

The representation of residents from the C1 (supervisory, clerical, junior managerial / admin / professional) social grades across both profiles are below the index figure by 2% and 3% respectively.

The representation of residents from the C2 social grade group (skilled manual workers) are above index for both profiles (5% and 3%).

The representation of people who are classified as DE social grade (semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers) are above the index figure for residents within the 0 to 120-minute contour (4%) and below the index figure for the 121 to 180-minute profile (7%).

Social Grade	0 to 120 minutes			121 to 180 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
AB: Higher/intermediate managerial /admin / professional	247,551	20.9	94	470,013	24.5	**110**
C1: Supervisory, clerical, jr managerial/admin/professional	359,642	30.3	98	574,162	30.0	97
C2: Skilled manual workers	259,406	21.9	**105**	409,849	21.4	**103**
DE. Semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers	318,763	26.9	**104**	460,564	24.1	93

5.2 Competitive landscape

For ease of reference we set out as Appendix Five the provision of self-catering accommodation providers within the locality using the following categories:

- Forest lodge sites
- Camping sites
- Touring caravan parks
- Static caravan parks
- Luxury self-catering cottages
- Glamping sites
- Luxury self-catering lodges

Alongside the above, AirBnB lists a number of properties which are available in the County Borough which has a bearing on supply and potential capacity. There is a relatively low level of existing accommodation types across the County Borough. Examples include forest lodges such as Afan Lodge. Pods have been introduced at Gelli Hir and Mountain View Camping, the closest pod site is approximately ten miles from Gnoll Estate Country Park.

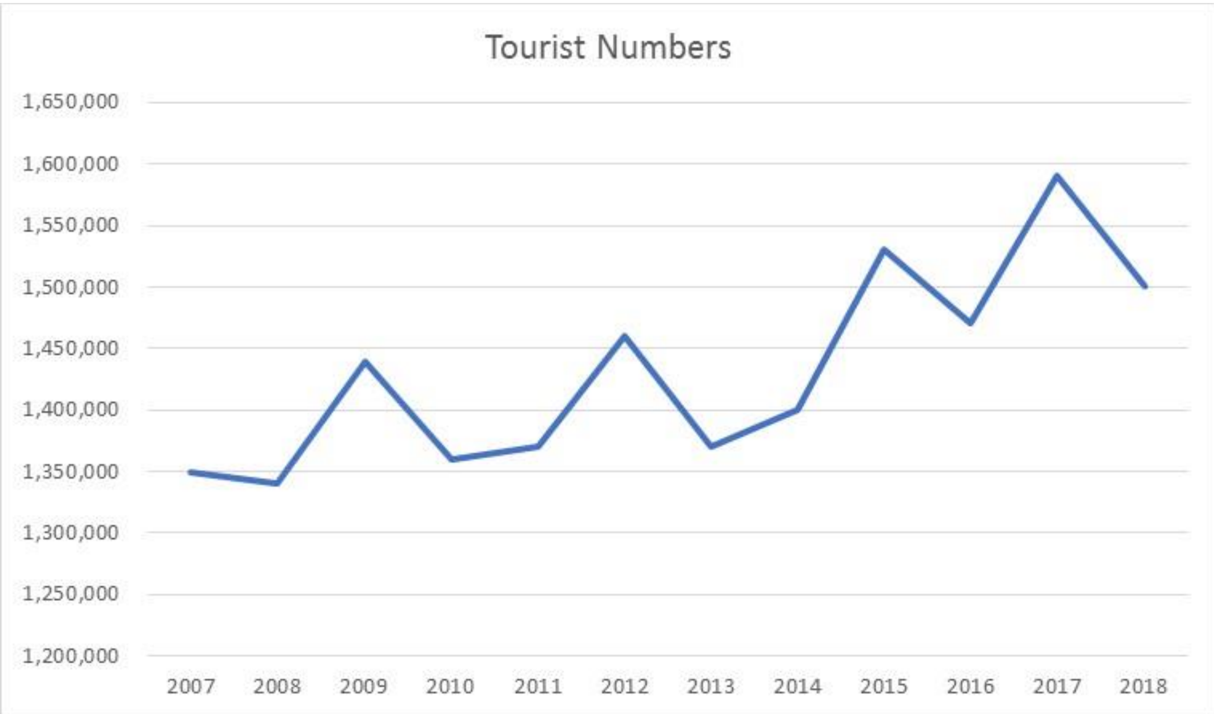
Also, as Appendix Six we provide a snapshot of country parks and forest recreation sites within 10-miles of Gnoll Estate Country Park. It is recognised that Margam Country Park is outside of this 10-mile radius and that there are a number of small-scale green spaces within the locality. The market place is highly competitive and, in comparison to Margam Country Park and Afan Forest Park, Gnoll Estate Country Park remains almost a hidden asset or undiscovered ‘gem’ which has limited recognition outside of its immediate catchment. This does emphasise a need to invest in marketing to help raise awareness of this important ‘resource.’

5.3 Tourism sector

Neath Port Talbot is a developing tourist destination and tourism plays an important role within the local economy supporting over 1,500 FTE jobs within the County Borough. The County Borough is bordered to the north by the Brecon Beacons National Park (a leading tourist destination) and to the west by Swansea and Gower. Similar to the Brecon Beacons Gower is an established tourist destination and competes against the County Borough.

There has been significant investment in creating a leading mountain biking destination at the nearby Afan Forest Park.

Tourist numbers are set out in the graph below which shows overall growth between 2007 and 2018, although it should be noted that a slight dip was recorded in 2018 compared to 2017. However, across the period overall growth has been recorded from 2007 through to 2018.



It is recognised that the County Borough attracts a high number of day visitors and one of the key drivers is identifying opportunities to convert day visitors to overnight tourists. During 2018 total visitor numbers reached 1.5 million and a high proportion - 1.16 million were day visitors.

Non-serviced accommodation tourist numbers shows overall growth from 250,200 in 2007 to 280,700 in 2018. However, a peak of 299,800 was achieved in 2011.

In terms of the breakdown in accommodation used by staying visitors during 2018 non-serviced accommodation generated the lowest level of usage (0.03 million) when compared against people SFR (0.22 million) and visitors using serviced accommodation (0.09m)

5.4 Visitor accommodation and occupancy data

5.4.1 Occupancy data

The latest Wales Tourism Accommodation Occupancy Survey is for 2017 (published in June 2018) and it provides a detailed breakdown of occupancy of serviced and non-serviced accommodation across Wales (on a national and regional basis). Below we set out summary information:

Wales

Self-catering (cottages and apartments)

- During 2017 the average unit occupancy achieved (for both agency and independently let units) was 58%, the highest level recorded in nine years. Average annual occupancy was 52% in 2016, 50% in 2015 and 50% in 2009.

- Peak months in 2017 were June through to September (achieving occupancy levels of 66%, 76%, 90% and 70% respectively) and the lowest months were November through to March (38%, 43%, 40%, 50% and 40% respectively). The increase in February could be due to the February half-term school holiday.

- The average occupancy rate achieved over the 'summer season' (May through to October) was 70% during 2017. This has shown positive growth over the previous three years 2014 (63%), 2015 (63%) and 2016 (66%).

- In terms of annual occupancy levels achieved based on the tariff charged, units which charged less than £300 achieved an average occupancy of 43%, those which charged £300 to £499.99 occupancy increased to 48%, those charging £500 to £800 saw a further increase in occupancy to 58% but for those charging over £800 there was a slight dip to 55%.

- Annual average occupancy by grade of self-catering accommodation was 53% for 2 star units, 60% for 3 star units, 55% for 4 star units and 57% for 5 star units. 5 star graded units achieved the highest levels of occupancy during July (82%), August (93%) and September (72%). Interestingly, ungraded properties achieved the highest average annual occupancy level of 62%.

Touring caravan and camping parks

- Average annual (May to October) pitch occupancy achieved at touring caravan and camping parks overall has only increased by 1 percentage point between 2009 (39%) and 2017 (40%). 2017 saw a slight decline from 41% pitch occupancy level in 2016 to 40%.

- Overall there has been a general recovery from a low of 31% average pitch occupancy achieved in 2014 to 40% reported in 2017. Please note this is based on a small sample size

- Peak months are July at 49% and August at 63%. The months which achieved the lowest levels of occupancy were May 34% and October 19%.

- Since 2012, pitches located in coastal sites have achieved a higher level of occupancy – although the difference narrowed in 2017.

Hostels and bunkhouses

- For hostels and bunkhouses, the average bed occupancy during 2017 was 53%

- Longer term trends are positive - average annual occupancy has increased from 41% in 2010 to 53% in 2017.

- During 2017, the months which achieve the highest levels of occupancy were April (62%), June (63%), July (66%) and August (73%).

- January recorded the lowest average annual occupancy – some 28%.

Regional – South West Wales
Self-catering (cottages and apartments)

- Average self-catering unit occupancy during 2017 in South West Wales for both independent and agency let units was 58% which is in line with the average across Wales. Both Mid-Wales and South East Wales recorded lower levels of unit occupancy 53% and 50% respectively.

- At a regional level in terms of occupancy across different years and periods within the year, combined data for both independent and agency let self-catering properties is not available. To look at long-term trends we have reviewed data for independently let units only (data for agency let units is only available for three years).

  - Peak months for occupancy in 2017 were June through to September (71%, 71%, 86% and 68% respectively) and the lowest months were November through to March (30%, 29%, 36%, 46% and 33% respectively).

  - The average occupancy rate achieved over the 'summer season' (May through to October) was 68% during 2017 some 6 percentage points higher than in 2016. There has been growth over the previous three years 2014 (52%), 2015 (62%) and 2016 (62%).

- For agency let units, the annual average occupancy was 59% in 2017, which has increased from 51% in 2015. Over the summer season (May to October) the average unit occupancy has increased from 64% in 2015 to 69% in 2017.

Regional data for touring caravan and camping parks and hostels and bunkhouses has not been captured.

5.4.2 Visitor accommodation products

Self-catering accommodation product development trends

Youth Hostel Association

The YHA has some 160,000 members and over 150 sites (including camping barns and bunk houses). A number of their units have been developed within heritage type of buildings. A number of also been developed adjacent to visitor experiences including the Sill in Northumberland (in partnership with the National Park Authority), the Eden Project in Cornwall and CONKERS in the National Forest.

During 2014 the YHA generated 1,755 million overnight stays which have increased from 1,719 million in 2011 (a peak of 1,759 was recorded in 2012). Although they only achieved an average occupancy of 54% (2014), this represents an increase from 51.7% in 2011. Spend per overnight stay declined from £23.27 in 2011 to £22.32 in 2014. More recent data is not available.

Revenue has increased from £43.4 million in 2015 to £49.4 in 2017/2018 (their accounting period).

In the early 2000s, the Youth Hostel Association divested itself of a number of properties. They have reinvested in their existing stock – during 2017/2018 the refurbishment budget was in the order of £5.5 million (on top of over £4 million on general maintenance and repairs).

The YHA has an investment programme in developing alternative accommodation (34 to date), which includes bell tents, tipis, pods and safari tents. They also have a further 40 sites which offer 'pitch-up camping'. Income from the alternative accommodation units during 2017/2018 was slightly less than £1 million (an increase of 25% over the previous year).

Some 70 sites are Learning Outside of the Classroom accredited. The YHA generated 110,000 residential school trips during 2017/2018.

Interestingly during the year their Exclusive Hire business, where hostels can be booked for sole use, has increased by 14% - generating £1.5m in income.

Glamping

The term 'glamping' has been coined to represent more luxurious tents and forms of camping such as pre-erected tents, wooden tents, shepherd huts and yurts. There has been growth in this sector and this has seen the introduction of businesses such as Canopy and Stars (a booking agency for luxury camping experiences).   These are often lifestyle businesses, but a review of Canopy and Stars show the relatively high tariffs which can be achieved.


External and interior photos of a yurt with a wood burning stove

A number of these are high tariff products in rural locations responding to market needs for high quality innovative and distinctive experiences.

Eskdale Camping Pods
http://www.campingandcaravanningclub.co.uk/ukcampsites/alternative-camping/eskdale/

Medium scale holiday lodge operators

There are several medium scale operators of lodges in the UK, including Forest Holidays. Forest Holidays is a growing player in the self-catering cabin market with its group of nine holiday sites, most of which offer some 40-70 units. These are all located in established forest blocks within the Forestry Commission's estate. Interestingly, they have very low-key central facilities (the Forest Retreat) – in effect a reception point and small catering offer, but a number have now been developed adjacent to successful Forestry Commission recreation sites e.g. Sherwood Forest.

Forest Holidays are positioning themselves as an upper level provider of forest breaks where cabins have hot tubs and wood burning stoves. Key site requirements are based on an large, accessible and attractive forest location.

Luxury self-catering cottage clusters

There are several examples of luxury clusters of self-catering accommodation which have been successfully developed in the UK. Perhaps, the most well known example is the Watermark experience in the Cotswolds, where high end 'cottages' have been developed around attractive lakes (former gravel pits). To date they have developed over 300 cottages around the lakes which can be purchased and then let on behalf of their owners.

Second homes (holiday homes)

In recent years there has been a trend towards second homes and holiday homes within the UK. At the upper end of the scale these are traditional bricks and mortar houses in popular holiday locations which are used by the owners for holiday purposes.

In terms of the housing stock the 2011 Census reported that out of the overall second homes market place some 11% or just over 165,000 were for holiday use. It should be noted that a number of Councils have advocated against turning existing residential property into holiday homes as this distorts the housing market for local residents.

Niche – self-catering provision

The unique selling point of many niche accommodation products is their limited scale which helps to create a level of distinctiveness and uniqueness. An example is the Living Architecture project where high end homes designed by leading architects are used as holiday accommodation – please see: http://www.living-architecture.co.uk/. The product commands a premium price, for example, the Shingle House in Kent has a tariff of £2,275 for a three night weekend break during August 2018. The Landmark Trust has developed luxury holiday accommodation within a number of historic properties and Under the Thatch market a number of high-quality historic holiday cottages in the UK and Europe.

Cadw, the National Trust and English Heritage have entered the self-catering marketplace

In a drive to maximise income generated from their estates and property portfolio Cadw, the National Trust and English Heritage are letting out high quality self-catering cottages. The National Trust which has over 5 million members has a portfolio of approximately 400 self-catering cottages, some of which levy a premium tariff. Additionally, the National Trust has a range of other properties including bunkhouses, bothies along with camping and caravanning sites and sites with wooden camping pods. Clearly, membership and / or national organisations have a significant advantage in terms of market reach.

Touring parks

The touring park sector is fragmented within the UK with a very wide range in size and characteristics of sites available. In terms of ownership a majority of sites are privately owned though local authorities and other public bodies own sites.

However, the Camping and Caravanning Club which has approximately 700,000 members and The Caravan and Motorhome Club which has approximately 350,000 member households (approximately circa 1,000,000 people) both operate a national network of sites.

The National Caravan Council estimates that there are approximately the following number of caravans in use:

- 555,000 touring caravans
- 365,000 caravan holiday homes
- 225,000 motorhomes

During 2017 there were just over 14,000 new registrations of motorhomes, up from 4,700 in 2004. In respect of the dispatch of new touring caravans the overall number delivered each year to the domestic market has increased from 23,100 in 2000 to 23,900 in 2017. However, a peak of over 33,000 was recorded in 2007. Although encouragingly, number of new caravans has been increasing since 2013.

It is interesting to note that with rising fuel prices it can make it prohibitive for touring caravan owners to take long continental breaks and with recent investment in the facilities at a number of key sites it has helped to strengthen the UK touring caravan market place. Investment in the facilities has been shown to improve occupancy.

New(ish) business models

AirBnB represents a relatively new business model which enables small-scale single owners of holiday accommodation to rent out individual rooms and whole properties to individuals. In effect AirBnB is performing a marketing and booking role for property owners.

Since launching the product offer has been developed with:

- Guests, since 2016 have been able to book an experience as part of their trip (guests can book over 800 experiences)

- The introduction of Airbnb Plus whereby properties are inspected

It is important to note the findings from recent Airbnb research[4]: *"Between July 2017 and July 2018, hosts and guests using Airbnb contributed an estimated £3.5 billion to the UK's economy, with approximately 8.4 million inbound guests travelling over this period…Over the last year, residents from 2,600 villages, towns and cities have welcomed 8.4 million guests who have travelled on Airbnb. This activity stretches across the whole of the UK, from big cities to rural villages, with 223,200 active listings on Airbnb in England, Scotland, Wales and Northern Ireland helping visitors travel in a more flexible way."*

Furthermore…"Between June 2017 and June 2018, the top five trending regions for travel in the UK included: 1 Wales The region has seen an 81 percent year-on-year growth in inbound guest arrivals….. Wales proved to be one of the most popular regions for Airbnb activity in the UK, attracting 467,000 inbound guests over the year-long period – with 21 percent of these guests arriving as part of a family 12 The following page captures the activity of the Airbnb community between 1 July 2017 and 1 July 2018. (the highest in the UK). The economic activity generated by these guests, who stayed at 13,600 active listings, totalled £155 million."

5.4.3 Wider trends in the accommodation sector

Through working on consultancy projects, managing a hotel and luxury self-catering cottage on the Isle of Wight and the involvement of one of our directors sitting on the board of an operating company providing luxury forest lodge breaks in Dorset we are noticing a number of trends in the accommodation sector.

- Expectations are rising in terms of the quality of accommodation being demanded by guests e.g. use of integrated hot-tubs and wood burning stoves within lodge developments

- For single operation sites, agencies such as Hoseasons and Bookings.com are key channels to market

- There is a trend to combine holiday with specific activities or experiences (see Airbnb which now allows guests to book local experiences alongside their accommodation)

[4] Airbnb UK Insights Report 2018

- On domestic short breaks people are holidaying closer to home
- Demand is increasing for accommodation units which can accommodate either large groups of friends or multi-generational families. In our experience the larger and/or higher quality units often sell out first.
- Research carried out by Barclays[5] identified that respondents felt that an important factor or motivation in use of their leisure time was 'escapism/distraction' (82%) and the opportunity to pursue an interest or take part in an educational activity (also generated a relatively strong score (58%).
- 'Unique' or 'architect-led' individual self-catering accommodation products are starting to achieve enhanced occupancy rates (and charge a premium tariff)
- Agencies like 'Under the Thatch' are offering a range of unique and quirky places to stay, which cater for the premium market place

5.5 Market SWOT

Below we set out a summary market SWOT analysis, which highlights the strengths, weaknesses, opportunities and threats associated with the marketplace.

Strengths	Weaknesses
• Substantial market size within 2 and 3 hours reaching more than 10 million residents • Within reach of large conurbations (including Bristol and Birmingham) within the core short break market • Removal of Severn Crossing toll no longer acts as a cost barrier • There has been growth in tourist numbers to the area albeit still at relatively low levels of overnight stays	• There is existing provision within the marketplace (but Gnoll still has the potential to provide a distinctive offer) • In the County Borough staying visitors are heavily biased towards stays with friends and relatives rather than in paid for accommodation • There remains a strong pattern of seasonal visits in south west Wales which makes it more difficult to take

[5] Destination UK, Driving Growth in the UK Hospitality and Leisure Sector, Barclays

• Average self-catering occupancy for Wales is showing a growth trend	forward viable schemes on a year round basis • Potentially, in the minds of visitors, Neath may not be a primary tourist destination
Opportunities	**Threats**
• Future improvements to M4 could extend market reach • Some opportunity to convert day visitors to overnight staying tourists • There have been a range of innovative products in the self-catering sector (including pre-bookable wooden pods, glamping etc) which present new business opportunities • Provide facilities for older age groups who have a higher representation within the core market catchments and also are more able to travel on year-round basis • Single site operations can compete effectively by working with online agencies and other booking systems	• Knowledge of the area among the key source markets for tourist visits appears limited and perceptions of area fail to attract tourist visitors in sufficient numbers • Development of new or investment in existing accommodation at other sites could act as a strong 'competitor'

6.0 Case examples

A number of attractions and country parks are investing in visitor accommodation to increase revenue generated onsite. Some visitor experiences are working in partnership to reduce the risk and level of capital investment whereas others are developing the option in-house. Examples include:

- The Eden Project in Cornwall is working in partnership with the Youth Hostel Association and similarly The Sill – a visitor centre in Northumberland National Park is also working with the YHA

- At Rother Valley Country Park the council has invested in creating a high specification touring caravan and camping site adjacent to the country park

Eden Project and Rother Valley Country Park (touring caravan and camping site)

6.1 Under The Thatch

Under The Thatch (UTT) is a niche holiday lettings agency specialising in quirky attractive properties with a focus on the family market.

It has a strong focus on properties in Wales with a presence in Ireland and France too and some other European countries.

It is interesting to note that the sector has witnessed considerable change in the past few years. Large web-based businesses such as Booking.com are 'mopping up' large parts of the market and so there has been a drive to become even more specialist and 'up-market'.

The company does not pro-actively look for new properties and currently all profits are ploughed back into design and build projects. Under The Thatch charges 25% commission including VAT of the tariff. The company does not ask for exclusivity on deal and owners are free to use other platforms to market their properties.

Under The Thatch will visit and arrange photographs - they pride themselves on relationships with owners. UTT is then responsible for marketing the properties and providing the customers.

It has a high specification automated web-based booking system and UTT will also assist owners with practical help and advice such as weekly rotas for housekeeping.

The properties need to be distinctive in themselves, 'the accommodation needs to be the star!' For marketing purposes there is a need to produce interesting and exciting photographs 'Instagrammable moments.' The build needs to be high quality with views from every property and even every room.

If only a standard cottage then it is better not to enter holiday sector but look for long term rents.

It is interesting to note that celebrity actor Griff Rhys Jones has a couple of properties to let on the site.

Given the location of a large proportion of their properties in Wales, the catchment along the M4 corridor represents a core part of their audience (mainly 2-hour catchment).

The Severn Bridge toll has been removed, which is expected to boost tourism volumes.

Under the Thatch has actually ceased to work with about a third of properties in last 1-2 years (removing the most complained about, worst quality / cheapest) and become more niche, more top end.

At the moment, we believe the self-catering cottage and the location of Gnoll Estate Country Park does not have a strong fit with the Under the Thatch product requirements.

6.2 Cwmcarn Camping Pods

Caerphilly County Borough Council has introduced 10 wooden camping pods at Cwmcarn Forest, a destination mountain biking area within easy reach of Cardiff. The forest site also incorporates a forest drive and visitor centre.

The site where the wooden pods have been introduced was already being used as a touring site for camping and caravans with a supporting shower block facility. The area used for visitor accommodation is located within a short walking distance from the café.

The ten pods were introduced over a period of two years with three being introduced in 2012 and the remainder in tranches of three and four in 2013. Full planning permission was required.

The pods consist of a mix of different size units:

- Seven family pods
- Three standard pods

The pods sit on wooden sleepers (to keep them off the ground), these have been laid on to concrete blocks which were cemented in place. The bases were laid in-house which helped to reduce the overall development cost. Additionally, there were already electric hook-ups in place for the touring caravans and a spur had to be taken off from the main supply, which further reduced the capital outlay required for the pods.

The pods cost approximately £7,975 each for the family pod and £6,950 each for the standard pod, with a transportation charge of £500 per pod.

The pods are very basic in nature and do not incorporate shower / washing facilities and no bedding is provided to guests. After opening it was decided to furnish six pods with a double bed, camping bunks for children and a fridge. The other pods are bare hires with no internal facilities. The furnished pods are cramped.

The pods are open year-round apart from a week over Christmas. They are managed in-house and no additional staff have been taken on to manage / oversee the day to day operation of the pods.

The pods are now marketed in-house via social media and the website (which enables online bookings to be taken). In the past the Council worked with an external agency but this was problematic, for example, guests would arrive and the onsite staff would have no record of the booking. Therefore, the decision was taken to take back the bookings operation in-house.

Annual occupancy being achieved is relatively low – approximately 33%. Whilst the main summer holiday period has high occupancy levels, mid-week periods outside of the holidays are difficult to fill. Occupancy has remained relatively static over the preceding years.

Guests are drawn from Bristol, Birmingham and further afield. This is linked to the centre's reputation for mountain biking and people attending events in Cardiff will use the pods.

During peak periods the tariffs per night are approximately:

- Standard £45

- Family £57

- Furnished £60

The ten pods generate an income of £35,000 to £40,000 per annum.

During 2019, the Council has introduced six lodges with integrated shower, toilet and kitchen facilities. They are planning to introduce a further three lodges. This is in direct response from customers (large families) requesting accommodation which can cater for five people (two adults and three children).

During peak periods the lodge tariffs per night are approximately:

- £115 for the larger lodge
- £105 medium lodge
- £95 small lodge

Key observations:

- Being an established touring site prior to introducing the pods was beneficial
- Proximity to Cardiff is an advantage, people attending an event in Cardiff stay in the pods
- The reputation of Cwmcarn Forest as a mountain biking destination is key and is able to draw people in from further afield (this is unlikely to be applicable to Gnoll Estate Country Park)
- Limited secondary spend is generated in the café people – guests bring their own food and also as the café is not open in the evening guests will order takeaway meals
- During periods of poor weather people who are camping onsite will book a pod to stay in
- Bookings for camping pitches have had to be cancelled due to flooding (this is not an issue for the wooden pods). Pods bring with them a level of wet weather resilience
- Higher quality accommodation is often booked out more quickly than lower grade accommodation.

7.0 Options assessment

7.1 Accommodation uses – a longlist

We set out below a longlist of accommodation uses which could potentially be introduced at the development site identified at Gnoll Estate Country Park

7.1.1 Conversion of former Rangers' cottage

Conversion of former Ranger's cottage	
Core component elements (Alternatively, could be disposed of as a residential dwelling on a long leasehold basis)	• High-quality self-catering accommodation unit with luxury fittings and fixtures, including hot tub and wood burning stove • Dedicated and secure outdoor space (garden) and adjoining parking area
Pros	**Cons**
• Could become attractive high quality, characteristic accommodation project • Benefits from attractive views across water • Straightforward to manage • Could be let by specialist accommodation letting agency such as Cottages4You or Hoseasons (therefore reducing the risk to the NPTCBC) • Potential for year-round occupancy - helps to extend the season	• Limited additional capacity - with relatively few bedspaces added to stock within County Borough • Potential high cost of bringing existing cottage back into use as high quality bedstock • Potential issue of people passing by the front of the cottage (to a degree lack of privacy would impact on attractiveness of offer)

- Positive use of cottage (secures building for future generations) - Lower planning risk as existing building is being used - Builds on existing self-catering lettings business at Margam Country Park	
Example	- High quality cottages let by Under the Thatch https://www.underthethatch.co.uk/ - Ivy Cottage at Margam Country Park
Strength of fit with development site Gnoll Estate Country Park	
Strength of fit: **Medium to High (subject to capital cost).** Alternative use could be to take to market as a residential dwelling on a long leasehold basis.	

7.1.2 Conversion of existing buildings (former potting sheds) on site to bunkhouse type accommodation

Bunkhouse	
Core component elements	Reinstatement of former potting shed with potential extension to develop a bunkhouse type of offer, which is able to accommodate different group sizes - Toilets / washing facilities - Small-scale kitchen preparation area (for use by guests) - Briefing space/recreation room (with wood burning stove)

	• Drying area
Example	• Dare Valley Country Park (https://www.groupaccommodation.com/properties/dare-valley-country-park-accommodation-aberdare-south-wales), which has secured investment to enhance the accommodation product
Pros	**Cons**
• Being able to accommodate school, team-building and other group /specialist visits as well as large family reunions • Low barrier to entry (i.e. low tariff makes product accessible) • Would make use of existing building stock	• Lower levels of occupancy in Winter • Likely to be low level of return on investment • Significant cost to reinstate former potting shed (in a very poor state of repair) and add extension
Strength of fit with development site Gnoll Estate Country Park	
• Strength of fit: **Low / medium**	

7.1.3 Cluster of high-quality self-catering lodges

Cluster of high-quality self-catering lodges	
Core component elements	• Cluster of 6 to 12 high-quality self catering lodges • Hot-tubs • Wood burning stove

	• Car parking spaces (adjacent to each lodge)
Example	• Burnbake, Rempstone Estate https://www.burnbake.com/luxury-lodges/ • Forest Holidays https://www.forestholidays.co.uk
Pros	**Cons**
• Potential high level of year-round occupancy • Adds a new product within the market place • High quality bedspace capacity added to County Borough stock • Attracts/targets higher spending tourists • Significant economic impact during construction and operational phases	• High risk as destination not established in market place • Significant capital investment £2m+ (probably higher due to infrastructure costs) • Unlikely to attract investor/operator (perhaps more suited as a long-term ambition) • Development site is not ideal for forest lodges
Strength of fit with development site Gnoll Estate Country Park	
• Strength of fit: **Low**	

Burnbake Forest Lodges

7.1.4 Cluster of seasonal yurts or other temporary 'glamping' structures such as pods or wooden tents

Cluster of seasonal yurts or other temporary 'glamping' structures such as pods or wooden tents	
Core component elements	• Secure area to introduce yurts, pods or wooden tents • Requires supporting facilities (shower + toilet block – potentially located in (converted) existing redundant building or new build. **Please note some pods now incorporate showers / toilets**
Example	• Glentress Forest Lodges (wooden pods) www.glentressforestlodges.co.uk/ • Ready Camping (from the Camping and Caravan Club) – pre-erected safari tents. Click here.
Pros	**Cons**
• Relatively low capital requirement and potential higher level of return when compared to built structures such as lodges • Marketed and let by a third-party agency such as Canopy and Stars to reduce risk to Council during the initial years of operation • Straightforward to deliver • Can yield high tariffs and generate higher level of income and longer season than camping	• Seasonal nature of business • As relatively low barriers to market entry could face more competition in future

• Lower planning risk	

Strength of fit with development site Gnoll Estate Country Park
Strength of fit: **Medium**

Wooden pods Wigwam Holidays

7.1.5 Seasonal camping 'field'

Seasonal camping field	
Core component elements	• Designated area for pitches • Car parking spaces • Supporting facilities for example: shower block, wash room, washing/drying area for clothes. These could potentially be accommodated within the former potting shed buildings (but with high capital outlay, a new build purpose-built facility or temporarily hired in facility for the season

Pros	Cons
• Taps into existing growth trend for camping/outdoor accommodation • Offers affordable tourist accommodation	• Seasonal business • More complex to manage that single use cottage/self-catering units • Not high profile • Limited profit (would require significant site to accommodate high number of campers)
Example	• Black Berry Wood, Sussex (mix of different types of accommodation including camping) http://blackberrywood.com/
Strength of fit with development site Gnoll Estate Country Park	
• Strength of fit: **Low to Medium**	

7.1.6 Floating structure

Floating structure	
Core component elements	Introduction of floating accommodation units on the main lake adjacent to the cottage • Supporting infrastructure including secure moorings with pontoon to take account of access and changes in water levels • Associated car parking space
Example	• Neyland floating pods (https://www.yachthavens.com/neyland/haven-pod/)
Pros	**Cons**
• Provides a unique accommodation offer within Neath Port Talbot • Marketed and let by a third-party agency such as Canopy and Stars • Real distinctive character adding to profile of destination in a positive way	• High risk from planning perspective • Significant capital cost including services linked to the units • Health and safety considerations • Security and privacy issues
Strength of fit with development site Gnoll Estate Country Park	
• Strength of fit: **Low**	

Bespoke design lodges, West Sussex

7.1.7 One-off design led intervention

One-off design led intervention	
Core component elements	• A design led one-off land-based accommodation modules (could include a mix of different and unique accommodation concepts) • Would require supporting infrastructure • Potential design competition
Example	• https://www.wallpaper.com/travel/epic-retreats-wales-first-pop-up-boutique-glamping-resort
Pros	**Cons**
• Opportunity to raise profile of the Neath Port Talbot associated with positive PR • Demonstrates innovative thinking	• Seasonal nature of the offer • Limited direct economic impact • Significant capital outlay required (also as a new and untested product may need to budget for higher ongoing maintenance costs)

Strength of fit with development site Gnoll Estate Country Park
• Strength of fit**: Medium**

7.1.8 Touring caravan site

Touring caravan site	
Core component elements	• Hardstanding pitches with electric hook up and services • Central hub building (reception, bookings, bar, catering offer, toilet, washing facilities etc)
Example	• Rother Valley Country Park https://www.waleswood.co.uk/
Pros	**Cons**
• Link in with one of the camping based membership clubs (potential joint venture) • Potential to incorporate camping use alongside touring caravans	• High land take compared to some of the other options • Access for larger caravans (driving up from lower level) • Seasonal nature of the marketplace • Limited size of the site (access, turning etc)
Strength of fit with development site Gnoll Estate Country Park	
• Strength of fit: L**ow**	

7.2 Assessment criteria and scoring matrix

In terms of identifying the accommodation product(s) which has the greatest potential of being introduced within Gnoll Estate Country Park we have developed a weighted scoring matrix (using a range of 1 to 10, with 10 being the maximum awarded) to evaluate the individual options.

Comments on basis for scoring	
Site fit	
Fit with development site	• Can the development site readily accommodate the use?
Synergy with the 'landscape' / environment of Gnoll Estate Country Park	• The level of synergy the accommodation product has with the qualities and landscape that make Gnoll Estate Country Park an attractive and special place to visit
Market considerations	
Potential to attract specific market segments	• How likely is the accommodation product to attract groups of visitors and independent travellers in Wales' target segments?
Seasonality	• How attractive is the option to staying visitors on a year-round basis?
Step change in profile of Gnoll Estate Country Park	• To what degree could the product enhance Gnoll Estate Country Park as a destination (adding to profile of the country park and Neath)?
Deliverability	
Project complexity	• Ease of deliverability
Risk	• Level of risk associated with the accommodation product being considered

Financial and operational considerations	
Indicative capital cost	• The indicative capital cost of the project (excluding any additional service / infrastructure requirements)
Economic impact	• The potential to have a positive financial impact in its own right and on other nearby local businesses and supply chain
Additional staff resource	• Level of additional staff resource to operate the 'business'

Within the scoring matrix we have applied a weighting (+1 to +2.5), which reflects the strategic objectives and priorities.

Uses / products	Site fit		Market considerations			Deliverability		Financial and operational considerations			Total weighted score
	Fit with development site	Synergy with the 'landscape' / environment of Gnoll Estate Country Park	Potential to attract specific target market segments	Seasonality (potential to generate year round occupancy)	Step change in profile of Gnoll Estate Country Park	How complex will the option to be deliver?*	Risk*	Indicative capital cost*	Economic impact	Level of additional staff resource*	
Weighting	**2.0**	**1.5**	**2.0**	**2.0**	**2.5**	**2.5**	**2.0**	**2.0**	**2.0**	**1.0**	
Conversion of former Ranger's cottage	9.0	9.0	8.0	8.0	4.0	8.0	6.0	9.0	5.0	9.0	**142.5**
Cluster of seasonal yurts or other temporary 'glamping' structures such as pods or wooden pods	8.0	8.0	7.0	4.0	6.0	8.0	7.0	8.0	5.0	6.0	**131.0**
One-off design led intervention	5.0	7.0	8.0	8.0	7.0	5.0	6.0	7.0	5.0	6.0	**124.5**
Conversion of existing buildings (former potting sheds) on site to bunkhouse type of	9.0	9.0	6.0	5.0	4.0	7.0	6.0	8.0	3.0	8.0	**123.0**
Seasonal camping field	6.0	7.0	7.0	3.0	4.0	9.0	8.0	9.0	4.0	5.0	**122.0**
Floating structures	1.0	6.0	8.0	7.0	7.0	3.0	5.0	7.0	5.0	6.0	**106.0**
Cluster of high-quality self-catering lodges	4.0	6.0	8.0	8.0	8.0	2.0	2.0	3.0	9.0	3.0	**105.0**
Touring park site	4.0	5.0	8.0	4.0	6.0	3.0	4.0	3.0	7.0	3.0	**93.0**

* Within this category a low score represents a negative outcome

7.3 Accommodation preferred development scenario

The scoring matrix has identified two key opportunities which focus on refurbishing the Ranger's Cottage (please see commentary below) and the introduction of a cluster of wooden camping pods.

Some uses such as a touring park at the depot site generated a relatively low score because of the physical fit along with access issues and the high level of capital cost to develop a site of suitable size and quality.

In respect of the 'wooden pods' we believe that the key opportunity relates to:

- Introducing a cluster of 12 high quality wooden pods with integrated shower, toilet and wash-basins (first phase).

- The use of ensuite facilities within the pods will allow a premium tariff to be charged and will be more efficient to operate. There would be some revenue savings - as there is no central shower/toilet block there would be lower daily cleaning costs

- Ensuite facilities make the offer more appealing, particularly to the family market place

Below please see example of a XL-Grande Pod, provided by Cedar Tree Pods.

Images kindly supplied by: https://cedartreepods.co.uk/ (the sofa can be replaced with a day bed and pull out mattress which could accommodate two small children

Specification

<u>6 x 3.3 metre glamping pod</u>

Dimensions 3.3m wide, 6m long, 2.9m high

Features

- Precision CNC machined framework
- Western red cedar horizontal cladding with airflow system
- Treated timber skids
- 100mm sub-zero insulation package
- Commercial grade laminate floor

- 20mm thick redwood internal cladding
- Painted bathroom walls
- Double glazed UPVC door and window
- Hardwood decked porch area
- Double gas lift bed with memory foam mattress. (Different mattress options available)
- Full en-suite with non-slip flooring, shower enclosure, toilet and basin.
- Kitchenette including sink, microwave combi oven and fridge.
- Sofa bed
- Table and chairs for 4 people

Electric package

- Brushed stainless fittings
- 4 double sockets including 1 USB
- LED downlights
- Exterior lighting
- Fitted bedside lights
- 2 way switching
- 16-40 amp electric connection

Following a conversation with a pod manufacturer it was recognised that the market is moving away from the basic pod modules to ones which are more luxurious.

Up to two pods can be delivered on a single lorry and then lifted into place and connected to services.

Design considerations

The pods would either be laid on a hard-core or concrete base and there will be a need to ensure that the units can be supplied with electricity along with connection to drainage, water and sewerage.

- The pods are split into two clusters of six with appropriate screening

- There would be a need to landscape the site to create an attractive and inviting environment and we have allocated a budget for this (including removing existing structures)

- Externally each pod would be equipped with a picnic table and also fire pit (creating a social space for guests)

- Separate building with facilities for washing and drying clothes. It was originally suggested that these could be located within a shipping container clad in hit and miss timber, which would reduce capital costs when compared to a standalone new build.   However, following consultation this facility would be located within a refurbished Potting Shed.

- Car parking would be integrated within the site

- Security gate

We set out below concept sketch of a pod and an indicative site plan (please see attached PDF for a clearer indicative plan).


Gnoll Estate Country Park: Visitor Accommodation
North
0m 2 4 6 8 10m
Utility room
Storage
Existing trees and vegetation retained around the perimeter

Maintenance
Annual maintenance would include oiling the exterior of the pod and touching up the paintwork where required.

In terms of the interior there would be annual wear and tear costs associated with use.

Phasing
The first phase of development centres around introducing a cluster of 12 wooden pods. Depending on occupancy level and demand there is the opportunity to increase the number of wooden pods which could be readily accommodated on the site.

Indicative schedule of capital costs for the accommodation module
We set out below a schedule of indicative capital costs in respect of the wooden pods.

Introduction of Pods	
Items	**Indicative costs**
Landscaping, bases, lighting and demolition of existing structures - excluding the Potting Shed (est)	81,500
Signage	1,500
12 x pods (based on an indicative cost provided by a pod manufacturer)*	256,800
Equipment within pod	6,000
Transport	7,800
Booking facility and updating of website	4,000
Potting shed fitted out with clothes washing and drying facilities	5,000
Refurbishment of Potting Shed	TBC
Security gate	3,000
Car parking and roadway/internal access	TBC
Indicative total	**365,600**

Please note costs to refurbish the Potting Shed to create a facility to wash and dry clothes remain unknown. The cost is likely to be significant which could therefore make the scheme unattractive from an investment perspective. Even if this option is not taken forward the costs to make good the Potting Shed are likely to remain high. Since the original discussion, creating two clusters of six lodges is likely to increase the cost allocated within the landscaping box.

Note: *Estimates are subject to site survey, preliminaries, input from a design team and QS. They exclude professional fees, contingency, ground investigation, anomaly factors, upgrading / additional and connecting the infrastructure / services to the pods and Neath Port Talbot County Borough Council's staff costs to manage and deliver the project. Figures are net of VAT. The schedule of indicative capital costs does not take into account increasing tender prices or inflation.*

The former Ranger's Cottage

The cottage generated a positive score and we believe that refurbishing the cottage as a high-quality self-catering holiday unit is a good opportunity which could potentially generate a strong holiday letting income.

However, the indicative capital refurbishment costs identified by the Council are very high at some £216,000. In our view, this makes it a high-risk investment decision in terms of generating an appropriate return on capital invested. We believe that an independent QS should be appointed to revisit the outline costing provided.

Indicative discussions held between a holiday letting agent and the Council indicates indicative net annual revenue of £14,300 to £20,300 could be achieved.

A further option to consider is a light touch refurbishment of the cottage which could then be let to a member of staff and generate a level of income. The occupant's responsibilities would include providing an onsite presence in respect of the Camping Pods.

An additional option is to let the property as a long-term residential dwelling although this will impact on the suitability of introducing a cluster of visitor accommodation units on the adjoining areas.

8.0 Financial and operational considerations

8.1 Occupancy

We are suggesting an eight-month season initially and, subject to demand, the length of the season can be adjusted.

We set out below a three-year model which shows the overall occupancy level with a small increase being applied annually. We have been cautious in our approach and shown an annual average occupancy level of 49.4% in Year One increasing to 51.4% in Year Three.

Years	Mar	Apr	May	June	July	Aug	Sept	Oct
Year 1	30.0	65.0	50.0	45.0	65.0	70.0	40.0	30.0
Year 2	30.6	66.3	51.0	45.9	66.3	71.4	40.8	30.6
Year 3	31.2	67.6	52.0	46.8	67.6	72.8	41.6	31.2

In order to de-risk the project to the Council, we would suggest that in Year One 75% of units are let by a specialist agency, reducing to 60% by Year Three. Depending on the level of in-house lettings there is a potential opportunity to accelerate the reduction in lettings by the specialist third party agency.

During this period, it will be essential that the development initiative is supported by an appropriate marketing campaign.

8.2 Tariff base

The base tariff is £60 (£50 net of VAT) in Year One which is flexed throughout the season with a tariff of £78 (£65 net of VAT) being achieved in the peak month of August. An annual increase has also been applied in Years Two and Three.

Years	Mar	Apr	May	June	July	Aug	Sept	Oct
Year 1	£42.50	£55.00	£50.00	£55.00	£62.50	£65.00	£50.00	£50.00
Year 2	£43.35	£56.10	£51.00	£56.10	£63.75	£66.30	£51.00	£51.00
Year 3	£44.22	£57.22	£52.02	£57.22	£65.03	£67.63	£52.02	£52.02

8.3 Financial model

Below we set out a three-year financial model.

Income	Year One	Year Two	Year Three
Pods	80,642	83,899	87,289
Total income	**80,642**	**83,899**	**87,289**
Costs			
Agency (75% of bookings via agency in Yr1 falling to 60% by Yr3)	15,120	13,634	13,093
Cleaning and linen	7,464	7,614	7,766
Waste collection (allocated minimum sum asssumes part of Gnoll CP)	500	515	530
Central admin support (bookkeeping / bookings etc)	4,032	4,195	4,364
Maintenance (and one off additional expenditure in Year Five required)	11,000	11,330	11,670
Utilities	4,354	4,441	4,530
Insurance (assumes bolted on to Council policy)	2,500	2,575	2,652
Marketing (part of wider country park initiatives)	2,500	2,575	2,652
Grounds maintenance	1,500	1,545	1,591
Fire maintenance / H&S	1,000	1,030	1,061
Bank / online booking charge	500	600	700
Staff (additional resource meet and greet)	8,100	8,343	8,593
Other	2,419	2,517	2,619
Total costs	**60,990**	**60,914**	**61,823**
Profit / (loss) before EBITDA	**19,651**	**22,986**	**25,466**

No allowance has been made for start-up cashflow or business rates.

Staffing

We have assumed that guests would be greeted by a member of staff at the arrival point (adjacent to the cottage). At the time of booking, guests would provide an estimated time of arrival to ensure that staff time is efficiently utilised.

There would be a need for a member of staff to be available on-call.

Cleaning and linen

Costs for cleaning and linen are included within the model.

Other

There may be an opportunity to work with Margam Country Park in terms of joint marketing and letting of the units as Margam Country Park already lets a self-catering cottage.

There will be an opportunity to increase spend within the café through pre-ordered breakfast and other meals. This is likely to be at a relatively low levels of throughput.

8.4 Sensitivity analysis in respect of occupancy levels

10% increase in occupancy levels being achieved

Revenue / Costs	Year One	Year Two	Year Three
Income	88,706	92,289	96,018
Costs	64,329	64,154	65,060
Profit / (loss) before EBITDA	**24,376**	**28,136**	**30,958**

10% decrease in occupancy levels being achieved

Revenue / Costs	Year One	Year Two	Year Three
Income	72,577	75,509	78,560
Costs	57,651	57,673	58,586
Profit / (loss) before EBITDA	**14,926**	**17,836**	**19,974**

8.5 Tourism impacts

The introduction of a cluster of 12 high-quality pods will have a positive economic impact during the construction and operational phases (alongside wider place making outcomes).

There will be direct employment opportunities generated. Additionally, there will be direct spend within the country park and wider local economy itself. Direct spend during the operational period will include but is not restricted to:

- The café within the Country Park
- Lettings income
- Fuel / transport cost
- Local businesses such as shops, gift outlets and other places of interest (attractions)
- Spend by the country park in terms of maintenance materials

Perhaps, more importantly it will contribute to developing Gnoll Estate Country Park as a destination itself (outside of the immediate market place) and improve the overall bottom line position. This is alongside wider placemaking benefits.

9.0 Visitor experience development action plan

Whilst the focus of the work is on assessing the feasibility of introducing visitor accommodation at Gnoll Estate Country Park, we recognise that there is a need to enhance the wider offer to meet the needs of overnight guests but also members of the local community.

Note: The visitor modelling for the adjacent Woodland Trust site has not yet been carried out (it is planned as a future stage of work). Depending on the outcome this could significantly increase the level of throughput generated at Gnoll Estate Country Park which would impact on our recommendations below.

9.1 Visitor needs

In the table below we set out the findings from the primary research. Overall, there is a positive outlook in terms of introducing new facilities / enhancing existing facilities to improve the overall offer at Gnoll Estate Country Park. There are several areas where visitors would like to like to see change or new facilities introduced. For example, this is particularly evident in terms of additional interpretation or improved signage, 52% of respondents felt the provision of additional information on the history of the country park was either a high priority or essential element which could be enhanced.

Facility / service	High priority (%)	Essential (%)	Desirable (%)	Not needed (%)	Would not like to see (%)
New play area	14	11	37	34	4
Scultpure trail	13	6	51	25	5
Play trail	22	11	52	12	3
Indoor play	15	14	32	28	10
Enhance café	21	26	40	12	1
Additional interpretation	6	5	26	48	5
Improved signgage	9	8	36	44	3
Dedicated BBQ area	13	10	38	25	15
Outdoor cinema	17	14	40	19	10
Enhanced focus on conservation / environment	32	30	32	6	0
More information on the history of the site / local area	28	24	37	10	1
Rowing boats for hire	20	13	41	15	11
Festivals / events	19	22	36	15	8

In respect of festivals / events respondents were asked to comment on ideas for the type of events. Responses included:

- *"Winter wonderland, food festival, wellness festival…"*
- *"A family concert would be lovely or a big family day out concert fair"*
- *"Music concerts, Christmas lights…"*
- *"Open air theatre…"*
- *"Music, craft festival, environmental issues/raising awareness, making things from junk (sculptures)"*
- *"Regular craft lessons/sessions (which could be hosted in the meeting room)"*
- *"Live bands, open cinema, food & drink markets, more children's events"*
- *"Events need to be more environmentally based...e.g wood carving etc. I really dislike the funfair"*
- *"Welsh music, something for St David's Day"*
- *"Ghost tours, history tour of site, themed days from18th century, music festivals, family fun sports day"*
- *"The Margam Park luminate event was a massive hit and sell out at Christmas, maybe we could explore the logistics of replicating a similar event at the Gnoll.*

However, one respondent commented they *"don't want to see themed events spoiling the tranquillity of the area."*

Other ideas / comments, included:
"I would love to see the park promote camping excursions, small festivals such as Neaths' Band Fest, which is currently held in pubs in Neath. The addition of boats of the lake would be exciting and appealing to all ages. Previously, the Gnoll held ghost tours in the cellars, this held great appeal! It was interesting and fun! The Gnoll holds so much history for Neath. Adding a campsite option will bring people to the town, it will need to be manned to avoid teenagers but Clyne Gardens and Langors Lake, Brecon have done it so well!"

Respondents were asked whether the improvements they selected as either high or essential would make them likely to visit more often. 91% stated they would.

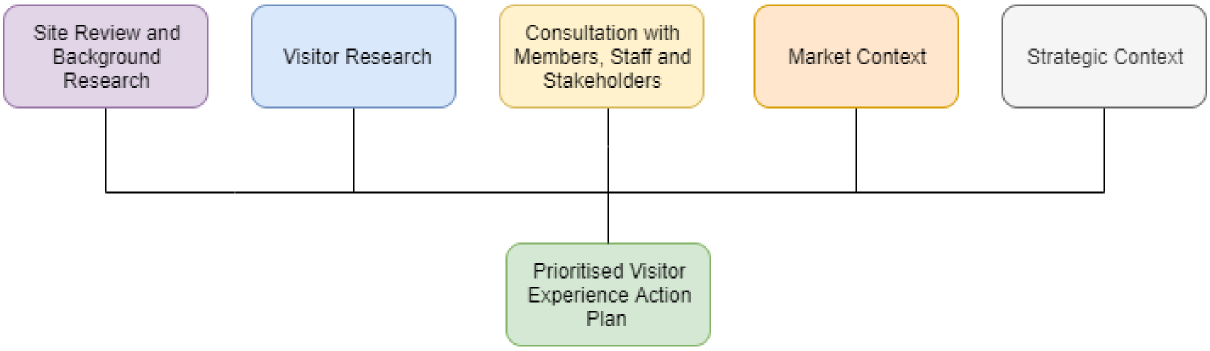
Respondents were also asked what they would **not** like to see introduced at Gnoll Estate Country Park. The answers generated varied responses but a number of comments were raised about car parking charges *"Higher charges for car park. The current price is far too high."* There are some concerns about the type of events and the noise which is associated with these.

Also, consideration should be given to the impact that enhancing or introducing new facilities could have upon the wildlife / environment and that the country park should not be 'over commercialised'.

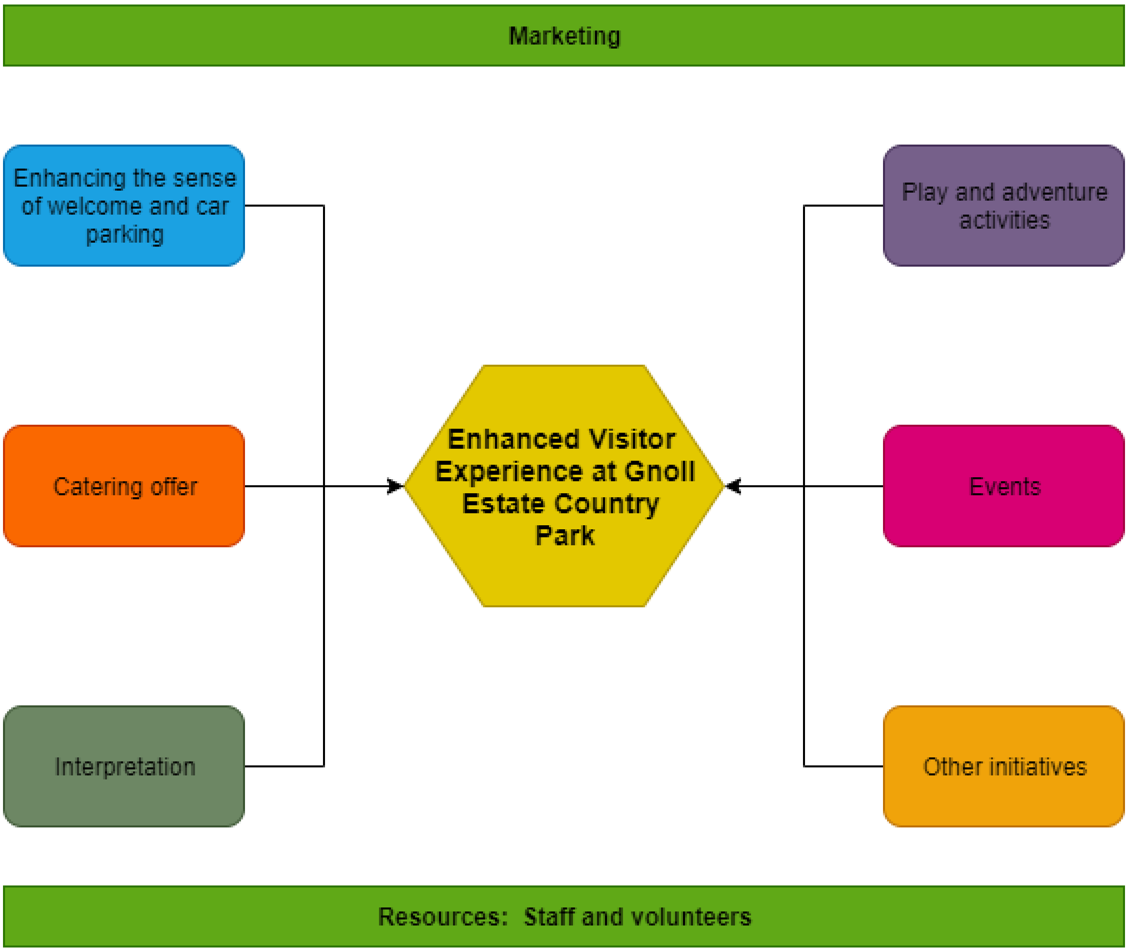
9.2 Development action plan

Based upon the drawing the research and consultation together we set below out a range of initiatives in an action plan format to enhance the visitor experience of the wider country park.

These represent a package of initiatives which set out the next steps for Gnoll Estate Country Park.



These have been themed or categorised under the following headings:



It is important to note that there are key guiding principles which provide a framework for developing the action plan:

- Where possible interventions / project should make a positive financial contribution to Gnoll Estate Country Park, but recognising that a number of interventions will not have a 'direct financial impact' but may increase dwelltime and engagement with visitors

- Interventions should respect the qualities that make Gnoll Estate Country Park a special place to visit

- The projects should be targeted at the local communities (it is recognised that visitor accommodation will draw people from further afield)

Health initiatives
At a National and County Borough Level there is a policy drive around encouraging people to become more active to reduce levels of obesity along with improving physical health and mental wellbeing. Country parks and recreation sites have a key role to play in this respect.

It is interesting to look at Moors Valley Country Park which is a hub site used by the Council to encourage people to become more active. 17 weekly health walks of different lengths, these include Nordic Walking, Wellness Walks, Workout Walks which are self-sustaining along with running, cycling (including night cycling and accessible cycling), Mindfulness in Nature, Summer Evening Yoga and Fitness Buggy Workouts.

Subject to seed funding this initiative could be introduced at Gnoll Estate Country Park. Alongside health and wellbeing outcomes there are financial benefits in respect of direct spend on car parking and within the café.

Indicative cost

We have allocated an indicative cost to all initiatives using the scale above. Please note all costs are subject to review by a QS, site survey and they do not take into account services or professional fees or Council staff time or any additional services required. All figures are net of VAT.

- £ <£1,000
- ££ - £1,001 to £10,000
- £££ - £10,001 to £25,000
- ££££ - £25,001 to £50,000
- £££££ - £50,001 to £100,000
- ££££££ - £100,000+

Impact and priority

The impact on the visitor experience and financial position (direct income) along with the priority of the project are set out as Low, Medium and High.

Resources

The initiatives have a resource implication in terms of delivering the project and this is highlighted in the action plan (this does not cover the operational phase – please see commentary below).

9.2.1 Enhancing the sense of welcome and car parking

Enhancing the sense of welcome and car parking							
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Introduce welcome signage at all vehicle entry points and main pedestrian entry points	• Enhance the immediate sense of arrival • Create a strong and positive first impression	£££	M	L	M	L
Incorporate orientation information at key points (entry, car parking and nodes within the country park) highlighting important features of Gnoll Estate Country Park	• To signpost key elements of the visitor experience to encourage visitors to use / explore specific areas within Gnoll Estate Country Park	£££	M	L	M	L
Introduce signage at payment points to explain to visitors how the car parking income is used	• Increase acceptance / willingness to pay car parking fee • Used to explain future increases in car parking charges	££	M	L	**H**	L

	• Reduces complaints					
Consider reviewing charging tariffs based on different dwelltime bands	• Potential to increase income generated via car parking • Wider acceptance of car parking charges	£	H	M	**H**	M
Consider introduction of ANPR system	• To minimise leakage and maximise revenue • Improve customer experience (paying on exit rather than at start of journey). Reducing queues	££££/£££££	H	M	M	L
Extend existing hard standing car parking (recognise need to consider any 'claw back' from Ryder Cup funding)	• Provide additional car parking spaces • Reduce dependency on good weather to accommodate additional cars during peak periods	£££££	H	H	**H (see first column)**	H

	• Reduces staff time spent managing the car park during peak periods					
Introduce car parking tariff on the lower level to have a consistent policy (we recognise that this needs to be handled sensitively). Would also need to consider controlling parking / access on the lower level road leading up to the former Ranger's Cottage	• Maximise revenue generated onsite	Part of above work package	L	L/M	**H**	M

PRECEDENT IMAGES


ANPR system introduced within car parks managed at Hampshire County Council's country parks

Attenborough Nature Centre – explaining how the car parking "donation" is used and messaging at Alice Holt Forestry England site

9.2.2 Catering

Improve the quality of the catering offer to maximise spend						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Open up hatch in reception space during peak periods (near main entrance within visitor centre) to serve a selection of drinks, ice-cream, premade sandwiches and snacks	• Reduce queues during peak periods and relieve pressure on main servery • Increase sales / income • Could be trialled relatively quickly	££	H	M	**H**	L
Redesign of kitchen / servery counter (current facilities are not ideal and impact on the experience / offer). Including investment in equipment Counter would enable food to be displayed in an attractive fashion	• Maximise revenue • Reduce queues / improves throughput • Create a more welcoming offer / space	£££££	H	H	**H**	H

Redesign menu (including healthy options / daily specials / pre-booked high-teas etc)	• Meeting the needs of customers • Help to reposition the café • Increase average spend and use of the café	Part of above	H	M/H	**H**	L/M
Market test option to hire out café outside of core opening hours to service functions / social uses e.g. wedding anniversaries, birthdays (not 18th birthdays). Also, opportunity for functions use of meeting space with improved catering offer	• Maximise revenue generated from 'asset'	££	H	M	**H**	L
Enhance ambiance e.g. picture windows, wood burning stove	• Improve customer experience, create a more warm / welcoming atmosphere • Taken together this package of initiatives has the potential to improve visits outside of the core season	££££	M/H	M	**H**	M

Trial 'dog friendly' café outside of peak season	• Meet needs of visitors (25% of respondents to the survey stated walking the dog was the main reason they visit the country park)	NA	H	L/M	**H**	L
Introduce weekly barbecue food offer to be run by catering staff during summer period (one evening per week on a trial basis)	• Used to extend opening hours • Provides additional revenue • Engage with new audiences	£	M	L	M	L
Refresh internal decor	• Creates strong positive first impression and welcoming atmosphere where people want to spend time	Part of above package of initiatives	H	L	**M**	L
Rebrand café as part of 'relaunch' (including signage, menus etc)	• Create stronger identity in the market place • Key part of 'refreshing' the offer / experience	££	M	L	**H**	L (external agency)

We did consider a standalone kiosk but we have been informed that if this was introduced that this would impact negatively on the event organisers business. It is recognised that the Council are investing in the external space immediately outside of the café.

PRECEDENT IMAGES



Queen Elizabeth Country Park: Architectural treatment of the front of the visitor centre and refurbishment of the café space with new menu offer



Wood burning stove at Dinton Pastures Country Park, use of a national dish – Cawl at Gower Heritage Centre and table top map promoting the National Forest at CONKERS

9.2.3 Interpretation

Interpretation – the rich built and natural heritage remains hidden. Explore opportunities to bring this to the forefront of the visitor experience[6]. The initiatives below would need to be considered as part of a wider interpretation plan						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Develop interpretation plan	• The aim is to build storytelling into a coherent, distinctive and captivating 'spirit of place'	££/£	M/H	L	M	L (work with external agency)
Introduce stamp boards as part of themed trail	• To encourage visitors to explore the wider country park	££	M	L	M	L
Introduce interpretation within the visitor centre	• Improve visitors' understanding and knowledge about the natural environment and heritage of the country park	£££	M	L	M	L (external agency)

*Further considerable should be given to introducing a consistence set of signs / use of interpretation and orientation panels in terms of presentation and branding. An opportunity may exist to work closely with the Woodland Trust to develop an integrated approach across both sites given the proximity and opportunity to work together.

[6] It is recognised that the Council has invested in creating a short film which is being streamed in the cafe

PRECEDENT IMAGES

Orientation map at Langley Park and signage at Silent Valley, Gwent Wildlife Trust

9.2.4 Play and adventure activities

The play and activity experience…encouraging repeat visits, increasing dwell-time and providing opportunities for physical activity						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Introduce play trail linking the visitor centre to the Woodland Trust land (the proposed bridge joining the two sites)	• Encourage visitors to explore wider country park (rather than staying around the honey pot area) • Encourage visitors to explore Woodland Trust site • Increase dwelltime and potential for secondary spend	££££££	H	L	**H**	M
Assault course challenge (longer term initiative to refresh offer)	• Encourage repeat visits • Generate some corporate use	££££££	H	L	L	M

Explore opportunities to introduce seasonal pedalos and/or rowing boat hire on the main water body (will need to introduce pontoon and rescue boat)	• Offers low cost option for visitors to get on the water • Broadens appeal of the Country Park • Direct income generator	£££/££££ (excluding pontoon)	M	M	**H**	M
Way marked routes for runners / walkers (potentially on a temporary basis) – linking routes of differing distances across Gnoll Estate Country Park and adjoining Woodland Trust site	• Integrate both sites • Make site specifically more 'attractive' to runners	£	M	L	M	L (work with Park Run and Woodland Trust)
Refresh play (adjacent to woodland) by introducing new pieces of play equipment	• Quick win, potentially deliverable prior to Whitsun half-term • Positive PR	££££	M	L	**H**	L

PRECEDENT IMAGES

Start of play trail at Moors Valley and swan pedalos at Ferry Meadows

9.2.5 Events (including activities)

Events						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Introduction of major out of season Winter Wonderland experience (would require partner to take forward project)	• Increase income (rental to Council and onsite spend) • Create a reason to visit Gnoll Estate Country Park during period of lower throughput (extends the season) • Engage with new audiences	££	H	M	**H**	M
Summer outdoor cinema evening programme (would require partner to take forward project)	• Extends onsite operating hours • Generates additional visitor spend • Engages with new audiences/create a new reason to visit	££	H	L/M	**H**	M

	• Low risk to Council if partnership approach adopted					
Advertise opportunity to event organisers that small-scale events e.g. crafting and talks can be hosted within the visitor centre meeting room and other activities such as bushcrafts within the wider country park (the events/activities would be run by approved third parties)	• Engage with new audiences (particularly outside of main season) • Income generation	£	M	L	M	L

The above options may require an investment from the Council in terms of supporting infrastructure and there is a requirement to develop an events strategy.

PRECEDENT IMAGES

Winter Wonderland at CONKERS (fenced site) – creating a new income stream at Gnoll Estate Country Park (in partnership)

9.2.6 Other initiatives

Other initiatives						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Introduce pre-booked bbq packages (purpose-built BBQs)	• Increase revenue generation across the country park	££	L	L	M	L
Introduction of additional seating to take advantage of key views across lower lake (route around the lake)	• Improves accessibility • Encourages people to explore wider country park	££	M	L	**H**	L
Dog agility course	• Directly serves important and rowing dog owner market • Creates good feature for regular PR and social media coverage	££/£££	M	L	M	L
Office letting engage with Woodland Trust to enquire	• Secures rental income	£	L	M	H	L

whether they require office space on the upper level of the visitor centre building. But could impact on using lower level of secondary catering outlet (see 9.2.2 above)						
Maintenance of landscape character / features along with paths/trails and repair of some heritage structures	• Improve visitor experience • Ensure all paths / trails are usable • Improve the condition for wildlife	Unknown	H	L	H	H (recognise this would need additional staff resource)
Consider a designated area for a Certificated Location (CL) for up to 5 touring units. Requires secure area but only limited facilities as a minimum.	• Complements proposals for camping pods	£££	L	M	M	M

PRECEDENT IMAGES

Dog agility area within Queen Elizabeth Country Park

Pre-booked bbq at Alice Holt (permanent bbq with picnic bench)

9.2.7 Marketing

Marketing – without marketing, it will be difficult to attract additional visitors to Gnoll Estate Country Park (particularly important given potential investment to be made into accommodation base)						
Actions	Rationale	Indicative cost	Impact		Priority	Staff resource
			Visitor experience	Financial		
Initial annual programme of customer research, using online service such as SNAP to reduce the costs / staff resource	• To understand the needs of customers • Identify new development opportunities • Track/monitor satisfaction levels	Revenue cost if carried out internally	NA	NA	**H**	L
Work with agency to develop annual marketing action plan (from Year 2 onwards update in-house)	• Develop strategic approach to marketing and integrate within existing Tourism Team(?) • Raise awareness of this hidden 'gem'	££	NA	NA	**H**	L (using agency in Year One. Then take in-house)

Employ part-time marketing officer (2 days a week to market the country park). Ensure that person has background in marketing of visitor attractions or similar Consider joint working with Margam Country Park (and / or other tourism assets)	• Implement marketing action plan and to raise the profile of Gnoll Estate Country Park • Increase the number of visits from new users • Increase the number of repeat visits from existing visitors • Leading to increase income generation potential	Revenue cost	NA	NA	**H**	H
Introduce system to track annual visitor numbers	• Develop accurate visitor data on number of visitors (help to evaluate offer and investment)				**H**	L/M

9.2.8 Resources

it is recognised that the current operation is run on a very lean basis, Councils are being asked to do more with less. With the current staffing structure there is limited capacity to take on new projects, both during the delivery phase and ongoing operational basis. This has also had an impact on the current visitor experience.

During the consultation it was felt as a minimum the ranger team needed an additional permanent member of staff to work between April through to the end of September. The enhanced catering offer will also need additional staff (subject to business planning).

A further consideration is to develop a strong, active and flexible volunteering group who are able to carry out specific physical tasks to support the Ranger team on a project-by-project basis. It is recognised that there is a financial and time resource commitment to develop, manage and train volunteers in specific skill sets. A volunteer system would also reinforce links with the community. A successful example to look at is Paxton Pits Nature Reserve managed by Huntingdonshire District Council.

It will be important to explore partnership working opportunities with the Woodland Trust, particularly in terms of marketing and landscape management.

10.0 Concluding remarks

Gnoll Estate Country Park incorporates a range of attractive landscape features from large water bodies through to a water cascade, open parkland and woodland. The size of the country park and 'zones' (some of which feel 'wild') help to create a feeling of 'getting away from it all' in certain areas of the country park.

Along with the natural heritage, there is a rich built heritage within the country park with the remains of Gnoll House, the Icehouse and Cellars (although the history almost feels hidden away).

Visitor facilities include a large-scale visitor centre which incorporates a café, toilets and meeting space through to accessible and adventure play areas and an established programme of events and activities (some of which are delivered by a third party).

The Woodland Trust's plans for the adjacent farmland will add a positive dimension to Gnoll Estate Country Park and present future opportunities in terms of raising awareness of the country park through the national marketing reach of the Woodland Trust. There is also the potential to generate additional income through Woodland Trust visitors who use the car park and café within the country park.

The introduction of overnight visitor accommodation at Gnoll Estate Country Park represents a positive step to generate additional income from commercial activities. However, the return on investment is limited and it is not without its risks.

The Council already lets holiday accommodation, a self-catering cottage at Margam Country Park, which may present opportunities for joint working, for example, marketing which could achieve some cost savings.

The former depot site, within the Country Park, has been identified by the Council as the location where overnight visitor accommodation could be introduced. With the introduction of a key coded gate the site becomes relatively secure and private. The introduction of visitor accommodation here would not impact on the day to day offer experienced by general visitors to Gnoll Estate Country Park. Importantly, the introduction of accommodation at this site would not visually intrude on the wider landscape of the country park. The site is within walking distance of the café within the visitor centre.

It is important to note that both Cwmcarn Forest and Dare Valley Country Park have and are continuing to invest in their visitor accommodation product. If the Afan Adventure Resort project is taken forward this would change the market profile.

A range of different self-catering accommodation options were identified and evaluated from touring caravans through to luxury lodges. A scoring matrix was been used to help identify the preferred development scenario which centres around introducing a cluster of twelve wooden pods as a first phase of development. The individual pods would incorporate a shower / toilet and small kitchen facility (the pod market is moving to some degree away from the basic pod offer).

We have applied cautious average overall year-round occupancy rates and tariff levels. The pod business has the potential to generate approximately £19,700 of profit (before EBITDA) in Year One, increasing to just under £25,000 in Year Three (this excludes the former Ranger's Cottage).

To reduce the risk to the Council, it is suggested that a number of the units are marketed and let by a third-party agency which specialises in this market place (high quality glamping accommodation). Through existing marketing channels and brand awareness a third-party letting agency would have a greater market reach than Neath Port Talbot County Borough Council.

As a second phase (and subject to demand) there is the potential to increase the number of pods from 12 to 24 to create a critical mass of units. This would be tested as the project enters its operational period.

When refurbished the former Ranger's Cottage offers a strong opportunity to generate additional holiday lettings income. The cottage has a unique location overlooking a major water feature and the historic link to the former estate creates a positive cachet to the marketable offer. Initial discussions held between the Council and a high-quality self-catering cottage operator indicates a potential annual revenue of £14,300 to £20,300 could be achieved. However, the current refurbishment costs of circa £216,000 appear to be on the high-side and we believe it would be beneficial to confirm the costs via an independent QS who specialises in the refurbishment of cottages. An alternative option would be to introduce a light touch refurbishment and let the cottage to a member of staff who would have a role in overseeing the onsite pod accommodation. A further alternative would be a long-term leasehold tenure although this would impact on the visitor accommodation opportunity. This would also generate a rent roll.

Whilst the main focus of this study has been to assess the opportunity for visitor accommodation there are a number of 'quick wins' (and long-term initiatives) which could be introduced to enhance the wider visitor experience within the country park. It should be recognised that the country park over the last five years, whilst facing budgetary challenges, have invested in enhancing this visitor experience. The visitor experience action plan has been informed by a module of direct primary research, which generated some 818 responses, along with consultation with Members, staff and other stakeholders (e.g. the Friends, Park Run etc).

There are some unknowns around the forecast visitor numbers to the Woodland Trust's project which could impact on the action plan.

A range of interventions were identified. These have themed using the following categories and set out in an action plan format.

- Enhancing the sense of welcome and car parking
- Catering
- Interpretation
- Play and adventure activities
- Events (including activities)
- Other initiatives
- Marketing
- Resources

It is recognised that staff resources are being stretched at the moment which is threatening the quality of the visitor experience. We believe this needs to be addressed as part of the visitor experience masterplan.

A key initiative centred around improving the café experience and another key initiative is linked to introducing a part-time marketing post to raise awareness of the country park which to some degree remains a hidden or undiscovered 'gem'.

COVID-19

Since this report has been commissioned, the COVID-19 pandemic has shut down the UK tourism marketplace, both in terms of domestic and overseas visitors. Commentary is highlighting that some sectors within the domestic tourism industry are likely to benefit when people can start to travel again.

At the time of reporting a number of leisure and recreation facilities remain closed. In the immediate term there is a need to focus on recovery planning for Gnoll Estate Country Park and in particular identifying the needs and intentions of visitors to ensure visitor numbers are maintained. For example, what are visitors' key concerns? How will these concerns impact on the 'offer'? How will revenue generation be maximised once the country park reopens?

As an outdoor attraction there are clear benefits in terms of being able to maintain social distance and breathe 'clean air.' Perhaps visitor numbers may increase as families are likely to be more wary about visiting an indoor attraction.

Appendix One: Costs to refurbish the former Ranger's Cottage

Prepared by the Council

Purpose of Report

To consider the costing of a scheme to refurbish Gnoll Pond Cottage

Financial Impact

Proposed Works

1. As per the attached schedule of works

Cost Implications

Schedule of Work

	Alteration and Refurbishment	
b	Roof & External Walls	42,200.00
c	Windows and External Doors	7,100.00
d	Internal Walls and Partitions	23,200.00
e	Internal Doors	7,200.00
f	Skirting's and Architraves	23,800.00
g	Floor Finishes	4,700.00
i	Fittings, furnishings and equipment	9,200.00
j	Mechanical and Electrical Installation	21,300.00
	Alteration and Refurbishment Costs	**£138,700.00**
	External Works	
a	Roads, paths and paving	10,100.00
	External Works Costs	**£10,100.00**
	Summary	
	Alteration and Refurbishment Costs	**£138,700.00**
	External Works Costs	**£10,100.00**
	Preliminaries 15%	**£22,000.00**
	Contingency 10%	**£17,000.00**
	Total Construction Costs	**£187,800.00**
	All Fees	**£28,200.00**
	Estimate Total	**£216,000.00**

Estimate Exclusions

This estimate excludes (or has made no allowance for) the following –

 V.A.T. @ 20%

 Works to areas other than indicated on the schedule of works

 Asbestos Survey and resultant works

Estimate Assumptions

This estimate assumes the following –

 The works to commence first quarter of 2020

 Work to be carried out during normal working hours

 Full contractors access at all times

 Project subject to competitive tender

Officer Contact

For further information on this report, please contact Paul Dorrell on

01639 686563 or Mobile 07870917694

Appendix Two: Local Development Plan - Strategic Tourism Policies

Strategic Policy SP13 Tourism Policy

"The economic prosperity of Neath Port Talbot will be promoted through encouraging continued growth in the tourist sector by: 1. Encouraging high quality, sustainable tourism development; 2. Providing a flexible approach to the development and conversions to tourism facilities; 3. Resisting, where appropriate, proposals which would result in the loss of tourism facilities; 4. Supporting tourism proposals through the allocation of land for tourism development."

LDP Objective: OB 14

"Tourism in Neath Port Talbot is a growing industry, providing a vital and valid contribution to the local economy. Over recent years, Neath Port Talbot has seen considerable investment in this industry, which has strengthened tourism infrastructure and increased and improved tourism facilities and services. This, in turn, has seen annual increases in the number of visitors to the area. The Council has a tourism action plan that recognises the contribution of this industry to the local economy and promotes future growth. The LDP supports this by taking a flexible approach to new tourism proposals and resisting where possible the loss of existing facilities.

Policies will allow flexibility in the location of facilities and provide protection to existing facilities where appropriate. Whilst flexibility is applied, proposals will be required to demonstrate they are sustainable in terms of location, accessibility and do not have an adverse impact on the environment."

Policy TO1 Tourism Development in the Countryside

"Tourism proposals outside of settlement limits will only be permitted where all of the following criteria are satisfied: 1. It is demonstrated that the proposal is viable and contributes towards the quality and economic sustainability of the tourism industry; 2. It is demonstrated that either the proposal requires a countryside location or it could not be accommodated within an existing settlement; 3. The proposal would not have an adverse impact upon the landscape, ecology, and cultural heritage and would not adversely impact upon the social, economic, environmental or residential amenity of the area; 4. The proposal does not create unacceptable levels of vehicular traffic, cause a detriment to highway safety and access can be provided by a range of transport modes.

This policy offers flexibility in providing new, high quality tourism facilities outside of settlement limits in locations which would not normally be considered for development. Since a large concentration of tourism facilities are located within the valleys area, allowing development outside of settlement limits will provide scope for the tourism sector to grow and contribute to reinvigorating the valley communities.

Proposals will be required to demonstrate that they are economically viable, will promote sustainable development and enhance economic growth in the tourism sector. The valley areas, with their rural setting have the potential to continue to build on the growing tourism industry and can integrate rural diversifcation into tourism schemes. Evidence required to accompany applications may include business plans and local data, including information on existing and projected visitor numbers for the area and an assessment of the position of the proposed development within the current tourism market.

Certain proposals, by their very nature will require a countryside location and may include activities such as golf, fishing and mountain biking. Such activities will need to be designed in a manner to ensure the environmental impact is fully assessed and is minimised."

Policy TO2 Protection of Existing Tourism Facilities

"Conversions or changes of use of tourism facilities to residential use will only be permitted where it is demonstrated that tourism or other employment generating uses are no longer viable.

Tourism is vital to the local economy, particularly in some valley areas. In order to protect tourism facilities and minimise any loss of premises or detriment to the local economy, conversions to residential use will be resisted.

Any proposal for the conversion or change of use of a tourism facility to residential use will need to demonstrate that tourism or employment uses are Neath Port Talbot County Borough Council Local Development Plan (2011-2026) Adopted January 2016 67 Section 5 Topic Based Policies no longer viable and that there is no potential for the premises to be so used. The type of evidence required will include details of why the premises is no longer suitable for tourism use, what other employment options have been considered and evidence to show that reasonable efforts have been made to market the premises for sale or lease for its existing use."

Policy TO3 Tourism Led Regeneration Scheme Policy

"The following site is allocated for tourism led development: Reference Site TO3/1 Rheola Estate, Glynneath

Land is allocated for the re-development of an area of brownfeld land at the Rheola Estate, Glynneath. This tourism led development will comprise up to 100 units of holiday accommodation, up to 350 sqm retail premises and up to 1,000 sqm of leisure complex with associated access, footpaths, ecological improvements, landscaping, boundary treatments and services.

The Rheola Estate, designated as a Historic Park and Garden, is situated within the heart of the Neath Valley and retains a rich historic heritage as an early 19th Century country estate. The site comprises the Grade II listed Rheola House set within a picturesque landscape and parkland together with the site of a former Aluminium Works. This brownfield part of the estate and associated areas are allocated for a sustainable tourism-led proposal which will secure the conservation and restoration of the historic estate.

The re-development also provides the opportunity to allow public access to the estate for the local community and visitors and will help to further expand the growing tourism industry in the Neath Valley. The scheme will beneft the local economy and contribute to the development of the Strategic Growth Area of the Upper Neath Valley."

Appendix Three: List of Consultees

Carol Bowen – Café Supervisor

Darren Chapple – Park Run Event Organiser

Wayne Curtis – Principal Officer Country Parks and Cemeteries

Alex Daniels – Park Ranger

Karleigh Davies – Destination Management and Marketing Manager

Maggie Elsey-Cox - Engagement & Communications Officer - South Wales, Woodland Trust

Simone Holmes – Gnoll Fun Days Organiser

Cllr Stephen Hunt – Local Member

Andrew Jenkins – Friends of the Gnoll Treasurer

Andrew Lewis – Waste and Neighbourhood Services Manager

Cllr Alan Lockyer – Local Member

Chris Max – Project Manager, Woodlands Trust

Steffan Newton – Acting Managing Ranger

Steve Rees – Park Ranger

Cllr Sonia Reynolds – Local Member

Nick Thomas – Senior Country Parks Officer

Brian Warlow – Friends of the Gnoll Chair

Caroline Wheeler – Friends of the Gnoll Member

Cllr Annette Wingrave – Local Member

Appendix Four: Calculating a drivetime contour using the Geometric Buffering Method

The Geometric Buffering method is the standard method used.

The start point of the drive/travel time rarely, if ever, coincides with any of the nodes (junctions) on the road network. For drive times, InSite, by default, looks for the nearest two nodes to use as its starting points and calculates the time taken to reach them using a straight-line calculation and applying a 'cross-country' road speed.

Barrier detection:

A barrier file is included to restrict the use of start nodes that may be closer, but are across a river or estuary with no bridge to connect them. It uses the lines in the barrier schema and/or the line of the clipping boundary – whichever is available. The intention is to check contours so that, in the cross-country "expansion" of the zones around junctions or roads, a barrier is not crossed. It is potentially quite 'expensive': it works by sampling radii around a junction, or perpendicular distances from sample points along a road, to see whether they intersect a barrier, and limit the distance accordingly if so.

Calculating the DriveTime:

From the start point(s) in the database, the application calculates the time at each node that can be accessed and continues in this way doing network searches, fanning out along each possible route, until the maximum time required has been reached. The time stored at each point is rounded to the nearest integer i.e. whole number. At this stage, polygon, or isochrone, generation takes place by effectively 'joining the dots' of all the maximum time locations.

Many of these locations will be 1 or more minutes less than the maximum time, so a 'cross-country' travel distance is calculated from these points until the time limit is reached and a contour is constructed from "circular" zones around each node, and "corridor" zones along each link (road) using a decelerating speed for a road network i.e. buffers of varying size are put around the nodes and links to represent the unused portion of the travel time.

Appendix Five: Gnoll Estate Country Park – local provision of accommodation providers

Name	Short description	Number of units	Distance from the site SA11 3EF	Postcode	Additional note
Forest lodge sites					
Cwmbach Cottages Woodland Lodges	Fully equipped, high standard scenic woodland high standard lodges.	3 lodges within the grounds	2.8 miles	SA10 8AH	
Bryn Bettws Forest Lodge	Bryn Bettws Lodge is located in Afan Forest in the South Wales Valleys, popular for outdoor activity holidays and group visits. The lodge is situated on a mountain, making it attractive for its scenic views.	1 lodge, sleeps 46 people.	5.2 miles	SA12 9SP	This site also has 5 cabins, each sleep 5 people.
Afan Lodge	Afan Lodge is an award winning forest lodge accommodation within Afan Forest Park. It is also the base camp for a variety of adventure sporting activities.	1 lodge, 2 bedrooms	11.1 miles	SA13 3ES	
The Lodge Craig Cefn Parc	Lodge located in Craig Cefn Parc. 3 bedrooms, 2 bathrooms and private garden and	1 lodge, 3 bedrooms, sleeps 7	8.6 miles	SA6 5SZ	

	scenic views of miles of open country side from inside the lodge.				
L&A Outdoor Centre	Scenic forest lodge cabin, offers catered or self-catered accommodation for groups up to 268 people. Accommodation includes swimming pool, meeting rooms and BBQ area and fire pits. Over 50 acres of woodland surrounding including play area.	16 log cabins with 124 cabin beds and 5 bunkhouses with 142 bed spaces.	10.5 miles	SA13 2YP	Cabins and bunkhouses also available.
Osprey Studios Cabin	Small private cabin with a shower room in the garden and overlooking views of the Brecon Beacons National Park. A mix of pubs within walking distance from the cabin.	1 cabin, sleeps 2.	19.9 miles	SA9 1YP	
The Roost Merthyr Tydfil	The site has 4 cabins, overlooking the valley, each with bunkbeds sleeping two adults and two children. Each cabin contains a porch area for bike storage and are close by to the shared kitchen and shower rooms. The site is located in Troedyrhiw, in the heart of the Welsh Valleys with the Brecon Beacons National Park close by.	4 cabins, each sleep 4 people.	27.9 miles	CF48 4HH	The site also has four campervan pitches for small to medium vans. Each pitch has an electric hook up and visitors have access of the shared facilities.

Cabin Gwynfa nr	Cabin Gwynfa nr is one of 4 cabins within the Roost Merthyr Tydfil site. The cabins are minutes away from Bike Park Wales, on the edge of the Brecon Beacons National Park.	4 cabins at Roost Merthyr Tydfil with shared shower rooms, kitchen facilities, parking and wifi. 1 cabin has 1 bedroom, sleeps 2 guests.	27.3 miles	CF48 4DU	Site also has campervan pitches
Camping sites					
TY Canol Farm Campsite	Idyllic camp site located on a family fun farm. Close proximity to many natural attractions including a beach, river, park and mountain biking trails. Facilities include 2 shower rooms and toilet facilities.	Booking only, 1 large campsite.	2.7 miles	SA10 7EY	This site also has 5 available pitches for touring caravans or motorhomes.
Lone Wolf Campsite	Lone Wolf Campsite is 20 acres of privately-owned woodland, shower and toilet facilities on site. Known for being a quiet rural campsite.	booking only but tents can be pitched anywhere within the woodland.	4.4 miles	SA10 8HF	
Tir Abbey Farm Campsite	The camp site is located on a small farm with scenic views of the surrounding towns. Facilities include 1 shower and toilet facilities.	Booking only, 1 large campsite	7.7 miles	SA8 3JA	

Afan Forest Park (Visitor Centre)	Showers and visitor centre / café.	Unknown	6.4 miles	SA13 3HG	It is interesting to note a comment on the website "Due to popularity it is necessary to book up to 4 weeks in advance during school and bank holidays."
Riverside Holiday Park	Holiday Park, facilities include a bar, indoor pool, jacuzzi, outdoor play area and chip shop.	10 tent pitches	7.7 miles	SA6 6QL	The park also includes 50 touring caravan pitches.
Silver Cross Camp Site	Silver Cross camp site is made up of 15 acres of woodland and is bordered by the River Llan. The camping site has been a scout site since the 1950's and is popular for survival training, group activities and youth groups.	15 acres of woodland available for tents.	10.9 miles	SA5 7LQ	
Willow Springs Campsite	Willow Springs is a family run, eco-friendly campsite with a beach, mountain areas and forest areas close by.	10 pitches	11.9 miles	SA13 3DD	Also available on site is a shepherd's hut.
Glyncorrwg Ponds	Mountain biking centre with a national reputation. Supporting infrastructure includes a visitor centre, showers and toilets	30 pitches (caravans) and 60 pitches (camping)	11.1 miles	SA13 3EA	

Touring caravan parks					
TY Canol Farm	Idyllic camp site located on a family run farm. Close proximity to many natural attractions including a beach, river, park and mountain biking trails.	Can only accommodate up to 5 caravans or motorhomes at a time	2.7 miles	SA10 7EY	This site also has available pitches for tents.
Riverside Holiday Park	Holiday Park with well-kept caravans to hire. Facilities include a bar, indoor pool, Jacuzzi, outdoor play area and chip shop.	50 touring caravan pitches	7.7 miles	SA6 6QL	This holiday park also has 10 available pitches for tents.
Glyncorrwg Ponds	Mountain biking centre with a national reputation. Supporting infrastructure includes a visitor centre, showers and toilets	30 pitches (caravans) and 60 pitches (camping)	11.1 miles	SA13 3EA	
Static caravan parks					
Caerau Park	Caerau is a small static caravan park containing 50 pitches, located within rural countryside and mountains.	1 caravan park, 50 pitches.	10.1 miles	CF34 DYN	
Luxury self-catering cottages					
Gellifelgaws Farm, Bwthyn Felgaws	Luxury, spacious cottage, decorated and furnished to high quality. Ensuite bathroom and shower room on ground floor. Large	1 cottage, 2 Bedrooms (Super king and twin room)	3.8 miles	SA10 7DX	

	kitchen and very spacious living room.				
Cilhendre Fawr Farm Cottages	4-star self-catered luxury cottages, converted from a barn and are located within 49 acres of farmland.	3 cottages, all sleep 6 people	5 miles	SA8 3HY	
Crynant Cottages	Crynant cottages consist of three 5-star cottages, converted from a traditional stone barn and are fully equipped with luxury furnishings.	3 cottages, all sleep 7 people.	6.6 miles	SA10 8SF	
Nant cottage	Self-catered luxury holiday cottage. Fully equipped with private garden and river views. Hiking trails close by.	1 cottage, 3 bedrooms	7.3 miles	SA8 4PS	
Ivy Cottage	Luxury self-catered holiday cottage located around acres of countryside and parkland. Rennervated at high standard with private gardens.	1 cottage, 3 bedrooms	11.9 miles	SA13 2TA	
Abergwynfi Cottage	3 bedroom self-catering holiday cottage. Renovated to high standard. Ideal for guests looking to partake in outdoor activities.	3 bedrooms (1 family room, one twin room and one single room). Sleeps up to 6 people.	11.9 miles	SA13 3YW	
The Afan Forest apartment	Family self-catered apartment designed for bikers and walkers. Site features	Two bedrooms each containing single beds that can be pushed	4.5 miles	SA12 9YE	

	a bike wash area, kit lockup and hot tub. Pets welcome. Located within the Afan Forest.	together. Sleeps 4-6 people. Living room with pull-out bed sleeping 2 people.			
Swansea Valley Holiday Cottages	Award winning 5-star self-catering holiday cottages located on the historic Plas Cilybebyll Estate, between Brecon Beacons National Park and Gower Peninsula. Guests can enjoy over a hundred acres of private countryside and some cottages are dog friendly. Described as an ideal location for walkers and mounting biking activities. Wheelchair accessible and each cottage has a well-equipped kitchen, parking outside, free Wi-Fi and laundry facilities.	Total of 6 Swansea Valley Holiday Cottages: - Ty Cerbyd (Sleeps 4) - Bwthyn y Saer (Sleeps 4) - Lloc Llo (Sleeps 4) - Y Stabl (Sleeps 4) - Ty Gambo (Sleeps 6) - Hafod Y Wennol (Sleeps 4)	6.6 miles	SA8 3JQ	
Tan-Yr-Eglwys Cottages	Tan yr Eglwys Cottages are 2 semidetached stone holiday cottages in Cilybebyll, located in the quiet countryside near Pontardawe. 4* luxurious cottages, furnished to a high standard. well equipped kitchen, LCD television, log burner, luxurious beds, Spacious dining area, Wi-Fi and a large selection of	2 luxury cottages: -The Barn Cottage (sleeps 6) -The Farm Cottage (sleeps 4/5)	6 miles	SA8 3JR	

	baby / children's equipment.				
Bwthyn Felgaws	Luxury Cottage with good quality furnishings.	Sleeps 4 or 6 with the Den plus cot. Two bedrooms (super king bed and a twin).			
Lothlorien Cottage	4-star luxury holiday cottage, self-catered, 3 bedrooms, fully equipped kitchen. Bike shed and garden with BBQ area. Wi-Fi included and pet friendly.	3 bedrooms sleeps 5 adults and a max of 6 with the addition of guest bed. Baby cot available.	11.8 miles	SA18 1PT	
Meadow View	4-star luxury holiday cottage, self-catered. Located adjacent to the Brecon Beacons. Car parking garage and tv included. Fully equipped kitchen and garden area with patio.	1 bungalow cottage. 1 double, 1 single bed with pull out bed to make small twin bedroom.	13 miles	SA11 5LN	
Rose Cottage	4-star detached stoned cottage. Fully equipped kitchen and Garden. Located with patio on the edge of the Brecon Beacons with plenty of outdoor activities available. Electricity included. No pets allowed.	1 cottage, 3 bedrooms, sleeps 4.	14.6 miles	SA9 2FL	
Glamping sites					
Willow Springs Camp Site	Glamping huts in a quiet location in South Wales. Situated next to the Afan forest with access to a variety of outdoor activities.	1 Shepheard's hut – sleeps up to 4 people 2 camping huts – sleeps up to 6 people	10.2 miles	SA13 3DD	

Mountain View Glamping	Luxury glamping pod, 1 bedroom, 1 bathroom, overlooking the Black Mountains at the Southern tip of the Brecon Beacons National Park. Located on a working hill farm, with marked walking trails starting from right outside the pod. Includes outdoor heated hot tub overlooking the mountains.	1 glamping pod, I bedroom, sleeps 2 people.	11.9 miles	SA9 2QH	
Gelli Hir Pods on the Lakes	The pod is located in a rural area overlooking 2 lakes. Cabin includes basic kitchen equipment and lighting over a balcony with scenic views of the lake. Water and toilet is located next to the pod.	1 cabin, sleeps 4. 1 bed and 1 sofa bed.	17.4 miles	SA4 3PR	
Y Glyd, Glamping at 68° West	Luxurious glamping pods with jacuzzi, log burner, shower room, BBQ and large decking area with table and chairs. Scenic views of the Brecon Beacons National Park.	2 pods, both sleep 5 people	38.4 miles	LD3 9LP	
Luxury self-catering lodges					
Cedar Lodge	Rural luxury log cabin, 3 bedrooms, 1 hot tub and located in open countryside. Driving distance to	1 lodge, 3 beds	3.8 miles	SA10 7DX	

	Brecon Beacons National Park.				
Pine Lodge	A semi-detached Canadian lodge in the owner's grounds. Pine Lodge has an open plan living room with French doors to the decking area, leather settees, dining table and chairs, and fitted kitchen area including fridge/freezer, dishwasher & w/machine. Shower room with large walk in shower and underfloor heating. TV, DVD, electric heating/aircon. Deck with garden furniture and large lawns to front, Parking available.	1 lodge, 3 bedrooms, sleeps 5 plus baby's cot. 2 ground floor bedrooms (king-size and twin) and a single upstairs.	1.9 miles	SA11 3RL	
Cwmbach Guest House & Cottages	Self-catering lodges, lots of walking, cycling and cannoning activities nearby available.	3 self-catering lodges capable of accommodating 2 to 6 people	2.8 miles	SA10 8AH	

Appendix Six: Forest and country park sites (within 10 miles)

Name	Short description	Main facilities	Activities	Distance from site
Craig Gwladys Country Park	Country park and nature reserve in the Vale of Neath. The steep hillside layout of the park was formed by glacial ice during the ice age, creating an unusual landscape.	-Free parking -Bicycle parking	-Scenic walking trails -Scenic picnic areas	3.3 miles
Afan Forest Park	Afan Forest Park is 48 square mile forest located in the Afan Valley in Neath, popular for outdoor activities, including mountain biking, wildlife and a forest safari offers a unique way to explore the forest. There are also two visitor centres and a camping offer.	-Visitor centre -Mountain bike centre -Toilets	-Mountain biking -Walking trails -Cycling -Afan forest safaris -Clay pigeon shooting -Quad biking -Paint balling	6.6 miles
Penllergare Valley Woods	Penllergare Valley Woods is known for its waterfalls, terraces, panoramic views and exotic nature. The site has received considerable Lottery Funding.	-Car park -Visitor centre -Woodland café with free wifi -Toilets	-Waterfall trail - Woodland walking trail	10.1 miles