



Planning Solutions Consulting
Research Et Analysis

Perfect Pitch Evaluation

Final Report



Prepared by

Planning Solutions Consulting Limited

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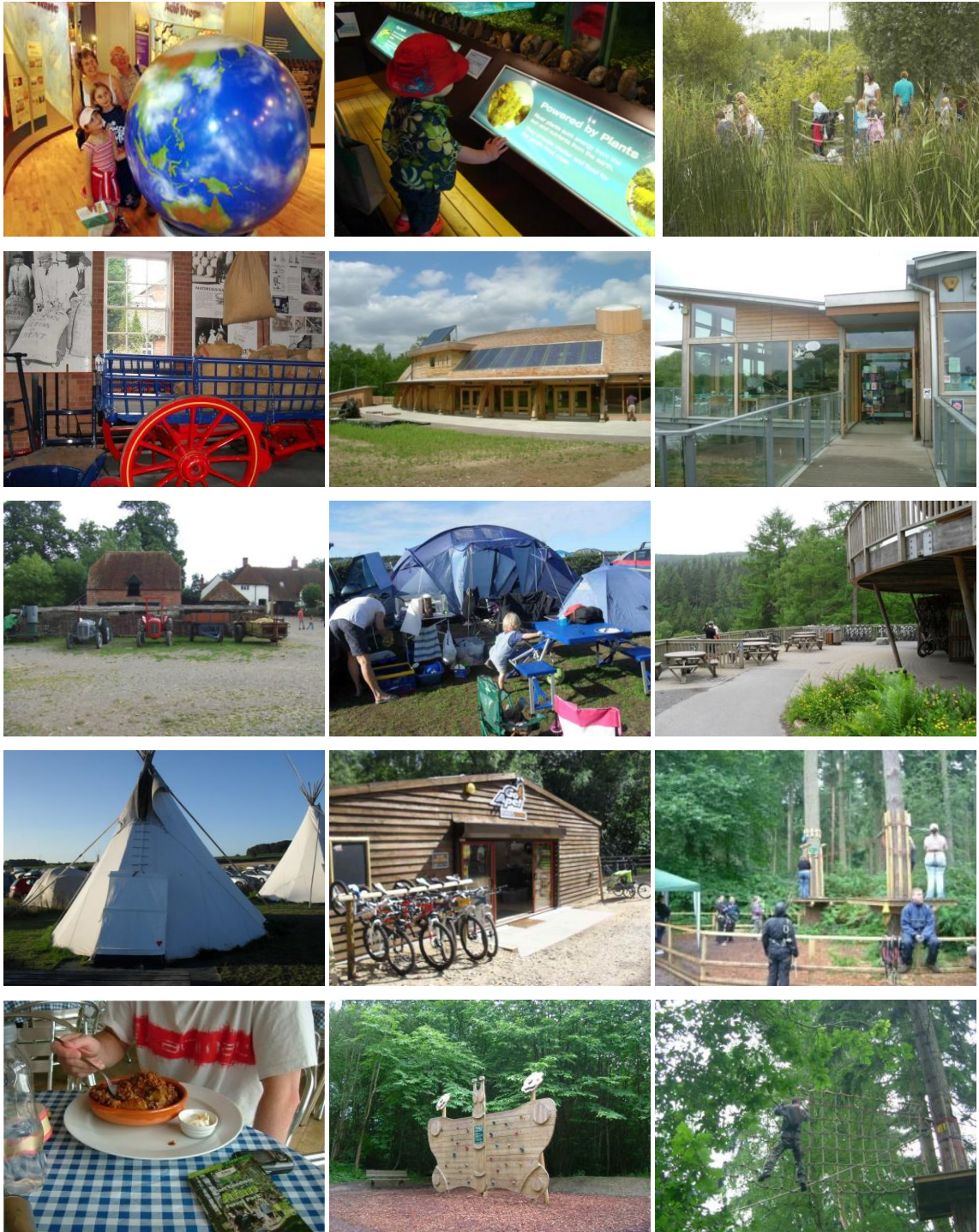


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Gwledig: Ewrop yn Buddsoddi
mewn Ardaloedd Gwledig
The European Agricultural Fund for
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Rural Areas



Llywodraeth Cymru
Welsh Government

Creating sustainable rural businesses



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1. Introduction

This Final Report is based upon our submission to carry out an evaluation of the Perfect Pitching Camping project in the Vale of Glamorgan of behalf of Creative Rural Communities.

The evaluation has focussed on:

1. Identifying what farmers and landowners and existing campsites gained from participating in the Perfect Pitch camping trial;
2. Uncovering whether any farmers or landowners will continue with their campsites in the future;
3. Identifying whether the trial attracted visitors who may not have visited the Vale of Glamorgan before;
4. Understanding the camping experience from the perspective of guests;
5. Identify any potential impact of the Perfect Pitch trail on the local community including residents and businesses; and
6. Key lessons learnt from this project.

Our report is structured as follows:

- **Section one** sets out the introduction, background information on Perfect Pitch and our methodology to carrying out the evaluation;
- **Section two** sets out the marketing initiatives used to raise awareness of the project and a profile of campers;
- **Section three** sets out the views of farmers and landowners, and existing campsites which took part in the trial;
- **Section four** provides an overview of the overall guest experience;

- **Section five** provides an overview of the impacts on the local community including residents and businesses;
- **Section six** provides feedback from project stakeholders; and
- **Section seven** sets out our concluding remarks.

1.1 What is Perfect Pitch?

Perfect Pitch is a trial to assist landowners in the coastal region of the Vale of Glamorgan with the legal, practical and financial support to develop and try out a campsite for low key sustainable camping on their land for a limited period of time. This trial provided an opportunity to see if this type of business is something that any of the participating farmers and landowners would like to embark on long term. The trial took place over the summer months in 2012.

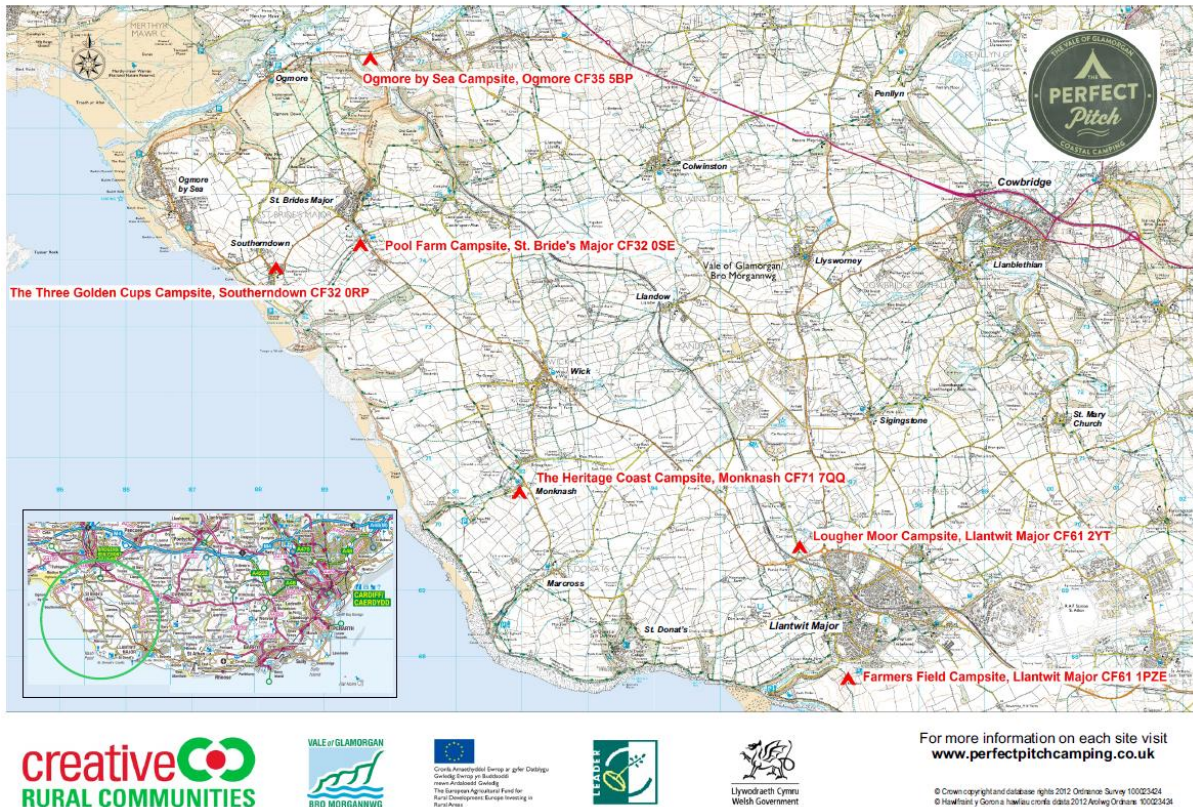
It is recognised that the trial represented a risky venture to some degree as camping is known to generate controversy in planning terms as there is often resistance from local residents to new tenting and touring pitch developments in their neighbourhoods.

Five farmers and landowners were selected to participate in the scheme following an assessment process and they were then joined by two existing campsites in the Vale of Glamorgan. The seven sites participating in the project are:

1. Farmers Fields Campsite, Llantwit Major
2. Lougher Moor Campsite, Llantwit Major
3. Heritage Coast Campsite, Monknash
4. Pool Farm Campsite, St.Brides Major
5. Three Golden Cups Campsite, Southerndown
6. Happy Jakes Campsite, Flemingston (existing campsite)

7. Llandow Park Campsite, Llandow (existing campsite)

Farmers Field, Heritage Coast and Lougher Moor were already involved with the hospitality sector to some degree and already had other forms of accommodation activity at their sites.



1.2 Project synopsis provided by Creative Rural Communities

Background

Creative Rural Communities is the Vale of Glamorgan Councils Rural Regeneration team. We are supported by the Rural Development Plan (RDP) for Wales 2007-2013 which is funded by the Welsh Government, the European Agricultural Fund for Rural Development and the Vale of Glamorgan Council.

We hold responsibility for delivering projects that meet the aims and objectives of the Local Development Strategy (LDS) which is a document created by the Vale of Glamorgan Rural Partnership and Local Action Group (LAG).

Our Pride in the Vale project, under which the Perfect Pitch Camping trial was developed is funded via Axis 4 of RDP for Wales and the LAG are responsible for administering this funding. The group have a budget to design projects that meet key elements of the LDS.

These include making best use of local resources, especially in the coastal location by supporting new products or services including the development of new tourism activities and to add value to the tourism industry targeting resources at new areas and promoting the existing ones. The LDS also encourages networking and cooperation amongst businesses and providing funding for groups of businesses to pilot new and innovative products or services which make use of local resources.

The Perfect Pitch Trial

The coastal camping project was been designed by the LAG to address identified challenges and opportunities unique to the Vale of Glamorgan. Discussions with rangers at the Heritage Coast identified that there is an issue with illegal camping along the coastline. In addition another CRC scheme, 'Pride in our Farming Families' which supports farm diversification, it was identified that many farmers identified a desire to open a campsite however where overwhelmed by the process and permissions required. The Eisteddfod basing the 2012 festival within the Vale of Glamorgan Heritage Coast also generated enquiries from local landowners wishing to capitalise upon the opportunity this might bring. Before the trial, the region had only 3 existing camping and caravanning sites available. Discussion on these issues at a LAG meeting led to the support of CRC to investigate the options further.



A family enjoying camping

The pilot was designed to strategically raise the profile of camping in the Rural Vale of Glamorgan as a camping destination, alongside the tackling of illegal camping and providing landowners with the knowledge and confidence to develop their own sites. It was hoped that as well as potentially creating new campsites, the existing camping providers in the region would also benefit from the increased marketing investment from this project.

At its inception all campsites in the Heritage Coast region were invited to be part of the joint marketing exercise. Happy Jakes and Llandow Caravan Park accepted this invitation. Acorn Campsite chose not to be involved within the trial. All of the pilot sites are existing businesses that are working together with the two existing sites to develop the Perfect Pitch trial.

In order to create a critical mass of campsites in the region, the project assisted landowners along the Heritage Coast with opening a temporary campsite. 6 sites were been selected following a panel assessment. Only those that had the long term possibility of applying for full planning permission should the trial be a success were invited to participate in the trial. Operating within the the trial did not guarantee full planning permission in the long term.

The 6 pilot sites receiving support were:

1. Heritage Coast Campsite, Monknash
2. Lougher Moor Campsite, Llantwit Major
3. Three Golden Cups Campsite, Southerndown
4. Farmer's Field Campsite, Llantwit Major
5. Pool Farm, St Brides Major
6. Ogmore by Sea Campsite, Ogmore by Sea – this site has now withdrawn from the trial.

The 2 existing sites participating and receiving joint marketing support are:

1. Llandow Caravan Park
2. Happy Jakes

The process to select the temporary sites for the trial was done via direct mail to potential sites within the region, alongside an open call - advert in papers and on web for anyone interested in new trials to come forward. 16 potential locations came forward. These were discussed with planning services to assess their suitability and long term potential, and then a panel chose 6 locations to be trialed. The panel consisted of LAG members including VOGC Tourism official,

Capital Regional Tourism and one of the existing campsite owners who is also a LAG member. The combined tourism impact of the critical mass achieved between the permanent sites and the temporary trials was considered at that time.

Financial Support

Each successful site were invited to apply for funding up to the max value of £5k to support the development of their campsites. This consisted of up to £2.5k towards on-site infrastructure improvements, and £2.5k towards the hire/purchase costs of on-site amenities, to include shower/toilet/hand wash facilities. All hire costs were off-set by income generated through the operation. Not all sites required the full £5k investment to operate. The landowners were required to apply to the panel for approval for all costs, which followed the strict procurement guidelines required for RDP funding.

In addition to direct financial support, the campsites were supported by a number of additional activities co-ordinated by CRC;

Marketing

A marketing campaign accompanied the trial which drove traffic to the Perfect Pitch Camping website promoting information about the existing two sites alongside the additional 6 pilot sites. It included a blog which was developed to allow readers to follow project progress. This ongoing dissemination of work is in keeping with the ethos of Axis 4 Leader.

A photo shoot was organized to gain professional photography to support the campaign. Both the new trial sites and two participating existing sites were included within this.

Signage

The new pilot sites were supported with temporary directional AA signage for the duration of the trial. Temporary signage is designed for temporary events not permanent businesses who would qualify for tourism white on brown signage. The two permanent sites that were part of the project both have existing Brown on White Tourism signage to assist navigation.

Regulating the new sites

There are no council licensing regulations for temporary sites, therefore CRC took steps to ensure a minimum standard at each of the sites to ensure constancy and ensure protection and a quality experience for campers. The minimum standards were developed through close

consultation with the Environmental Health Officers. We adopted the same licensing requirement that sites would need to meet if they were to look for a permanent site licence.

In addition to our own Funding Agreement which includes our own minimum standards, the pilot sites were required to sign up to reaching the minimum licensing standards as part of our funding agreement with them.

All of the campsites were inspected to ensure that they met our funding conditions. This was not a legal requirement for them to operate because, as temporary campsites, there are no legal licensing requirements.

All sites were subject to ongoing ad-hoc monitoring throughout the trial. All sites were advised that appropriate insurance would be required before operating. This included Building & Content and Public Liability Insurance. It was the responsibility of the sites to ensure they had appropriate insurance in place.

Due to the restrictions of operating under the 28 day rule, the trial sites were not allowed to accept bookings from visitors wishing to sleep in caravans/campervans. The sites were instructed to re-direct such enquiries to the existing sites. The same was done to direct enquiries received through the Perfect Pitch website.

Training

The pilot initiative including training for each of the pilot sites. A workshop session was held bringing together all relevant departments to inform the campsite owners of their requirements in running their sites. Existing sites were also invited to attend this session to act as mentors to the new campsites. The proprietor of Happy Jakes attended and spoke to the group.

Topics covered were:

- Health & Safety
- Licencing
- Planning
- Refuse
- Marketing
- Exemptions
- Signage
- Administration

In addition to this, the site owners attended a study trip to visit a number of different operational sites in the Gower. This allowed direct communication between our pilot sites and those that have first hand experience of running permanent sites in an area well known to the camping visitor. Existing sites were also invited to attend this visit but gave their apologies.

Of the 6 sites selected to take part in the trial, 5 opened and operated for a max 28 days during the summer season 2012.

The landowner responsible for the Ogmores by Sea campsite decided not to open this campsite for a number of reasons. The amount of preparation involved both physically at the site to meet our minimum standards, and the effort involved to market the site, has been more work than anticipated. Coupled with very wet weather, and the amount of work on the farm being delayed until the late sunny spell, the farmer felt that he was unable to operate both campsites and the farm at this time. The farmer is very grateful for the opportunity to be involved with Perfect Pitch and hopes that he will be able to review the campsite at Ogmores by Sea at a later date.

All 5 other temporary sites operated for a max 28 days each between the 27th July and the end August 2012.

1.3 Methodology

Our programme of research has involved working closely with Creative Rural Communities team in Cowbridge, in the Vale of Glamorgan and has included:

- Face to face meetings and / or telephone interviews with the seven participating landowners and farmers;
- A postal survey to 70 local residents (along with an online version of the questionnaire);
- An online survey among previous guests;
- An email survey to enquirers (people who made direct enquiries via the Perfect Pitch website);
- A survey among local businesses;
- Consultation with Panel Members and other project partners.

2. Marketing

Equinox Communications have provided a summary of the marketing outcomes:

PR

Three press releases were drafted and issued to local, regional and national media. Coverage was secured in the following titles/ outlets:

- BBC Newyddion
- ITV Wales Tonight
- South Wales Echo (x 4 articles)
- Western Mail
- WalesOnline
- Buzz Magazine
- Glamorgan Gazette
- Glamorgan Gem
- Cardiff and South Wales Advertiser
- Daily Express
- BBC Newyddion Online
- ITV Wales

Online

- Touring and Tenting Online
- Cool Camping Online

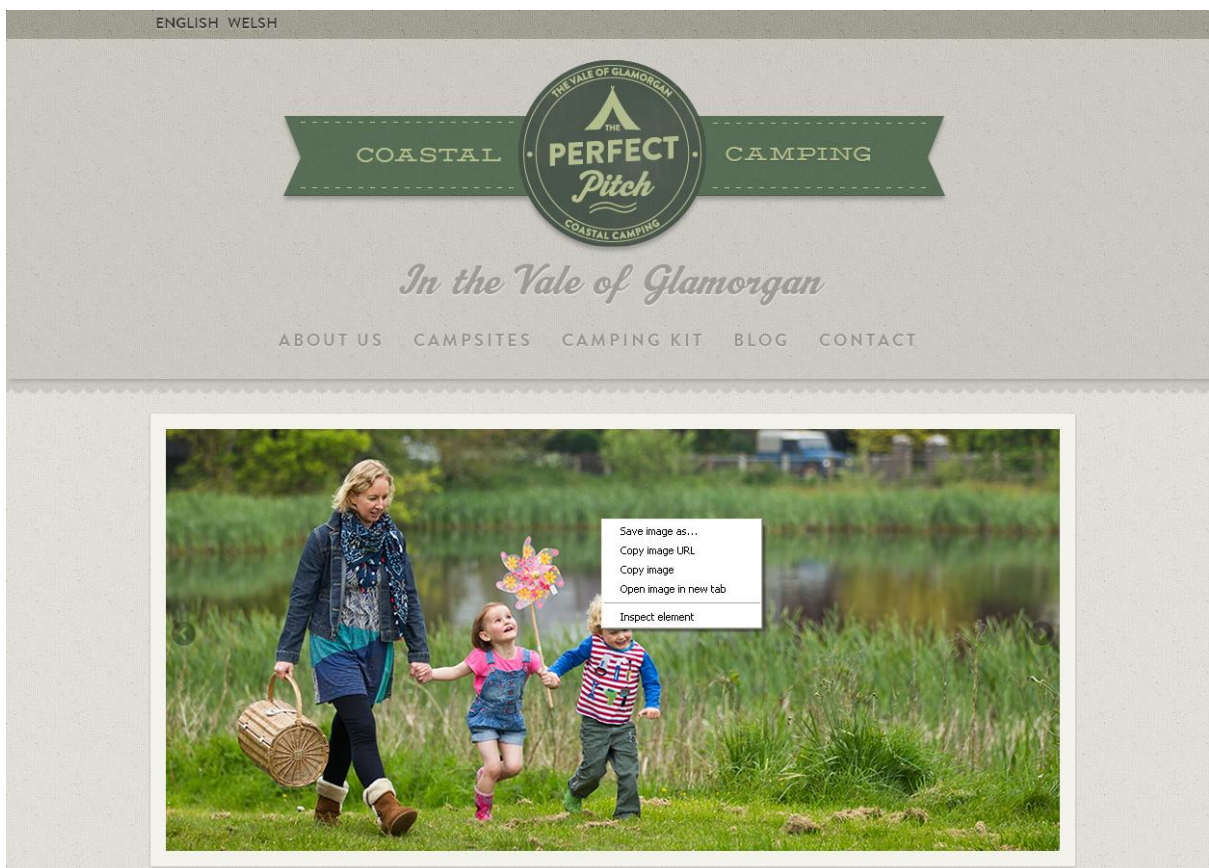
This coverage generated 3,943,556 opportunities to see and has a PR value of £98,613.

In addition to the press releases a blog promoting Perfect Pitch was secured on the Visit Wales blog page, four adverts were placed in magazines, social media coverage was also secured and a paid per click campaign was set up. In all the media and promotional activity generated a total number of opportunities to see of 5,012,787.

Google analytics

The table below shows the key statistics from Google Analytics. It is interesting to note that whilst hits significantly dropped off during September that the site is still receiving hits.

	July	August	September	Totals
Visits	3,300	5,015	566	8,881
Unique Visitors	2,678	4175	489	7,342
Pageviews	17,090	21698	2657	41,445



Screenshot of the Perfect Pitch website

How did guests hear about the Perfect Pitch trial?

Alongside the information provided by Equinox Communications, with Creative Rural Communities we reviewed the booking forms. In terms of marketing channels used the most popular was the web – with some 76.1% of lead group bookers finding out about the campsite via the online world. This was followed by the other category 21.9% and press articles 2%. If

we analyse the 'other category' the highest proportion within this category discovered the campsite by driving past it, followed by road signs and via a recommendation.

Other means of discovering the campsites*	Guests**	%
Drove by the campsite	10	22.73
Flyer	2	4.55
Recommended	5	11.36
Road signs	7	15.91
Tourist Information Centres	3	6.82
Local pub	2	4.55
Miscellaneous	15	34.09

* Note the above table shows a breakdown of the 'other category' only.

** Only relates to guests who completed the survey

In terms of the online activity, it is interesting to note that some 16.34% of the lead group bookers found out about the project via the Perfect Pitch website, although the most popular website was the established UK Campsites (please see table below). The campsites participating in the trial had a basic entry on the UK Campsites website, although two paid for an upgraded entry and reported a strong response from this.

Website	Guests*	%
Perfect Pitch	25	16.34
UK Campsites	32	20.92
Cool Camping	3	1.96
Google search	12	7.84
Glamorgan Camping	1	0.65
Guardian	1	0.65
Other camping websites	4	2.61
Pub website	1	0.65
Unspecified	74	48.37

* Only relates to guests who completed the survey

Note the above percentages relate to the 'web use category' only.

Where do guests live?

The table below sets out the postcode areas where guests live. Some 24.7% of visitors live within the CF Cardiff postcode area - the Vale of Glamorgan is evidently a destination which is very accessible to residents living within this postal area, particularly urban neighbourhoods. It is interesting to note that the total of the next top three postcode areas account for 16.9% of guests (these are Bristol 6.5%, Gloucester 5.2% and London 5.2%). The project also attracted visitors from considerable distances including Scotland, Yorkshire, Kent and from overseas.

Postcode areas	Guests*	%
Cardiff	57	24.7
Bristol	15	6.5
Gloucester	12	5.2
London	12	5.2
Other areas of Wales (excluding Cardiff, Newport, Swansea and Wrexham)	11	4.8
Birmingham	10	4.3
Newport	10	4.3
Swindon	8	3.5
Hereford	7	3.0
Oxford	7	3.0
Swansea	7	3.0
Overseas	7	3.0
Wrexham	5	2.2
Coventry	5	2.2
Bath	4	1.7
Not known	3	1.3
Various other postcodes**	51	22.1

* Only relates to guests who completed the survey

** Less than 3 responses per postcode includes visitors from Scotland, Yorkshire and Kent

Please note, not all booking forms collected postcode data.

Marketing (from the online survey)

In terms of how guests heard about the Perfect Pitch, 50% discovered the campaign via an online source, 12% via the campsite owner, 8% were via a recommendation, 8% via newspapers/ magazines, 4% via the leaflet and 4% through driving past. 12% of responses were not categorised. A number of the owners reported reasonable levels of repeat business even within the short 28 day period of the operating season.

Booking income

We analysed the booking forms and below we set out the bookings' income generated from the five campsites. The number of bookings and average value of each booking ranged from £32.86 for Lougher Moor through to £46.84 for 3 Golden Cups. Total booking revenue for the five campsites was just under £11,000.

	Farmers Fields	Heritage Coast	Lougher Moor	3 Golden Cups	Pool Farm	Totals
Bookings revenue	£1,391.50	£4,480.00	£1,150.00	£3,232.00	£440.00	£10,693.50
Bookings	31	100	35	69	11	246
Average booking revenue per booking	£44.89	£44.80	£32.86	£46.84	£40.00	£41.88

There were some 246 bookings in total. The average secondary spend per booking was stated as £205.56. If we extend this to all bookings and add the £41.88 accommodation spend this represents some £247.44 per booking. Overall therefore this 28 day trial would have generated some £60,870.24 of revenue (please note this is based on a small sample size).

3. The views of farmers and existing campsites

Support received acted as an enabler

New campsite operators interviewed welcomed the scheme as they would never have gone ahead with a camping business on their own. One farmer who had been thinking of introducing camping pitches several years ago did not have the confidence to take this project forward because of concerns over legal issues but Perfect Pitch provided the reassurance and support to take it forward during 2012.



Lougher Moor campsite

Overall the farmers / landowners were delighted with the Perfect Pitch project in terms of support they received from Creative Rural Communities. Comments included “first class trial, excellent, can’t praise them (Creative Rural Communities and their staff) enough.” The staff at CRC came in for notable praise as incredibly hard working, enthusiastic, committed and helpful.

The key outcome was that the trial gave farmers / landowners the confidence to further explore the opportunity to introduce camping pitches on a more regular basis.

Financial outcomes

Financially it was difficult to generate a reasonable surplus income from an activity based on 28 day rule usage and a limited number of pitches (25 or 30 per site). The campsites generally did not reach capacity. However the trial gave a strong indication of product suitability and market appeal. One of the more popular sites was Heritage Coast whose booking levels were

reasonable particularly in light of the very poor weather conditions over the Summer which clearly dissuaded many campers from travelling. The higher level of bookings may have been due to the enhanced website listing on Camping UK.

One public house assisted with the management of a trial site and they started to serve breakfasts in recognition of demand from campers. The publican commented that the trial helped to increase turnover. They estimated 95% of the guests visited the pub during their stay and they served up to 40 breakfasts on some days (weekends).

The direct financial outcome for participating farmers / landowners in part was shaped by the very poor weather across the period of the trial which has had a significant impact on the domestic tourism market. In addition as a start up business activity it inevitably requires time to become established and generate referred / repeat users. Farmer felt that the trading expectations were set quite high and that these were not reached. The potential to generate bookings from visitors to the Eisteddfod did not materialise in any significant form.

Data collection

The booking system worked well and was easy to administer from the owners' perspective. Although from the analysis of the booking forms it can be seen that not all owners were collecting detailed information e.g. the guest's email address.

Local businesses

Farmers / landowners promoted local businesses to their guests including pub / restaurants and the local train services (including free park and travel at Llantwit Major railway station) and other providers such as bakeries, surf school, camping equipment store etc. Additional business was referred to other existing sites for caravan and campervans enquiries.

It is interesting to note that farmer in particular felt (in a positive way) that the local pub made more money from the project than he had. The local pub started to provide breakfasts in response to demand from camping guests.

In some instances camping visitors have been encouraged to return to the Vale outside the Summer period using self catering cabin / cottage accommodation.

Marketing

It was felt that the brand was well presented and that it reflected the ethos of the project. One trial campsite mentioned that the project had a low carbon footprint (e.g. slow tourism, walking, cycling), which fitted well with their own operational ethos.

It was also felt that if the campsite continued to operate in future it would upgrade the advertising package on the main campsite website (UK Campsite) as it was widely acknowledged that the Internet is the most effective route to the domestic holiday market. Businesses with their own website e.g. Farmers Field used this to help promote the camping experience, another distributed leaflets when visiting other areas.

Operational considerations

One landowner in particular noted the main operational issue related to the hire of equipment and the need for a generator to activate the shower which had cost and noise implications and caused some issues. It also required onsite supervision for at least 2 hours per day. One farmer benefitted from an existing shower and toilet unit which helped meet the expectations of guests.

The public house which helped to manage one of the trial sites felt that it took too long to complete the booking forms, which was an issue when the pub was busy. One way to overcome this could be through the use of an online booking system.

The farmers / landowners were aware of some negative feelings in the community about the trial and some owners suffered difficult relationships with their neighbours as a result. It is clear that camping does raise fears in homeowners about noise and disturbance and highlights the need for clear rules. In many ways the trial provided an opportunity to 'test' some of these issues but there are differing views on reported guest behaviour.

The hiring of tents was not widely used and some (but not all) owners believed this aspect was not a necessary part of the trial.

Operationally, there were no major issues reported.

Guest experience

In terms of market types attracted there was a wide variety of users with a notable proportion of city dwellers from the Cardiff area. It is also interesting to note that several participants mentioned that campers were not looking for campsites with significant central facilities.

Little things which really helped to create positive feelings amongst campers were that dogs and fires were allowed on site (Farmers Field and Heritage Coast), electric power source was provided enabling guests to recharge mobile phone and use other electrical devices (Pool Farm). One of the campsites provided free eggs for new arrivals and another offered a full Welsh breakfast service, taking orders the previous evening. The farmers / landowners received positive feedback from the guests both directly and via online reviews. Heritage Coast had 9 online reviews with one score of 10 and the rest of 9 with many people enjoying the quiet environment and spotlessly clean facilities.

The future

The farmers / landowners which took part in the trial are looking at different options for the future. Out of the five new campsites five (this includes the public house which helped to manage one of the sites) have reported that they would like to continue with the camping. Some are actively considering their options e.g. Certificated site, continuation of the existing offer from 2012, extending the season, introducing a camping pod type of accommodation, operating under the 28 day rule but strategically opening during weekend periods and for two weeks in August. One landowner has already secured planning consent for camping use.

At least three of the farmers / landowners felt that in the future they could continue without the support of Creative Rural Communities but there was mention that some form of investment grant would be welcome.

Other

Ogmore by Sea – it was felt that the site was remote and as it had not received any bookings it would be difficult to take it forward and that the operator's efforts should be concentrated on their main site.

Feedback from existing site owners taking part in the scheme

There were two landowners who had existing campsites and who participated in the Perfect Pitch initiative but not the trial, mainly in terms of offering some mentoring assistance and also joining in with the online marketing. The main issues raised included the following:-

- There was a feeling that the vision to attract additional campers with a relatively low level of facilities (including temporary facilities such as Portaloos) did not respond to today's market needs. In addition there was differing standards across the new parks.
- The notion of 'pop-up parks' risked lowering the standards of the camping sector.
- The restrictions on use to include only tents was not always strictly followed and this was not properly 'policed'. This was deemed to break the guidelines under the 28 day rule and to contravene regulations in some instances.
- The road signage was deemed very unsightly (St Bride's in particular). In some instances it was reported that signs directed people away from the existing sites in favour of the new sites.
- Felt that new campsites took business away from existing sites and indeed other providers such as B&Bs. Five new sites are seen as too many to introduce all at the same time in difficult economic conditions and in a tough market.
- The administration to start up five new sites was not properly implemented with issues around insurance for example not being resolved until the last minute.
- Some issues around the suitability of the selected sites in terms of being too close to neighbouring residential properties or indeed too close to other camping facilities and in one case using a field deemed to be within the curtilage of an adjacent property.
- Planning consent for some 150 new touring pitches has reportedly already been issued in 2012 in the Vale (50 at the golf club, 45 at Happy Jakes and 56 at Llandow). This was already ample provision and there was no capacity issue requiring further touring pitches for tents. This issue was amplified by the fact that the Summer of 2012 represented the worse year for tourism in nine years which one owner confirmed was supported by Visit Wales data.
- Positive outlook from one existing site for attempting to launch a new scheme which aimed to bring additional tourism in the Vale of Glamorgan.

- It took one owner 3 years to gain planning consent for a touring park. The application for Heritage Coast has now been consented within just a few months.
- There is concern that the trial may have caused some long term damage to the sector by over-supply of pitches available.



Enjoying camping in the Vale of Glamorgan

4. Visitors and the camping experience

As part of the evaluation programme where an email address was supplied we asked previous camping parties to complete an online questionnaire . Additionally, people who made an enquiry via the Perfect Pitch website were also contacted and asked to complete the online survey (which generated one additional response which is included below). In total some 28 surveys were completed (out of some 68 delivered emails).

We set out below a summary of the research.

Length of stay

Short breaks represent the predominant type of break taken by guests. Just under 54% of guests stayed for 1 or 2 nights, 34.6% stayed between 3 to 5 nights. Only 3.8% of guests stayed between 1 and 2 weeks.

Holiday book – lead in time

38.5% of guests booked their holiday within one week of the start date with some 30.8% booking between one and two weeks before the start date of their holiday. This short lead time is likely to be explained by the short length of the trial over the summer, but it could also be driven in part by the fact that a number of guests lived relatively close to the campsites.

Also this Summer many campers kept their plans ‘on hold’ until checking weather forecasts near to proposed departure dates.

Extending the stay

Some 15.4% of guests extended their stay once they had arrived. Guests gave a number of reasons for extending their stay and one commented “my daughter enjoyed the camping experience and wanted to stay longer, I couldn’t say no” and another responded “we weren’t sure how many nights to stay. But after such a lovely time was had on the first night we just had to stay another!” No one cut short their stay.

Camping experience

Overall the camping experience was very positively rated by guests. The table below shows the number of responses and how they rated the different element of the experience. Everyone rated their overall experience as excellent, very good or good.

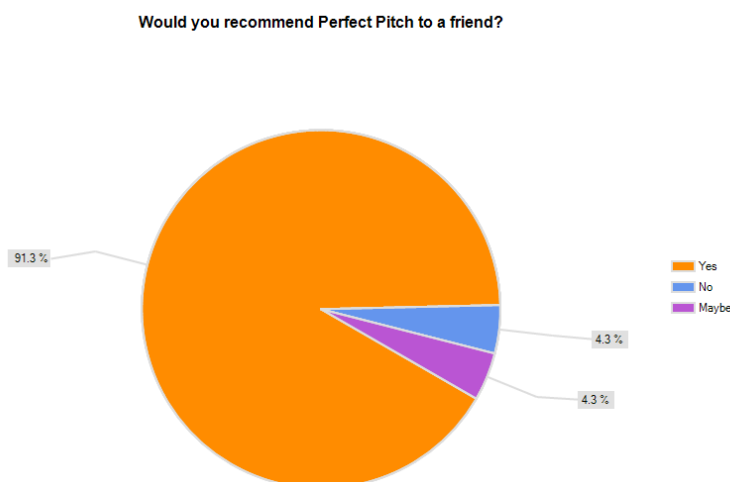
Answer Options	Excellent	Very Good	Good	Average	Poor	Very poor	Not applicable (didn't use)
Perfect Pitch website	6	11	2	1	0	0	4
Booking process	8	9	5	0	0	0	2
Sense of arrival (driving on the campsite)	6	8	8	2	0	0	0
Blue and white signage to campsite	7	10	2	5	0	0	0
Reception you received	12	8	4	0	0	0	0
Shower	3	2	3	8	4	1	3
Toilets	2	4	5	8	4	1	0
Washing up	2	3	4	5	2	3	5
Refuse / re-cycling	3	7	3	5	4	1	1
Your overall experience	10	8	6	0	0	0	0

There were some areas which did not score as highly for example the shower facilities, toilets, washing up and refuse / recycling facilities. This can in part be explained by the use of portable shower and toilets, which were used as this was Perfect Pitch was trial. The main comments in terms of future facilities related to use of better shower and toilet facilities. Although it is important not to over develop the sites.

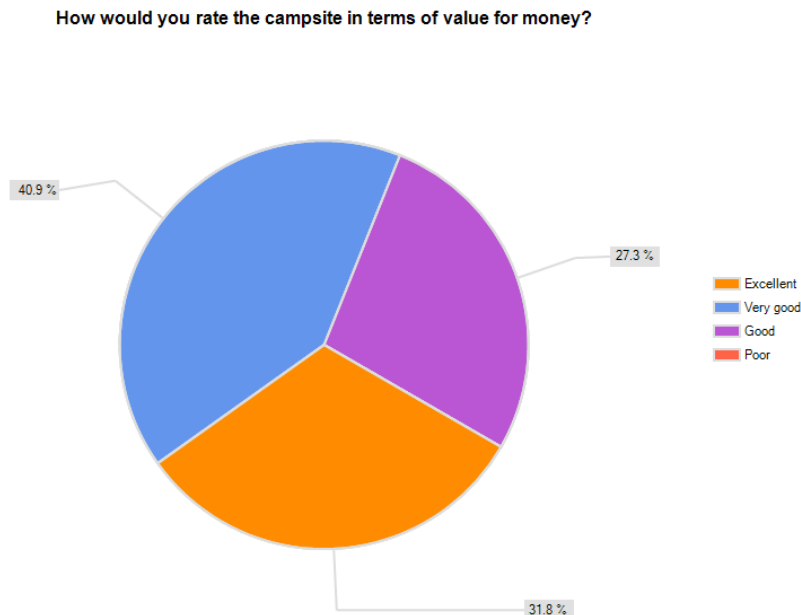
UK Campsite (www.ukcampsite.co.uk) is a website which promotes caravanning and camping sites in the UK. Two of the participating campsites (Heritage Coast and Lougher Moor) both received positive feedback from guests.

Recommending Perfect Pitch in the future and value for money

A very positive endorsement of the guest experience is shown in the chart below, where 91.3% of guests would recommend Perfect Pitch to a friend.



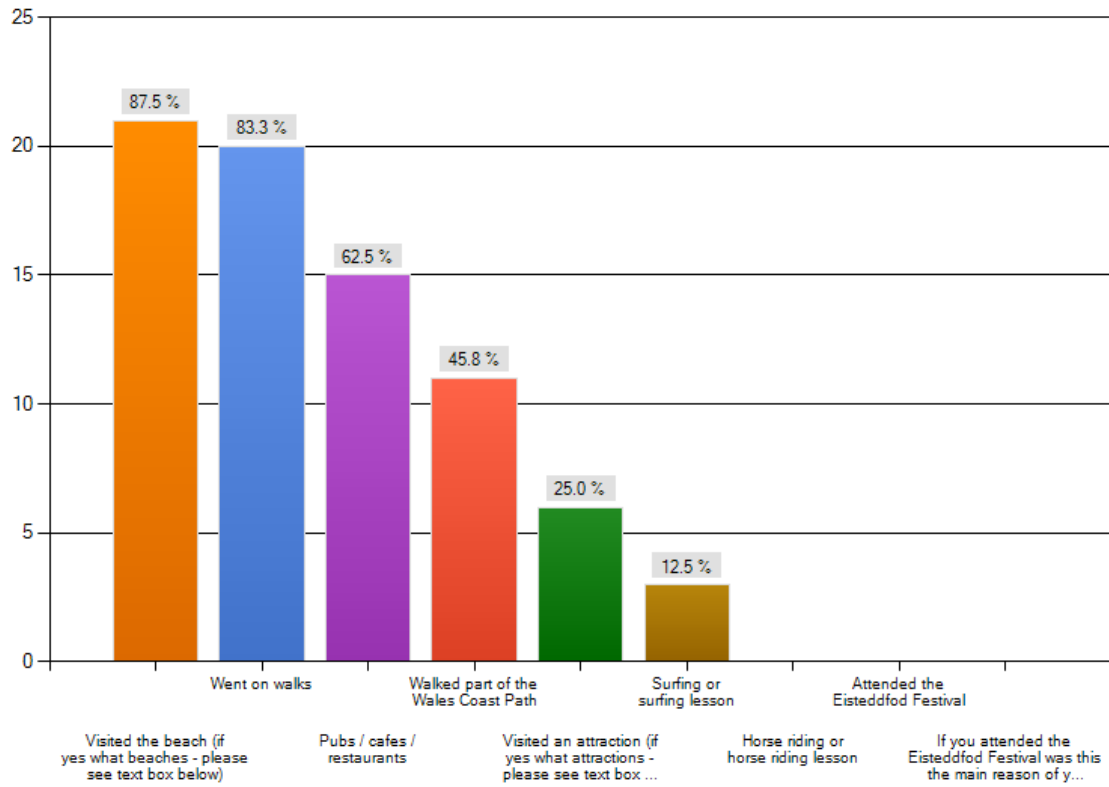
The chart below shows that 100% of guests felt that the campsite was either excellent, very good or good value for money. This suggests that the pricing was competitive for the market.



Activities carried out during their stay

The most popular activities guests undertook during their stay included visiting beaches (87.5%), going on walks (83.3%) and visiting pubs, cafes and restaurants (62.5%). 45.8% of guests walked on part of the Wales Coast Path. Interestingly no guests who completed the survey attended the Eisteddfod Festival (please see chart below). A number of the sites were ready to assist with local information on walks, circular routes, stopping off points and even return bus timetables to help their guests to explore the area.

What did you do during your stay?



The Wales Coast Path

Other activities included, for example, visiting the Speedway Grand Prix at Cardiff Millennium Stadium, Port Talbot Church, Col Huw and Ogmere beaches, Barry Tourist Railway, Cowbridge Physic Garden, Caldicot Castle and taking part in a sea fishing trip. Towns visited by guests include Llantwit Major (73.7%), Cowbridge (31.6%), Bridgend (21.6%) and Cardiff (31.6%).

Mode of travel during their stay

Sustainable and low impact tourism was mentioned by two of the participating campsites. It is interesting to note that the predominant mode of travel around the area during their stay was 'walking' (50%). This links into the wider ethos of the Perfect Pitch trial. Campsite owners reported limited car use during guests' stays.

Previous visits to the Vale of Glamorgan

75% of guests had visited the Vale of Glamorgan previously, but only 21.1% of the people have camped in the Vale of Glamorgan.

Interestingly, 20.8% of participants would not have visited the Vale of Glamorgan if they could not have stayed on a Perfect Pitch campsite. This represents an indication of the level of new and additional business generated by the trial. For a significant number of visitors the Vale offered a very appealing alternative to longer travel times to alternative destinations in Devon, Cornwall and West Wales.

Future visits

Some 95.8% of guests would use Perfect Pitch in the future. However, the same percentage of guests would visit the Vale of Glamorgan even if Perfect Pitch was not used, which suggests a high level of satisfaction and that visitors are keen to return to the Vale as a destination.

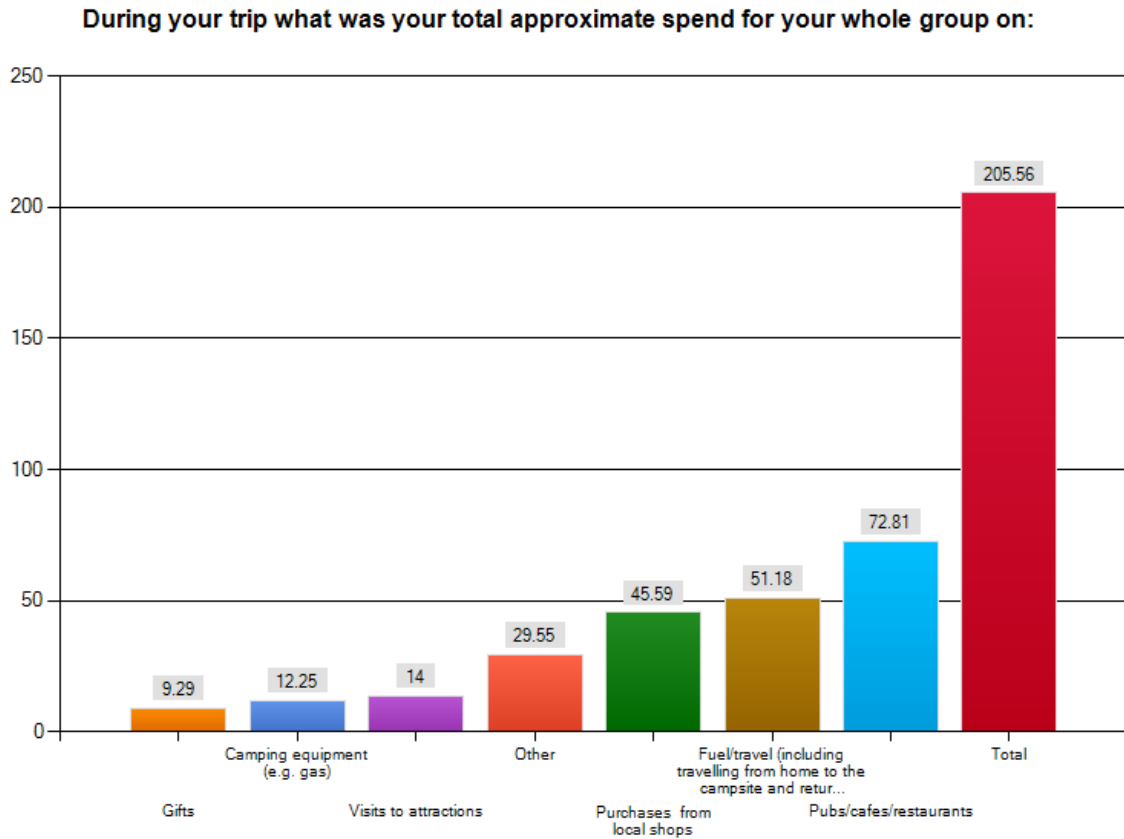
What makes the Vale of Glamorgan attractive to guests?

The Vale of Glamorgan is an attractive destination for a number of different reasons, including:

- Closer to the main markets (for example, Bristol and Cardiff) and this makes it popular for short breaks;
- High quality beaches and the Heritage Coast (and countryside);
- Good area for walking and watersports.

Visitor spend

The chart below sets out a breakdown of the average approximate spend per group. The average total spend was £205.56 per group.



In terms of the economic category of guest 63.3% are classified as working full time (30+ hours per week), 18.2% working part time (9 to 29 hours), 9.1% not working (looking after house / children), 4.5% not working (student) and 4.5% were classified as other.

5. The impact on the local community and businesses

5.1 Local community

Questionnaires were delivered to local residents whose property was located close to the trial campsites with a prepaid return envelope. 29 questionnaires were returned. We also hosted an online survey which was promoted via posters which generated 12 responses. We set out the key findings from the residents' survey below.

Local awareness

46% of local residents had heard of the Perfect Pitch trial prior to the residential survey.

44% of respondents live less than 100 metres from one of the five new campsites participating in the trial, 31% between 100 to 500 metres and 26% over 500 metres.

Local impact

52% of respondents had not noticed any effect of Perfect Pitch on themselves. There was a mixed response in terms of the impacts noticed at a personal level. On the positive side these ranged from *“Not in a bad way - more people walking locally, busier in the pub. A good atmosphere, generally”* through to *“it was lovely to walk my dog up there every morning as I usually do and see holiday makers enjoying the sunshine and our beautiful countryside. The local shops/pubs /restaurants were also busier and everyone commented on how successful it was. It brought great business to Llantwit Major, and the comments and responses from all of us locals were extremely positive.”*

On the negative side these ranged from damage to private property through to the use of other people's land to consume alcohol, littering, loud music, some increase in traffic and smells from refuse.

Community impact

In terms of the wider local community 39% had not noticed an impact on their community but some 61% had noticed an impact on their community. The responses centred upon noise at night, additional traffic and a feeling that residents have to be more security conscious. Other responses included *“disquiet in the village about its impact on such a small community.*

Disappointment that views of residents were not sought prior to the establishment of the site and were ignored when voiced.”

Other community impacts noted included more business for local pubs and shops. It also appeared that the project encouraged interaction between some local residents and campers *“More visitors coming to Llantwit and enjoying our lovely coastline I also encountered walkers from the Monknash campsite who were having a lovely stay.”* Additionally *“Nice to see more tourism locally, although it is apparent from petitions etc that many locally disagree”* and *“big difference to local businesses. more custom!”*

Preconceptions

24% of residents had preconceptions about Perfect Pitch, these centred on a realisation that there may be more local traffic. One resident was concerned about the impact on the value of their property. Another resident raised the question of community consultation to let residents know about the proposals. Interestingly one resident who lives very close to a campsite commented *“the 3 Golden Cups is not known as a quiet pub, with loud music often audible late at night. We had been concerned that the campers would be noisy at night, but if they were, we were unaware of it where we live.”*

Suggested areas for improvement and overall views

We received a mixture of responses and we recognise that inevitably people who have negative experience / opinions are more likely to respond to a questionnaire of this nature. Some residents felt that Creative Rural Communities and landowners and farmers could have carried out some of the project differently. Ideas include locating campsites away from public houses, greater consultation with residents *“I feel more information should have been provided and views of residents sought before site was established.”*

Other comments included *“yes! look at the negative effect on local businesses! No need for more campsites all you are doing is closing down existing sites for your own gain and greed! do the right thing and support the community by closing these unnecessary sites.”*

Another commented *“If this campsite opens again, it would be a good idea to impose a noise curfew after, say, 11pm. We looked at the posted rules and it did not seem to have such a curfew, which is very common at most camp-sites. The Facebook page of the 3 Golden Cups, run by the landlady, also promoted the site to people living in Bridgend as an alternative to getting the bus*

home after live music etc. This was accompanied by comments from her and others to "Party" etc. I would suggest that this line of promotion is not really in line with the concept of Perfect Pitch. There was even an all day party to mark the opening of the site, which again probably gave the wrong impression locally, and did not help their cause to persuade residents to support the project."

One resident commented that they were very happy with the campsite which they lived near to, another commented that they hardly noticed the site. Other residents commented "No - Well run project. Very professional" and "No - It was a well run nicely branded project."

5.2 Local businesses

Six local businesses responded to a hand delivered survey businesses including village shops, a camping store, a farm and pub.

Three of the businesses had heard of the Perfect Pitch trial. Clearly as local businesses are the main beneficiaries of secondary spend it is important to raise awareness amongst local businesses so that they can engage with guests in the future. Retailers suggested that campsites could advertise the local shops available.

Five out of six of the responding businesses would like to see their 'local campsite' reopen in 2013. Four of the businesses reported noticing an increase of visitors in the local area and two reported an increase in trading activity, for example, grocery sales, newspapers, drinks and camping equipment.

Retailers felt that additional advertising and word of mouth are key ways to attract visitors to their local area. This could include promoting some relatively unknown facts about the area e.g. Hounds of the Baskervilles was filmed at Cowbridge. Signage could also be improved to some towns, for example, Llantwit Major, which has a cultural heritage offer (it is believed that as directions are not provided to the old part of the town people proceed along the bypass to Barry and beyond). The accessibility of the Vale of Glamorgan is also important to promote.

In summary some local businesses report an increase in trade. In addition, the evidence from the limited online survey is that secondary spend has been quite significant.

6. Feedback from the Panel and stakeholders

As part of the evaluation programme we engaged with Panel Members and other stakeholders including Capital Region Tourism, the Vale Marketing Group, Vale of Glamorgan Council (tourism / marketing) and local tourist information centres to gain their views on the project.

Key objectives

Panel members agree that the primary objective of the Perfect Pitch trial was to raise the profile of camping in the Vale of Glamorgan by creating a critical mass of facilities. However it was recognised that there were a range of further objectives including to:

- Raise the profile of the Vale of Glamorgan as a tourist and visitor destination to a wider range of people;
- Deter fly camping and anti-social behaviour along the Heritage Coast by providing appropriate alternatives;
- Meet anticipated additional demand generated by the Eisteddfod and opening of the Wales Coast Path and deriving economic value from them;
- Prepare for a raised demand for staying on the Heritage Coast through other activities (e.g. Sense of Place and Interpretation projects);
- Address a perceived deficit in camping provision in the Vale;
- Test the planning system's attitude and assistance to permanent tourism development proposals in a coastal setting;
- Offer local people the opportunity to start their own businesses;
- Encourage local supply chains and clustering;
- Create local additional income streams for rural businesses and make an economic contribution (on the basis of more visitors likely to generate greater spend in the region).

Further objectives were to support the development of Slow Tourism initiatives in the Vale of Glamorgan, encouraging visitors to travel less, with lower carbon footprint, to engross themselves in the local area (including using local pubs, shops, attractions) and to engage in sustainable activities such as walking, cycling and surfing.

The project aimed to ensure that prospective site operators had all the tools and knowledge required to run a safe and lawful campsite.

It also provided a business advisory service for selected landowners, who may have just opened campsites without appropriate support or specialist knowledge of the sector and the trial was an opportunity to test the market and create confidence.

The process

In terms of the process the preparatory work was thorough and included site visits, workshop and face to face support and advisory services. Overall it was deemed to be a rigorous process taken seriously by applicants and the Panel.

It was felt that there could have been greater clarity as to what the grant could cover (for example the criteria changed by WAG half way through process which could have had a detrimental effect on participants). There were some concerns about how major capital items were purchased with no clear disposal/ exit strategy (e.g. mowing equipment).

The hiring of facilities (for the campsite operation such as generators, portaloos) proved onerous in some cases and there is recognition that this could be approached differently in future, possibly allowing sites to procure facilities directly and thereby avoid over-complication.

There is a sense among Panel members that the signage was too big, too general and easy to move. Also it was recognised that the signage could have been confusing unless visitors knew exactly which of the sites they were heading for. Some issues with signage occurred due to the different issuing authorities of signs for existing and temporary sites and did cause a point of contention for existing operators. General signage to indicate the facility of camping in the area may be less contentious.

It was recognised that some applicant sites were not selected as they were too remote. Selected sites generally benefitted from proximity to the coast, pubs, restaurants, attractions and activities.

The process was recognised as presenting a learning curve for CRC staff as well as campsite operators. For CRC this represented the first time of dealing with a level of resident antipathy.

Impacts

Panel members provided feedback on a wide range of scheme impacts which we summarise below:-

- Landowners/tenants have developed a positive and open relationship with the local planning services, so that they can work together to achieve mutually agreeable solutions.
- A number of landowners/tenants have demonstrated a real understanding of what is required to run a campsite, both in terms of customer demands, marketing, requirements from the local authority, and understanding of the law/regulations.
- The landowners/tenants have understood the value in developing their own Unique Selling Points, working with local service providers and pubs and shops.
- Visitors used and paid for the facilities and a range of other local ancillary services.
- Some of the local pubs saw the project as a significant benefit to them.
- The camping shop in Cowbridge (OBI) expressed overwhelming support for the project and the new sites.
- Some of the local residents saw the campsites as an asset to them as well as visitors from outside of the county, and were happy to 'holiday at home'.
- The Southerndown Surf School benefitted from increased visitors to the Vale.
- B2B approach was built into the decision-making, training and assessment processes
- Some campers had never considered the Vale as a holiday destination and would return again next year. Others had planned to travel from Cardiff to Swansea (Gower) camping, but were directed to the Vale by the TIC in Cardiff.
- The branding and the delivery of the marketing was well received according to feedback and there was positive PR and media coverage for the initiative and the Vale

- The landowners/tenants have expressed a desire to continue their campsites in the future, this demonstrates that they have found the trial useful in learning about what it required of them.
- The expectation raised by the Eisteddfod organisers was that the Vale was set to accommodate 120,000 to the Vale in August 2012, many of which would be looking for campsites. In reality, very few Eisteddfod visitors stayed at the new campsites, which in turn gave a truer picture of demand for the future.
- Although campervans/caravans are not permitted (as overnight accommodation) onto sites using the 28 day rule some did arrive at selected sites. CRC sought advice from the planning team and the campervans were allowed on site as long as they were not slept in (ie: had a tent as well.) In hindsight, this made it difficult to monitor as staff could not be on-site at campers' bed times! Whilst CRC re-iterated this to the campsites frequently, it would have made it easier and clearer to monitor if campervans/caravans were not allowed on the new sites during the trial. All enquiries via the Perfect Pitch website regarding caravans and campervans were specifically advised to contact Llandow and Happy Jakes Caravan and Camping parks regarding their booking.
- It was felt that the Tent Hire scheme is worth persisting with to attract more walkers and first time campers to the campsites, however there was regrettably inadequate time to market this by targeting these specific markets. The hire tents on site also contributed to confusion to neighbouring residents who thought that sites were being operated for more than 28 days as hire tents were left erected but not occupied on a number of nights. Furthermore, the tents were offered as alternative accommodation to those travelling by campervan.
- Whilst it was difficult to monitor the 28 days that each site operated, as these were not always consecutive, Panel Members felt that by allowing the sites to close on days that they did not have bookings, and open on days that they did, each site was allowed to maximise their opportunities to accommodate campers and to maximise their opportunity to meet the trial objectives.

Panel members reported positive feedback from participants and bookings were reasonable considering the weather during the trial period. In general, the campsites seemed to be popular and well received by the visitors.

Looking to the future

Panel members would like to see a level of planning applications to create permanent sites and to achieve higher standards of quality under the Visit Wales Quality Assurance Scheme.

It is hoped the trial would help to engender a positive approach from planning to allow those that wish to, to create permanent sites.

There is not a strong will to replicate in other areas of the County as the Vale is relatively small and this could potentially cause displacement, particularly if a number of participants go forward for full planning. However CRC has been approached by another RDP team to share the experience. CRC has also designed a Tool Kit aimed at both other new campsites and other strategic organisations to share lessons learned.

Panel members recognised that it caused quite a lot of emotional reactions in the camping fraternity and also within at least one neighbourhood. Some of these issues were considered unfounded or demonstrated an inward looking attitude by the complainants. However, a transparent work ethic and a common sense attitude and clear information towards existing sites as well as new ones should help avoid unpleasantness. The trial has offered the applicants the chance to embark on a new business which otherwise they may have been too hesitant to start.

From among panel members, further support which might be appropriate and could be offered in the form of development advice, marketing, networking, bookings and referrals. The Tourism Association (VMG) would be able to help with advice, networking with other businesses in the region and marketing via its website and campaigns. The regional tourist board (Capital Region Tourism) could provide support with training and skills, influence and advocacy, marketing advice and support, networking opportunities and best practice from elsewhere.

Overall conclusion (Panel Members)

It helped to dispel the myth that modern campers want all mod-cons at their campsites, participants in the trial visited successful campsites that have been running for years at full capacity that had just a porta-loo on site and a fantastic view! They claimed that their campers deliberately chose them as there was no chance of re-charging a mobile phone or a games console.

Of course participants in the trial saw equally successful campsites that had everything from club houses to launderettes, hard standings and electric hook-ups, and maybe some of the new campsites will aspire to provide some of these facilities in the long term, on the understanding that they can offer a great experience even with minimal facilities.

Overall the trial was more time consuming, more multi-faceted and complex than CRC had anticipated from the outset. Having said that, CRC believes the trial did meet the aims and objectives of the project. CRC is pleased that over 8,000 people visited the Perfect Pitch website, that over 700 campers visited the trial campsites and that 5 campsites feel that they can make an informed decision about their futures.



Slow tourism in the Vale of Glamorgan

7. Summary comments

In summary the Perfect Pitch team have undertaken an ambitious project in a potentially challenging sector of the tourism industry, entered a new business area and made a positive step to attract new visitors to the Vale of Glamorgan.

The trial has not been without its teething problems in terms of some negative feedback from local residents and participating established campsites.

The trial has offered an opportunity for landowners and farmers to diversify their businesses and to consider opportunities for additional income generation and the project has supported the wider rural economy via secondary spend. Creative Rural Communities have provided the support to allow businesses to explore and develop additional revenue streams.

The project has increased the opportunities for camping in the Vale of Glamorgan. The project has been able to respond to certain market needs e.g. an accessible destination for people wanting a short green / slow tourism. Clearly, if the pattern of multiple break taking and holidaying 'closer to home' continues, the Vale of Glamorgan is likely to benefit from this trend due in particular to its proximity to Cardiff, Swansea and Bristol.

In summary the trial has met its primary objective which was to raise the profile of camping in the Vale of Glamorgan by creating a critical mass of facilities. The project also supported the development and promotion of slow tourism within the Vale of Glamorgan, created confidence in landowners and farmers to introduce camping pitches on their land (with a number going forward with longer term accommodation based activities), launched a new internet based route to market and generated secondary spend within the Vale of Glamorgan local economy.



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