

GOLDEN GROVE and the GELLI AUR COUNTRY PARK CARMARTHENSHIRE

FINAL FEASIBILITY STUDY January 2025



Prepared for the Golden Grove Trust



Hiraeth.



Planning Solutions Consulting
Experts in visitor experiences



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1.0 INTRODUCTION

Background

1.1 The Golden Grove Trust received a grant from Carmarthenshire County Council's Rural Innovation Fund which is funded from the U.K. Government's Shared Prosperity Fund. The Fund provides opportunity for third sector and public sector organisations to pilot and test new ways of working that provide innovative solutions to rural challenges.

1.2 The Charitable Objects of the Golden Grove Trust (No: 1143416 on the Charity Commission's Register) are set out in their Governing Document as:

"To provide activities which benefit the local and wider Community and in particular (without limitation) to:-

Acquire, restore and conserve for the community and public benefit the historic buildings known as Golden Grove, Carmarthen, together with its historic gardens, arboretum, surrounding gardens and parkland known as Gelli Aur and associated buildings and structures. Provide opportunities for education, leisure, well-being or other identified local needs which are exclusively charitable, by maintaining and managing public access to and use of this space for the benefit of the local and wider community, as well as ensuring that it is sustainably managed for the future."

1.3 The funding offer noted that Golden Grove and the Gelli Aur Country Park is in a state of disrepair and that the new Trustees of the Golden Grove Trust aim to rescue the estate and create a sustainable future for the place in ways that would connect with and benefit the local community. It is widely recognised to be a major heritage asset within the region. One of the outputs of the grant is the funding of this feasibility study, assessing the future viability of the estate. Together with the parallel community consultation it is the first step of what will become a major heritage regeneration project.

The Brief

1.4 The Golden Grove Trust invited tenders on 15th July 2024 based on a Brief that required the consultant to carry out a feasibility study of a number of options, to inform this with public consultation and to provide a report which the Trust will use to plan next steps and ultimately to deliver a phased project. Given the presence of the ancient wood pasture of the deer park, as well as other habitat and landscape types found within the estate, it is likely that Gelli Aur contains a significant ecological resource. This is very likely to contain a range of statutorily protected species such as bats, dormice, breeding birds and invertebrates. While the Brief did not require the preparation of an ecological appraisal, such input will be a necessary part of taking forward any of the options presented in this Feasibility Study.

1.5 Please note, with the agreement of the client, the scope of the study was changed since the brief was issued, to reflect a reduction in the available budget.

The Consultant Team

1.6 On 26th July 2024 the Trust appointed a consultant team composed of Holland Heritage, Hiraeth Architecture, Planning Solutions Consulting and McQuitty Landscape Design. The consultants have met Trustees and visited and carried out fieldwork assessment of those parts of the estate to which the Trust has access. We have also carried out desk-based and primary research, engaged with key stakeholders and held a community consultation event in November 2024. The adopted methodology has focused on understanding the heritage significance and local needs before considering viable options for adaptive reuse. This approach helps to ensure that proposed change will not compromise the identified heritage significance and will appropriately preserve Golden Grove and the Gelli Aur Country Park for future generations.

1.7 Alongside our consultancy expertise we have also used Planning Solutions Consulting's sister company's operational experience of managing visitor and heritage attraction sites and a hotel. These include:

- CONKERS, a 120-acre woodland discovery experience in National Forest;
- Kent Life, a 28-acre heritage park and farm attraction;
- Cotswold Country Park and Beach, an activity destination / country park;
- The Royal Esplanade Hotel, Ryde, Isle of Wight (Grade II listed).

Previous work

1.8 Since closure of the College there have been a number of attempts to identify a viable new option(s) for Golden Grove and the Gelli Aur Country Park. Most recently there was the proposal for a centre for veterans of armed conflict and for an art gallery. This was informed by various independent report, including an Indicative Business Plan prepared by the Carmarthenshire Heritage Regeneration Trust in 2009. Although substantial grant funding was obtained the project was not implemented. What sets this 2024 Feasibility Study apart is that it has engaged the local community in discussion about their needs and preferences for Golden Grove and the Gelli Aur Country Park.

Recent work by the Trust

1.9 Since the creation of the new Trustee Board in 2023 and its expansion in 2024 the Trust has revised its Articles of Association and achieved successful grant applications, including to the Rural Innovation Fund and Architectural Heritage Fund. In parallel to this study it has also commissioned a structural survey of the Atrium at the heart of the Mansion. In this period, the Trust has actively engaged with the local community, significantly expanded the volunteer base and reopened the Country Park to the public. A new tenancy has been let for the Café which is proving popular locally and another reason to visit Golden Grove / Gelli Aur.

Location

1.10 Golden Grove and the Gelli Aur Country Park is set approximately 5km south-west of Llandeilo. The mansion is at National Grid Reference SN 5972 1986. It is reached from the B4300 and then from the drive east off the lane through the village of Golden Grove.

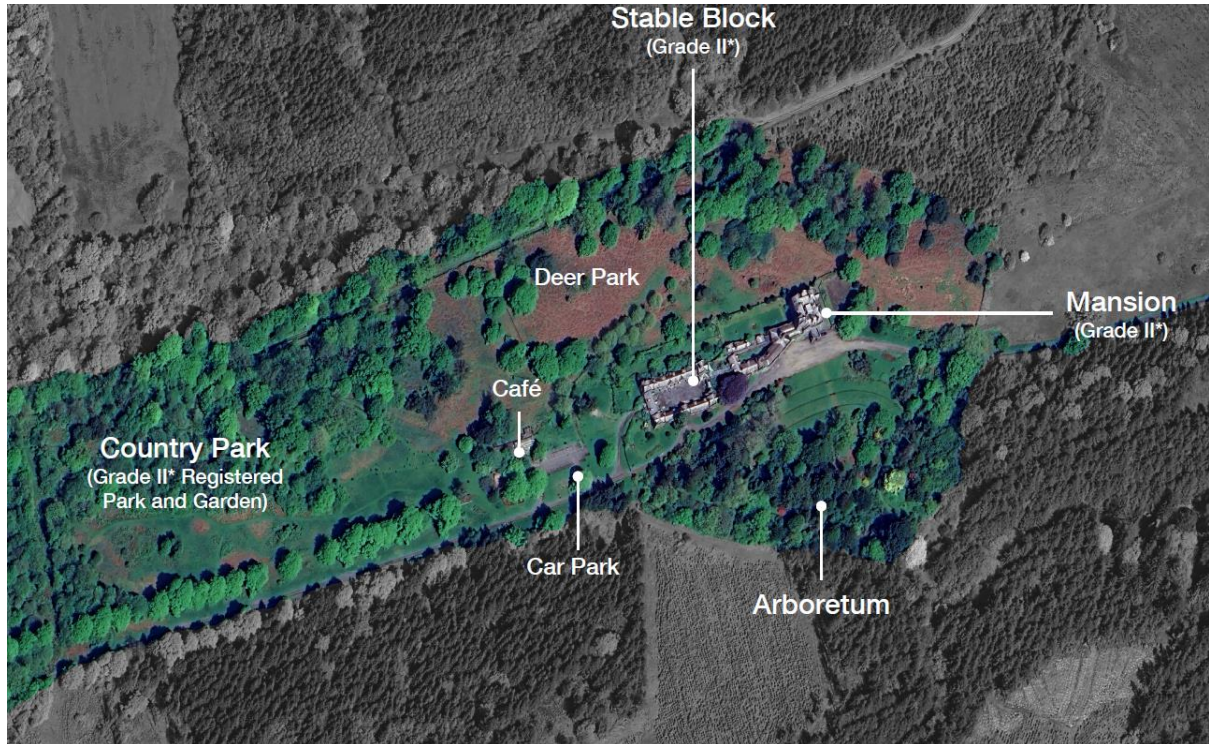


Figure 1 Annotated Aerial view © Hiraeth Architecture



Figure 2 Aerial view © www.goldengrove.org.uk

2.0 HERITAGE SIGNIFICANCE & CAPACITY FOR CHANGE

2.1 This section of the report is based upon survey work carried out in August and September 2024 as well as desk-based research and research in the National Library of Wales and National Monuments Record.

2.2 The descriptive account given here is intended only to provide an outline of the history, character and significance of the heritage of Golden Grove. For the purposes of the Feasibility Study, a comprehensive account is not necessary but what is included is sufficient to inform the assessment of potential future uses. More complete description and analysis of the buildings can be made at a future stage when changes are being designed.

2.3 Relevant Heritage Designations

2.3.1 Golden Grove Mansion was listed in 1966 but the other individual listed items were not added until 1999. The listed entries within the boundary of the Golden Grove registered historic parkland are set out in the table below, although outlying items are outside the control of the Trust.

Listed Building Name	Grade	Cadw Ref:
Golden Grove Mansion	II*	10926
Golden Grove Stable Block	II*	22204
Golden Grove Terrace	II	22205
Golden Grove Garden Seat and Stairs	II	22206
Golden Grove Inner West Gate	II	22170
Golden Grove Inner East Gate	II	22171
Gate Piers at West Lodge	II	22207
West Lodge	II	22184
North Lodge	II	22173
Pont-y-Wern	II	22178
Eagle Lodge	II	22172
Garden Wall of the former Mansion	II	22174

2.3.2 Golden Grove is a Grade II* Registered Historic Park and Garden (Cadw reference PGW(Dy)10(CAM)).

2.3.3 Golden Grove lies within the Cadw / ICOMOS Tywi Valley entry (Cadw reference HLW(D)5) in the Register of Historic Landscapes of Outstanding Interest in Wales.

2.3.4 Llanfihangel Aberbythych Community as a whole has 37 listed buildings, the majority of which are Grade II. Nine of these are in the village of Golden Grove

immediately to the west of the parkland and another is East Lodge beside the B4300. The Community also has three Scheduled Ancient Monuments but they are each 1.5km or more from Golden Grove Mansion.

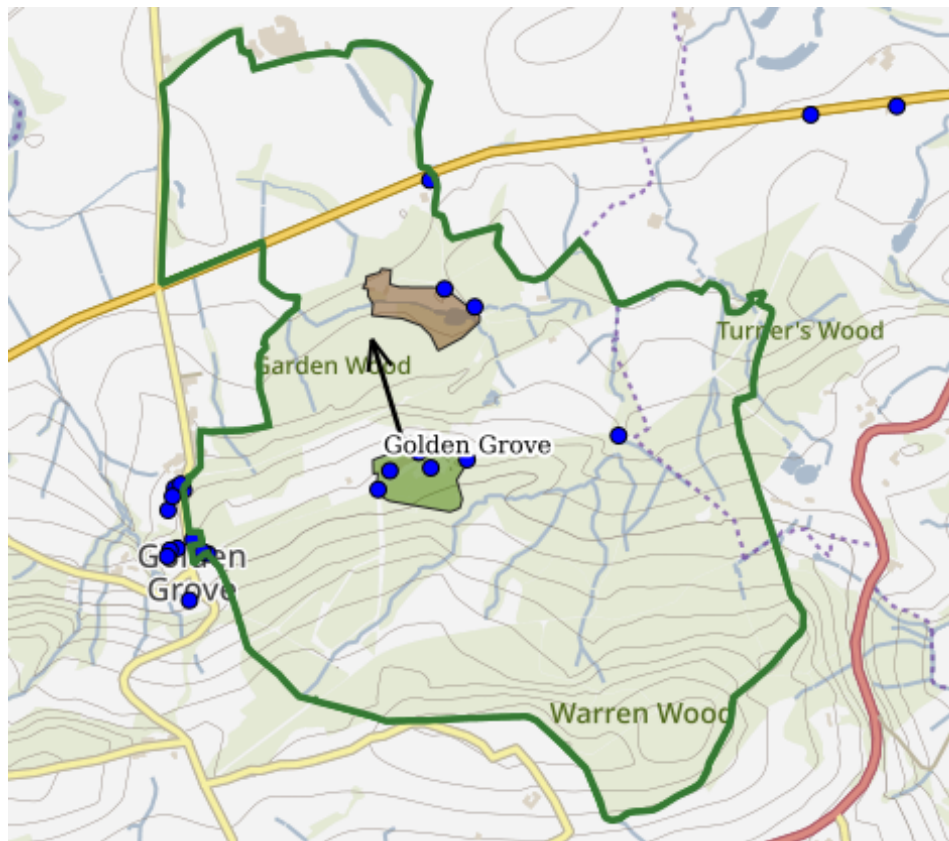


Figure 3 Designated Heritage Assets at, or close to, Golden Grove © Cadw Cof Cymru (the green line defines the boundary of the Registered Historic Park and Garden, the blue dots locate the listed items, the green shaded area defines the pleasure gardens and arboretum of the present mansion and the brown area defines the walled garden of the former mansion)

2.4 Outline History of Golden Grove

2.4.1 Golden Grove is historically associated with the Vaughans who owned the estate from the mid-16th century to 1804 when it passed to the Cawdors. The earlier house was sited below to the north-east and included a lake and a walled garden. It was reputedly the largest country house in Carmarthenshire and was one of the most important in South Wales. A major fire in 1729 led to a rebuild in 1750s and later in the 18th century John Vaughan consulted Nash and Adam about further rebuilding but nothing came of it with the result that the house inherited by Lord Cawdor in 1804 was in poor repair. Between 1826 and 1834 the 2nd Earl of Cawdor created the mansion that we see today on higher ground away from the risk of flooding and commanding extensive views along the Tywi Valley.

2.4.2 The present house was designed by Jeffrey Wyattville 1826 to 1834 and as he was at the same time busy at Windsor Castle, work was supervised by his

assistant Henry Ashton. It is in an eclectic style with Elizabethan elements such as the crow-stepped gables and mullion and transom windows but it also a Scottish baronial flavour to it in the porte-cochere and tower. This is thought to be a reference to Cawdor's Scottish ancestry. The stables and offices are contemporary but some of the outlying buildings are later in the 19th century.

2.4.3 In the 1970s the family sold the estate to Carmarthenshire County Council which operated it variously as an Agricultural Institute and Art College, until 2003. It was then bought with a view to conversion to a hotel but nothing came of that and it eventually passed into the control of the Golden Grove Trust. Proposals for a home for heroes and an art gallery were scoped out but never implemented and today new Trustees are seeking viable proposals for the future of the mansion and the wider estate.

2.5 Outline Description of the Mansion

2.5.1 Exterior

2.5.1.1 The 2-storey and attic mansion is at first sight forbidding in its dark grey Llangynderyn limestone. It is characterised throughout by cross-framed mullion and transom windows with Tudor hoodmoulds. The main part of the front (south) elevation is symmetrical with crow-stepped gables to the outer bays and a crenelated porte-cochere to the centre defining the main entrance. The attic windows are in the form of Gothic lancets and the clustered chimneys are octagonal in a Tudor manner. To the west is a tall gable tower on which are clock-faces set in lozenge-shaped panels.



Figure 4 South Elevation © Holland Heritage

2.5.1.2 The east front has a splayed bay to relate to the distant views which can also be enjoyed from the paved terrace along the north side and from the associated terrace garden.



Figure 5 Terrace to north-west © Holland Heritage



Figure 6 Rear of Mansion © Holland Heritage

2.5.1.3 To the south-west is a lower two-storey link to the offices which extend on a canted angle to join the stable courtyard and contains some four-light mullioned and transomed windows. They contain extensive rooms for Housekeeper, Butler's Pantry and servant accommodation above.



Figure 7 Front elevation of Attached Service Accommodation © Holland Heritage

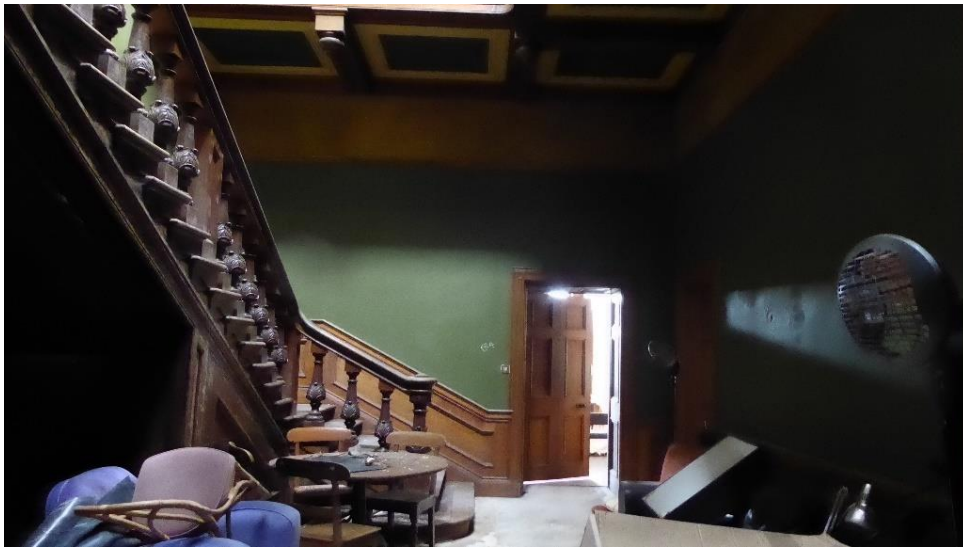


Figure 8 Internal Service Courtyard © Holland Heritage

2.5.2 Interior

2.5.2.1 The main entrance from the porte-cochere to the south is no longer accessible but it once opened into a rectangular hall with an acanthus cornice, central rose and oak panelling to half-height. There is a marble chimneypiece to the east wall and a stone floor with inlaid polished lozenges. This led to the grand baronial staircase hall top lit by a large, raised, lantern with mullioned glazing and supported on pendant brackets. It has bulbous oak balusters, handrail and panelled dado.

2.5.2.2 The primary reception rooms have decorative plaster ceilings to a variety of designs and marble fireplaces, some Italianate and some with overmantels. Doors are mostly 6-panel and most rooms retain their original floorboards. Many rooms also retain panelled shutters. The corner rooms with the bay windows have the richest ceilings and wall decoration, that to the north-east having been the dining room and retaining the arched buffet recess. The south-east corner room has a lozenge panelled ceiling with rope ornament. There is a secondary staircase to the south-west which is cantilevered and has metal balusters under an oak handrail. It accesses the different levels of the service wing and has a curious tripartite screen with four-centred arches at its base.



Figures 9 and 10 Grand Staircase as seen from Ground Floor (above) and First Floor (below) © Hiraeth Architecture





Figure 11 Secondary Staircase as seen from half landing looking down to ground floor level of service range © Holland Heritage

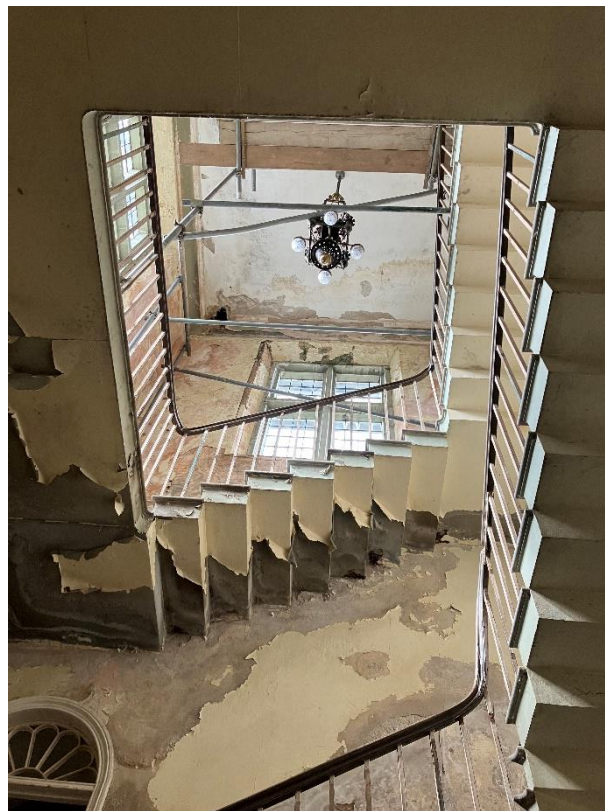


Figure 12 Secondary Staircase view up into clock tower © Holland Heritage

2.5.2.3 The upper floors including the primary chambers have much more simple detailing, mostly with plain cornices, panelled shutters and four-panel doors and panelled reveals.

2.5.2.4 The basement retains vaulted corridors and chambers for storage.



Figure 13 Drawing Room ceiling © Holland Heritage



Figure 14 Dining Room typical panelling and marble fireplace © Holland Heritage

2.6 Outline Description of the Stable Courtyard



Figure 15 South elevation of Stables © Holland Heritage

The rectangular stable courtyard is seen from the drive as a single-storey elevation with two-storey gables to either end. Within the courtyard the elevations have attic gables, some with chimneys rising from the apex. The south range has vast tack rooms and the north range has arched carriage bays and the east and west ranges both have central arches.



Figure 16 Stable Courtyard © Holland Heritage

2.7 Ancillary structures

To the east and west of the mansion and stable courtyard are gated screens, both of which are individually listed. These define the layout of the core of the estate so that the house and its attached service ranges are separate from the wider parkland. There remain tarmac drives to the west and east terminating in Gate Lodges. Modern changes include the creation of parking area to the west with a café built in upvc but in the style of an orangery, toilets and ancillary sheds and a children's play area. Beyond that the parkland opens up to west with walks down to the quarry area. To the north overlooked by the mansion terrace is the former deer park and to the south is the Arboretum. Beyond the fields to the east of the mansion the remainder of the historic parkland is outside the Trust's ownership.



Figure 17 Gate-piers to east drive © Holland Heritage



Figure 18 Café © Hiraeth Architecture

2.8 Landscape Setting, Parkland, Gardens and Arboretum

2.8.1 The Landscape Setting

2.8.1.1 The Vaughans were the dominant family in the valley and Golden Grove remains a key property in this historic landscape. It remains a vital part of the ensemble of unique heritage properties in the Tywi Valley. The drama and richness of the visual setting for the House and Estate is still very much present in spite of the dereliction and loss of quality of the landscape and built elements. The scale of the ambition of previous owners is still evident. This is a very large house, with its ornamental terraces and dramatic views out across ancient parkland and the valley. The skillful use of levels and contouring are key components of the landscape setting of the house.

2.8.1.2 *The Tywi Valley* is included in the *Cadw Register of Landscapes of Historic Interest in Wales*. In the Register entry the summary 'contents and significance' of the valley are described as:

'a long narrow river valley of renowned scenic quality from its source in the south of the Cambrian Mountains to its estuary in Carmarthen Bay, containing ancient route corridors and the setting for an unrivalled group of planned landscapes. The area includes: Iron Age forts, Roman forts, medieval castles and mottes, post-medieval gentry houses, designed parks and gardens, highly cherished and celebrated historic artistic Picturesque landscapes.'

2.8.1.3 The historic value of this ensemble of unique heritage properties is of great importance in any consideration of the future rejuvenation of Golden Grove and the Gelli Aur Country Park. In spite of its dereliction Gelli Aur, remains one of the most important planned parks within this overall outstanding historic landscape. The current 1830's house is impressively built to relate to the extensive views along the Tywi Valley and to be itself a focus within the landscape. From here the eye can see Dinefwr Castle, Paxton's Tower, Dryslwyn Castle and Grongar Hill and the mansion can be seen elevated on the hillside when viewed from the other side of the valley.

2.8.1.4 The antiquity of the site reflected in, amongst other things, the number of ancient trees in the deer park, is a result of the historic system of land management of wood pasture, which is itself a comparatively rare feature in West Wales.

2.8.1.5 It is important to note that with the exception of the walled garden, and its lake and canal, that are associated with the earlier mansion, all of the main elements contained in the *Cadw Registered Historic Park and Garden Summary*

Description of Gelli Aur lie within the Trust's ownership of approximately 100 acres at the heart of this designation.



Figure 19 View east along the Tywi Valley © McQuitty Landscape Design



Figure 20 View across part of the Deer Park © McQuitty Landscape Design

2.8.2 Deer Park

2.8.2.1 The deer park dates back to the earliest period of Gelli Aur's history and the antiquity of the site is reflected today in, amongst other things, the number of ancient trees in the deer park.

2.8.2.2 The deer park provides a comparatively rare example in west Wales of wood pasture. Wood pasture is a product of historic landscape management practices over many generations. Essentially a long-established tradition of

grazing has been allowed with the survival of multiple generations of trees including a significant proportion of 'veterans'. A mosaic of vegetation has developed ranging from small areas of woodland to scattered trees with open grassland and scrub. While some wood pasture has started as medieval hunting forests or wooded commons, the origins of others are within the designed landscapes of large estates. In the case of Gelli Aur, the original deer park would have been as a setting for the early mansion but also providing an attractive domain for the pursuit of hunting by the landowner.

2.8.2.3 Although no formal ecology analysis or input is within the remit of this Feasibility Study, it is evident with the survival of significant wood pasture and veteran trees across different parts of the site, that Gelli Aur can be presumed to make an important contribution to the natural ecosystems of the Tywi Valley. The large old trees, growing in unimproved grassland on land that has probably never been ploughed, will have led to a mosaic of habitats, some of which are likely to be of 'priority' species.

2.8.3 Wider Parkland including Drives, Lime Avenue and Current Visitor Facilities

2.8.3.1 The Lime Avenue along the West Drive remains an impressive entrance to the Park from the west, in spite of some encroachment from forestry to the south and an inappropriate line of young limes planted in part of the verge to the north. The main rows of limes are now mature with many having developed massive trunks. The car parking, café, play area and visitor facilities are accessed by this drive.

2.8.3.2 There are 3 easterly drives although one of these – the south-western – is blocked by forestry. The main drive from the east has a lodge at its entrance and runs for over a kilometre before crossing a small stone bridge as it approaches the present Mansion. The third drive also enters by a lodge before skirting the former walled garden and then running north and then westwards to the Mansion. The Trust has ownership and control over the western drive and rights of access over the eastern drive.

2.8.3.3 A small disused quarry is located within the north-western wooded part of the deer park. There are fine rock exposures and, combined with the naturally growing ferns and other shade loving species, create an intriguing, hidden landscape.

2.8.4 North and South Garden Terraces and Mansion House Surrounds

The Gardens and terraces to the north and south were once fine external spaces complimenting the House. However, the main forms of these are still visible; the grassed terraces to the south are still a dramatic feature even though the associated steps and other stonework are degraded and in poor condition. On the

north side the outline of Lady Cawdor's former formal garden (the Long Terrace) is still visible along with remnants of box hedging, Irish yews, and early hybrid tea roses. Two projecting viewing areas offer panoramic views out across the Tywi Valley. These and other locations within the Estate offer a strong visual link with a number of the other key heritage properties in the valley.

2.8.5 The Arboretum

2.8.5.1 The Arboretum is located on higher ground above the grass terraces and rhododendrons south of the Mansion. It appears to have been created in the 1860's some 30 years after the construction of the second Mansion (the present Mansion). Substantial stone walls set in a ditch like a ha-ha still provide a degree of enclosure and protection. The hillside setting, with formal grass terracing below and views to house and valley beyond are unique features of this arboretum.

2.8.5.2 The Arboretum also has some exceptional trees including several 'champion trees'. Outstanding specimens of trees now known mostly for commercial forestry e.g. Sitka Spruce, or of high horticultural value e.g. Lawson Cypress, are present. Other specimen trees of note include Western red cedar and Grand fir, redwoods and a fine fern leaved beech. It also retains some pre-existing trees, e.g. one of Jeremy Taylor's oaks known to have been growing in 1717.

2.8.5.3 There is a mix of single stem and multi-stem specimen trees. The latter would have been developed by the pinching out of the leader stem when the tree was a sapling.

2.8.5.4 The understory contains some fine shrub species such as varieties of Rhododendron, Witch hazel and magnolia.

2.8.6 The Fernery

2.8.6.1 This feature is located in the north-eastern corner of the Arboretum. A narrow rock lined entrance leads to a small circular open space. A rustic hexagonal summerhouse or 'barkhouse' was at the centre, the original then reworked by Carmarthenshire County Council in the 1980's.

2.8.6.2 The building has now collapsed, and the remains lie within the circular open space. However, much of the fernery planting remains.

2.8.7 The Pinetum

This small area is located south-east of the Mansion, just beyond the northern boundary of the Arboretum. This was unenclosed and has been overgrown for a considerable period of time. However, a number of fine specimen trees are still present including a Monkey Puzzle (*Araucaria aurucana*).



Figure 21 View across remnants of former North Terrace Garden © Holland Heritage



Figure 22 Terraced gardens between Mansion and Arboretum © Holland Heritage



Figure 23 Arboretum © Holland Heritage

2.9 Assessment of Significance and Heritage Values

2.9.1 The significance of Golden Grove and its landscape setting is assessed in accordance with Cadw's *Conservation Principles*¹, setting out how historic assets should be managed to sustain their values. The preceding part of this report has described the heritage asset and the next stage is to assess its heritage significance and to test this against the published conservation principles. Cadw sets out criteria for how significance can be evaluated, considering Evidential, Historical, Aesthetic and Communal values and says that:

"The significance of an historic asset embraces all of the cultural heritage values that people associate with it".

2.9.2 Evidential Value

2.9.2.1 This derives from those elements of an historic asset that can provide evidence about past human activity, including its physical remains or historic fabric. These remains provide the primary evidence for when and how an historic asset was made or built, what it was used for, and how it has changed over time.

2.9.2.2 Golden Grove has exceptional evidential value that illustrates the ambitions and composition of a major historic estate. The prominent landscape setting and the tree-lined drives and lodges are evidence from afar that this is an important country house. The mansion itself is evidence of the work of a major architect, Sir Jeffry Wyattville, as are the attached service ranges and stables and the scale of the combined buildings is evidence of the importance of this landed estate. The arboretum and terraced gardens are evidence of a conscious creation of a designed setting for the house.

2.9.2.3 The deer park dates back to the earliest period of Gelli Aur's history and the antiquity of the site is reflected today in, amongst other things, the number of ancient trees in the deer park. The deer park provides a comparatively rare example in west Wales of wood pasture. It served as a key element of the setting of the early mansion but its survival also provides evidence of the pursuit of hunting by the landowner.

2.9.2.4 The Arboretum also has some exceptional trees including several 'champion trees' and specimen trees of note include Western red cedar and Grand fir, redwoods and a fine fern leaved beech.

2.9.2.5 Beyond the area of the parkland under the control of the Golden Grove Trust is surviving evidence of the earlier house and its walled garden and canal. Some of the trees nearer to the present house are also evidence of long-

¹ *Conservation Principles for the sustainable management of the historic environment in Wales, March 2011*

standing occupation of this part of the Tywi Valley. The estate village including its surviving church and school is further evidence of the importance of the place and its owners.

2.9.2.6 Features such as the café and car parking area and playground are evidence of the modern development of Gelli Aur as a visitor attraction.

2.9.2.7 The condition of the mansion and stables is evidence of a lack of maintenance and progressive abandonment over the last decade.

2.9.3 **Historical Value**

2.9.3.1 This derives from how the historic asset might illustrate a particular aspect of past life or be associated with a notable family, person, event or movement. These illustrative or associative values of an historic asset may be less tangible than the evidential value but are nonetheless important and will often connect past people, events and aspects of life with the present.

2.9.3.2 Golden Grove has exceptional historical value. It was the largest and one of the most important estates in South Wales. It was long the seat of the Vaughans and then the Cawdors until it passed into the control of the County Council. The house visually dominates the Tywi valley as a reminder of how it once historically dominated the valley. At one time it extended across 50,000 acres and included five castles. In the 20th century the house was a school and then an agricultural college. Gelli Aur is one of an ensemble of unique heritage properties, which are a key feature of the character of the *Tywi Valley Cadw Registered Landscape of Historic Interest in Wales*.

2.9.3.3 The historic value of the ensemble of unique heritage properties is of great importance in any consideration of the future rejuvenation of Gelli Aur Country Park. In spite of its dereliction Gelli Aur, remains one of the most important planned parks within this overall outstanding historic landscape.

2.9.4 **Aesthetic Value**

2.9.4.1 This derives from the way in which people draw sensory and intellectual stimulation from a heritage asset. This might include the form of a heritage asset, its external appearance and how it lies within its setting. It can be the result of conscious design or the way in which a heritage asset has evolved and been used over time, or it may be a combination of both. Inevitably, understanding the aesthetic value of a heritage asset will be more subjective than the study of its evidential and historical values. Much of it will involve trying to express the aesthetic qualities or the relative value of different parts of its form or design.

Golden Grove has high aesthetic value although it has been described as being “more solid than inspiring”.² The Mansion is at once evocative of an important country house and its darkened stone creates a powerful sight to the visitor. The scale of the house and its attached service accommodation and stable courtyard illustrate how the building were used and help the visitor to imagine life within a country house at different levels. The terraced gardens create a beautiful setting to the south of the house and the arboretum beyond retains trees of high aesthetic value. The views along the Tywi Valley from the mansion and its north terrace are remarkable and include focal points with their own aesthetic value such as Dinefwr. and Paxton’s Tower. These were part of a group of heritage features in the valley which played an important part in the history of the Picturesque, a major aesthetic movement in the 18th century.

2.9.4.2 The drama and richness of the visual setting for the House and its wider Estate is still very much present in spite of the dereliction and loss of quality of the landscape and built elements. The skillful use of levels and contouring are key components of the landscape setting of the house.

2.9.4.3 Unfortunately, the condition of Golden Grove today diminishes the aesthetic value, especially inside the mansion where most rooms are characterised by decay and abandonment.

2.9.5 Communal Value

2.9.5.1 This derives from the meanings that a heritage asset has for the people who relate to it, or for whom it figures in their collective experience or memory. It is closely linked to historical and aesthetic values but tends to have additional or specific aspects. Communal value might be commemorative or symbolic. For example, people might draw part of their identity or collective memory from a heritage asset or have emotional links to it. Such values often change over time and they may be important for remembering both positive and uncomfortable events, attitudes or periods in history. Heritage assets can also have social value, acting as a source of social interaction, distinctiveness or coherence, and also economic value, providing a valuable source of income or employment.

2.9.5.2 Golden Grove has very high communal value as an important element of Carmarthenshire’s heritage. Local people value Golden Grove and the Gelli Aur Country Park as a visitor attraction in which they can walk, play and meet in the café. The work of the Golden Grove Trust seeking to rescue the house and its setting and open it up to greater public access responds to this high communal value.

² Thomas Lloyd, Julian Orbach and Robert Scourfield, *Carmarthenshire and Ceredigion*, The Buildings of Wales series, (Yale University Press, 2006), p.68.

2.9.6 Overview of Significance

2.9.6.1 The survival of Golden Grove is made all the more significant on account of the partial or complete loss of so many other country houses. The Buildings of Wales volume for Carmarthenshire and Ceredigion says "The country houses of the two counties have not fared well, Carmarthenshire in particular having lost the majority of its important houses, mostly in the C20."³

2.9.6.2 When it came to the building of a new Golden Grove, Lord Cawdor's choice of Wyattville is significant as he was the most celebrated architect of his day, appointed by the King to remodel Windsor Castle. Cawdor even showed his plans for Golden Grove to the King who was suitably impressed. However, this is Wyattville's only completed house in South Wales where the more prolific architect of this period was Edward Haycock (e.g. Stradey Castle and he may also have been responsible for the porte-cochere at nearby Aberglasney).

2.9.6.3 Golden Grove gains additional significance from its location in this part of the Tywi Valley which is rich in history and cultural significance. Within only a few miles of Golden Grove is Newton House where Penson remodelled and encased the 17th house in the 1850s rather than building an entirely new mansion as Cawdor did. The house is set in a broad landscaped park incorporating the remains of the medieval castle of Dinefwr famed for its association with Lord Rhys. Nearer to Golden Grove is Aberglasney and its remarkable Italianate gardens and further afield the National Botanic Gardens set in the parkland of the now lost Middleton Hall. The landscape of the Tywi Valley also is deeply associated with art and poetry, especially John Dyer's Grongar Hill and Paul Sandby's watercolours of Dinefwr to name but a few. It has an important place in the history of the Picturesque aesthetic movement.

2.10 Assessment of Capacity for Change

2.10.1 The Mansion has capacity for physical change to a range of uses that benefit from large rooms with high ceilings and a variety in the size of the spaces. Any viable change will be subject to evidence of the current or likely future market. Adaptive reuse could also be phased over a long period as long as the whole building was wind and water-tight and structurally sound, even if left partially unconverted.

2.10.2 It is understood that consent has previously been granted for conversion to a hotel, to a media centre and to residential use. There are sufficient public rooms of suitable grandeur, there is sufficient existing circulation space and on the upper floors there are already several bathrooms making the task of creating of ensembles manageable without major alteration. The plan-form and character of

³ Lloyd, Orbach and Scourfield, p.61.

the mansion's interior also creates potential capacity for change to other single or mixed uses (e.g. a conference centre) though the appropriateness of any use will be dependent on the impact of the specific changes required. Uses that provide good public access and community benefit and generate sufficient revenue to create viability will best deliver the Trust's charitable objectives.

2.10.3 There is also scope for temporary reversible change to attract film companies.

2.10.4 The stables and offices provide capacity for physical change to more flexible uses to attract visitors e.g. for exhibitions, workshops, holiday lets etc. These areas also provide capacity to create a much-needed base for the growing number of volunteers. The spaces here are damaged and retain almost no historic features giving them good capacity for alteration as long as the character of the elevations was preserved and enhanced. The courtyard itself also offers scope for outdoor events and an ancillary space to whatever uses are introduced to the surrounding ranges.

2.10.5 It is essential that any change respects the heritage values of the setting of the Mansion and takes full account of the importance of the parkland and the arboretum. There is little capacity for change to these other than to enable them to be opened up to safe public access and interpretation. The forecourt to the Mansion is an important open space that befits such a baronial piece of architecture. Accordingly, conversion of the Mansion must avoid the risk of this space being filled with cars though it is acknowledged that any viable adaptive reuse would generate a lot of extra car parking need and this would have to be provided somewhere within the immediate estate. The view from the arboretum towards the mansion emphasises why this is a highly sensitive part of its setting.

2.10.6 The capacity for any new build or new planting is limited by the statutory protection of the entire setting and key views along the Tywi Valley in both directions as well as views through the parkland have no capacity for change.

2.10.7 There is high capacity to change with regard to the café and neighbouring ancillary buildings as these are modern and of no aesthetic value. If the Trust, through conservation and adaptive reuse, attracts significantly higher visitor numbers it creates the opportunity to build a new visitor centre in the area of the existing café.

2.10.8 There is less capacity for change within the Parkland where the significance of the landscape, gardens and arboretum would be vulnerable to change that resulted in interrupting key views or removal of important trees.

2.10.9 Cadw's published guidance helps to guide capacity for change. *Managing Setting of Historic Assets in Wales* (May 2017) states that:

1. Setting is important to the way in which historic assets are understood, appreciated and experienced and contributes to their significance;
2. Setting often extends beyond the property boundary of an individual historic asset into a broader landscape context. Intangible as well as physical factors can be important to understanding the setting of a historic asset. These may include function, sensory perceptions or historical, artistic, literary and scenic associations;
3. National planning policy encourages local planning authorities to take the settings of historic assets into account when preparing development plans and when determining planning applications;
4. When change or development is proposed, it is important to identify the historic assets that might be affected, define their setting and understand how that setting contributes to the significance of the historic assets;
5. If a proposed change or development is likely to have an impact on a historic asset and its setting, the applicant should prepare a proportionate and objective written assessment of that impact to inform the decision-making process;
6. Development proposals should aim to avoid any harmful impact on a historic asset and its setting;
7. It is good practice for applicants to discuss with their local planning authorities whether a planning application should include an assessment of the impact of the proposed development on the historic asset and its setting;
8. should prepare a proportionate and objective written assessment of that impact to inform the decision-making process;
9. Development proposals should aim to avoid any harmful impact on a historic asset and its setting;
10. It is good practice for applicants to discuss with their local planning authorities whether a planning application should include an assessment of the impact of the proposed development on the historic asset and its setting;
11. It is good practice to make the written report understandable to non-specialist readers. The applicant should lodge a copy of the report with the appropriate historic environment record.

3.0 CONDITION OF THE HERITAGE

3.1 Buildings

The following is the Executive Summary of the Building Condition Report, which is provided in full as a stand-alone accompanying document. The Condition Report is prepared by Hiraeth Architecture

3.1.1 The House and Stable Block are clearly suffering after an extended period of inactivity with regards to undertaking repairs and general maintenance. The severity of the consequences of this are now significant with a number of items of pressing concern. The principal issue to both building relates to the theft of lead to the roofs allowing water into the structure. Addressing this and the associated effects is paramount to the survival of the retained fabric.

3.1.2 To the main house, the loss of the lead covering to the lantern has allowed a clear path for water to enter the building. This has in turn led to the rot of principal structural members supporting the lantern, with the lantern structure having dropped from its original position as a result. Without addressing this immediately there is clear potential for the lantern to collapse, with consequent loss of the stairs as a minimum. It is therefore noted that whilst access to the stairwell is generally prevented by the Trust, signage and barriers should also be introduced in the intervening period.

3.1.3 There are a number of other areas where lead theft is affecting the structure, not least to the Tower. Associated consequences include loss of internal ceiling fabric, damage to intermediate floor finishes and invariably, the associated underlying structure. The replacement of lead in these situations is paramount and extensive. A further area of deterioration is the entrance portico where it is presumed that poor detailing and workmanship to the roof covering has allowed water to again pour through the roof finish, leading to the loss of the ceiling below, and extensive damage to the supporting structure. Access to this area should continue to be prevented, with the preferred approach to renew the roof structure. To ensure the free flow of rainwater away from the property a number of damaged and missing lead downpipes require repair and replacement as necessary.

3.1.4 Internally, aside from water ingress, the condition of the principal structural walls is reasonable to poor. The ongoing loss of fabric relating to moisture is apparent, although this is primarily cosmetic in these areas. This is not urgent however and efforts should be focussed on making the external fabric wind and weathertight.

3.1.5 To the Stable Block, the issues are largely mirrored. Of note in this area is the loss of leadwork to the eaves level that has left the roof truss ends exposed with the associated rot that accompanies this. This is again a pressing issue, particularly in light of the known presence of asbestos in certain areas of the building.

3.1.6 It is noted that some general clearing of these structures is beginning to be undertaken in the courtyard. These include safely storing elements of fabric that have become detached from the buildings. Photographically recording and numbering these elements in situ, prior to removing, is essential, as is the securing of the courtyard going forwards to prevent theft. In this light, it is encouraging that the Trust is being proactive with a new security camera system having been installed.

3.1.7 It is also important to remember that works such as structural repairs and roof renovations can be harmful to bats. Various guidance notes (e.g. from the Bat Conservation Trust at <http://www.bats.org.uk/>) exist to help in the understanding of how bats can affect plans for building projects.

3.2 Landscape, Parkland, Gardens and Arboretum

3.2.1 The scale of the ambition of previous owners is still very evident. However, when seen from the surrounding countryside the historic parkland and ornamental setting of the estate has become blurred and less distinct from the rural surroundings. This is mostly a product of the lack of maintenance and dereliction of the estate as well as the establishment of the substantial coniferous plantations on some of the former parkland surrounding the core of the estate.

3.2.2 The Lime Avenue along the West Drive remains an impressive entrance to the Park from the west, in spite of some encroachment from forestry to the south and an inappropriate line of young limes planted in part of the verge to the north. The main rows of limes are now mature with many having developed massive trunks. The current car parking, café, play area and other visitor facilities are accessed by this drive.

3.2.3 The Gardens and terraces to the north and south were once fine external spaces complimenting the House. Whilst the main forms of these are still visible and the grassed terraces to the south are still a dramatic feature, the associated steps and other stonework are degraded and in poor condition. On the north side the outline of Lady Cawdor's former formal garden (the Long Terrace) is still visible along with remnants of box hedging, Irish yews and early hybrid tea roses.

3.2.4 The arboretum has suffered neglect, like other parts of the heritage assets at Gelli Aur Country Park, but unlike the buildings, the heritage of arboretum trees

has mostly been enhanced by age and growth although remedial work will be needed including following recent storms. The understory also has suffered a loss of quality with invasive bramble, ruderal weeds and self-sown tree and shrub species in places. The former circular walk has been obscured or blocked in places by uncontrolled vegetation growth.

3.2.5 We understand that a survey has been recently carried out to establish tree surgery necessary for health and safety and to enable safe future public access.

3.2.6 Commercial coniferous woodland, some of which appears to be nearing maturity is located adjacent to the southern eastern boundaries of arboretum on Cawdor Estate land outside the Trust ownership. While commercial coniferous plantation is not as appropriate to the historic setting of the arboretum as the earlier deciduous woodland at the time of the arboretum's creation, it nonetheless provides shelter and enclosure and a more intimate character for the arboretum. Presuming that the Cawdor's estates intention will be to clear fell and replant in the foreseeable future, there will be quite a strong visual change in character to significant parts of the arboretum given its comparatively modest size.

3.2.7 The Fernery building has now collapsed, and the remains lie within the circular open space. Investigation should be carried out to determine if it can be appropriately rebuilt.

3.2.8 The Pinetum, which lies just beyond the northern boundary of the arboretum on Cawdor Estate land, has been overgrown for a considerable period. It would be desirable for careful management to be carried out to conserve the fine specimen trees that are still present including a Monkey Puzzle (*Araucaria araucana*), but this lies outside the Trust's ownership and responsibilities.

4.0 PLANNING AND POLICY CONTEXT

4.1 The scope of this Feasibility Study does not include a planning or ecological assessment. However, as part of the context of the study a brief summary of planning history and an outline of the relevant wider planning policy context is provided below.

4.2 Planning History

4.2.1 Within the planning history there are three key consents relating to the area in the Trust's ownership:

Planning Application: E/02861 this is for conversion (2001) to a Media Centre but no details as to what this entailed;

Planning Application: E/07028 this is for residential (2004) – conversion to 25 units;

Planning Application: E/07030 this is for change of use (2004) to offices / conference centre. In 2009 there was an application to allow an extra 3 years to implement this consent.

4.2.2 It is also understood that there has in the past been a consent for a hotel. There were plans for a multi-million-pound project to convert the mansion into a rehabilitation centre for veterans who had served in Iran and Afghanistan and whilst this received substantial funding there is no evidence on the planning portal that this ever obtained consent.

4.3 Planning Policy

4.3.1 Planning Policy Wales (PPW Edition 12 February 2024).

The relevant national planning policy framework is provided principally by Planning Policy Wales (February 2024) Edition 12 is a key policy document in the delivery of the aspiration of the Wales Well-being of Future Generations Act. The concept of placemaking in PPW12 is seen as *'a key element to deliver on the aspirations of the Act and drive plan making and development management decisions. It embraces the statutory goals and ways of working as well as giving clear direction through the definition of key planning principles and placemaking outcomes in Wales'*.

"Placemaking" in PPW is defined as is *'a holistic approach to the planning and design of development and spaces, focused on positive outcomes. It draws upon an area's potential to create high quality development and public spaces that*

promote people's prosperity, health, happiness, and well-being in the widest sense. Placemaking considers the context, function and relationships between a development Site and its wider surroundings. This will be true for major developments creating new places as well as small developments created within a wider place'.

Paragraph 6.3.3 states:

'All the landscapes of Wales are valued for their intrinsic contribution to a sense of place, and local authorities should protect and enhance their special characteristics, whilst paying due regard to the social, economic, environmental and cultural benefits they provide, and to their role in creating valued places'.

Paragraph 6.0.2 states:

'The special and unique characteristics and intrinsic qualities of the natural and built environment must be protected in their own right, for historic, scenic, aesthetic and nature conservation reasons. These features give places their unique identity and distinctiveness and provide for cultural experiences and healthy lifestyles'.

Paragraph 3.8 states:

'Good design can help to ensure high environmental quality. Landscape and green infrastructure considerations are an integral part of the design process. Integrating green infrastructure is not limited to focusing on landscape and ecology, rather, consideration should be given to all features of the natural environment'.

Paragraph 6.1.6 outlines The Welsh Government's specific objectives for the historic environment which include seeking to:

- *conserve archaeological remains, both for their own sake and for their role in education, leisure and the economy;*
- *safeguard the character of historic buildings and manage change so that their special architectural and historic interest is preserved;*
- *preserve or enhance the character or appearance of conservation areas, whilst the same time helping them remain vibrant and prosperous;*
- *preserve the special interest of sites on the register of historic parks and gardens; and*
- *protect areas on the register of historic landscapes in Wales*

Under the heading 'Historic Parks and Gardens' the guidance goes on to state in Paragraph 6.1.18

'Planning authorities should value, protect, conserve and enhance the special interest of parks and gardens and their settings included on the register of historic parks and gardens in Wales. The register should be taken into account in planning

authority decision making. Green Infrastructure Assessments should be used to explore the role of historic parks and gardens and the findings of other landscape character assessments should be fed into historical and cultural assessments to ensure consistency of information.'

4.3.2 Tan 12 Design March 2016

Tan 12 Design March 2016 provides further guidance.

Paragraph 5.5.2 advises that:

"In general terms, good design will almost always be dependent on working within the natural constraints and the historic character of the landscape and this should be the starting point from which the design of development evolves. The aim should be to achieve good design solutions which maximise the natural landscape assets and minimise environmental impact on the landscape. It is particularly important that proposals to amend or create new landscape are not considered as an afterthought and that the long-term impact of development on the landscape is fully understood. The quality of implementation and the long-term management of changes implicit in planting schemes are fundamental to a scheme's success".

Then in Paragraph 5.6.2 the guidance goes on to state:

"In areas recognised for their landscape, townscape, architectural, archaeological and/or historic value, such as National Parks, Areas of Outstanding Natural Beauty, World Heritage Sites and conservation areas, the objective of sustaining character is particularly important and context appraisals should reflect this".

4.3.3 Carmarthenshire Local Development Plan 2018-2033

This is still at Deposit stage but contains relevant policies relating to the Historic Environment. This includes:

"Strategic Policy – SP 15: Protection and Enhancement of the Built and Historic Environment

Development proposals should preserve or enhance the built and historic environment of the County, its cultural, townscape and landscape assets, and, where appropriate, their setting. Proposals will be expected to promote high quality design that reinforces local character and respects and enhances the cultural and historic qualities of the plan area."

Paragraph 11.449 states:

"The County's historic buildings, townscape and landscape should be regarded as assets and positively conserved and enhanced for the benefit of residents and visitors alike. These are not only affected by change and neglect, but also by changes to their setting. As such, this is an important consideration in making decisions on proposals which may have an effect."

Policy BHE1: Listed Buildings and Conservation Areas states that:

"Proposals in respect of a listed building will only be permitted where they accord with the following:

- a) Proposals for the alteration and/or extension to a listed building, or its curtilage will be required to ensure that the special architectural character, or historic interest is preserved or enhanced;
- b) The change of use of a listed building, or its curtilage will only be permitted where it contributes to the retention of a building or its sustainable re-use, whilst avoiding an adverse effect on its character, special interest, or structural integrity;
- c) Proposals for the total or substantial demolition of a listed building will only be permitted where there is the strongest justification and convincing evidence that the proposal is necessary;
- d) Proposals which have a relationship to, or impact upon the setting of a listed building, or its curtilage must ensure that the setting is preserved or enhanced."

Policy BHE2: Landscape Character Development states that:

"Proposals should relate to the specific landscape and visual characteristics of the local area, ensuring that the overall integrity of landscape character is maintained by:

- a) identifying, protecting and, where appropriate, enhancing the distinctive landscape and historical, cultural, ecological, and geological heritage, including natural and man-made elements associated with existing landscape character;
- b) protecting international and national landscape designations including National Parks and Areas of Outstanding Natural Beauty (AONB) and their settings;
- c) preserving local distinctiveness, sense of place and setting;
- d) respecting and conserving specific landscape features, and integrating the principles of placemaking and Green and Blue Infrastructure;
- e) protecting key landscape views and vistas.

Carmarthenshire County Council has adopted a range of Supplementary Planning Guidance including:

- Placemaking and Design (adopted September 2016) addresses the importance of preserving the landscape;
- Archaeology and Development (including gardens and landscape) – August 2018. At paragraph 2.2 this states that:
"Carmarthenshire County Council considers that the historic environment of the County has high value not just in its rich historic and archaeological inheritance but also in the benefits it can bring to the present and future. It contributes significantly to our modern lives giving us a sense of place and identity. It also offers significant economic benefit attracting visitors to the County."

4.4 **Ecology**

4.4.1 It is noted that Golden Grove is likely to provide a suitable and safe environment for Bats, with a number found flying around in basement area during inspections. Bats and their roosts are legally protected from harm and disturbance (Wildlife and Countryside Act, 1981 and the Conservation of Habitats and Species Regulations, 2017). It is imperative to consider the effect of this on the future maintenance of the structure and to allow for any enhancements that may be required in future works.

4.4.2 Works such as structural repairs and roof renovations can be harmful to bats. Various guidance notes therefore exist to help in the understanding of how bats can affect plans for building projects. The principal source being the Bat Conservation Trust which can be found at <http://www.bats.org.uk/>.

4.4.3 Similar protection exists for bird populations. Their nests and eggs are protected by law. The Wildlife and Countryside Act 1981 (as amended) is the primary legislation which protects animals, plants and habitats in the UK.

4.4.4 With an obvious richness of surrounding wildlife and ecology, it is imperative that a Preliminary Ecological Assessment is commissioned, the context within which any proposed works should be developed. The results of this and other surveys will influence the choice of use(s) which, for example, will have varying levels of night-time light and noise impact.

5.0 MARKET ASSESSMENT

5.1 Introduction

In this Section of the Golden Grove and Gelli Aur Country Park Feasibility Study, we set out an overview of the marketplace. This considers:

- The wider economic context;
- The demographic profile of the residential population living within the 0 to 30 and 31 to 60-minute drivetime catchments of Golden Grove;
- Future population trends at a regional and county level;
- Vehicle movements on the local road network;
- The tourism marketplace;
- The heritage sector (including group tours and key challenges);
- Wider visitor attraction marketplace;
- Competitive landscape.

5.2 Economic context

5.2.1 It is recognised that overall inflation in the UK has declined from a peak of over 10% to approximately 3%. However, consumer prices have experienced their highest level of increase since 1980. The ongoing cost of living crisis, including higher mortgage rates alongside high utility and food costs, places significant pressures on consumers across the UK. This disproportionately impacts people on low incomes the hardest.

5.2.2 The latest Public opinions and social trends, Great Britain data from July 2024 (published in August 2024) noted: *"When asked about the important issues facing the UK today, the most commonly reported issues remain the NHS (89%), the cost of living (88%), the economy (68%), housing (60%), crime (59%) and climate change and the environment (58%). Around a quarter (25%) of adults believed they would be unable to pay an unexpected but necessary expense of £850."* The report continues: ***"In the latest period, the most common action reported by all adults because of their rising cost of living was spending less on non-essentials (59%), with the next most common action being shopping around more (44%)."***⁴

5.2.3 The erosion of consumer confidence coupled with price rises and decreasing disposable income may make people think twice about non-essential spending on leisure, holidays and other recreational types of activities, which over the short to medium term may impact on potential 'chargeable activities' which could be

⁴ Source: Office for National Statistics (ONS), released 16 August 2024, ONS website, statistical bulletin, [Public opinions and social trends, Great Britain: July 2024](#)

introduced within a regenerated Golden Grove. **Although clearly the current 'country park' type of offer has low economic barriers to entry.**

5.2.4 At the same time, increasing **operating costs of businesses** across the wider heritage, recreation and tourism sectors is impacting on the bottom line and financial viability of some businesses in the short to medium-term. The recent changes in the budget (October 2024) in respect of increasing Employers NIC contributions, the reduction in the threshold and the increase in the National Minimum and Living Wages will also place further pressure on the budgets of organisations and businesses.

5.2.5 Inflationary pressures and a high-cost base, along with supply chain and labour issues, will also increase future **capital costs of new development and regeneration projects**.

5.2.6 Additionally, **local authority budgets** are facing significant fiscal challenges as funding is prioritised to the delivery of statutory services.

5.3 Drivetime analysis

5.3.1 In terms of exploring the opportunities to enhance the offer at Golden Grove, it is important to understand the local demographic profile. The local residential market, particularly within the immediate 0 to 60-minute drivetime catchment is likely to be the key driver of users, particularly on a year-round basis.

5.3.2 Potential visitor flows generated from the tourism market are subject to seasonal fluctuations and have different needs to the local residential marketplace.

5.3.3 As part of this study, we have carried out a review of the residential population living within the 0 to 30-minute and 31 to 60-minute drivetime catchments from Golden Grove.

5.3.4 The further residents are located away from Golden Grove, the propensity to visit will decrease and the degree of competition will be greater (people have more alternative places to visit open to them).

5.3.5 Headline figures

Headline residential figures are presented in the table below. Within the immediate core 30-minute drivetime market place the population is just over 305,000 residents, which represents approximately 230,000 households. In the wider 31 to 60-minute catchment the figures increase to over 675,000 residents and 291,000 households. The overall population within the one-hour drivetime catchment is just under one-million residents.

Drivetime catchment (minutes)	Population	Households
0 to 30	305,898	131,419
31 to 60	675,445	290,797
Total	981,343	422,216

5.3.6 Employment

5.3.6.1 In the table below, we set out a breakdown of the employment status of residents living within both drivetime catchments. Where the difference from the national average is 5% (or more) the cell is highlighted.

Employment Status	0 to 30-minutes			31 to 60-minutes		
	National	Area	Area index	National	Area	Area index
Part-time	11.9%	12.1%	101.9	11.9%	11.6%	97.8
Full-time	34.2%	31.4%	91.9	34.2%	29.7%	86.9
Self Employed	9.5%	7.5%	78.9	9.5%	9.0%	94.3
Unemployed	2.8%	2.2%	80.0	2.8%	2.3%	83.4
Retired	21.6%	25.0%	115.7	21.6%	26.6%	123.2
Students	7.9%	7.8%	98.8	7.9%	7.0%	89.0
Looking after home or family	4.8%	4.2%	87.1	4.8%	4.3%	88.9
Long-term sick or disabled	4.2%	6.8%	162.8	4.2%	6.5%	153.7
Not Working Other	3.1%	2.9%	93.6	3.1%	3.0%	95.9

5.3.6.2 The representation of adults who are either in full-time employment or who are self-employed is below the area index across both drivetime catchments. Within the 31 to 60-minute drivetime catchment the representation of residents in part-time employment is also slightly below the area index, but within the immediate catchment there is a higher representation than the national average. Encouragingly, the representation of residents who are classified as unemployed, across both catchments, is significantly below the national average (by up to 20%).

5.3.6.3 Residents who are classified as either long-term sick or disabled are above the national average by up to 63%. Similarly, the representation of residents who are retired, across both catchments, is above the national average.

5.3.7 Age profile

In the table below, we set out a breakdown of the age profile of residents living within both drivetime catchments. When compared to the national average across both drivetime catchments, there is an under-representation of residents who are aged between 0 and 49 years old (apart from residents aged 20 to 24 within the 0 to 30-minute drivetime catchment which is directly in line with the national

average). At the same time the representation of older adults (aged 55 and above) is above the national average across both catchments.

Age Bandings	0 to 30-minutes				31 to 60-minutes			
	National	Area	Area index	Population	National	Area	Area index	Population
0 to 4	5.4%	5.0%	92.3	15,314	5.4%	4.7%	86.1	31,543
5 to 9	5.9%	5.6%	94.1	17,020	5.9%	5.4%	90.7	36,217
10 to 14	6.0%	5.8%	96.6	17,828	6.0%	5.7%	93.7	38,170
15 to 19	5.7%	5.5%	97.4	16,964	5.7%	5.4%	95.5	36,739
20 to 24	6.0%	6.0%	99.6	18,406	6.0%	5.7%	93.6	38,198
25 to 29	6.5%	5.9%	90.0	18,025	6.5%	5.6%	85.1	37,647
30 to 34	7.0%	6.3%	90.7	19,306	7.0%	5.9%	84.6	39,781
35 to 39	6.7%	6.0%	90.4	18,473	6.7%	5.7%	84.7	38,201
40 to 44	6.3%	5.7%	90.2	17,379	6.3%	5.5%	87.0	37,049
45 to 49	6.4%	6.0%	94.2	18,315	6.4%	5.9%	93.1	39,967
50 to 54	6.9%	6.8%	98.5	20,857	6.9%	7.0%	100.8	47,116
55 to 59	6.8%	7.1%	105.7	21,852	6.8%	7.5%	110.4	50,424
60 to 64	5.8%	6.6%	113.0	20,041	5.8%	6.9%	118.9	46,570
65 to 69	4.9%	5.8%	118.3	17,880	4.9%	6.3%	127.1	42,424
70 to 79	8.6%	10.1%	117.9	31,024	8.6%	11.0%	127.8	74,210
80 and over	5.0%	5.6%	112.6	17,216	5.0%	6.1%	122.0	41,189

5.3.8 Social grade

In the table below we set out a breakdown social grades of residents living within both drivetime catchments.

Social Status	0 to 30-minutes			31 to 60-minutes		
	National	Area	Area index	National	Area	Area index
AB	22.3%	16.3%	73.16	22.3%	17.4%	77.93
C1	30.2%	30.1%	99.57	30.2%	28.5%	94.47
C2	22.5%	24.5%	108.94	22.5%	26.1%	116.22
DE	25.0%	29.1%	116.38	25.0%	28.0%	111.76

- Across both drivetime catchments, the representation of residents who are classified as AB social grade (higher / intermediate managerial / admin / professional) is below the national average, by up to nearly 27%;
- Residents from the C1 social grade (supervisory, clerical, junior managerial / admin / professional) are also below the national average (although only slightly below the national average for residents living with the immediate catchment);
- The representation of residents from the C2 social grade (skilled manual workers), is above the national average by between 9% and 16.2%;
- Similarly, across both drivetime catchments the representation of residents who are classified as DE social grade (semi-skilled and unskilled

manual workers, on state benefit, unemployed, lowest grade workers) is above the national average by up to 16.4%.

5.3.9 Size of the available education market

In the table below we illustrate the size of the available schools-education market.⁵

Age Bandings	0 to 30-minutes	31 to 60-minutes
5 to 9	17,020	36,217
10 to 14	17,828	38,170
15 to 19	16,964	36,739
Totals	34,791	74,910

The overall size of the available schools-education market is relatively limited with only 34,800 school / college aged children living within the immediate drivetime catchment. This increases to just under 75,000 people within the wider 31 to 60-minute drivetime catchment.

Whilst the figure is not available from Visit Wales, it is worth highlighting that the Visitor Attractions Trends (England) report for 2023 (published in July 2024) noted: *"School trips continued to increase (by 25% compared with 2022) and accounted for 6% of admissions in 2023, equalling their proportion share of visits in 2019. However, the volume of school visits remained substantially behind 2019 levels."*⁶

5.3.10 Regional and county population trends

The table below shows the projected population growth across the Mid and South West Wales region between 2024 and 2043. Overall, the region's population is projected to increase from 917,000 to 947,000 residents, an increase of 3.27%.

Interestingly, the population of Carmarthenshire is projected to increase by 3.53%, a slightly higher percentage increase from the overall region. However, in terms of 'numbers' the population of Carmarthenshire is forecast to increase by less than 7,000 residents over the 20-year period.

⁵ Please note age data is only provided in specific age bands

⁶ Source: Published by Visit England (incorporated under the 1969 Development of Tourism Act as the British Tourist Authority) © 2015 British Tourist Authority (trading as VisitBritain).

	2024	2029	2034	2039	2043	%
Mid and South West Wales	916,846	926,182	934,093	940,860	946,815	3.27%
Powys	132,653	132,880	133,147	133,516	133,927	0.96%
Ceredigion	70,759	70,536	70,043	69,157	68,745	-2.85%
Pembrokeshire	126,838	127,840	128,648	129,488	130,196	2.65%
Carmarthenshire	190,493	192,467	194,091	195,751	197,218	3.53%
Swansea	250,796	255,263	259,274	262,410	264,840	5.60%
Neath Port Talbot	145,308	147,195	148,890	150,539	151,889	4.53%

Source: 2018-based projections for local authorities in Wales, Welsh Government (updated August 2021), Contains public sector information licensed under the Open Government Licence v3.0.

It is important to highlight that between the 2011 census and the latest census, the proportion of the population within the county aged 65 and over has increased by 18.9%. During 2024, it is projected that 24.91% of the population will be aged 65 and over. By 2043, this figure is projected to increase to 29.53% (just under 1 in 3 of the residential population).⁷

5.3.11 Local vehicle movements

The Department for Transport produces a range of traffic movement statistics, using a mix of counting / estimating to identify vehicle movements on the road network. There are a number of nearby count points to Golden Grove.

- To the east on the A483 (to the south of Ffairfach), during 2023, the estimated average annual daily flow of vehicles was 3,600 – which represents some 1.316 million vehicle movements per annum;
- To the north on the A40 (near Pentrefelin), during 2023, the estimated average annual daily flow of vehicles was 4,700 – which represents some 1.727 million vehicle movements per annum.

5.3.12 Carmarthenshire County Council Tourism trends/Tourism market

5.3.12.1 We set out below a summary of the key tourism trends in Carmarthenshire.

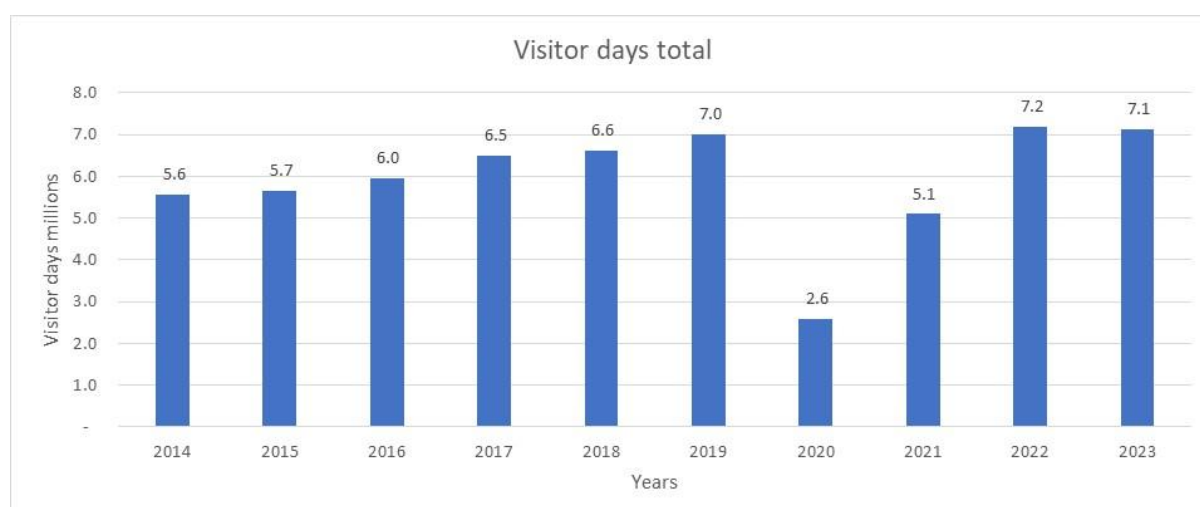
5.3.12.2 The overall **economic impact** of tourism over a ten-year period has increased from £343 million in 2014 to £683 million in 2023. It is important to

⁷ <https://www.carmarthenshire.gov.wales/home/council-services/ageing-well-in-carmarthenshire/#:~:text=Carmarthenshire%20is%20the%204th,18.9%25%20since%20the%202011%20Census>

recognise in terms of economic impact that Carmarthenshire has recovered strongly from the impact of Covid (as shown below)⁸.

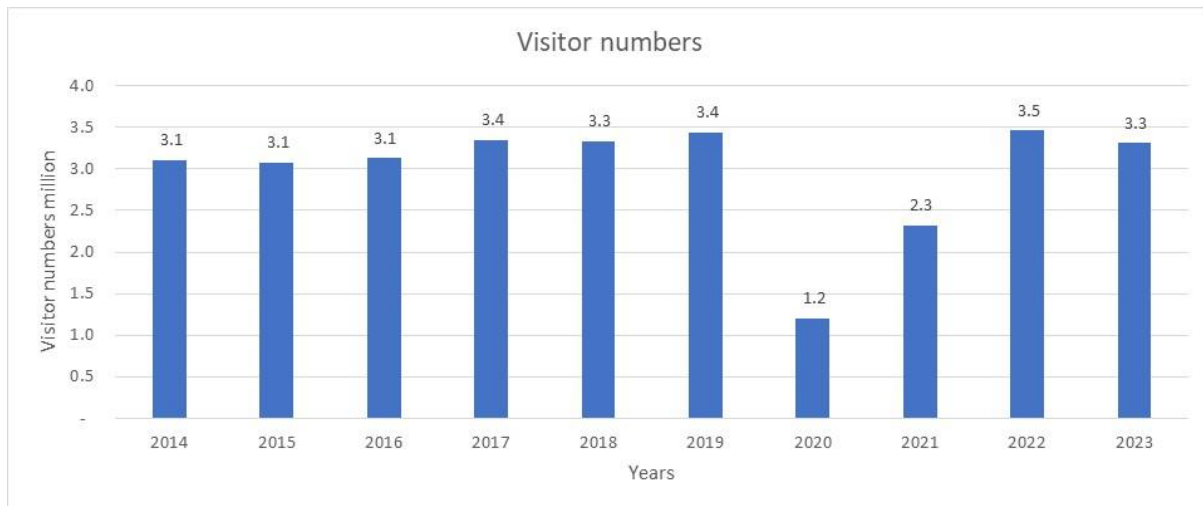


5.3.12.3 However, total **visitor days** set out in the table below shows a lower level of growth. During 2023, the actual number of total visitor days declined to 7.12 million (from 7.19 m recorded in 2022).



5.3.12.4 Over the same period, the total **number of visitors** (staying overnight and day visitors) has shown a small increase from 3.10 million in 2014 to 3.31 million in 2023. However, the number of actual visitors recorded during 2023 remains below those recorded in 2017 (at 3.35 million).

⁸ Some figures are rounded. Source: Steam Report for 2012-2023, Final. Carmarthenshire County Council



5.3.12.5 The number of **fulltime equivalent jobs** supported by tourism in Carmarthenshire has increased from 5,273 FTE positions in 2014 to 6,649 FTE positions in 2023. Although, between 2023 and 2022 the overall number of supported FTE positions declined slightly from 6,652 to 6,649 FTE positions.

5.3.12.6 **Day vs. overnight staying visitors** - in terms of the actual numbers of visitors, similar to many destinations, the sector is dominated by the day visitor market-place rather than visitors staying overnight (please see chart below).

5.3.12.7 Encouragingly, the actual proportion of overnight staying visitors has increased from 29% in 2014 to 35% in 2023.

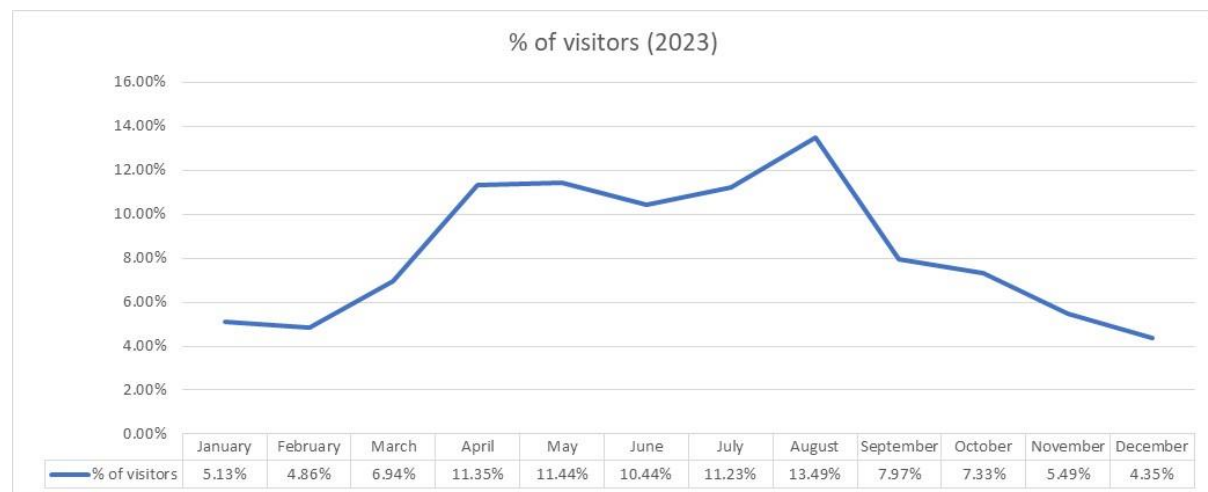


5.3.12.8 It should be recognised that the economic impact associated with overnight staying visitors is significantly higher. For example, in 2023, the economic impact generated by all staying visitors was £598.47 million and in comparison, the economic impact of visits generated by day visitors was £93.79 million.

5.3.12.9 **Types of accommodation used** - over the same ten-year period (2014 to 2023) the number of visitors staying in serviced accommodation has declined from 247,000 people to 235,560 (-5%). Whereas the number of people staying in non-serviced accommodation has increased from 356,190 to 651,930 people (+83%) and the number of people staying with friends and relatives has increased slightly from 285,260 to 292,080 (just over 2%).

5.3.12.10 The **average length of overnight trip** has increased from 3.77 days in 2014 to 4.23 days in 2023.

5.3.12.11 The chart below highlights the **seasonal pattern of visits** to the county. The peak six months of tourism visits – April to September accounted for 66% of all visitors in 2023.



5.3.12.12 We set out at **Appendix A** a brief overview of research carried out in Carmarthenshire (2019), which provides a 'snapshot' in time.

5.3.13 Heritage market

Introduction

5.3.13.1 Heritage and cultural sites or places of interest are key attractors in Wales for both domestic and overseas visitors. At the same time, they can play a critical role in placemaking, identity and community cohesion alongside supporting employment and economic development.

5.3.13.2 Research published in 2023 by the Welsh Government noted that in terms of experiences which domestic tourists were seeking in Wales, 40% were looking to visit heritage sites or cultural attractions such as museums and galleries. This is the third most popular activity after visiting outdoor visitor attractions e.g. gardens and country parks (45%) and secondly trying local food

and drink (40%). A regenerated Golden Grove could potentially deliver all of these experiences which domestic visitors are seeking.⁹

Potential opportunities linked to group heritage and garden tours

5.3.13.3 The group travel market forms an important part of the tourism sector and for some heritage sites is a key part of the overall visitor mix. Group travel is organised around visiting places of interest - either as part of a day visit or a packaged tour involving overnight stays visiting multiple sites. Group travel trips are booked in advance and can be used to help fill quieter mid-week periods and outside the main season.

5.3.13.4 It is important to highlight that the traditional view of the group tour – elderly people following the established tourist trail is changing. Today's group visitors are more discerning, demand better visitor experiences and seek meaningful visits. Group visits come in many forms; they include:

- Tour groups – travelling by coach and staying in hotels on an itinerary;
- Commercial day trips – mostly organised by coach companies;
- Affinity group trips – seeking a whole host of specialisms.

5.3.13.5 Group tour specialists are developing their programmes to reflect changing trends:

- Visitors who are returning to places they have visited before are seeking a different view of these destinations, hence the rise of 'undiscovered' itineraries, that feature less well-known places;
- Group tourists increasingly want to personalise their trips and do this through add-ons before, during and after their visit;
- Group tourists are increasingly likely to travel out of season;
- Many group travellers are seasoned travellers/visitors and rely on their organiser to bring them interesting, new places to visit;
- Group sizes are getting smaller; many use minibuses or small capacity coaches – groups of 10-15 are common;
- Group travellers are becoming less price conscious – as 'boomers' begin to retire and seek group travel opportunities; they also demand high quality and are prepared to pay for it.

5.3.13.6 A report published by the Welsh Government on attractions (which considered group travel) in 2022 noted: "*The proportion of visitors that were estimated to be from organised groups or tours in 2019 was 14%. This is similar to the estimate provided for 2018 (13%)...*" During 2020, the figure declined to

⁹ Source: Visit Wales Tourism Market Demand Report – UK January 2023

8%.¹⁰ The previous report from 2018 identified that average visiting levels as a group or as part of a tour were **9.7% to historic properties**, 17.2% for industrial / craft attractions and 15.4% for museums / art galleries.¹¹

A challenging marketplace

5.3.13.7 The Heritage Risk Barometer 2022,¹² published in January 2023 by Ecclesiastical, is based on a survey carried out in July 2022 among 500 people working in the heritage sector. The survey results paint a challenging operating environment with 83% of participants extremely / very concerned with increasing costs, 80% extremely / very concerned about managing volunteer wellbeing, 80% extremely / very concerned about the recruitment and retention of volunteers, 78% extremely / very concerned about the impact of the cost-of-living crisis on visitor/customer numbers and 77% extremely / very concerned about the loss of funding.

5.3.13.8 The report noted: *"The majority of heritage organisations surveyed (58%) have seen a reduction in visitor numbers since the pandemic, alongside a change in visitor patterns. Nearly half (45%) now believe this is due to a fall in disposable incomes. Visitors feeling the pinch might not travel at all, or may spend less in cafes or gift shops when they get there."*

5.3.13.9 Heritage organisations are seeking ways to reduce their expenditure. For example, 45% of participants are renegotiating contracts with existing suppliers, 44% are making staff redundancies, 43% are seeking new suppliers, 42% are limiting the rooms that are open and heated, 39% are reducing opening hours and 39% are opening on fewer days.

5.3.13.10 In terms of visitor numbers: ***"The threat of declining visitor numbers is the chief concern of decision makers as they look three and five years ahead. This suggests the sector has little confidence in a speedy end to the crisis. Its pessimism is entirely understandable. Over half (58%) of the organisations surveyed have already seen a fall in visitor numbers since the pandemic. COVID fears are considered the most likely cause of that (68%), but a large proportion of respondents (45%) also blame falling disposable incomes...On the upside, it's possible that the cost-of-living crisis will keep more people in the UK over the next 12 months and heritage properties might benefit from the staycation trend. However, 76% of respondents are also concerned by a reduction in the number of visitors from overseas."***

¹⁰ Visits to Tourist Attractions in Wales 2019 & 2020, Report for Visit Wales © Crown Copyright 2022

¹¹ Visits to Tourist Attractions in Wales 2018, Report for Visit Wales © Crown Copyright 2020

¹² <https://www.ecclesiastical.com/insights/heritage-sector-risks/2022/>

5.3.13.11 The survey also identified that: ***"Four out of five (80%) respondents are engaging more with local customers as a direct response to the cost-of-living crisis. As fuel prices rise, many people are limiting the distances they travel. Attracting more customers from the local community may be good for both the environment and the bottom line."***

5.3.13.12 It is important to note the funding cuts to core heritage bodies - Museum Wales and the National Library of Wales, along with Cadw which were announced in the Welsh Government budget (2024 to 2025).

5.3.13.13 In a recent UK Heritage Pulse Survey (March 2024) which was focussed on local authority funding, organisations were asked *"compared to a decade ago, how has your regular local authority funding changed?"* The following answers were generated¹³:

• Increased above inflation	4.8%
• Increased below inflation	4.8%
• Standstill (i.e. real-terms cut after inflation)	19.0%
• Reduced by 25% or less	19.0%
• Reduced by 25-50%	14.3%
• Reduced by 50-75%	4.8%
• Reduced by 75-99%	4.8%
• Totally cut	4.8%
• Mixed picture (e.g. varies by council, or high volatility)	23.8%

5.3.13.14 Whilst the survey is based upon a limited sample size, it continues to present an uncertain and challenging outlook for the heritage sector.

5.3.14 Visitor attractions

5.3.14.1 The last survey available which covers the visitor attraction sector in Wales was published in August 2022 and covers 2021 and the results were severely impacted on because of the ongoing impacts of COVID. Therefore, we have used 2018 as the baseline year, which is based upon 248 attractions completing the survey.¹⁴ In summary:

5.3.14.2 Visits

- 22.2 million visits were made to participating attractions – the majority 61% were made to attractions which did not charge an admission fee

¹³ Source: <https://heritagepulse.insights-alliance.com/updates/full-results-local-authorities/>

¹⁴ Source: <https://www.gov.wales/sites/default/files/statistics-and-research/2020-01/visits-to-tourist-attractions-in-wales-2018.pdf>

(free to enter). Although, at a regional level, in South-West Wales more visits were made to paid for attractions than free attractions;

- 23 of the attractions which reported data generated over 200,000 visitors each accounting for nearly 50% of all visits;
- Visits to participating attractions increased by 4.4% between 2017 and 2018 (free attractions recorded a 9.2% increase in visits whereas paid for attractions saw a decline of 1.4%);
- Participating attractions in South-West Wales recorded a slight decline of 2.2% over the previous year;
- The historic property category of attraction account for 17.1% of recorded visits (3,797,000 visits in total or on average 66,614 visits to each participating attraction. An increase from 63,596 recorded in 2017);
- It is interesting to note that visits to Cadw owned sites declined by 6.7% between the two years (which may be related to admission and membership price increases recorded in 2018);
- The average number of visits to participating attractions (free and paid for) was 89,610. For South-West Wales the figure was 77,200;
- Looking at the top ten paid for attraction three were historic properties (Cardiff Castle, Caernarfon Castle and Conwy Castle).

5.3.14.3 **Revenue and admissions**

- 47.1% of attractions reported an increase in gross revenue (of 3.3%, which is similar to the previous year – 3.1%);
- Historic properties recorded on average a 5.7% increase in revenue (compared to -0.5% in the previous year);
- The average adult admission price increased by 1.3% to £8.59 (based on sample of the attractions completing both the 2017 and 2018 surveys). The average child admission price increased by 3% to £5.45;
- Only 39% of attractions had an admission price of £8.00 and over;
- At historic properties the average adult admission price was £6.98 (the child equivalent was £4.95).

5.3.14.4 **Type and origin of visitors**

- The majority of visitors to participating attractions were adults – 70.4% (at historic properties the comparable figure was 67.8%);
- In terms of the origin of visitors - 48.6% were local visitors coming from within Wales, 40.3% from the rest of the UK and 11.1% were international visitors;
- At historic properties, the origin of visitors were – 41.6% local visitors, 43.7% from the rest of the UK and 14.7% from overseas.

5.3.14.5 **Other**

- 68.5% of participating attractions were open on a year-round basis;
- Full-time employees accounted for 19.1% of all permanent employees (reported) and 8.6% of all seasonal employees;
- Part-time employees accounted for 10.7% of all permanent employees and 14.4% of all seasonal employees;
- Volunteers accounted for 9.8% of all permanent roles and 37.4% of all seasonal roles.

5.3.14.6 **Wider visitor attractions sector**

The visitor attraction market remains a difficult sector to operate in and the outlook is challenging.

Following multi-million-pound investment programmes there have been reported high profile closures of attractions including large-scale projects such as Hastings Pier, in late 2022. After a £30 million programme of development the Trust managing Nottingham Castle entered into administration although the site has now reopened. Nottingham Castle benefits from a significant residential catchment on its doorstep and access to an established tourist market.

Other attractions are struggling with the Great Tapestry of Scotland Museum in the Scottish Borders reportedly only achieving half of the forecast visitor numbers.

More recently in 2024, two multi-million-pound projects - Heartlands visitor attraction in Camborne and the Moat Brae visitor attraction closed. The Hampshire Cultural Trust has also announced that five of the venues which it manages are under threat of closure.

5.3.15 Competitive landscape

5.3.15.1 It is recognised that the Tywi Valley is a destination in its own right with an established range of attractions which both tourists and local residents can visit. However, the Brecon Beacons National Park is located in close proximity and to the west is Pembrokeshire and its National Park with 'destinations' which have a higher profile in the visitor marketplace.

5.3.15.2 It is also important to recognise the leisure landscape and how we spend our leisure time has changed over the last 25 years. The marketplace is becoming more competitive in different ways and is constantly changing. Not only is Golden Grove competing against other 'visitor attractions,' it is now competing against retail experiences (people spending a day shopping) and in-home digital entertainment (from watching a film on Netflix through to online gaming).



5.3.15.3 Managed by the National Trust, Dinefwr is a key destination attraction which includes a dressed 17th century mansion house - Newton House and is set within a wider 800-acre parkland and deer park. Supporting visitor infrastructure includes formal gardens, a courtyard, café, a secondary catering kiosk, play area and a bookshop. Dinefwr generated just under 79,000 visits in 2021 and 87,000 visits in 2019 (pre-covid). Admission charges to the National Trust property are £11 for an adult (including Gift Aid) to the house and £5 for the car park which we understand allows access to the wider parkland. This means careful consideration will need to be given to introducing an appropriate admission fee to access the Arboretum at Golden Grove. Dinefwr is located within five miles of Golden Grove.

5.3.15.4 To the south of Newton House sits Dinefwr Castle which is managed by Cadw.

5.3.15.5 Paxton's Tower, a folly, is also managed by the National Trust and is located to the south-west of Dinefwr. Whilst visitor facilities are limited (a small car parking area), visually it is an impressive landmark feature.

5.3.15.6 In terms of the marketplace, it is important to highlight that the National Trust has an established route to market and further benefits from economies of scale as an operator of multiple sites across Wales, England and Northern Ireland. Furthermore, as a membership-based organisation it benefits from having approximately 5.38 million members or 2.62 million memberships (a decline on the previous year).¹⁵ Although overall visitor numbers increased by 5%.

5.3.15.7 Other nearby heritage properties include Carreg Cennen Castle, an attractive ruin with long distance views across the landscape. The site is maintained by Cadw and jointly managed by a third-party farmer, who also operates a tearooms and gift shop as part of the 'combined experience'. Castell Dryslwyn, is a ruin managed by Cadw and is located to the west of Dinefwr - apart from a small carpark there are no 'visitor facilities'.

5.3.15.8 Aberglasney Gardens are nationally important and cover approximately 10-acres and include the only surviving example of an Elizabethan Cloister Garden. Visitors can explore 11 'gardens' which include, but are not limited to a kitchen garden, rose garden and Asiatic garden. The site also features a Grade II* listed mansion house, where visitors can explore the restored ground floor. A programme of events is run throughout the year, including a Christmas Fayre. Group visits are also accommodated. Another part of the offer includes two, two-bedroom high quality self-catering holiday cottages. Supporting infrastructure includes a tearoom and giftshop. Importantly, produce from the kitchen garden is used in the tearoom. The adult admission charge is £14.50 (visitors aged up to 16 are free). Aberglasney Gardens generated approximately 41,500 visits in 2021 which is very similar to the 40,000 visits recorded in 2019. Aberglasney Gardens are located within two miles of Golden Grove.

5.3.15.9 The Aberglasney Restoration Trust's Annual Report and Financial Statements for the year ending 31st March 2023 show a net trading loss of £80,160, excluding investment income and investment losses (the comparable figure from the previous year shows a small surplus of £37,072 was generated). The Trust benefits from investments linked to the Cabot Endowment Fund and the Ethel Kerry Fund, which appeared to provide an investment income of £61,000. The value of the fund was just under £2 million at the end of the last financial year.

¹⁵ National Trust, Annual Report 2023–24. It is interesting to note that in 2022 that donations generated from the sale of second-hand books reached £2.5m during the period

5.3.15.10 The Trust has a number of major capital projects in the pipeline including the development of an arboretum and native woodland (linked to an area of woodland which it has purchased), the development of a new building to house a commercial kitchen and toilets and the refurbishment of the South Barn to provide accommodation for student gardeners and the North Barn will be converted into holiday accommodation.

5.3.15.11 The National Botanic Garden of Wales, located approximately seven miles from Golden Grove, has a dual purpose as a traditional visitor attraction and research centre. The overall site covers approximately 500 acres. The signature Great Glasshouse is home to a wide variety of species which are under threat. The stable block area incorporates a cafe, gift shop and reception space. In this main visitor hub area, gardens are located in close proximity to the Great Glasshouse (the Wallace Garden, the Double Walled Garden including the Tropical House, the Bee Garden, Japanese Garden). It is important to emphasise the onsite Nursery Glasshouses which provide a number of the plants on display (which are grown from seed, helping to tell an important 'story'). There is also a dedicated Science Centre which is home to the National Seed Bank of Wales, a herbarium, a library and archive.

5.3.15.12 The Regency Tŷ Melyn building can be used to accommodate private hires for conferences and other uses. The wider landholding presents a number of different 'experiences' for the visitor including a wildflower pasture, arboretum, experimental hay meadow, a series of lakes alongside a waterfall and cascade, a themed fairy wood, play area and the British Birds of Prey Centre. Across the estate there are a number of different routes, which can take between 30 minutes and 2 hours to walk.

5.3.15.13 Interestingly, they have invested in a Gruffalo themed trail to broaden audience appeal. There is also an active calendar of events. The adult admission charge is £19, which includes Gift Aid allowing people to revisit without charge over the following 12 months. Gated visitor numbers during the 2022 to 2023 season reached 160,800. It is interesting to note the importance of the additional 32,000 visits generated by the Luminate Christmas event alongside some 14,000 education-based visits.

5.3.15.14 The annual accounts, for the year end 31st March 2023, show a small loss based on operational activities of £6,000 was recorded. It is important to note some £630,000 of grant funding was made available (which included £594,000 core funding from the Welsh Government and a further £37,000 from the Welsh Government in relation to Rural Development Wales). A further £1.5m of grant funding was also secured e.g. £45,764 from the Swansea Bay University Health Board (which are likely to be linked to specific projects). In the past the National

Botanic Garden of Wales have been close to closure, but the use of grants has enabled the nationally important attraction to continue. These grants are unlikely to be available to Golden Grove.

5.3.15.15 Given that the current offer at Golden Grove is focused around delivering 'a country park experience' it is also worth highlighting the proximity of Llyn Llech Owain Country Park and Mynydd Mawr Woodland Park, which are both managed by Carmarthenshire County Council and located to the south of Golden Grove.

5.3.15.16 We also need to consider that nearby residents and visitors have a number of other places where they can decide to spend their 'leisure time', including the 'great outdoors' in the form of existing walking trails and routes.

5.3.15.17 Whilst not a visitor attraction, it is worth noting the nearby Tywi Centre provides accredited training courses in respect of the restoration and repair of historic properties.

5.3.15.18 Reference to the range of heritage-related attractions in the area highlight the potential for Golden Grove to work in partnership. In doing so Trustees could benefit from shared experience and the opportunity to broaden awareness of the significance of Golden Grove and of the visitor and community experience it could offer.

6.0 SUMMARY OF THE PUBLIC CONSULTATION

6.1 Public Consultation Open-Day

The public consultation event was held at the Tywi Centre, Llandeilo on 13th November 2024. It was attended by over 50 people as well as Trustees and consultants and it was open until 7pm to accommodate people who were in work during the day.



6.2 Members of the public who came to the event were invited to give their suggestions for new uses, whether specific or general. The following is a summary of discussions and the post-it note comments (as seen in the image above). These are set out by theme of proposed use(s):

6.2.1 Arts and Crafts

Listed below are various permutations expressed for essentially the same use – it was a popular theme in conversation.

- Art Classes;
- Art Groups and Courses;
- Artist Studios;
- Artist Residencies (*this comment was based on Elysium Swansea model*);
- Arts and Crafts studios (e.g. in courtyard);
- Arts and Crafts Centre.

6.2.2 Heritage and Culture

- Museum of the Area;
- Historic Exhibitions;
- “Rolling Art Gallery”.

6.2.3 Hotel

Various permutations expressed – it was a popular theme in conversation.

- Hotel and Spa;
- Private Premium Hotel and Spa;
- Spa.

6.2.4 Sport and Leisure

- Create courts for Basketball, Tennis and Netball;
- New Cycle Route to join Golden Grove to Llandeilo to Carmarthen Path;
- Horse Riding through the parkland by permits issued by the Trust;
- Open access footpaths to enable people to enjoy the park and access wider footpaths;
- Open up existing footpaths in and around Gelli Aur;
- Link to wider cycle path to access Tywi Valley sites;
- Create a Park Run that starts and ends at the Café;
- Tennis court – pay for membership;
- Full walking access to parkland and gardens;
- Create Gym / Fitness Trail;
- Hockey field with Astro;
- Create a Pump Track instead of the Deer Park;
- Outside Swimming Pool (as alternative to pool in mansion- see below)
- Mountain Bike Trail;
- Get a Slide in the park;
- Campsite for those doing Duke of Edinburgh challenge;
- Bike Hire;
- Encourage cyclists into the parkland – apparently there are a large number on the local roads that could be tempted in.

6.2.5 Nature and Well-Being

- Support nature and well-being groups to provide activities in the park;
- “Wildflower meadow and picnic tables”.

6.2.6 **Office Space**

- Rent an office space per 1hr

6.2.7 **Food and Drink**

- All day Restaurant / Bistro etc;
- Curry evenings.

6.2.8 **Retail**

- "Little shops in the old stables";
- Old-fashioned sweet shop;
- Sweet shop in the Park.

6.2.9 **Tourism**

- Holiday Property Bond development;
- Holiday homes.

6.2.10 **Residential**

- Part residential (which part not specified);
- Create four units within Stable Courtyard – by doing up one quarter, selling it off and using capital to do up the next one – a revolving fund basis of development?.

6.2.11 **Education and Training**

Traditional building skills was a popular theme in conversation.

- Educational experiences for children;
- Training in Traditional Building Crafts and Skills – develop local skills;
- Traditional Skills Workshops;
- Outdoor learning area;
- Residential activity centre for school trips;
- Renew link to the Art College in Carmarthen;
- Workshop facility with Technician tied in with Art College;
- Garden tutorials.

6.2.12 **Events**

Wedding venue was especially popular theme

- Wedding Venue;
- Murder Mystery weekends;
- Weddings conducted in marquee;
- Events Hall / space;
- Historical Re-enactments;
- Concerts;
- Art Exhibitions;
- Cultural events;
- Pink Floyd Tribute concert;
- Treasure hunts;
- Antiques fairs;
- Garden tours and visits.

6.2.13 **Media**

- TV filming of repairs (like Escape to the Chateau)
- Rent out for film sets;
- Use front of mansion for film sets;
- Base for film studios.

6.2.14 **Arboretum, Parkland and Landscape**

- "Retain access to the special aspects of Gelli Aur – its arboretum and natural landscape";
- An Azalea weekend when they are in bloom;
- Get peacocks in the park again;
- Create an area to watch the deer and to feed them;
- Reinstate bottom entrance access gateway – enable safe access into the park by local community. (*there was strong feeling about this from several people at the consultation*)
- Pinetum and Arboretum to be reopened;
- Create Sculpture Park;
- "Expanding the Woodlands Temperate Rainforest";
- Enable Access to arboretum for intergenerational and healthy activities.

6.2.15 **Mansion**

- Restaurant;
- Restaurant and Toilets;
- Pay for tours around the mansion;
- Swimming Pool.

6.2.16 **Stable Courtyard**

- Convert to artist / craft studios

6.2.17 **Café**

- Consider new café building in timber, not glass, to ensure not too hot/cold;
- There was strong support for the café being "a great place to take locals"; the café was described as having "become a big part of the community".

6.2.18 **Other suggested desires or ideas**

- Study areas;
- Library;
- Disabled access;
- Environmental education;
- Maintain the "quiet enjoyment" of the place;
- Clear signage needed.

Some of the above would accord with the wish that Trustees expressed after the event which was to have an Education Centre.

6.3 Questionnaire

6.3.1 In parallel to our work, an independent media consultant - WeDig Media (www.wedig.media) was contracted by the Trust to promote the consultation, engage with a wider audience and to design a questionnaire that could be completed manually or on-line. The resulting statistical output from the multiple-choice questions was provided to us and our analysis of that shows that the key findings from the survey are as follows (though please note that this provides only a 'snapshot' based on 133 responses):

6.3.2 Proximity to Golden Grove

Participants were asked how long it took them to get to Golden Grove on their last visit:

- 80% took up to 30 minutes to reach Golden Grove
- 48% took up to 15 minutes and
- 33% took between 15 and 30 minutes
- 10% of participants took between 30 and 60-minutes
- 3% of participants took between 1 and 2 hours.¹⁶

6.3.3 Reason for visiting

The main interests participants have in visiting Golden Grove (respondents were able to provide more than one answer to this question):

- 65% to use the café
- 59% to walk the estate
- 54% are casual visitors
- 39% visit the arboretum (which is currently closed)
- 16% for another reason (no further data was supplied)
- 8% to volunteer
- A number of other answer options were selected, which each generated a very low response rate

6.3.4 Frequency of visits

- 30% of participants visit at least once a week (2% every day, 14% 2 to 6 times per week and 13% once a week)
- 20% visit once or twice a month
- 40% visit between 1 and 6 times per year (17% visiting 3 to 6 times per year and 23% 1 to 3 times per year)
- 8% have only ever visited once
- 2% have never visited

¹⁶ Figures are rounded, participants could select more than one answer option and not all participants answered all of the questions. For example, when asked about future support only 87 people answered the question

6.3.5 What would visitors like to see in mansion house and stable block?

Participants were asked what they would like to see introduced within the mansion house or stable block (respondents were able to provide more than one answer to this question):

- 66% exhibits
- 63% would like to see events introduced (theatre & performance based)
- 62% open to the public
- 59% adult education events / courses
- 56% craft workshops
- 55% would like to see a visual display of the heritage of the estate
- 50% children's educational events
- 43% an events centre
- 36% an education centre
- 35% a wedding venue
- 29% selected other (no further data was supplied)
- 17% holiday lets

6.3.6 What would visitors like to see introduced within the parkland?

Participants were asked what they would like to see introduced within the parkland (respondents were able to provide more than one answer to this question):

- 67% would like to see events introduced (theatre & performance based)
- 56% children's educational activities
- 52% craft workshops
- 49% adult educational events / courses
- 49% a visual display of the heritage of the estate
- 42% exhibitions
- 33% selected other (no further data was supplied)
- 27% a wedding venue
- 15% holiday lets

6.3.7 Likely impact of delivering the above on frequency of visits

Participants were asked whether investment in the facilities and services identified above would encourage them to visit more often:

- 92% stated it would
- 8% were not sure
- Less than 1% stated no

6.3.8 Interest in helping

Participants were asked what aspects of the conservation and regeneration of Golden Grove would they be interested in helping with

- 46% felt that they could make a donation
- 54% felt that they could volunteer

6.3.9 Volunteering

The 54% above that said they would be willing to volunteer were asked what specific volunteering they could offer:

- 27% would like to focus on volunteering associated with grounds maintenance
- 18% buildings maintenance
- 9% media
- 21% fundraising
- 25% selected other (no further data was supplied)

6.4 Outline Analysis of Consultations

6.4.1 Analysis of the above indicates a strong desire for Golden Grove and the Gelli Aur Country Park to provide opportunities for leisure and exercise including walking and cycling. The potential for links with the forthcoming cycle route was mentioned by several people. This connectivity would enable visitors to pass through the parkland but other suggestions offered ideas to encourage visitors to stop and enjoy fitness or biking trails. This creates the potential to increase the number of people deriving benefit from the heritage asset without creating the risk of unacceptable harm. Conversely, some suggested creating tennis and basketball courts and pump track but these would be likely to be judged harmful to the special character of the registered park and garden.

6.4.2 In terms of the mansion there was strong interest in creation of a hotel and spa and some thought this could also become a wedding venue. This option could involve a very significant level of change but it needs to be included within the assessment as there are many examples around the U.K. where the future of a country house has been secured through this route. Golden Grove would undoubtedly require very substantial capital funding to repair over and above the level of grants that the Trust would be likely to be able to obtain from funders such as the National Lottery Heritage Fund or from the local authority. Conversion to a luxury hotel of the kind suggested by local people at the event is likely to need fewer, larger, rooms than more usual hotels. In this way, it has the potential to be compatible with the existing plan-form without requiring excessive alteration but the impact of the required parking and ancillary services might cause more harm and might limit public access to the primary areas of the estate.

6.4.3 In terms of the stable courtyard there was strong interest in creation of arts and crafts facilities. This is considered to be an appropriate and deliverable range of potential uses and could provide studios, retail spaces and exhibition spaces according to need. The Tywi Valley has an active arts and craft network and it is understood there are sufficient local artists looking for studio space as to be likely to attract demand at Golden Grove.

6.4.4 The café is clearly serving an important purpose of providing a gathering point for local people and it suggests that the Trust could build on this to create other facilities that would strengthen the community hub. Trustees have suggested creating an Education Centre to the rear of the café.

6.4.5 The arboretum is clearly a popular part of the estate and one that has considerable potential for access and interpretation and one person at the consultation suggested a sculpture park.

6.4.6 There was broad interest expressed at the consultation for Golden Grove to hold events including concerts, fairs, exhibitions as well as more niche events such as historical re-enactments and murder mystery weekends.

6.4.7 Some of those attending considered that there was potential for Golden Grove to derive income from hiring out the mansion and its setting to film companies. Whilst this might be appropriate, in terms of business planning this would be a highly unpredictable source of income.

6.4.8 In parallel with the community consultation event there was earlier engagement with key stakeholders, Cadw, Carmarthenshire County Council's heritage team and Architectural Heritage Fund. Whilst concerns were raised about the condition of the Mansion and the unsuitability of past works carried out, there was nevertheless strong support for the Trust's work to rescue the heritage and to identify viable options for the future.

7.0 SWOT ANALYSIS

In parallel to the understanding of the historic asset, the assessment of the market and the engagement with stakeholders and the local community, it is important to consider what Strengths, Weaknesses, Opportunities and Threats are identified by this holistic assessment of Golden Grove. A SWOT analysis is a standard project development tool and some factors can emerge as both strengths and weaknesses depending on how a specific project is put together and delivered.

STRENGTHS	WEAKNESSES
<p>Heritage Values of its history, buildings and parkland generates interest</p> <p>Location in an area visited by many and with a remarkable cluster of heritage attractions</p> <p>Size – the scale and layout of the mansion and stables offers opportunity for wide range of uses without needing extensions or radical change</p> <p>Beauty of the landscape setting</p> <p>Tywi Valley 'Outstanding' on Cadw Register of Landscape of Historic Interest in Wales. Valley is the setting for a unique group of planned parks and gardens playing an important part in the history of the 18th century Picturesque movement</p> <p>Facilities for all ages and has a café and parking</p> <p>Volunteers – quantity and enthusiasm</p> <p>Trustees – energy and commitment</p> <p>Ecological diversity</p> <p>Has a 'wow' factor</p> <p>Its communal value transcends past private ownership and being now open to the public</p>	<p>For a project of this scale and complexity the Trust Board is too small and lacks past experience of major built and landscape heritage regeneration projects of this kind. To address this the Trust is actively recruiting new Trustees with specialist expertise);</p> <p>Condition of the buildings and cost of adaptive reuse</p> <p>Condition of the Arboretum</p> <p>Lack of a holistic estate wide historic landscape value / arboricultural survey of this part of the Gelli Aur heritage asset</p> <p>Heritage Attraction competition in the area</p> <p>Contentious recent history</p> <p>Lack of working capital; difficulty in getting grant funding on the scale needed</p> <p>Better-known properties of scale in the area and a current lack of public awareness about Golden Grove</p> <p>The existing access is limiting in terms of capacity and passing places for larger events; also no public transport to the place</p> <p>Presence of bats within the house and a requirement to maintain their habitat</p>

OPPORTUNITIES	THREATS
<p>This is a well-known site of heritage importance with good scope to attract more visitors to a wide range of uses / events / activities.</p> <p>Opportunities to provide public access and interpretation of the remarkable heritage of ancient, dramatic and inspiring trees in the Deer Park, Arboretum and Pinetum. An early standalone project that might attract grant funding.</p> <p>Past planning consents for a wide range of uses suggests good opportunity for future planning consents for new uses</p> <p>Provide skills training during the building conservation works (e.g. with Canolfan Tywi)</p> <p>Opportunities for partnership with local heritage attractions</p> <p>Opportunities for bringing on a developer partner to deliver the high-risk elements demanding the most capital investment</p> <p>Potential for phasing the works to fit with potential sources of grant funding – e.g. stables and mansion and parkland could all be separated into different phases including early wins or ‘meanwhile uses’ to demonstrate activity on the site</p> <p>Could be a flagship heritage regeneration project.</p> <p>Recruitment of new Trustees with specific skillsets and experience of working on similar projects</p>	<p>Heritage is highly designated meaning statutory constraints to future change and uses</p> <p>High cost of repair and adaptive reuse</p> <p>Potential for catastrophic collapse of roof of the mansion</p> <p>Length of time needed to secure grant funding</p> <p>Trustee capacity both in terms of numbers and breadth of skills; too big a project for 3 people;</p> <p>Continuing presence of former Chair of Trust</p> <p>This could be the last chance for Golden Grove to secure support and funding for its rescue</p> <p>Potential challenges around access with neighbours re. open days</p> <p>Constraints on creation of sufficient additional parking</p>

8.0 OPTIONS ASSESSMENT

8.1 Overview

8.1.1 This section is based upon the above research and analysis, along with consultation with the Trustees and feedback from a public engagement event. Our evaluation of a wide range of issues is intended to assist the Trust determine the suitability, deliverability and sustainability of options for Golden Grove and the Gelli Aur Country Park. For each of the seven options we provide:

- A short description;
- A reference example in the marketplace;
- Key commercial / operational considerations are identified;
- A note on the market competition;
- A commentary on the option's associated pros and cons.

8.1.2 The following options focus on aspects requiring the greatest level of investment and challenges to deliver but it is important to note that the sensitive inclusion of the arboretum, historic gardens and parkland is imperative in all options. Desirable options for the arboretum and parkland could be more iterative and require less transformational change than those for the mansion and stables and in this way can be compatible with most options. By contrast, options for the mansion and stable courtyard require a high level of intervention, some of it irreversible, and this will to a large extent determine the ultimate choice of option.

8.1.3 In addition, we include a further option that could be delivered individually, or in tandem with any of the options for the Mansion and Stables set out below. This focuses on the arboretum celebrating 'the remarkable heritage of trees'.

8.1.4 It is also important to note that some of the sport and leisure uses discussed at the consultation event can be developed in parallel to all the options detailed below. For example, maintaining a network of footpaths and increasing the opportunity for cycling and connecting to the National Cycle Route.

8.2 Options for the Mansion House and Stable Block

Over the last 20 years there have been several proposals to redevelop part of the former estate into a luxury hotel, residential accommodation, a conference centre with offices, a convalescent home for wounded soldiers and a place to exhibit art. We set out below a range of potential uses which could be accommodated within the mansion house or stable block.

1. High quality heritage-based visitor attraction
2. Hotel use in the mansion house and linked stable block
3. Self-catering accommodation in the stable block
4. Craft or similar units in the stable block
5. Weddings / social venue in the stable block
6. Medium-scale events usage (including outdoor spaces)

OPTION A High quality heritage-based visitor attraction	
	<p>To restore and transform the mansion house (and immediate gardens) into a heritage attraction of regional if not national importance. With core component elements, including:</p> <ul style="list-style-type: none"> • Exhibition / gallery spaces • Integrated retail space • Catering (potentially in the stable block) • Education offer • Events programme • Wider offer linked to weddings / social function uses • Supporting back of house facility (inc. Trust offices)
Reference example	Newton House / Dinefwr , a nearby National Trust property
Key commercial / operational considerations	<ul style="list-style-type: none"> • Admission charge required • Likely to require an ongoing revenue subsidy as a standalone heritage attraction • Significant staff and volunteer base required to deliver the offer • Subject to demand, consideration to be given to closure of the mansion house to the general public during mid-week periods over the winter months (apart from pre-booked tours and other activities) • Careful management required between 'pay zone' and 'free to access' areas e.g. wider parkland • The high level of capital funding required to create this option would require a major grant from the NLHF or similar and securing the match funding would be challenging
Market competition	<ul style="list-style-type: none"> • Existing provision in the local area, would need to establish a USP in the minds of visitors

Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • A 'natural fit' with use • Ensures public access to the mansion house is reinstated (meeting a key objective of the Trustees) • Wider economic impacts / community benefits during construction and operational phases (e.g. job creation, local supply chains used and supporting wider economy etc) • Adds positively to the profile of Carmarthenshire as a 'destination' • Potential to become a home for local history and heritage group (building stronger links with the community) • Potential for partnership with other local heritage attractions 	<ul style="list-style-type: none"> • Revenue support likely to be required • Significant competition in the locality • High capital costs (multiple funding partners required to take forward) • Complexity to deliver and then manage during the operational phase (e.g. specialist curatorial staff required) • Speed of delivery perhaps, a long-term ambition (potential need for a stop-gap solution) • Lack of associated / authentic artefacts available to 'dress' the house • Difficult to compete in the marketplace as a single site operation • Limited efficiencies as a single site operation • Trust would have to maintain the mansion during a long period of project development

In summary, this option has the potential to celebrate the heritage and to make the mansion house once again the centre of a publicly accessible Golden Grove Estate. This would be considered as a 'long-term' opportunity. It would respond positively to the views received during the community consultation in which there was clear support for a broad-based heritage attraction.

OPTION B Hotel use in the mansion house and linked stable block	
Short description	<p>The mansion house would be converted into a high-end boutique hotel. The stable block would provide additional bedrooms and a space which could readily be used to accommodate events, large social functions and a spa (again, suggested during the consultation event).</p> <p>The land immediately surrounding the mansion house would be integrated within the demise of the hotel operation (not including the wider parkland which would remain accessible to the public). Careful consideration would need to be given to the arboretum.</p> <p>There would be a requirement for a dedicated car park for hotel guests and other users which did not adversely impact on the heritage setting.</p> <p>The mansion house, stable block and land would likely be let on a long-term lease.</p>
Reference example	<ul style="list-style-type: none"> • Hensol Castle, Vale of Glamorgan, is Grade I and set in a registered historic park and garden (given its proximity to the M4 and Cardiff it promotes a 'business offer' alongside other uses e.g. weddings, events, afternoon tea and a gin distillery). • Palé Hall, (Grade II*) a luxury five-star hotel with 18 bedrooms alongside garden suites and a Michelin Green Star restaurant located to the east of Bala in North Wales and Bodysgallen Hall Hotel and Spa a Grade I listed house on the North Wales coast set within a registered park and garden (and is owned by the National Trust).
Key commercial / operational considerations	<ul style="list-style-type: none"> • Dependent upon securing an operator to take the project forward without limiting the Trust's ability to maintain public access to the country park. • Hotel operator might want separate access to those using the country park.
Market Competition	<p>Very limited competition, for example: Mansion House Llansteffan and Tŷ Mawr Country Hotel (although on a much smaller scale)</p>

Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • Ongoing revenue generated for the Trust and wider Golden Grove Estate • Does not rely wholly on funding from other trusts, institutions or government bodies • Allows the Trustees to focus on more manageable projects linked to the parkland • Significant economic benefits • Wider PR benefits linked to Carmarthenshire as a destination 	<ul style="list-style-type: none"> • Public access to the mansion house severely restricted; although as part of lease arrangement there could be public access on a specific number of open days during the year • Potential negative PR for the Trust and for Golden Grove • Potential to upset the local community • Market appeal to a hotel operator (ability to secure an operator) • Difficult to create degree of privacy between general uses of the wider site and the hotel operation • Likely to require some form of support / funding from public sector (as seed funding) • Similar to the visitor attraction option, this will be complex to take forward and requires a significant capital ask and lengthy project development period during which time the Trust would have to maintain the Mansion • Single use of the 'property'

It is noted that the introduction of a high-end boutique hotel, does not meet a key objective of the Trustees in terms of maintaining a high-level of public access. However, for completeness this has been included in this options' review, not least because it is a use that was suggested in different forms by several people attending the consultation event. In summary, with this option, the mansion house and stable block would be repaired and brought back into use on a commercial basis. It would preserve the heritage but would limit public access.

OPTION C Self-catering accommodation in the Stable Block/Courtyard	
Short description	High-quality self-catering units introduced in the stable block, ideally with some private external space and dedicated car parking. The mix of units could include four x three-bed self-catering units. Alternatively, a smaller number of units could also allow for other compatible uses in the remainder of the stable block and courtyard.
Reference example	<p>Cardigan Castle - there is a bed and breakfast operation as well as a more traditional self-catering holiday lettings business, which includes four self-catering properties.</p> <p>The unit sizes vary from the largest which is for ten persons down to the smallest which are for two persons.</p> <p>We understand that three of the self-catering units have their own or shared private courtyard areas.</p>
Key commercial / operational considerations	<ul style="list-style-type: none"> • Requirement to work with a third party to manage marketing, promotion and bookings • Onsite staff required on change-over days to clean the individual units
Market Competition	<p>There is significant competition in terms of the provision of self-catering properties. Cottages.com, a leading provider of self-catering cottages across the UK, lists over 20 properties in or within close proximity of Llandeilo. Airbnb lists significantly more.</p> <p>However, if a self-catering property is introduced within the stable block this would have a unique USP.</p> <p>It is interesting to note that Aberglasney Gardens already has two self-catering properties known as the Gardener's Cottage and Coachman's Cottage. There are proposals to convert the North Barn into a self-catering property.</p> <p>The National Trust also lets Dinefwr Home Farm, a large self-catering farmhouse which can accommodate 12 guests.</p>

Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • Access to wider landholding outside of core operating hours (a key attractor for guest) • Straightforward to operate by working with a third party such as Under the Thatch. A third party would be responsible for marketing the property and handling bookings • Helps to extend the season (bringing in additional cashflow during the shoulder periods) • Could be used to accommodate people staying overnight, linked to any onsite activities e.g. craft courses, weddings, events etc • Overnight stays would have a greater economic benefit for the locality 	<ul style="list-style-type: none"> • Lack of privacy for guests during core operating hours will impact on appeal • Operationally difficult to separate out accommodation from other uses e.g. busy country park and guests seeking high-quality accommodation and that 'getting away from it all feeling' • Doesn't provide a solution for the Mansion

In summary, with this option, the stable courtyard would be rescued and given a type of adaptive reuse that could be appropriate, notwithstanding the amount of alteration that would be required. At a discounted 'tariff' outside of the main season the accommodation could be utilised by people attending any courses which are delivered by third parties at Golden Grove.

However, it does not provide a solution for the Mansion House, other than potentially the service range. It would also mean that the most appropriate location for the craft studios, for which there is strong Trustee and community support, would no longer be available. Whilst the Community Consultation did hear some support for creating holiday homes there was limited support for this as a use for the stable courtyard.

OPTION D Craft or similar units in the stable block	
Short description	A cluster of craft units located within the former stable block would need supporting facilities such as toilets (within the stable block) etc.
Reference example	<ul style="list-style-type: none"> • Markeaton Craft Village located in former stables within Markeaton Park in Derby. The park generates over one million visits per annum. However, the park is able to draw on a much larger residential catchment than Golden Grove. • Ruthin Craft Centre, includes four galleries one of which is retail space, a cafe, eight studios, an education space (for workshops and events), an admin office, toilets and a car park. There is also a funded residency programme.
Key commercial / operational considerations	<ul style="list-style-type: none"> • Generates a rent roll • Requirements or guidelines for individual craft unit leaseholders to (a) attract the 'right type' of tenant and (b) to maintain standards • Need to integrate stable block within the wider operation (to ensure visitors flow through the space and do not bypass it) • Ensure that crafts people provide live demonstrations • Potential to extend into the evening through workshops etc. • Need to develop a critical mass of units • Potential need for 3-phase power for some of the units e.g. if there is a pottery crafts person
Market Competition	Crafts Alive, a co-operative of makers and crafts people from across Carmarthenshire, Pembrokeshire, Swansea and Ceredigion. Located in Llandeilo with an established route to market and strong existing links with makers and others.

	<p>Potential to engage with the organisation to enquire about the opportunity of (a) relocating to the stable block or (b) would they be interested in having a 'seasonal' satellite operation within the stable block?</p> <p>Llandeilo is also home to a number of independent makers / crafts people, similarly is there an opportunity whereby the stable block becomes another 'shop window' for their work which is sold on a commission basis.</p> <p>Similarly, it would be beneficial to contact Tywi Valley Open Studios (mentioned during the consultation event).</p>
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Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • Supporting local economy e.g. craft businesses / producers • Draw in new users / visitors • Stable block and courtyard become an animated space • Generates income (albeit limited) • Will continue to allow other uses to be delivered within stables & courtyard (i.e. not a single use) • Potential to become a destination in its own right • Existing supporting infrastructure already in place (e.g. café, toilets, car parking) • Stable block could become a very secure space 	<ul style="list-style-type: none"> • Seasonal opening hours • Limited income potential • Can be difficult to manage e.g. requirement for crafts people to be onsite when Golden Grove is busy • Requires significant footfall to attract tenants (initially potential for a discounted rent to attract tenants) • Takes time to establish demand • Requires regeneration of the stable block / courtyard (a significant capital ask) • Without a solid business case it might be hard to get sufficient capital funding for this option

In summary, with this option, the stable courtyard would be rescued and given a type of adaptive reuse that could be appropriate, notwithstanding the amount of alteration that would be required. This option does not preclude other uses which could be accommodated within the stable block. Although it does not provide a solution for the Mansion House it does fit Trust objectives. This option also responds well to a strong interest expressed at the community consultation in creating arts and craft uses in the stable courtyard.

OPTION E Weddings / social function spaces	
Short description	<p>Create a multi-use wedding / social function-based venue in the stable block / courtyard area which could be operated on a temporary basis (i.e. potentially allowing some other uses when not in use for a wedding).</p> <p>A semi-permanent tensile cover could be placed over part of courtyard and the carriage bays could be utilised.</p> <p>The mansion house could be licensed to host civil wedding ceremonies.</p> <p>There would be a requirement for a dedicated production kitchen alongside toilets.</p> <p>Dry storage would be required for furniture.</p> <p>In the long-term the mansion house could be licensed to host civil wedding ceremonies. Potentially this would only require refurbishment of the ground floor of the Mansion reducing capital cost, as long as the roof was sound and the upper floors safely closed off.</p>
Reference example	<ul style="list-style-type: none"> • Stansted House and Park in Hampshire, multi-function 'destination' with a mixed used business model - café, outdoor pizza garden, farm shop / deli, arboretum, garden centre, walled garden, small business units and office space. The House has a limited opening season. Weddings and social functions are accommodated. Bridal suite is available for £1,500. • At Bignor Park, Sussex, the stables and gardens are available for wedding receptions and social function uses, which includes the stables.
Key commercial / operational considerations	<ul style="list-style-type: none"> • Need to avoid conflict with other uses, but can be overcome with careful programming • Creates a 'packaged offer' with ceremony and reception (and potentially onsite accommodation) • Requirement for dedicated / specialist staff to deliver high-quality service

Market competition	<p>Established local competition e.g. Carreg Cennen Castle and Farm (hosts weddings and social functions), Glansevin Mansion, Llangadog, (hosts weddings and social functions alongside providing accommodation, which can accommodate up to 40 guests), Oak Tree Farm Wedding Venue (dedicated wedding venue with onsite accommodation) and Pantglas Hall, Llanfynydd, (accommodation focussed with lodges and leisure offer which also hosts weddings in different onsite venues e.g. in the courtyard and the coach house).</p> <p>The National Botanic Garden of Wales hosts social functions. It is noted that the National Trust used to run a wedding venue at Dyffryn Gardens (to west of Cardiff).</p>
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Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • Area can be readily secured to create a private space • Strong fit with historical setting – parkland and mansion house add spectacular ‘backdrops’ • Significant injection of ‘revenue’ into the business model • Weddings, social gatherings will be booked up / programmed months in advance to minimise (with careful planning) potential conflict with other uses • Support local businesses e.g. accommodation providers (if accommodation use is not taken forward at Golden Grove) 	<ul style="list-style-type: none"> • Human resource intensive to promote, manage and ‘hold the hands’ of booking parties. Successful venues often have dedicated ‘events’ staff • Weddings popular during summer period (though this is likely to be busiest period for generating visitors to Golden Grove) • Lead in time to develop business, build reputation and market awareness • Can disrupt ‘core business’ operation • Requires regeneration of the stable block / courtyard (significant capital ask)

In summary, in this option, the stable courtyard would be rescued and given some seasonal adaptive reuse, albeit with considerable alteration. Although it does not provide a solution for the Mansion House it is compatible in other ways with the Trust’s objectives and has the potential to generate some revenue. This option also responds well to a strong interest expressed at the community consultation in Golden Grove hosting weddings and functions.

OPTION F Medium-scale events usage

Short description	<p>In the short term, utilising the terraced garden with the backdrop of the Mansion House and arboretum for:</p> <ul style="list-style-type: none">• Theatre performances• Opera• Tribute bands• Winter Christmas Wonderland experience• Craft fayres• Halloween events• Lights in the forest (in the Arboretum) <p>In the longer term, the Mansion House and stable courtyard can be utilised (providing a level of wet weather resilience).</p> <p>Alongside this, a number of small-scale activities such as bushcraft skills, guided tour of the arboretum and wildlife walks etc., can potentially be delivered by volunteers in the immediate future.</p>
Reference examples	<ul style="list-style-type: none">• CONKERS, a visitor attraction in National Forest which delivers an annual programme of events – from forest ranger activities through tribute bands and a Christmas Winter Wonderland Experience¹⁷• Scolton Manor Park – a historic house, parkland, woodland, walled garden and Bee Keeping Centre managed by Pembrokeshire County Council
Key commercial / operational considerations	<ul style="list-style-type: none">• Work with third party providers to organise, market and deliver events (the Trust receives a hire fee and car parking income)• Overnight security could be required depending on the scale and duration of the event (e.g. Winter Wonderland experience over several nights)• Car parking will need to be carefully considered as well as health and safety and crowd management (requirement to temporarily prevent access to front of Mansion)

¹⁷ CONKERS is managed by Planning Solution Consulting's sister company

Market competition	<ul style="list-style-type: none"> Nearby Aberglasney Gardens (events e.g. guided tour of the mansion house upper floors, which are unrestored, winter fair, art in the garden). A range of events are also delivered at Dinefwr
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Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> Working with third-party specialist event providers (a) reduces risk to the Trust (b) enables the Trust to deliver medium scale events now while it has limited human resource or money available to deliver events in-house Long term, as Golden Grove/Gelli Aur's reputation is established, there is opportunity for the Trust to take more of leading role Speed of delivery (can be delivered independently and does not require restoration of Mansion or stable block). Demonstrating to local residents that other changes are happening now Rural site / not a significant number of neighbours (i.e. noise should not be an issue) Positive PR opportunities; helps to build market awareness of G.G. Engages with new audiences (who may not necessarily yet visit) Works well alongside other uses which could be introduced here 	<ul style="list-style-type: none"> Consideration given to bats etc (i.e. impact of light pollution at night) For performance events / shows spaces are outside and not covered which, in our experience of managing CONKERS is likely to impact on ticket sales (i.e. very weather dependent) Can take time to establish position in the marketplace as an 'events destination'

In summary, this option, has reasonable potential to provide viable activities and use for a restored stable courtyard. It is unlikely to provide an adequate solution for the Mansion but it does fit Trust objectives and fulfil local need and benefit. This option also responds well to a strong interest expressed at the community consultation in Golden Grove holding a wide range of events.

8.3 Option for the Landscape Park, Deer Park and Arboretum

OPTION G The remarkable heritage of trees as a visitor experience	
	<p>The aim would be to provide high quality access and interpretation of Gelli Aur's heritage of ancient, dramatic, and inspiring trees which could be a real attraction and draw for visitors. The core elements would be:</p> <ul style="list-style-type: none"> • The monumental specimens of the Arboretum • The ancient giants of the Country Park and deer park • The experience of visiting these trees should take full advantage of their unique setting. Views of the House and panoramic views out across the estate and the Tywi Valley would be part of this experience <p>This is alongside enhancing the accessibility of the wider parkland setting and Arboretum through the improvement of trail surfaces. Supporting interpretation would also be introduced as part of this option.</p> <p>As a latter phase of development (and subject to demand) consideration should be given to the introduction of a dedicated cycling route within the wider parkland. To avoid any conflict between different user groups the cycling trail would be separate from the existing network of walking trails.</p>
Reference example	<p>Mount Stuart Arboretum National Trust Northern Ireland, Alice Holt Arboretum Surrey, Batsford Arboretum Gloucestershire, Harcourt Arboretum University of Oxford, Westonbirt Arboretum</p> <p>It is also interesting to note the development, over the last 20 years, of Bedgebury National Pinetum and Forest. Significant investment has been made in the supporting visitor infrastructure (car parking, toilets, café, a network of cycling and mountain biking trails, interpretation and a programme of events). The site is managed by Forestry England who work with third parties to deliver specific elements of the visitor experience e.g. café operator, cycle hire and high ropes. The investment in the 'visitor infrastructure' has helped to drive a significant uplift in visitor numbers. There is no 'admission charge' – car parking charges are a key revenue generator.</p>

<p>Key commercial / operational considerations</p>	<ul style="list-style-type: none"> • Admission charge required for the Arboretum (the wider parkland would remain free to enter); • Careful management required between 'pay zone' and 'free to access' areas e.g. wider parkland; • Lower level of capital funding required to create this option compared with buildings but still would require significant funding to achieve a high-quality attraction commensurate with the potential quality of the trees and landscape setting • May be attractive to a wider range of donors than NLHF finding, e.g. Wolfson Foundation and other charitable bodies with a heritage/environmental and healthy living remit (strong political fit with climate and biodiversity emergencies agendas) • Requirement for ongoing and specialist management of the Arboretum. We recognise the recent appointment of a new Trustee with the appropriate skillset and expertise • Admission charge required for the Arboretum; • Careful management required between 'pay zone' and 'free to access' areas e.g. wider parkland; and in the short to medium term to prevent access to the mansion house. • Lower level of capital funding required to create this option compared with buildings but still would require significant funding to achieve a high-quality attraction commensurate with the potential quality of the trees and landscape setting • May be attractive to a wider range of donors than HLF finding, e.g. Wolfson Foundation, Julia Rausing Trust and other charitable bodies with a heritage/ environmental and healthy living remit
<p>Market competition</p>	<ul style="list-style-type: none"> • The challenge will be to raise awareness of the Arboretum (as a paid for attraction), particularly given the proximity of The National Botanic Garden of

	<p>Wales, the wider parkland at Dinefwr with its veteran oaks and the nearby Aberglasney Gardens.</p> <ul style="list-style-type: none"> • Whilst, considered 'competitors' there could be an opportunity to work in partnership to help to raise the profile of the Arboretum at Golden Grove. • Perhaps, a triangle of opportunity exists between these attractions, which between them offer different experiences linked to the natural world.
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Pros / benefits	Cons / disbenefits
<ul style="list-style-type: none"> • It takes advantage of one of the site's unique assets. The trees of Gelli Aur are a remarkable asset waiting to become a special visitor attraction. Although needing management, including succession planting, the heritage of trees, unlike the buildings, has mostly been enhanced by age and growth. • Trees are very much in the public consciousness these days; for example, their value in combating climate change, the habitats and ecosystems they support, their visual appeal, educational and cultural value – many of these aspects could be brought out in a visitor experience at Gelli Aur. • Would be a potential opportunity to restore the arboretum to achieve status as a tree collection of national importance. • May be scope given the potential high-level status of a restored arboretum to obtain seed of rare/remarkable trees from around the world which could be 	<ul style="list-style-type: none"> • The public enthusiasm and pressure to open up as soon as possible the arboretum – and to a lesser extent the Pinetum -, is completely understandable. • Although this unique asset has the potential to create a real wow factor for visitors - and be something the local Tywi Valley community could be proud of - without high-quality access and interpretation, the public offering would be much diluted in its impact. • Significant costs will be involved in creating this quality of supporting infrastructure although these are likely to be substantially less than what would be required for building restoration • There will be a challenge of carefully managing the site to enhance public access, including various events for different age and interest groups, while at the same time promoting the quiet enjoyment by the public of the arboretum and deer park historic and visual interest and ecological

<p>grown on at Gelli Aur and become part of future visitor attractions.</p> <ul style="list-style-type: none"> • Could evolve into a wider vision of the site as a 'hub' to encourage much stronger connections between children, families and community to the natural world. (ref. seminal book, <i>Last Child in the Woods; Saving Our Children from Nature-Deficit Disorder</i> by Richard Louv.) • Potential scope for a range of family friendly events and activities, for example 'Christmas Tree Trails', an Arboretum Geocache Trail, guided walks etc. • The scale of the deer park and its mix of openness and woodland offers potential opportunities for different informal recreational activities including exercise and running, cycle and footpath connections and picnic areas • Developing public awareness of the tree heritage will also beneficially increase awareness of the buildings and their heritage importance and vital contribution to the 'sense of place' of the site. 	<p>value. It should be noted the overall landholding lends itself well to 'zoning' (linked to intensity of use).</p> <ul style="list-style-type: none"> • Potential impact of climate change (e.g. more extreme weather events) and pests / diseases on the wider parkland requiring new approaches to management. • It is likely local residents may not be regular visitors to the paid for Arboretum (unless they have an annual pass or are visiting with relatives or friends who are staying with them). Therefore, engaging with the visitor market will be key (albeit challenging)
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In summary, this option, has strong potential to be a viable project in the one to five-year period. The funding needed is much less than that for the Mansion and has the potential to be a project capable of securing sufficient capital grants. Taking this option forward would not be at the expense of the long-term goal of rescuing the Mansion but it would an appropriate project that could stand alone at the outset and thereafter add value to projects for the Mansion and/or Stable Courtyard. This option could be a route for the Trust to build capacity and to bring Golden Grove and the Gelli Aur Country Park to the attention of a wider audience. This option would also meet the Trust's objectives and provide clear public benefit and support the strong desire shown at the community consultation for greater access to an enjoyment of the parkland and arboretum.

8.4 The above range of options deliberately excludes the '**Do Nothing**' option as this would neither meet the Trust's charitable objects nor would it do anything positive to preserve the designated heritage assets for future generations. Accordingly, whilst the status quo is in theory an option it is not one which should be considered any further.

8.5 **Assessment criteria**

In terms of evaluating the different options to identify the lead option, we have produced a scoring matrix (using a score of 1 to 10 with 10 being the maximum awarded), with a range of criteria to assess the options which are shown in the table below. The scoring matrix is weighted.

Please see Appendix B for further commentary on the interpretation of the scoring.

Evaluation Criteria	
Site and heritage considerations	
Physical fit / integration	<ul style="list-style-type: none"> How well does the option fit in terms space use requirements?
Heritage impact	<ul style="list-style-type: none"> To what extent does the development impact on the heritage significance of the site?
Market considerations	
Market considerations	<ul style="list-style-type: none"> Potential to engage with the local market-place Potential to engage with visitor market-place adding to destination appeal creating more attractive place to visit and live/invest in in Tywi Valley
Strategic case	
Policy alignment	<ul style="list-style-type: none"> The level to which the option will help to deliver the charitable objects of the Trust
Job creation	<ul style="list-style-type: none"> Potential to create new jobs / secure existing jobs
Financial case	
Financial sustainability	<ul style="list-style-type: none"> Financial position / risk profile
Economic impact	<ul style="list-style-type: none"> Wider economic impact of development along the Tywi Valley

Deliverability	
<p>Capital costs</p> <p>Deliverability</p>	<ul style="list-style-type: none"> • Indicative investment (on a sliding scale from high to low) • Ease of deliverability of planning and development process (i.e. is it straightforward or are there concerns about taking forward / implementing the option?) • Level of risk associated with delivery of the Option • Onus on the Trust to manage a complex project development phase (need capacity building of Trust)
Operation	
<p>Complexity to operate</p>	<ul style="list-style-type: none"> • Complexity to manage during the operational phase

8.6 Scoring Table

The following page shows the Scoring Table for each of the seven options under thirteen assessment criteria grouped within six overall categories.

The seven options are:

- High quality heritage-based visitor attraction
- Hotel use in the mansion house and linked stable block
- Self-catering accommodation in the stable block
- Craft or similar units in the stable block
- Weddings / social venue in the stable block
- Medium-scale events usage
- The remarkable heritage of trees as a visitor experience

The assessment criteria scored in the thirteen columns fall under the following six categories of:

- Site and Heritage Considerations
- Market Considerations
- Strategic Case
- Financial Case
- Deliverability
- Operation

The final column shows the aggregated score once the weighting has been applied. The rationale of the weighting is that the most important criteria when deciding on any option is:

- the magnitude of the likely heritage impact
- the potential to deliver the Trust's charitable objectives
- the financial sustainability of the option; and
- the ease of deliverability

The scoring of each option assumes:

- that outstanding borrowings will have been repaid;
- car parking need will have been resolved. Existing hard-standing is insufficient but needs to cater for potentially 300 cars for an evening event.

Options	SITE & HERITAGE CONSIDERATIONS		MARKET CONSIDERATIONS			STRATEGIC CASE		FINANCIAL CASE		DELIVERABILITY			OPERATION	Total weighted score
	Physical site fit / integration	Potential impact on heritage*	Potential to engage with local marketplace	Potential to engage with visitor marketplace	Adding to destination appeal (place to visit, live and invest in)	Potential to help deliver the Trust's charitable objects*	Job creation	Financial sustainability*	Economic impact	Indicative level of capital investment*	Ease of deliverability*	Level of risk*	Complexity to operate*	
Weighting	1.5	2.5	1.5	1.5	1.5	2.5	1.5	3.0	1.5	2.0	2.5	2.0	2.0	
OPTION A High quality heritage-based visitor attraction	5.0	5.0	5.0	8.0	8.0	8.0	7.0	2.0	8.0	1.0	1.0	1.0	1.0	108.50
OPTION B Hotel use in the mansion house and linked stable block	4.0	4.0	3.0	7.0	8.0	2.0	7.0	4.0	8.0	1.0	1.0	1.0	2.0	93.00
OPTION C Self-catering accommodation (stable block)	8.0	6.0	2.0	7.0	4.0	4.0	2.0	6.0	5.0	5.0	4.0	4.0	7.0	127.00
OPTION D Craft or similar units in the stable block	8.0	7.0	5.0	5.0	5.0	4.0	3.0	3.0	3.0	5.0	4.0	4.0	7.0	122.00
OPTION E Weddings / social function spaces	8.0	6.0	4.0	4.0	4.0	4.0	3.0	5.0	4.0	5.0	4.0	4.0	4.5	117.50
OPTION F Medium-scale events usage (third party)	9.0	8.0	6.0	6.0	5.0	4.0	2.0	6.0	3.0	8.0	9.0	8.0	5.0	159.00
OPTION G The remarkable heritage of trees as a visitor experience (Arboretum)	9.0	9.0	5.0	7.0	8.0	7.0	2.0	3.0	3.0	7.0	6.0	6.0	6.0	153.00

* Low score represents negative position or impact

The scoring would place the options in the following order (from highest to lowest):

Option F 159.00
Option G 153.00
Option C 127.00
Option D 122.00
Option E 117.50
Option A 108.50
Option B 93.00

8.7 Commentary on Scoring Table

8.7.1 The table identifies that the options that are likely to be the *most achievable and appropriate* are Options F (Medium Scale Events) and G (The Remarkable Heritage of Trees). These both score highly on their potentially low heritage impact, their potential to deliver the Trust's objectives, their potential for securing the necessary funding and being sustainable and the likelihood that delivering them could be within the capacity of the Trust.

8.7.2 In particular the introduction of a programme of events could be readily delivered at 'speed' by working with a third-party events specialist, which reduces risk and financial exposure to the Trust. This does not preclude the Trust from delivering a range of supporting activities in-house (e.g. heritage tours, wildlife walks etc). This would help to demonstrate to visitors and more importantly to the local community that 'things' are changing at Golden Grove and Gelli Aur and that there is a distinct break from the past.

8.7.3 As part of Option G consideration also needs to be given to investment within the visitor infrastructure within the parkland setting, which is in effect akin to a country park. For example, improving the surfacing of some of the trails to improve accessibility, interpretation, introducing natural play features (which could be constructed out of fallen timber from the estate) and potentially the introduction of a dedicated mountain biking trail. All of which will add positively to the visitor experience. Again, this would also help to show the local community that change is being delivered by the new Trustees.

8.7.4 The table identifies that the options *least likely to be achievable or appropriate* are Options A (High Quality Heritage Based Visitor Attraction) and B (Hotel in the Mansion House and linked Stable Block). The low score of Option A, on the face of it, would seem surprising but when analysing the scoring it can be seen that to achieve a *high-quality visitor attraction* could involve substantial change to the primary buildings to create the visitor facilities. It would require an enormous level of investment to deliver this and it is unlikely that the level of funding would be obtainable through grants. The level of competition for National Lottery Heritage Fund grants, and other funds, is so strong that it is unlikely that any grant from them would be large enough, especially as they are often reluctant to fund heritage attractions because of their uncertain viability. Visitor income is seldom sufficient to cover all costs. Additionally, across all options, there would be a significant 'human resource' requirement to secure development funding. Here at Golden Grove, it would be hugely challenging to create a visitor attraction that successfully competed with the existing market (e.g. Aberglasney, Dinefwr etc.) to a level that created financial sustainability.

8.7.5 However, the commentary above does not prevent the Golden Grove Trust from exploring opportunities to work in partnership with heritage attractions such as Aberglasney, Dinefwr and the National Botanic Garden of Wales. Additionally, to make the built and natural heritage more accessible consideration should be given to the digital presentation of Golden Grove and the Gelli Aur Country Park, where historic photos, documents etc., could be made available online.

8.7.6 Accordingly, this Feasibility Study concludes that whilst such a heritage attraction would fit the Trust's objectives it would be very challenging to take forward at the current time, particularly in terms of financial sustainability and deliverability, as well as the potential for it to require a level of alteration that might not get statutory consent. The low score for Option B is also influenced by the certain high level of heritage impact that would result. Whilst this has been carried out in some other comparable examples, these do not necessarily provide precedents sufficient to persuade Carmarthenshire County Council and Cadw to grant consent at Golden Grove. The score is also low on account of the difficulty in the current market of securing the right developer partner / hotel operator. Critically, the introduction of a hotel would not meet the Trust's objectives and general public access to the mansion would be restricted to some degree.

8.7.7 It is also important to note that as the results of detailed ecological and other surveys are known these may impact on the feasibility of the options discussed above.

8.7.8 This Feasibility Study acknowledges that in the short to medium term securing the investment needed to rescue the Stable Block and Mansion House may prove too great a challenge. This is likely to need either a greatly increased supply of grant funding or a developer partner willing to invest to a substantial level in a use for the building that is both appropriate to the heritage and acceptable to the Trust.

8.8 Other uses that do not form the core of any single option but were raised during the consultation stage

8.8.1 Sports/Leisure activities

Whilst not assessed in the core options we have considered other sporting opportunities which have been identified by Trustees. These include introducing traditional sports facilities such courts for ball sports and an astroturf sports pitch. In our view the impact on the heritage landscape will be significant and they would detract from the historic setting. A swimming pool and gym were also identified – these would require significant capital investment and the development of standalone buildings. The impact on the landscape setting would be significant and given the location are likely to require ongoing revenue subsidy.

8.8.2 Education

Running alongside our work we understand that the Trust is actively exploring options linked to developing an Education Centre at Golden Grove and Gelli Aur. Consideration should be given to creating flexible / multi-use spaces within any education building which could also be hired out for meeting and other uses to enhance viability.

8.8.3 Filming

It is recognised that there has already been filming usage at Golden Grove. Due to the condition of the Mansion House and stable block, currently the buildings are not suitable for full filming use at this current moment in time. A number of heritage sites, such as Margam Country Park (which includes Margam Castle) and Chatham Docks, generate income through filming-based activities. Filming can also help to raise awareness of specific locations. Filming activity would require careful programming with other site uses, especially during the main visitor season.

In 2022, Visit Scotland's Insights Department published an updated report (The Outlander Effect & Tourism) which highlighted that Blackness Castle which featured in the series saw a 36% uplift in visitor numbers to reach 58,000 in 2018. Freshwater West in rural Pembrokeshire draws in visitors (known as Potterheads) because this is where Dobby's Grave was filmed (part of the blockbuster Harry Potter series of films). Careful management may be required in terms of managing any significant increase in visitor numbers as this can negatively impact on local communities, the physical infrastructure of the site and the natural environment itself.

Filming income is cyclical and unpredictable. The use of the restored Mansion House or stable block as a film location can be all-consuming and would effectively 'shut off' part of Golden Grove for a period of time. The sector is also subject to external market factors such as industrial action in the US which during 2023 effectively 'shut down' a number of filming locations across the UK.

8.9 Other considerations when deciding on a preferred Option

8.9.1 Emergency works

To enable any of these options to be delivered it is essential that emergency works are carried out to the Mansion and that its setting including the arboretum and parkland are properly maintained to preserve the heritage and to build confidence with the key stakeholders, especially those who will provide funding and planning consents.

8.9.2 Security and Health and Safety

Security of the mansion house and stable courtyard remains an ongoing concern and the introduction of CCTV and security lighting should be considered as a priority intervention. Increasing public access has the potential to increase security and health and safety issues which the Trust can address with the necessary advice. Importantly, lessons be learnt from comparable country parks, arboretums and historic houses which are open to the public and we would encourage the Trustees to engage with managers of other sites. It is important to consider the need for a member of staff to live on site and to conduct a Health and Safety Audit across the estate.

8.9.3 Building the capacity and expertise of the Trust

It is positive that a fourth Trustee has recently been recruited and that they bring direct operational expertise but the diversification into additional or alternative uses will require a wide range of skills within the Board of Trustees which may not currently be in place and will require further recruitment. This will inevitably add a level of added risk for any new venture considered.

8.9.4 Volunteers and volunteer management

Visitor access of any kind and especially in the context of the heritage attraction option would require the retention of a team of volunteers. Advice has been provided to the Trustees on preparing a Volunteer Management Plan and on recording volunteer hours as this can help with calculating the match-funding in future grant applications.

8.9.5 Contents of the Mansion House

Currently the house retains a large quantity of apparently uncatalogued furnishings and personal effects. Adaptive reuse of the house requires at a very early stage an inventory of the contents and a strategy for their appropriate dispersal.

8.9.6 Car parking

As discussed above, before investing in transformational opportunities to broaden access and increase visitor numbers, consideration needs to be given to introducing additional car parking provision. There are approximately 30 hardstanding spaces and a further 100 cars can be accommodated onsite on a grassed area (in front of the café) but marshals are required to oversee this.

Additionally, the overflow area can become unusable during periods of wet weather. The current arrangement could detract from the historic setting and from an operational perspective the overflow provision presents health and safety risks.

Consideration at an early stage also needs to be given to the future provision of EV charging points and wider service provision which may require the introduction of a sub-station. An allowance of 10% would be typical at the current time.

Car parking is a key revenue generator at a number of country parks and rural recreation sites such as those managed by Forestry England. It would be beneficial to consider opportunities to maximise revenue generation from car parking at Golden Grove and Gelli Aur Country Park, perhaps moving towards a more formal system.

Messaging around car parking tariffs is critical. It is interesting to note the messaging which is used on the car parking tariff board in Lulworth, Dorset (please see photo below). This highlights how the revenue generated from car parking is used e.g. beach care, wildlife, toilets, access, education and the visitor centre.



9.0 CONCLUSION and NEXT STEPS

9.1 This Feasibility Study has set out the detailed results of surveys, research and consultation. It has sought to understand the significance of the place and the vision of the Trust and the needs of the market and community before considering change. The study has explored a range of options and has identified the key issues that need to be considered for each, in order to take forward a preferred option. The report concludes with consideration of next steps.

9.2 Exceptional Qualities of Golden Grove and Gelli Aur

9.2.1 This report has evidenced that Golden Grove and Gelli Aur have undisputed potential to celebrate its remarkable heritage and there is a range of opportunities which can be taken forward over a number of phases. Golden Grove itself is highly designated. The Mansion and Stable Block are Grade II* listed, a grade that places it amongst the top 10% most significant listed buildings in Wales, notwithstanding its long period of decline. The arboretum, gardens and parkland are Grade II* registered which means they are considered to be of great quality and puts them within the top 25% of such places in Wales. What makes Golden Grove even more special is its context. It is an important place within an extraordinary historic landscape of the Tywi Valley containing a rich collection of heritage assets. It is registered by Cadw and ICOMOS as an Outstanding Historic Landscape which represents centuries of landscape creation and management, encompassing some of the great changes in taste and fashion. It is notable that Carmarthenshire has more registered landscapes than all other Welsh Local Authorities, apart from Gwynedd, which places the county strongly in terms of its heritage. Golden Grove and the Gelli Aur Country Park have the potential to make an important contribution to the ongoing development of the Tywi Valley as a 'destination.'

9.2.2 This breadth of special interest cannot be underestimated and should be highlighted by the Trust in any funding bids made. Furthermore, it can enhance interpretation of the place in order to engage with a wider audience. The options we have discussed are born out of judging Golden Grove and Gelli Aur to be an important part of an ensemble of unique heritage properties.

9.2.3 Public consultation showed how much local people value using the café and the opportunity to walk in the parkland, helping to deliver a number of outcomes particularly linked to health and wellbeing. The strength of this community benefit is also important to celebrate as it sets Golden Grove and Gelli Aur apart from some places that are primarily heritage attractions for visitors without particular local use.

9.2.4 Whilst the Trust's ownership is a comparatively small part of the overall historic estate, it nonetheless comprises the core historic area containing most of the major elements which give Golden Grove and Gelli Aur its special historic significance and interest.

9.2.5 In taking forward any option for the future the Trust must adopt an integrated conservation approach for the buildings and their parkland / landscape setting. Whilst the options presented in this report focus mainly on the buildings, they all assume conservation input to the parkland / landscape setting, helping to create a more accessible landscape.

9.3 Initial next steps

9.3.1 It is acknowledged that the estate needs a very substantial level of investment to safeguard the full extent of the heritage and to create an all-encompassing, appropriate and viable new use or uses. This will need to be quantified by a suitably experienced Quantity Surveyor and form a part of detailed project development work. Accordingly, our recommendation is that the Trust can only work towards fulfilling their ultimate objective by identifying manageable projects within the overall vision. While focusing initially on the elements that can achieve success within the capacity of the Trust and the funding available, Trustees will need to find some way of managing the condition of the Mansion House and the Stable Block so that their continued decline does not prejudice a future project. Without some repair there remains the risk of potential catastrophic loss of heritage value. Accordingly, it may be appropriate for the Trust to consider a minimal approach to immediate repairs, sufficient to ensure the Mansion House and the Stable Block are wind and weathertight and free from vandalism. This would respond to the building condition concerns of Cadw and Carmarthenshire County Council. Such interventions could include as a minimum:

- Replacement of the leadwork removed from the roofs;
- Prevention of further water ingress;
- Structural support for the staircase lantern;

Further information on building condition issues is set out in the separate Condition Survey report prepared by Hiraeth Architecture.

9.3.2 The above would not involve any internal restoration but it would prepare the building for a sustained period of vacancy and minimise the chances of it developing environmental conditions where decay would take hold. Nevertheless, it is a last resort as there is no substitute for a building being in use and accessed regularly. In preserving the potential for the buildings to be given future use it would make them more likely to attract future investment.

9.3.3 In the short-term, interpretation about the buildings could provide information to the visitor about the historical importance and special interest of the Golden Grove estate.

9.3.4 To raise awareness of Golden Grove and Gelli Aur and to assist in marking a break in the management of the estate from its recent history, and to generate some revenue, a programme of appropriate small or medium scale events could be outsourced to professional events organisers.

9.3.5 The Trust could seek Project Development grant funding from funders such as the Architectural Heritage Fund (www.ahfund.org.uk [Wales | The Architectural Heritage Fund](#)). The National Lottery Heritage Fund also offers development funding for those projects that are successful with the initial expression of interest stage and are applying for over £250K. It is important to be aware that the skills needed for project development are different from those needed for project implementation and it is recommended that the Trust plans ahead to have on its board those who can lead at each stage.

9.3.6 Building on project development work, funding applications should be submitted for conservation of the arboretum. This would also draw on the strengths of one of the existing Trustees and, if successful in securing funding, could conserve, interpret and re-open access to the arboretum. This would be popular with the community, be likely to attract paying visitors and not be too onerous for the Trust in terms of management. It scored highly in the assessment of the selected options and it is known that funders such as the Wolfson Foundation has a specific fund awarding £15,000 to £100,000 for buildings and landscapes ([Funding for historic buildings & landscapes](#)). There was also a recent award by the Julia Rausing Trust (<https://www.juliarausingtrust.org>) of £190,000 for Westonbirt Arboretum though it is noted that this is not a Trust to which charities can make direct applications. Building on the existing Shared Prosperity Fund (Rural Innovation Fund) grant, the Trust may be able to apply to Carmarthenshire County Council for a contribution towards the required match funding. The Trust should be under no doubt that all potential funding sources will be over-subscribed and require a long-term approach to funding and implementation.

9.3.7 Success breeds success so if the Trust can achieve good results from manageable-sized projects such as those discussed above it will build its own capacity, begin to create a positive track record with potential funders, and will raise credibility and awareness within the community. All of which would make the likelihood of the Trust achieving its full vision in the long-term more achievable.

9.4 Phasing

Addressing all the heritage and delivering the Trust's vision in full requires a very significant level of investment required. Accordingly, it is recommended that, alongside immediate repairs to make the buildings wind and weather-tight, a phased approach to delivery is adopted. An indicative phasing could be as follows:

- | | | |
|-------------------|---|---|
| 1 to 5 years | - | Focus on the Arboretum and wider parkland
Deliver a programme of active events (some to be delivered by a third party) |
| 5 to 10 years | - | Focus on the Stable Courtyard |
| 10 years & beyond | - | Focus on the Mansion House having mothballed it for the previous decade. |



APPENDIX A

Historic research re Visitors

The latest visitor research survey published by Carmarthenshire County Council is from 2019¹⁸. The research is historic and provides a 'snapshot'. The research summary is set out below is based upon key findings from interviews carried out at the National Botanic Gardens of Wales, Pembrey Country Park and Newton House Dinefwr.

- 87% of visitors to Carmarthenshire were from within Wales (which is higher than Wales as a whole – 69%) i.e. approximately only 12% of visits to the county come from outside of Wales
- A higher proportion of visitors were female 62% vs 38% male (which is in line for the whole of Wales)
- A higher proportion of older visitors (55+) were visiting the county – 44% (compared to 37% for the whole of Wales)
- The county attracts a higher proportion of more affluent AB visitors – 48% (compared to 35% for the whole of Wales)
- Key motivators for visiting the county include the landscape, countryside and beaches – 63% (compared to 55% for the whole of Wales)
- Visitors to the county were likely to say they were visiting to see places / historical and religious sites and attractions - 43% (compared to 36% for the whole of Wales). The most popular activity was visiting gardens – 40%¹⁹ (compared to 13% for the whole of Wales)
- Encouragingly, 97% of participants said they are likely to return in the future (with 88% stating that they definitely will)

¹⁸ Research Report - Wales Visitor Survey 2019 Carmarthenshire County Council Prepared by: Beaufort Research Limited (Fieldwork took place between 4 May and 22 November 2019. 238 interviews were conducted at Stage 1 and a further 157 were conducted at Stage 2 with visitors to 3 locations in Carmarthenshire County)

¹⁹ The motivating factor is likely to be heavily influenced by the location of the interview

APPENDIX B

Commentary on scoring

Strong positive score

Site and heritage considerations: The option can physically be integrated within the listed stable block and / or mansion house and the impact on the heritage setting is minimal. The chosen option must be sympathetic to the heritage values of all elements of the place.

Market considerations: Strong appeal among visitor segments and does not alienate local community users. The use adds to the critical mass of tourism facilities within the Tywi Valley adding positively to the destination's appeal.

Strategic fit: There is a strong degree of alignment for the proposed use with the charitable objects of the Trust. The option will create a number of employment opportunities during the operational phase.

Financial case: The option will help to secure and potentially create new employment opportunities. The outlook for the long-term financial sustainability of the option is positive (i.e. it is self-sustaining). There are also wider economic impacts.

Deliverability: It is relatively straightforward to deliver the option e.g. gaining planning permission and agreement to take the proposals forward. The capital ask is at a reasonable level and the risks are minimal. The option is capable of attracting capital funding.

Operation: Once delivered the option will be manageable within the existing resource base of the Trust and it is straightforward to operate. The Trust retains sufficient control to be able to demonstrate to funders that the chosen option can be managed by them without harm to the heritage. Must be capable of meeting the needs of people of all ages and abilities and interests and be able to operate bilingually.

Moderate score

Site and heritage considerations: With careful planning the option can be accommodated within the existing stable block and / or mansion house. There are some concerns about the impact on the listed buildings and/or their heritage setting.

Market considerations: The option has some potential to engage and attract new audiences and raises some concerns amongst local users. The use will add to the destinations appeal, but in less so of a manor than a strong score does.

Strategic case: The charitable objects will continue to be delivered but may not be fully aligned with current priorities.

Financial case: The option presents opportunities to generate additional revenue, but it could require some level of ongoing financial support. There are some limited wider economic impacts.

Deliverability: Potential difficulty in delivering the option e.g. raising capital finance and the level of risk is not insignificant and will need careful monitoring. There are some concerns around the option securing capital funding to take the project forward.

Operation: The option will require investment to be made into developing the resource (human capacity) of the Trust to manage it on a day-to-day basis and plan for the long-term future.

Low score

Site and heritage considerations: It will be difficult to integrate the use within the stable block and / or mansion house. There are severe concerns that the option will impact negatively on the historic buildings and/or their heritage setting.

Market considerations: The option has limited potential to engage with new audiences and the use has limited potential to add to the destinations wider appeal.

Strategic fit: There is limited fit with the Trust's charitable objects and this option will create a low number of employment opportunities.

Financial case: The option will continue require ongoing financial support. The economic impact is minimal.

Deliverability: We have serious concerns about the deliverability of the option, there is a high level of risk associated with this option; the capital ask is significant and the option will struggle to secure funding.

Operation: The option is complex to manage and significant investment will need to be made into developing the resource (human capacity) of the Trust to manage it on a day-to-day base and plan for the long-term future.