Pembrokeshire Coast National Park

Management Plan (2015-2019)

Local Development Plan 2

(2015 - 2031)

Background Paper No *: Enjoyment

March 2018

PEMBROKESHIRE COAST NATIONAL PARK AUTHORITY

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Partnership for Growth – The Welsh Government Strategy for Tourism 2013 – 2020 (June 2013)

1. This is intended to be a strategy for tourism overall in Wales, and not just one for the Welsh Government.

2. Good progress has been made in taking forward the priorities and actions identified in the previous 2006 – 2013 national tourism strategy *Achieving Our Potential*, with some of the strategic challenges identified then still current.

3. The strategy has the following Vision for tourism: Wales will provide the warmest of welcomes, outstanding quality, excellent value for money and memorable, authentic experiences to every visitor.

4. The goal is for: Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales.

5. Wales can offer 5 areas of competitive advantage:

   - Natural environment
   - Heritage and culture
   - Activities and Adventure
   - Events and Festivals
   - Distinctive Destinations

Extracts from the Welsh Government's Tourism Strategy 2013 – 2020: Framework Action Plan Years 1 – 3

5. Year 1 – Improve the quality of the visitor experience across the industry including serviced and self-catering accommodation, caravan and camping, attractions and activities

   Action – Review and update Visit Wales Investment Strategy, to identify investment priorities for tourism, based on future market needs, higher quality, economic benefit and product gaps.

6. Years 1 – 3 More luxury and branded hotels.

   Action – Identify key development sites across Wales; Develop relationships with branded products and potential inward investors.

7. Year 2 – More well-being facilities such as spas and wellness centres.

   Action – Improve industry awareness of spa and well-being design and best practice.

Provide support towards spa/wellness facilities.

8. Year 2 – More heritage hotels that utilise historic and distinctive buildings.

   Action – Identify key development sites across Wales

   Research and identify additional funding sources to support investment.

9. Year 2 – More all year round visitor attractions, activities and cultural/heritage experiences that can increase the appeal and reputation of Wales.

   Action – Explore future market needs; share best practice; understand innovative opportunities; explore funding solutions.

10. Ongoing – Increase the use of public transport for journeys to and within Wales.

   Actions – Enhance the range and relevance of information on public transport; Promote higher levels of public transport use; Develop and promotes 'real-time' timetable information, integrated ticketing and daily/weekly touring passes.

Welsh Coastal Tourism Strategy Draft Final Strategy Document (December 2008): Welsh Assembly Government

Vision

11. An integrated year round coastal tourism industry, based on an outstanding natural environment and a quality tourism product that meets and exceeds visitor expectations, whilst bringing economic, social and environmental benefits to coastal communities.

Aims

- To ensure that sustainable tourism is making an increasing contribution to the local economy of coastal communities

- To improve the quality of the visitor experience

- To achieve an integrated approach to the development and management of coastal tourism

- To safeguard and protect the environment and cultural heritage as a Key resource for coastal tourism.

12. The purpose of the coastal strategy is to identify a clear way forward for the development of coastal tourism which realises and builds on the economical potential of the coastline of Wales whilst respecting its environmental quality and recognising the importance of achieving community benefits.

13. The strategy is divided into the following geographic areas:

- Coastal resorts – it identifies Tenby and Saundersfoot which will continue to be a major focus for visitor activity at the seaside. Future prosperity must come from diversification of the local economy and tourism-related elements including accredited beaches, adaptive accommodation, quality retailing and catering establishments and promotion of alternative means of access to the car.

- Rural coasts – these are valued for their unspoiled scenery, peace and quiet. Within these areas settlements are often established around harbours which now offer potential for safe havens and other leisure activities. Many have an attractive environment with heritage, cultural and historic attractions, such as St Davids. Within these areas the accommodation base should be expanded to cater for changing demands. Rural beaches attract substantial informal use which needs to be balanced against the large numbers of environmental designations bestowed on them. Innovative public transport, walking and cycling measure are needed to reduce traffic pressures around the coast both on land and water.

14. There are a wide range of coastal activities but the greatest demand is for walking. The Welsh Assembly Government's coastal access programme aims to increase public access to the coast. Wildlife tourism is an expanding market which can help to extend the visitor season, but needs appropriate management to protect the environment.

15. Golf, kite activities and climbing are growing in popularity. Levels of participation of water activities are low compared with land activities but one of the most important contributors to local coastal economies is angling. The economic impacts of boating can be increased by building new marinas or improving facilities at harbours. Milford Haven is cited as one such place where improvements could be made to the harbour. New slipways and all-tide landing stages can improve access to the water and increase the potential for a range of activities. With one of the main attractions of the Welsh coastline being its unspoiled scenery, peace and quiet, there also needs to be a focus on less intrusive activities.

16. Many complaints arise from the use of personal watercraft but this can be a legitimate use if properly managed. Specific opportunities for Pembrokeshire are to improve slipway access and management and to develop surfing and climbing activities.

17. The strategy identifies the scale of type of marinas in Brittany as being appropriate to the Welsh coast – about 350 to 400 berths with marine-related commercail development, some commercial leisure and limited ancillary housing. Smaller harbour schemes can provide alternatives such as at Milford Haven.

18. Cruising is a growth sector in international tourism and Milford Haven has the potential for developing the cruiseliner market.

19. Coastal culture can attract visitors all year round through events and attractions based on local-sourced food, special events, coastal heritage and the Welsh language.

20. A full list of the recommendations is attached at Appendix A to this paper.

Extract from Welsh Coastal Tourism Action Plan: Welsh Government (not dated)

Table 1: Welsh Coastal Tourism Action Plan

Recommendation	Actions	Partners	Priority
That towns and resorts should seek to strengthen their attractiveness for tourism by developing appropriate opportunities to provide land and water based recreation facilities and nature watching activities which meet changing market demands.	· The opportunities to be identified and prioritised in through Local Development Plan process subject to no adverse impacts on habitats and species. · CCW will encourage the Local Access Forums to consider opportunities for land and water-based recreation. · Support implementation and maintenance of access improvement provided through the CAIP and maximisation of benefits to their local community and businesses. · Opportunities identified in Environment Agency Wales' Recreation Strategy " A Better Place to Play" for coastal waters are implemented. · Partners are made aware of opportunities available thorugh the SPLASH funding programme.	LA's EAW	High
That resorts should be encouraged to prepare and undertake characterisation studies to inform environmental improvement schemes for key	· The development of a programme of environmental, landscape, biodiversity and public realm	LA's Cadw	Medium

Recommendation	Actions	Partners	Priority
areas to increase their attractiveness for visitors and residents.	improvements. · Undertake urban characterisation studies at key coastal towns and resorts that will capture the essence of the built environment and inform future town masterplans and regeneration schemes. · Landmap and Landscape Character Map of Wales will inform decision of preserving and promoting the character of coastal areas.		
That town and city master planning and coastal resort regeneration programmes should identify implications of proposals for local infrastructure.	· In the development of coastal resort regeneration programmes, regeneration managers should engage and work with spatial planning groups and water companies to identify any infrastructure constraints and opportunities to accommodating seasonal changes in population.	LA's DE&T Visit Wales	High
That changes in the accommodation stock in and around resorts should be encouraged to meet changing demands in the tourism market, involving improvements to existing stock, new provision and conversion of redundant premises to other viable uses.	· Consideration of the changing accommodation requirements in coastal settlements be taken account of during the preparation of LDPs. · Invest Wales to prioritise funding of accommodation in coastal resorts in	Private sector Invest Wales Las Visit Wales	High

Recommendation	Actions	Partners	Priority
	· accoradance with Visit Wales' investment strategy. · Consideration to ensure energy efficienvy and the development of renewable energy schemes in new build accommodation.		
That innovative local transport schemes are identified to reduce seasonal congestion and the use of the car within resorts and other coastal towns.	· Consideration by the Regional Transport Consortia of innovative local transport schemes, including community transport in the context of the Regional Transport Plans. · Provision linking public transport to coastal access and recreational facilities is included in Regaional Transport Plans.	Regional Transport Consortia Las Voluntary Sector Private sector	Medium
That resorts consider opportunities for developing coastal spas and thalassotherapy.	· Invest Wales to consider opportunities to support funding of spas/thalassotherapy at coastal towns through its investment strategy.	Invest Wales Private Sector Visit Wales	Low
That the heritage tourism sector seeks to improve existing attractions and to make connections between them, creating new attractions only when there is a proven business need.	· Invest Wales to prioritise funding of attractions in coastal resorts in accordance with Visit Wales' investment strategy.	Invest Wales Visit Wales CADW LA's Private Sector	Medium
That a programme of work is developed to understand the impacts of different activities on	· The provision of facilities siuch as parking, slipways,	LA's	High

Recommendation	Actions	Partners	Priority
the environment and the character of historic settlements to evaluate the ecological and social carrying capacity of different coastal areas.	highways, toilets and water facilities to take account of the sites capacity to absorb visitor pressures. · The development of a programme of work to understand the impacts of different activities and to evaluate the ecological and carrying capacity of different coastal habitats. · Partners are aware of opportunities available through the SPLASH funding programme. · Supporting the development of the Pembrokeshire marine code in an all Wales context. · Support Coastal Recreation Audits in areas where they haven't already been undertaken. · Ensure this is fed into the LDP process.	NPA's CCW EAW	
That innovative public transport initatives are promoted and developed to provide opportunities for visitors to visit the coast without using their cars.	· Consideration by the Regional Transport Consortia of innovative local transport schemes in the context of their Regional Transport Plans, to include waking and cycling as well as public transport.	Regional Transport Consortia LA's Private Sector Voluntary Sector National	Medium

Recommendation	Actions	Partners	Priority
		Trust	
That the development of new and appropriate tourism accommodation and infrastructure is encouraged, in support of the proposals along the rural coast.	· Policies relating to new and appropriate forms of sustainable accommodation and infrastructure in rural areas be considered in the LDP process. · Priority to be given to the conversion of existing buildings and the development of disused sites where these are feasible. · Invest wales to prioritise funding in accordance with Visit Wales investment strategy.	LA's Invest Wales Private Sector Visit Wales Regional Tourism Partnerships National Trust	High
That rural beaches, where water quality meets the relevant standards are managed to enable them to meet existing and where possible , future Green Coast requirements.	· Prioritisation of beaches where infrastructure improvements (beach access and facilities) are required.	LA's Green Sea Partnership EAW	High
That the supply and quality of facilities for land and water recreation are improved where appropriate and subject to the environmental capacity of the area.	· Identify the need and provide facilities such as showers, toilets, slipways, trailer parks and other supporting infrastructure. · Build on the strategic plan for water related recreation in Wales.	LA's Visit wales Private Sector EAW	Medium
That marina capacity is expanded to meet demand where such development satisfies an agreed range of criteria outlined in the strategy.	· The WG to identify priorities in consultation with the Spatial Plan Area Groups.	DE&T WSPG Private Sector LA's	Low

Recommendation	Actions	Partners	Priority
		CCW EAW MCA	

Health Challenge Wales

21. Encourages organisations to do as much as they can to help their customers and people who use their services, and their own employees, to improve their health, and promote 'better health' messages more effectively; and encourages individuals, to do what they can to improve their own health and that of their families.

Wales Environment Strategy: Welsh Assembly Government (2006)- end date 2026

22. Key outcomes relating to access:

- There is easy, equitable access high quality green space

- There is sustainable, widespread and equitable access to the countryside and coast, which recognises the need for a balance between tranquil areas and areas supporting larger numbers of people and a range of activities. Damaging access will be discouraged

- The number of people choosing to walk or cycle as a means of transport is increasing.

- The Welsh Government is currently considering how the Environment Strategy and its reporting functions are taken forward in light of the work undertaken since its launch.

23. The last annual progress report for 2010 – 11 was published at the end of 2011. This coincided with the end of the second action plan. The most recent State of the Environment Report was published in July 2012.

24. Since the launch of this strategy the following documents have been published:

- One Wales: One Planet – the sustainable development scheme for Wales (2009);

- The Climate Change strategy for Wales (2010);

- Towards zero waste (2010);

- Woodlands for Wales (2011)

25. The Plan acknowledges the need to enable people to become more physically active through creating an appropriate environment supported by targeted programmes that create behavioural change. With reference to the physical environment it includes the following strategic aim: To develop and maintain a physical environment that makes it easier and safer for people to choose to be more physically active.

26. There is a clear link between physical activity and the design of the environment. The overall aim of this strategy is to support the development of and access to well-designed and maintained built environments and natural environments across both urban and rural communities. There needs to be a specific focus on ensuring appropriately designed and maintained play areas, safe and attractive streets, pedestrian links and cycle paths and ensuring access to green space such as parks, playing fields, woodlands, allotments and waterways.

27. Evidence indicates that the following factors contribute to an environment that will encourage people to be more active:

   ▪ Proximity of local services to people;
   ▪ Streets designed to encourage physical activity;
   ▪ Attractive environments which are perceived to be safe;
   ▪ Traffic reduction and calming measures;
   ▪ Well-designed, user friendly walking and cycling routes which also consider the needs of disabled people.
   ▪ Cycle facilities such as racks, showers and lockers;
   ▪ Accessibility and design/position of stairwells;
   ▪ Access to well designed and maintained green spaces such as parks;
   ▪ Access to a variety of environments for play.

28. Priorities to achieve the aims are listed as:

   ▪ Ensuring that the natural and built environment encourages people to be physically active, ensuring any redevelopments or new builds are accessible, safe and designed to make physical activity an attractive option.

   ▪ Increasing availability, access and use of high quality local green space, waterways and countryside.

29. Actions to achieve these aims:

   ▪ Ensure that Planning Policy Wales supported by Technical Advice Notes provide guidance on the development of infrastructure that encourages physical activity and gives due prominence to walking and cycling, as outlined in TAN16 (2009);

   ▪ Provide a web-based toolkit to signpost architects, planners, planning committee members, developers and transport planners to best practice, guidance and assessment tools which demonstrate how they can contribute to physical activity agenda.

- Encourage Local Planning Authorities to use tools such as Open Space Assessment, Health Impact Assessment and other toolkits when preparing Local Development Plans.

- Develop long-term facilities taking into account community priorities.

- Encourage new regeneration and housing projects to consider physical activity impact in their design.

Planning Policy Wales 9th Edition (November 2016): Welsh Government

30. Land use planning can help to achieve the Assembly's objectives for transport through:

   a) Reducing the need to travel, especially by private car, by locating development where there is good access by public transport, walking and cycling;

   b) Improving accessibility by walking, cycling and public transport;

   c) Ensuring that transport is accessible to all, taking into account the needs of disabled and other less mobile people;

   d) Promoting walking and cycling (Para 8.1.4)

31. The Active Travel (Wales) Act 2013 aims to make walking and cycling the most attractive option for shorter journeys.

32. Cycling should also be encouraged for shorter trips and as a substitute for car journeys or as part of a longer journey when combined with public transport….Where appropriate, planning authorities should also seek to assist the completion of the national cycle network and key links to and from the network. (Para 8.2.2)

33. The Assembly Government supports the development of sport and recreation and the wide range of leisure pursuits which encourage physical activity…..The Assembly Government's main planning objectives are to promote:

   - A more sustainable pattern of development by creating and maintaining networks of facilities and open spaces in places well served by sustainable means of travel, in particular within urban areas;

   - Social inclusion, improved health and well-being by ensuring that everyone, including the elderly and those with disabilities, has easy access to the natural environment and to good quality, well-designed facilities and open space; and

   - The provision of innovative, user-friendly, accessible facilities to make our urban areas, particularly town centres, more attractive places, where people will choose to live, to work and to visit. (Para 11.1.3)

34. The Planning System should encourage sustainable tourism in ways which enable it to contribute to economic development, conservation, rural diversification, urban regeneration and social inclusion, recognizing the needs of visitors and those of local communities. (Para 11.1.4)

35. In rural areas, tourism-related development is an essential element in providing for a healthy, diverse, local and national economy. It can contribute to the provision and maintenance of facilities for local communities. Here too development should be sympathetic in nature and scale to the local environment and to the needs of visitors and the local community. (Para 11.1.7)

36. Planning authorities should provide the framework for well-located, good quality tourism, sport, recreation and leisure facilities. The areas and facilities provided in both rural and urban areas should be sensitive to the needs of users, attractive, well-designed, well maintained, protected from crime and vandalism. They should be safe and accessible, including to deprived or disadvantaged communities and to people whose mobility is restricted, by a variety of sustainable means of travel, particularly walking, cycling and public transport. Long distance routes, rights of way, disused railways and waterways are important tourist and recreation facilities, both in their own right and as a means of linking other attractions. (Para 11.1.8)

37. Development for tourism, sport and leisure uses should, where appropriate, be located on previously used land. (Para 11.1.9)

38. The planning system should ensure that adequate land and water resources are allocated for formal and informal sport and recreation, taking full account of the need for recreational space and current levels of provision and deficiencies, and the impact on the locality and local communities. (Para 11.1.10)

39. Formal and informal open spaces, including parks, with significant recreational or amenity value should be protected from development, particularly in urban areas where they fulfil multiple purposes…. (Para 11.1.11)

40. All playing fields whether owned by public, private or voluntary organisation, should be protected except where:

   ▪ Facilities can best be retained and enhanced through the redevelopment of a small part of the site;

   ▪ Alternative provision of equivalent community benefit is made available; or

   ▪ There is an excess of such provision in the area. (Para 11.1.12)

41. Local planning authorities should seek to protect and enhance the rights of way network as a recreational and environmental resource. They are also encouraged to promote the national cycle network, long distance footpaths, bridleways, canals, inland waters and disused railways as greenways for sustainable recreation. (Para 11.1.13)

42. Planning Policy Wales (Chapter 11) sets out how Local Development Plans should consider tourism, sport and recreation including:

   ▪ Consider the scale and broad distribution of existing facilities and activities and provide for future needs, taking into county environmental, social and economic implications.

- Set standards of provision for sport, recreational and leisure facilities, identify deficiencies and include policies to protect and provide for enhancement.

- Protect playing fields and open space from development.

- Locate high traffic generators in or close to town centres; provide guidance for access to the countryside and coast, ensuring access by a choice of means of transport.

- Consider the scope to use disused land; encourage safe cycle routes and footpaths.

- Encourage multiple use of open space and facilities where appropriate.

- Encourage diversification of farm enterprises and other parts of the rural economy for appropriate tourism, sport, recreation and leisure uses.

TAN16: Sport, Recreation and Open Space (January 2009): Welsh Government

43. The WG's long-term strategy for sport and physical activity in Wales for the next 20 years is set out in the document *Climbing Higher* (January 2005). The strategy includes the following targets which should guide the development of planning policy and the setting of standards within local authorities, in particular that by 2025:

- The percentage of people in Wales using the Welsh natural environment for outdoor activity will increase from 36% to 60%

- 95% of people in Wales will have a footpath or cycle path within a 10 minute walk;

- No-one should live more than a 6-minute walk (300m) from the nearest natural green space;

- All public sector employees and 75% of other employees will have access to sport and physical activity facilities at, or within a 10 minute walk of the workplace.

44. In the WG's long term strategy for protecting and enhancing the environment (Environment Strategy for Wales (May 2006) it states that every community should have a high quality, well-planned built environment which provides access to green spaces, areas for recreation and supports biodiversity. It also provides for an increased number of people walking and cycling and using the natural environment.

Open Space Assessments

45. Particular standards of provision are not prescribed, but should be based upon the findings of the Open Space Assessment. A well-conceived strategy will seek to improve the match between current levels of provision again existing and likely future patterns of demand.

46. Locally generated standards should include:

- Quantitative elements (Whether new provision is needed for the area)

- Qualitative components (against which to measure need for enhancement of existing facilities)
- An accessibility component (to whom and how is the provision accessible to the local community).
- Please see the Open Space Assessment Background Paper for further details.

47. These standards should be set out in the Local Development Plan. (See Open Space Assessment Background Paper)

48. Whether there is an excess of playing field provision in an area is essentially a matter for the local planning authority.

Development Plans

49. The Local Development Plan should set out the strategic vision for the Authority with regard to providing, protecting and enhancing facilities for sport, physical activity, open space and recreation, and provide clear area-based or criteria-based policies.

50. Open spaces and playing fields should be protected from development, unless their loss can be justified. Sometimes the retention and enhancement of facilities may be best achieved through the redevelopment of rehabilitation of small part of a site.

51. Standards for new open space and recreational provision should be based on robust evidence drawn, where available from the Open Space Assessment. The aim should be that everyone has easy local access, by means other than the car to formal and informal recreational facilities and open space.

52. Local Planning Authorities should ensure that new development, including that in commercial and industrial areas makes adequate provision to meet the recreational needs arising and opportunities for walking and cycling.

53. In rural areas new facilities should be located in or adjacent to settlements. Any proposed developments in the countryside would require special justification. Appropriate proposals linked to farm diversification may be given favourable consideration.

Allotments

54. Policies in the Local Development Plan should address the need to provide and protect allotment/compost/wildlife sites where a shortfall has been identified and to improve the accessibility of such sites for all users.

Water Based Recreation

55. Sport and recreational proposals, particularly those which contribute to the restoration, regeneration and protection of Wales' inland water resources, harbours and docks and marine and freshwater wildlife should be encouraged, subject to there being no unacceptable adverse effects on the environment, water quality, biodiversity, the amenity of local residents and the enjoyment of the resource by other users.

Marinas

56. The existing provision of marinas and watercraft berths, and anticipated future demand should be identified in the Open Space Assessment and Local Development Plan policies should reflect the findings.

Golf Courses

57. Local Development Plans should identify suitable locations for golf courses, dependent on the authority's Open Space Assessment.

Cemeteries and Church Yards

58. The finite capacity of cemeteries means there is a requirement to identify areas for future need and demographic data can provide local planning authorities with information to forecast future provision. Such areas need to be accessible to all.

Accessibility and Rights of Way

59. The Local Development Plan should help protect existing rights of way and consider the potential for extending and enhancing local and long-distance recreational routes for walking, cycling and horse riding.

60. The Local Development Plan should contain guidance to ensure that sport and recreational facilities and open spaces are accessible by public transport, walking and cycling.

Regional

Wales Spatial Plan

61. Encourages increased visitor spend and extension of the tourist season linked to the environment, coast, culture and heritage.

Wales Spatial Plan: Pembrokeshire Haven Tourism Opportunities Action Plan (Final Report, November 2006)

62. Contains projects geared towards lengthening the tourism season, managing activities and enhancing sustainable transport for visitors.

Local

Pembrokeshire Single Integrated Plan (2013 – 2018)

63. This document will frame public, private and voluntary sector activity in Pembrokeshire. It describes the issues that are important to Pembrokeshire and the approach that a range of organisations will adopt in attempting to tackle them.

64. The outstanding natural environment of the National Park and rest of Pembrokeshire is recognised in the Plan as is the importance of the County's natural assets to tourism. It also recognises that Pembrokeshire will experience a significant increase in its older population in the next 10 years and a change in service provision will be

required in order to support the health and well-being of the population. Organisations will need to work with communities and individuals to promote healthy lifestyles and encourage independent living as much as possible.

Pembrokeshire Coast National Park Authority and Pembrokeshire County Council Rights of Way Improvement Plan for Pembrokeshire 2007-2017

65. The document has been prepared jointly by the National Park Authority and Pembrokeshire County Council. It identifies, prioritises and plans for improvements to the rights of way network in Pembrokeshire and addresses the need to improve access opportunities for groups with special needs.

66. Part 1 of the Plan is an assessment of local rights of way, setting out the main characteristics of the network in Pembrokeshire. Part 2 is a statement of action.

67. There are no site-specific proposals in the Plan.

Pembrokeshire Visitor Survey 2011-12 (Sept 2012)

68. The main conclusions from the report are:

Pembrokeshire continues to appeal to visitors of all ages with the south of the county experiencing a slightly younger visitor profile than the north.

- Three quarters of visitors are in the ABC1 social class (compared with 50% in the UK).
- The home market remains the key with a 50/50 split between Welsh and other visitors.
- There is an increasing strength of attachment to the region – one quarter now visit more than once a month.
- Day trips continue to account for one quarter of all visits.
- The natural environment is the key – including beaches and walking.
- Parking is the main negative issue.
- Lack of mobile phone signal is a major concern.

- Activities are focused on the landscape – this is a frequent motivation for the trip. Over one quarter of visitors come to walk and one in ten for the beach. Eight per cent visit natural attractions.
- Two-thirds of visitors stay in paid accommodation.

Pembrokeshire Coast National Park Management Plan 2015 - 2019

69. The National Park Authority has a wide range of roles including providing access and outdoor recreation. The Management Plan should give a clear line of sight between National Park Purposes and management policies. The Plan sets out the aims to guide management of the Park by the Authority and others. Of particular relevance to this paper are the following:

- Policy DE1: Provide, manage and promote appropriate types of recreation
- Policy DE2: Remove barriers to people's enjoyment of the National Park

- Policy DE3: Promote the National Park as an inspirational place for enjoyment, outdoor learning and personal development

70. The National Park is used for a wide variety of recreational pursuits. Seasonality of tourism means that some opportunities are under-capacity off season, but over-used at other times. Competition for a limited recreational resource can bring different users into conflict and include the following:

Table 2 Potential User Conflicts

Activity	Potential conflicts	Example locations
Beach horse-riding	Rights of Way, beach users	Druidston, plus some other west and south coast locations
Boat launching and beach parking	Other beach and inshore users	Freshwater East and ST Brides Haven (launching); Newport (beach parking)
Coasteering	Angling, other users	Abereiddi, Stackpole Quay, Ceibwr
Diving	Angling, boating	Martin's Haven
Kite sports	Other beach and inshore users	Broad Haven, Whitesands
Mountain biking (on stretches of path registered as footpath)	Pembrokeshire Coast Path users	Pembrokeshire Coast Path National Trail
Off-road vehicles	Other users (plus habitat damage and disturbance)	Common land and dunes
Paragliding	Grazing and horse riding	Common land and dunes
Powered watercraft	Beach and inshore users	Tenby, Lydstep Haven, Newport, Whitesands, Freshwater East
Unauthorised camping and caravanning	Other users (plus habitat damage and disturbance)	Various

71. With the exception of relatively few locations, and a restricted range of (mainly motorized) activities, the National Park still has capacity for greater levels of recreational use, particularly outside the summer holiday period. Where potential conflicts exist, these can often be resolved through voluntary and agreed Codes of Conduct.

Pembrokeshire Coast National Park Recreation Plan (2011)

72. The plan sets out a vision and principles to guide the development of outdoor recreation within and around the National Park. It takes a pro-active approach to encouraging recreation in suitable locations, based around the special qualities of the area and the capacity of a particular place to accommodate any given mix of recreational activities.

73. The Local Development Plan, National Park Management Plan, codes of conduct and the ability to promote, educate and improve access are the main powers available to the National Park Authority in the management of recreation.

74. The Vision contained in the Plan is:

We work in partnership to make Pembrokeshire a leading year round opportunity for outdoor recreation balancing protection of the special qualities of the area, respect for site capacity and promotion of environmental sustainability, with enjoyment, ease of access for everyone, a prosperous local economy and healthy and active residents. Ultimately, we simply want people to continue enjoying the National Park in a sustainable way.

75. The Authority's Recreation Management Plan uses the special qualities of the National Park to place the environment at the heart of recreation management, and show that conservation and public enjoyment, the two statutory purposes of National Parks in the UK are not only compatible but can be complementary. It takes a proactive approach to encouraging recreation in suitable locations, based around the special qualities of the area and the capacity of a particular place to accommodate any given mix of recreational activities.

76. The Plan formed the basis of supplementary planning guidance to the Local Development Plan, adopted by the Authority in December 2012.

Tourism Accommodation – Pembrokeshire and the National Park

Accommodation

77. It is estimated that Pembrokeshire has 100,000 visitor bedspaces (2013 Visitor Bedspace Survey: Pembrokeshire County Council). Of the total 6.7% are in the serviced accommodation sector; 18.9% in the self-catering sector; 73% in the caravan and camping sector and the remainder made up of hostels, bunkhouses and other types of accommodation.

Serviced Accommodation in Pembrokeshire Coast National Park

78. A survey undertaken for Visit Wales in 2012 indicates that there are over 130 serviced accommodation premises in the National Park comprising approximately 60

hotels and 70 guest houses. These premises provide approximately 3000 bed spaces. There are a further 70+ bed and breakfast providers offering 430 bedspaces. The level of provision has not changed since the previous assessment in 2007. The map below shows the distribution of rooms throughout the National Park. The map shows the greatest concentration of serviced accommodation in Tenby, Saundersfoot and St Davids.

Map1: Number of Serviced Accommodation Rooms in the National Park by Community Council Area

Number of Serviced Accommodation Rooms in the National Park by
Community Council Area

	0.0 - 7.0
	7.0 - 28.0
	28.0 - 88.0
	88.0 - 180.0
	180.0 - 846.0
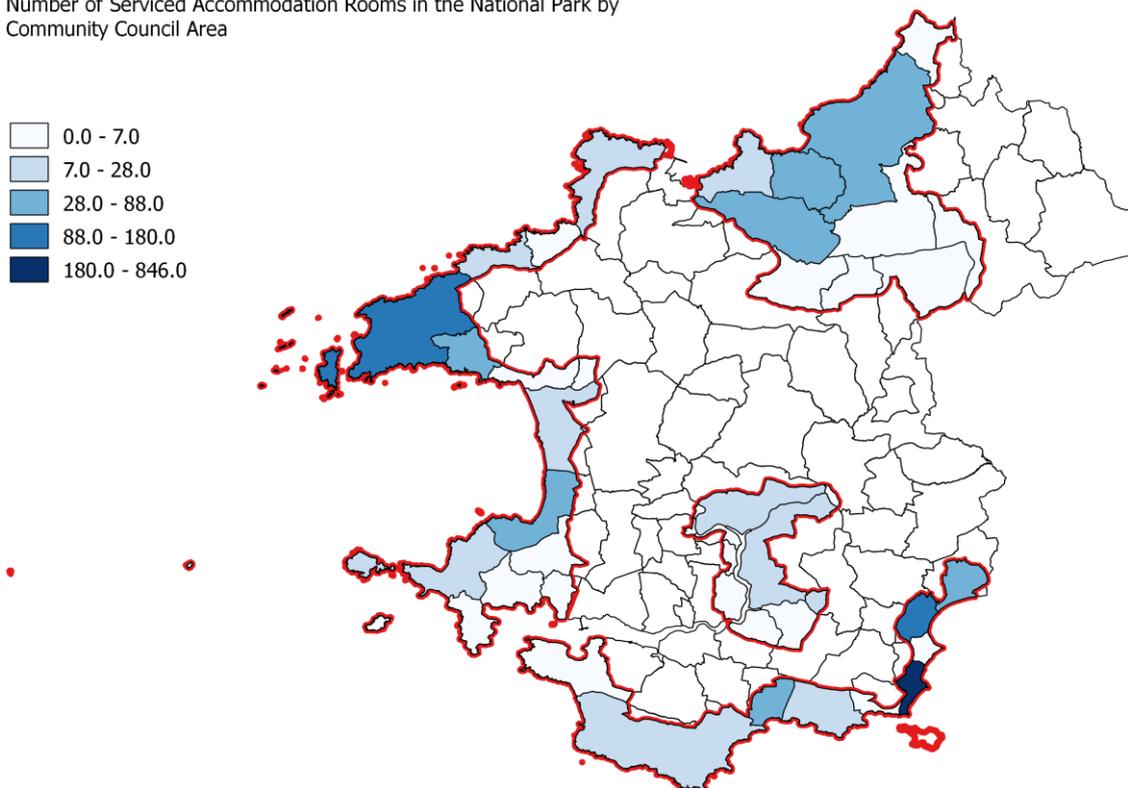
79. Since the Local Development Plan was adopted in September 2010, five hotels have been converted to other uses or demolished to make way for other development. Two of the hotels in Tenby were part of a redevelopment scheme which has included the provision of a new Premier Inn hotel on the site. Of the remaining 3 hotels, 2 have been converted into private residential use and the 3rd has permission as a residential care home, although this has not been implemented to date.

80. Visit Wales publishes statistics on occupancy of serviced accommodation. The latest published Annual Report on Wales Accommodation is for 2013.

   ▪ **Hotels** – Room and bedspace occupancy rates in 2013 saw a small rise compared with the previous years to 61% and 45% respectively. The overall trend has been a slow increase from 56% room occupancy and 42%

bedspace occupancy since 2003. The statistics continue to show peak occupancy during the months of July and August (max 74% room and 59% bedspace occupancy). The statistics for Wales also show a definite shoulder season from May to October.

- The figures for south-west Wales show average occupancy rates in 2013 as 50% (room) and 41% bedspace occupancy. As in previous years establishments in seaside areas recorded the highest annual average bed occupancy rate (50%).

- The occupancy rates for Pembrokeshire show a continued increasing trend between 2010 and 2014. The overall room occupancy rate in 2013 was 45.6% (room) and 36.8% (bedspace). This is for all serviced accommodation. The figures continued to show a very marked peaking of occupancy rates during August (76% room occupancy and 70% bedspace occupancy) which is higher than the Welsh average. The figures rise and fall either side of that season more markedly than across Wales as a whole indicating that tourism in Pembrokeshire remains highly seasonal.

- **Guest Houses and B&Bs** – The annual average occupancy rates for these have shown a relative amount of consistency since 2010. The average bed occupancy rate has been in the range 27-28% and average room occupancy 34-35%. Similarly to hotels the occupancy figures show a very marked peak in July and August with occupancy peaking at 57% (room) and 49% (bedspace). As in previous years the bed and room occupancy rates in south-west Wales were the highest in Wales.

Chart 1: Comparison of serviced accommodation average annual room occupancy in Pembrokeshire and Wales
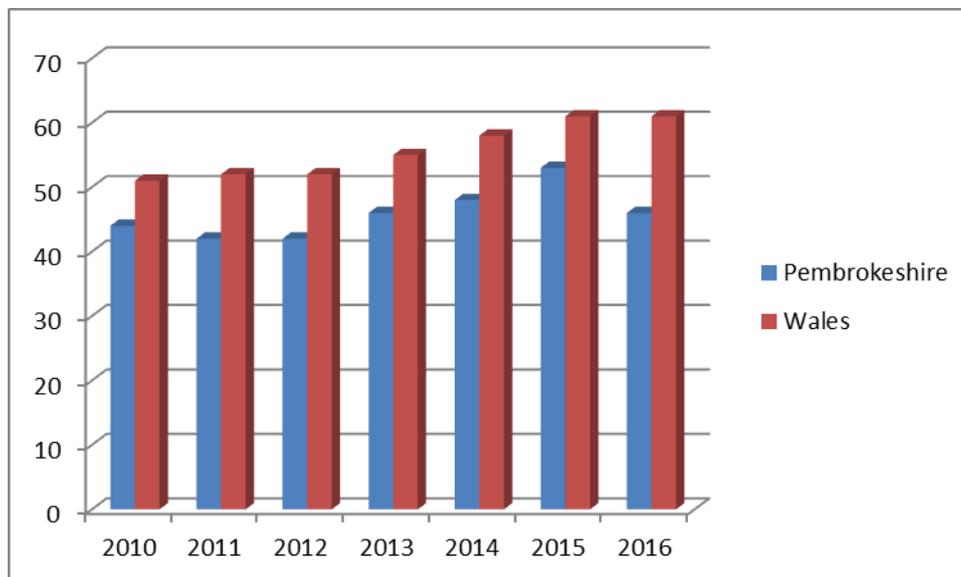
Chart 2: Comparison of serviced accommodation average annual bed space occupancy in Pembrokeshire and Wales
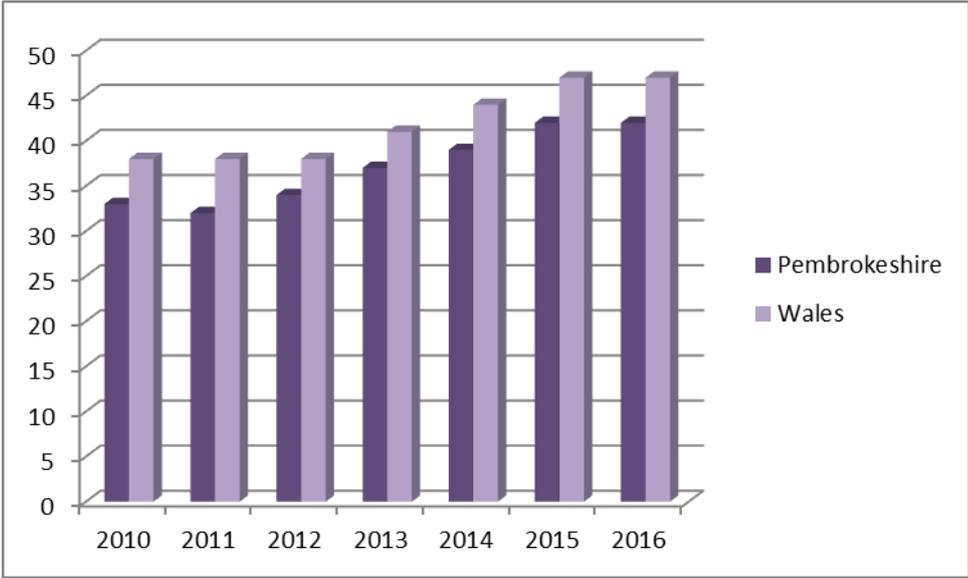
Chart 3: Comparison of serviced accommodation August peak room occupancy in Pembrokeshire and Wales

Chart 4: Comparison of serviced accommodation August peak bedspace occupancy in Pembrokeshire and Wales

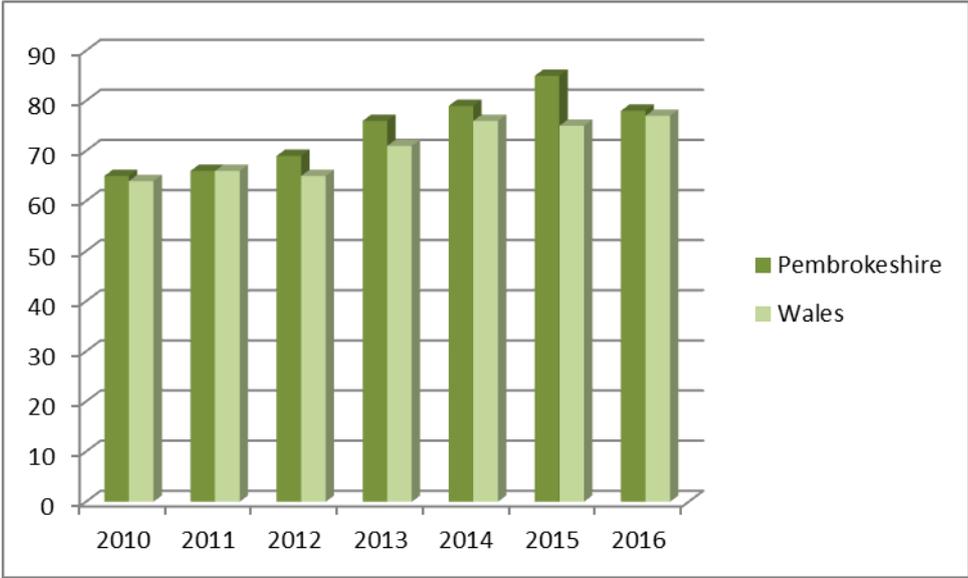**Chart 5**: Comparison of 2013 serviced accommodation room occupancy in Pembrokeshire and Wales

Chart 6: Comparison of 2016 serviced accommodation room occupancy in Pembrokeshire and Wales
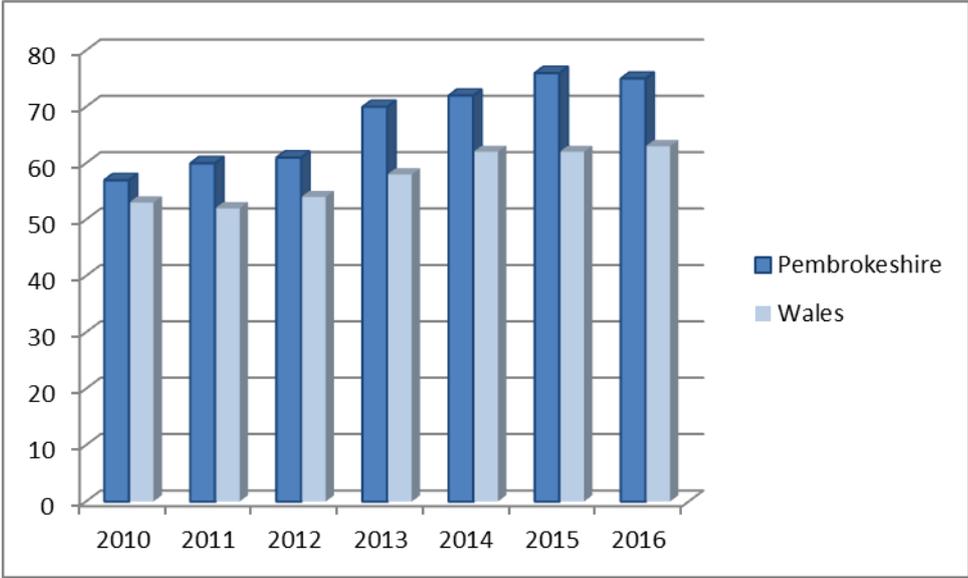

Chart 7: Comparison of 2013 serviced accommodation bedspace occupancy in Pembrokeshire and Wales

Chart 8: Comparison of 2016 serviced accommodation bedspace occupancy in Pembrokeshire and Wales

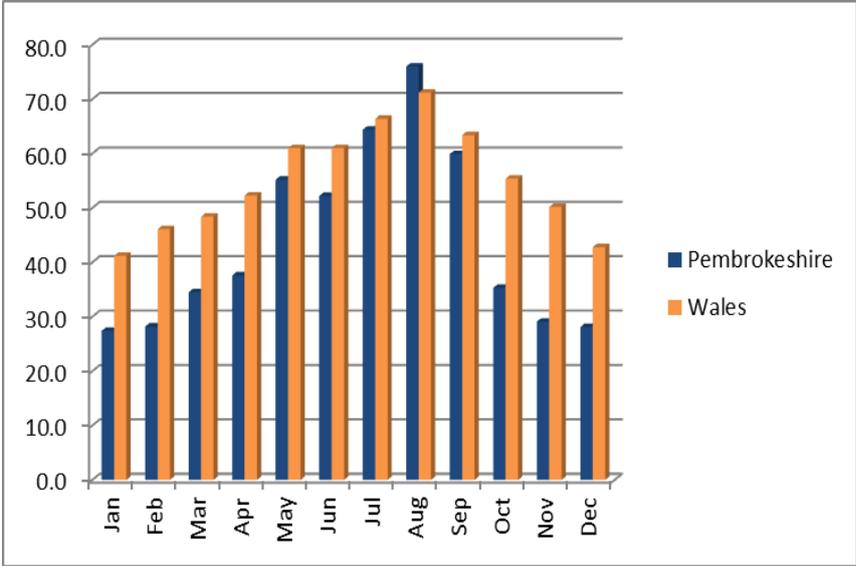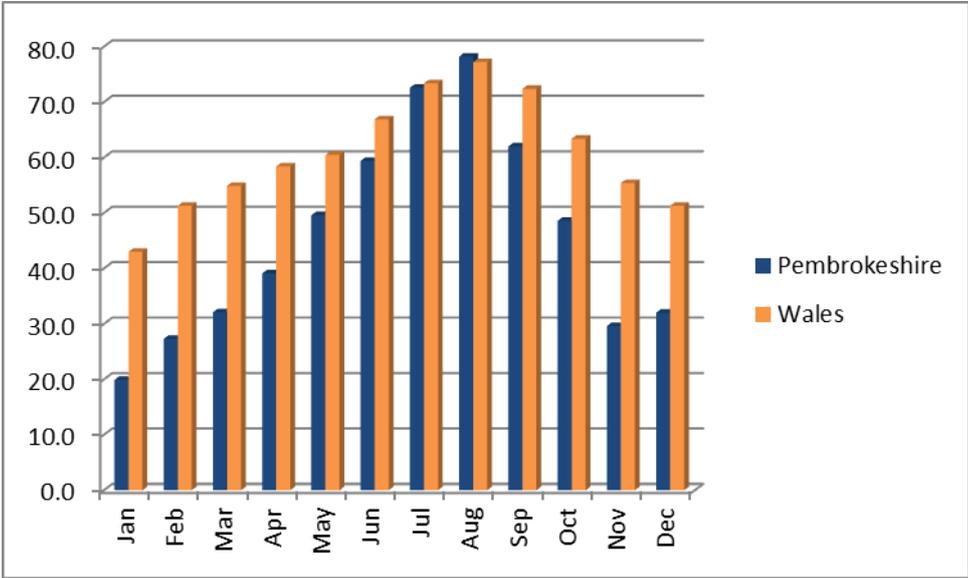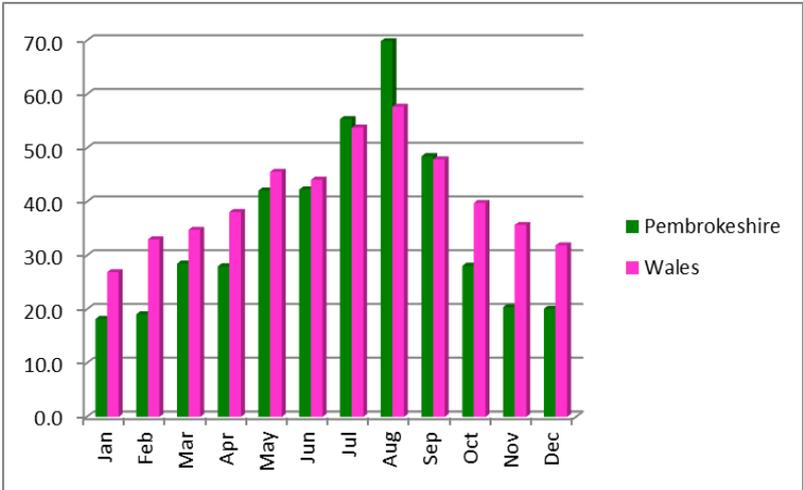## Self-Catering Accommodation in the National Park

81. It is very difficult to determine the exact levels of self-catering accommodation available in the National Park. This is because only an element of the available stock is advertised as such whilst an unknown proportion is made available on a less formal basis, for example through the letting of second or holiday homes.

82. The data available from Pembrokeshire County Council's bed space survey undertaken in 2013 amounts to 1668 letting properties (with an estimate of 13,500 bed-spaces) in the National Park. The total number of address points National Park is 13,700 and so the self-catering accommodation makes up just over 12% of the overall stock.

83. The totals can be broken down by Community Council areas (National Park area only) as follows:

Table 3: Self-catering properties by Community Council area Pembrokeshire County Council Bed Space Survey 2013

Community Council Area	No. address points in National Park	No. Self catering properties in the National Park	Proportion of addresses in Self catering use
Amroth	196	45	23%
Angle	189	10	5%
Boulston and Slebech	78	2	2.5%
Brawdy	54	1	2%
Burton	85	3	3.5%
Camrose	2	0	0%
Carew	172	11	6%
Cosheston	54	0	0%

| Community Council Area	No. address points in National Park	No. Self catering properties in the National Park	Proportion of addresses in Self catering use
Crymych	74	1	1%
Cwm Gwaun	104	14	13%
Dale	157	25	16%
Dinas Cross	501	60	12%
Eglwyswrw	147	11	7%
Fishguard	6	0	0%
Freystrop	5	0	0%
Hayscastle	11	0	0%
Herbrandston	169	1	0.5%
Hook	49	0	0%
Hundleton	0	0	0%
Jeffreyston	46	0	0%
Kilgetty/Begelly	5	0	0%
Lamphey	512	45	9%
Llangwm	36	1	3%
Llanrhian	294	74	25%
Llawhaden	3	0	0%
Maenclochog	71	6	8%
Manorbier	639	10	1.5%
Marloes and St Brides	195	31	16%
Martletwy	137	14	10%
Mathry	42	26	62%
Merlin's Bridge	2	0	0%
Mynachlogddu	114	3	3%
Nevern	396	33	8%
Newport	833	101	12%
Nolton and Roch	188	71	38%
Penally	13	0	0%
Pencaer	133	22	16.5%
Puncheston	40	0	0%
Saundersfoot	1682	185	11%
Solva	510	113	22%
St Davids	1145	163	14%
St Dogmaels	62	3	5%
St Ishmaels	260	10	4%
St Mary Out Liberty	181	4	2%
Stackpole and Castlemartin	299	37	12%
Tenby	2998	392	13%
The Havens	761	137	18%
Walwyn's	63	3	5%

Community Council Area	No. address points in National Park	No. Self catering properties in the National Park	Proportion of addresses in Self catering use
Castle			
Total	13713	1668	12%

MAP2: Self Catering Properties

Self-catering properties in the National Park
by Community Council Area

☐ 0 - 5%
☐ 5 - 10%
☐ 10 - 20%
☐ 20 - 40%
☐ 40 - 50%
☐ 50%+
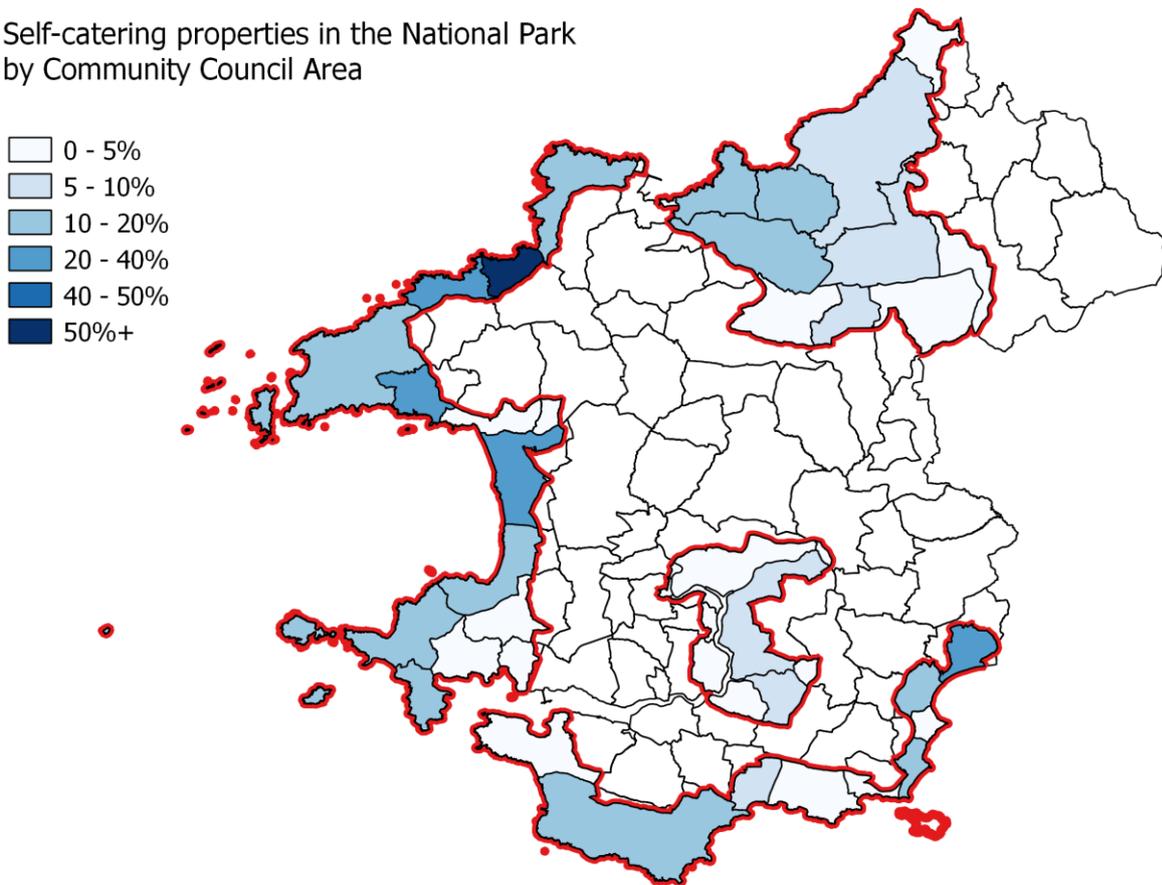
84. The table and map show that some areas are clearly more popular than others for provision of self-catering properties. Particular hot spots are Amroth, Dale, Llanrhian, Marloes and St Brides, Mathry, Pencaer, Solva and The Havens. It should be noted that these figures relate to the proportion of the housing stock in the National Park

only and does not take account of household numbers nor holiday accommodation outside of the National Park.

85. The Welsh Government publishes monthly and annual accommodation occupancy information for all Wales and Pembrokeshire.

Chart 9: Self-catering accommodation occupancy 2016 showing percentage occupancy

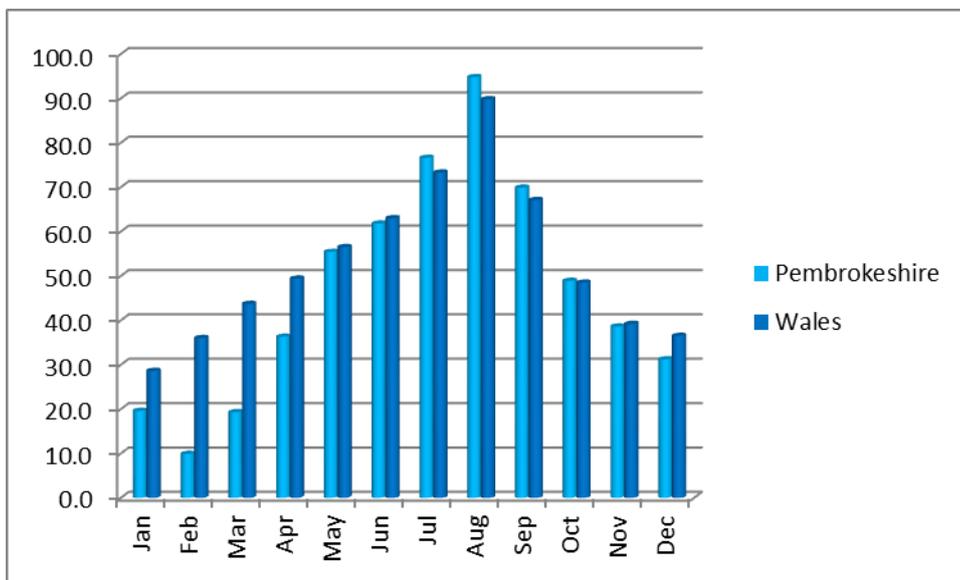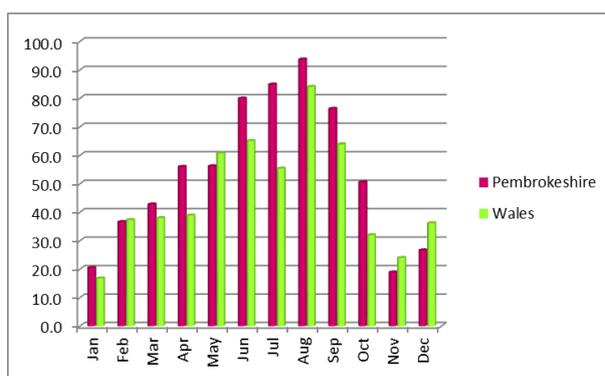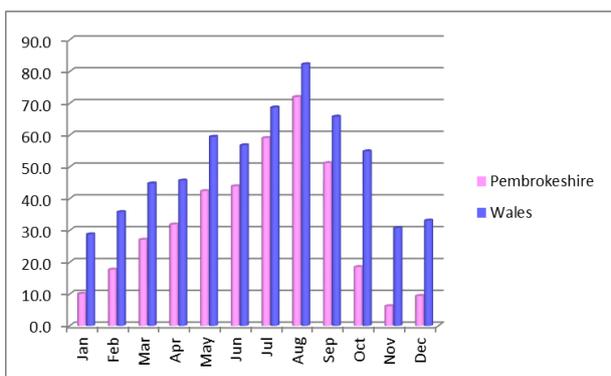**Chart 10: Self-catering accommodation occupancy 2010 and 2013 showing percentage occupancy**

2013

2010

86. Chart 10, showing the occupancy figures for 2010 and 2013 are provided for comparison purposes. As expected occupancy figures for Wales and Pembrokeshire peak during the main school summer holiday period but still tend to fall off more markedly in Pembrokeshire outside the summer peak than the rest of Wales.

Table 4: Caravan and Camping in Pembrokeshire

	PCNPA	PCC	Total
Caravan/camping sites	100	101	201
Authorised static caravan pitches	4737 (57%)	3546 (43%)	8283
Authorised touring caravan pitches	1377 (45%)	1655 (55%)	3032
Authorised tent pitches	665 (81%)	154 (19%)	819
Authorised unit pitches	111 (39%)	174 (61%)	285
All authorised pitches	6890 (55%)	5529 (45%)	12,419

87. The National Park occupies 38% of the land area of Pembrokeshire, and accommodates 50% of caravan sites and 55% of caravan and camping pitches. The map below shows the distribution of caravan and camping pitches throughout the National Park. This clearly shows distinct concentrations of pitches in the south-east area centered around Tenby and Saundersfoot and a second concentration within the St Davids peninsula. The figures in the St Davids area, in particular have increased through pitches being granted permission through Certificate of Lawfulness applications.

Map 3 Caravan and Camping Pitches

Number of authorised caravan and camping pitches in the National Park by Community Council Area

Legend:
- 0 - 25
- 25 - 118
- 118 - 211
- 211 - 387
- 387 - 675
- 675 - 1013
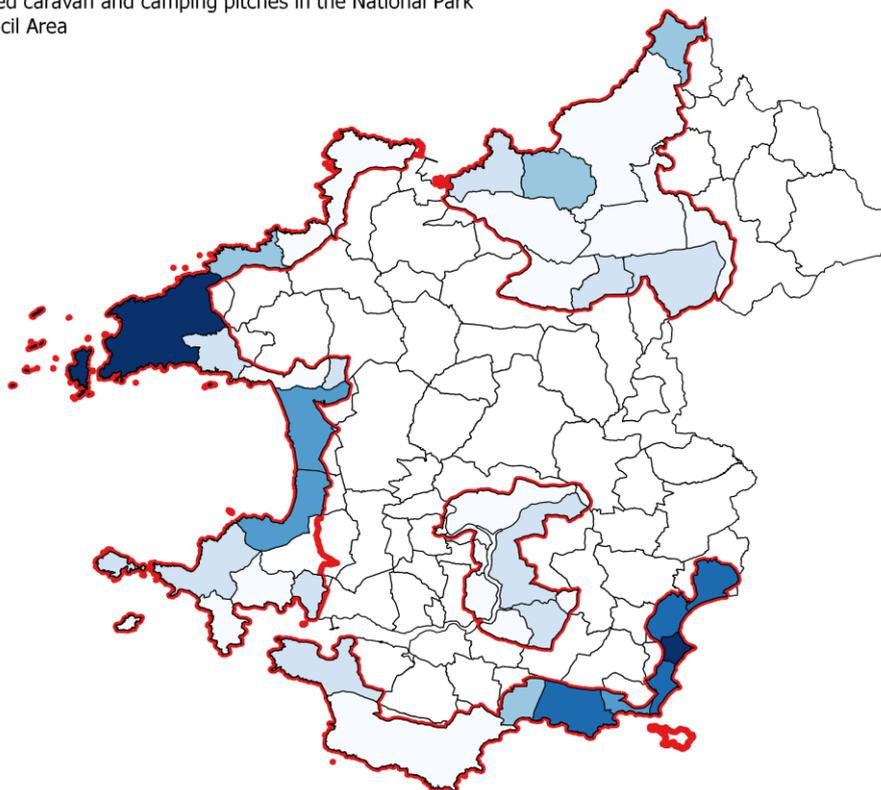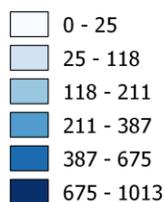
88. Caravan site occupancy increased significantly between 2000 and 2006 and increased again slightly between 2008 and 2014 (14%). Occupancy of all static caravan sites throughout Pembrokeshire is now 96%. Occupancy of static pitches in the National Park area only has risen by 3% to 93%. . This leaves some 400 pitches unoccupied by static caravans in the National Park. The data shows however that the majority of these pitches are accounted for on a very small number of sites, some of which are currently not operational. The majority of sites with any vacant pitches have less than 10 – which can be expected for operational reasons such as change-over of stock.

89. The data has been collected by means of aerial photographs and therefore the number of touring caravans is likely to vary greatly depending on when the photographs were taken. Records show that there are just almost 1400 touring caravan pitches in the National Park with a further 1650 in Pembrokeshire County Council's planning area.

90. In addition to the authorised sites the Caravan Club and the Camping and Caravanning Club operate over 100 sites throughout Pembrokeshire, with approximately 40% of the total in the National Park and 60% in Pembrokeshire

County Council's area. These sites are licensed for Club Members[1] to use and generally are permitted up to 5 touring caravans and 15 tents, although a small number of sites have planning permission for a larger number. The National Trust has also recently been granted an exemption certificate allowing them to operate small sites outside of planning control. There is considerable evidence of a significant number of sites operating under the 28-day rule and many sites without planning permission.

91. Mapping the sites shows a distinct concentration of sites in the south-east Pembrokeshire between Penally and Amroth. This is also the case in the area within Pembrokeshire County Council's planning jurisdiction.

92. The Welsh Government publishes monthly and annual accommodation occupancy information. The table below shows that there is significant available capacity within existing static caravan sites in Pembrokeshire, even during the peak summer season. Unfortunately data is not available for every month, but where it is available if shows that Pembrokeshire static caravan occupancy is considerably lower than the Welsh average.

Table 5: Static Caravan Occupancy yearly average occupancy for Pembrokeshire and All Wales

	Percentage occupancy (to nearest whole figure)													
	Pembrokeshire							Wales						
	2010	2011	2012	2013	2014	2015	2016	2010	2011	2012	2013	2014	2015	2016
April	47	41	18	*	*	*	17	27	41	19	11	*	23	18
May	49	55	17	18	51	*	28	33	44	19	26	23	29	28
June	41	75	29	19	22	18	30	42	54	34	28	22	33	13
July	49	62	72	*	21	*	45	46	61	44	43	33	50	53
Aug	73	72	82	*	*	43	70	67	66	56	47	48	58	64
Sept	49	60	45	*	*	21	23	48	47	28	24	*	26	34
Oct	38	22	8	*	*	9	15	35	30	14	15	*	17	18

*Figures not available

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[1] Where the Club and landowner agree, non-members can be accepted on these sites.

Table 6: Touring Caravan Occupancy yearly average occupancy for Pembrokeshire and all Wales

| | Percentage occupancy (to nearest whole figure) | | | | | | | | | | | | | |
| | Pembrokeshire | | | | | | | Wales | | | | | | |
	2010	2011	2012	2013	2014	2015	2016	2010	2011	2012	2013	2014	2015	2016
April	47	55	*	*	*	*	31	58	82	62	37	*	34	64
May	50	52	44	38	65	*	42	80	79	63	76	60	60	89
June	71	59	45	38	51	47	42	73	81	62	84	45	50	93
July	72	56	60	*	56	*	63	83	71	89	67	18	77	92
Aug	88	90	*	*	*	83	87	89	93	84	84	22	88	97
Sept	61	*	*	*	*	63	65	75	88	92	89	*	67	95
Oct	*	55	*	*	*	*	42	70	70	78	17	*	78	80

Figures not available

93. Again there is variation in the totals but this time with an overall trend downwards. The overall figures show that there is a significant under-occupancy of touring caravan pitches both in Wales and even more so in coastal locations.

Caravan and Camping – Local Development Plan Policy Background

94. A restrictive policy against new and extended caravan sites has existed in the National Park since the mid 1970's. A letter from the Secretary of State for Wales in 1975 expressed concern about the impact of holiday caravans and chalet development, especially in National Parks. Prior to the publication of the Dyfed Structure Plan the former Preseli and South Pembrokeshire District Councils, Dyfed County Council and NPA supported a joint policy of protection of coastal areas against further caravan and chalet developments. Once published in 1983, Dyfed Structure Plan policy TR1 presumed against the development of new static caravan sites or increases in the number of static caravans on existing sites. This policy has been carried through the Structure Plan and the subsequent Local Plans produced by the Authorities. Following the National Park Local Plan Inquiry in 1997, the Inspector reported that although the Secretary of State's letter (1975) and the Dyfed Structure Plan predate more recent guidance, (namely PPG21 Annex B and draft TAN(W)23) there is no lessening of environmental concern about caravan sites in that recent guidance. In considering objections to the policies contained in the Joint Unitary Development Plan for Pembrokeshire, the Inspector concluded: This policy rightly seeks to protect Pembrokeshire's sensitive coastal areas, most of which lie within the National Park, from environmental damage through the

intensification and expansion of static caravan parks and I see no justification for weakening its provisions.

95. This same policy position has been continued in the Local Development Plan, although there have been increasing enquiries from existing caravan site owners to switch from touring to static pitches. There is also a significant increase in unauthorised camping sites in the National Park, some of which start as 28-day tent sites but frequently continue through whole summer season and also accept touring caravans and motorhomes. Enforcement action taken has generally resulted in owners submitting Certificate of Law applications for their sites and the National Park Authority recently approved an application for a new touring caravan and tent site contrary to policy and Officer recommendation.

Table 7: Comparison of Caravan and Camping Policies with other Authorities

	Policy Approach	Pembrokeshire Coast National Park (current Local Development Plan)	Pembrokeshire County Council	Ceredigion County Council	Snowdonia National Park	Brecon Beacons National Park
1	New static caravan or chalet sites	Red	Amber	Amber	Red	Red
2	Increases to pitch numbers in existing static caravan or chalet sites	Red	Amber	Amber	Red	Red
3	Exchange of touring pitches to static pitches	Amber	Amber	Red	Red	Red
4.	New touring or tent/camping sites	Red	Red	Amber	Red	Amber
5.	Increases in pitch numbers in existing touring/tent sites	Red	Amber	Amber	Red	Amber
6	Extensions to existing sites to make environmental improvements only (no increase in pitches)	Green	Green	Green	Green	Green
7	New Yurt/tipee/glamping sites	Red	Amber	Amber	Red	Amber
8	Exchange of existing pitches to yurt/tipee/glamping pitches	Amber	Amber	Amber	Amber	Amber

Key

🟥   Not permitted

🟧   Permitted in limited locations or in limited circumstances only

🟩   Generally permitted

112.   The table shows that there is a general consistency of approach in the neighbouring authorities and other Welsh National Parks in policy terms. Ceredigion is more vigorous in its approach to control caravan and camp sites in the coastal areas whilst allowing some sites further inland where it is identified that the accommodation offer is deficient and needs strengthening. This approach is replicated across the two Pembrokeshire planning areas where some new development is permitted in the inland areas within Pembrokeshire County Council's planning jurisdiction.

113.   In Brecon Beacons National Park the Development Plan strategy does not identify a need for increased static caravan provision. There are only 19 touring caravan sites within that National Park and further sites are permitted where they can be integrated in the landscape. In Snowdonia new sites or increased static pitches are not permitted but some existing touring or camping sites would be permitted to expand providing there is no visual impact and is combined with improvements to the internal landscaping of the site. Such extensions must also be proportionate with the original site size.

114.   There are no specific policies in any of the authorities Plans relating to tipees, yurts or glamping pods. Where mentioned it is accepted that these would be considered as tent/touring sites or would be permitted on existing pitches within existing sites.

Camping and Caravanning Control

115.   Caravan and camping sites needing planning permission: Planning permission is required for land to be used as a caravan or camping site. In addition a site license will be required (issued by Environmental Health (PCC)) based on the number of pitches on the site.

116.   Planning permission **must** be granted before a site license is issued for caravan sites. Licenses for tent sites can be issued **without** planning permission being granted.

117.   Motor caravans (motorhomes) are caravans for the purposes of planning control and site licensing (case law).

Definition of a Caravan

118.   A structure designed or adapted for human habitation composed of no more than 2 sections and is physically capable of being moved by road from one place to another (towed or transported). Max dimensions – length 20m; width 6.8m; height 3.05m (floor to ceiling).

119.   **Sites Occupied and Supervised by Exempted Organisations**: Exemption certificates are issued by the Welsh Government (Defra in England). They are issued

to properly formed clubs with a constitution and with the aims of promoting leisure activities. The Certificate will only be used by the Club and its Members. The Certificate means that neither a site licence nor planning permission is required. Councils have the right to remove exemption certificates if, for example they receive complaints of nuisance. The Clubs will be expected to supervise and manage the operation of their sites. Certificates are usually valid for 5 years. The Club can select sites for its members to stay on by issuing certificates to the landowner or occupier – these are valid for up to 1 year.

120. The clubs include The Caravan Club; The Caravanning and Camping Club; The Scouts Association; The National Trust – but there are over 400 organisations on the approved list. Planning permission is not required but the most popular clubs do have a best practice policy of consulting the planning authority. Sites are not permitted on land designated as an SSSI. Some clubs also operate larger sites for which planning permission is sought.

121. Up to a maximum of 5 caravans may be parked on exempted organisation approved sites (over 100 such sites in Pembrokeshire). These also generally allow 10 tent pitches, but it can be more dependent on the Certificate. Rallies and meetings supervised and organised by exempted organisations may be held for up to 5 days.

122. These sites are for occupation by the Members of the organisation. It has been recognised that this provides a useful means of providing small sites in sensitive rural areas where larger sites would be unduly intrusive and should help to contribute to the rural economy in these areas. It is further recognised that use of these sites by other than members of these organisations would be a breach of the terms of the general planning permission.

123. **28-day Sites**: Land (not buildings) can be used for up to 28 days in a calendar year:

124. Land of 5 acres or more can be occupied by up to 3 caravans and unlimited tents;

125. Land of less than 5 acres can be occupied by 1 caravan (max 2 nights in 1 location) and unlimited tents.

126. The land must not be within the curtilage of a building and must not already be in use as a caravan site.

127. Breach of the 28 days allowed as permitted development has been held to have occurred in case law when a site was open for the reception of campers for longer than 28 days, even though on some days no units were actually on the land. Thus sites open for July and August will have breached this allowance. In addition sites without planning permission advertising online that they are open from Easter to October will also be in breach of the permitted development rights.

128. The 28-day day allowance cannot be moved from field to field within a single planning unit as a means of side-stepping planning control. A farm, for example would be a single planning unit. This also means that land used as a caravan site cannot also operate a 28-day site within the same planning unit.

129. Any temporary facilities such as toilets and wash facilities must be moved off the land on expiry of the 28 days.

130. **Within the curtilage of a dwelling house**: Caravans are usually considered to be a use of land but provided they are used ancillary to a dwelling house planning permission would not be required. This does not allow for them being let out for holiday purposes and planning permission would be required for this purpose.

131. **Glamping, Pods, Shepherd huts etc:** There is scope, within current local policy, within existing sites to replace pitches used for static or touring caravans or potential some tents with these types of accommodation. The designs and types of structure (eg fixed to the ground) blur the definition of caravans and therefore we need to assess each on its merits.

Recommendations

1. That towns and resorts should seek to strengthen their attractiveness for tourism by developing appropriate opportunities to provide land and water based recreation facilities and nature watching activities which meet changing market demands

2. That resort regeneration programmes are undertaken which seek to diversify and strengthen the resort economy while adding value to tourism activity. Such programmes will involve partnership between the public, private and voluntary sectors

3. That local communities are involved in identifying local needs and solutions for regenerating of coastal resorts

4. That resorts should be encouraged to prepare and undertake characterisation studies to inform environmental improvement schemes for key areas to increase their attractiveness for visitors and residents

5. That resort beaches, where water quality meets relevant standards, are managed so as to enable them to meet existing, and where possible, future blue flag requirements

6. That innovative local transport schemes are identified to reduce seasonal congestion and the use of the car within resorts and other coastal towns

7. That changes in the accommodation stock in and around resorts should be encouraged to meet changing demands in the tourism market, involving improvements to existing stock, new provision and conversion of redundant premises to other viable uses

8. That the accommodation sector is encouraged to network with coastal activity providers

9. That mechanisms are established for exchanging best practice between coastal towns and resorts

10. That the heritage tourism sector seeks to improve existing attractions and to make connections between them, creating new attractions only when there is a proven business need

11. That city and town master planning and coastal resort regeneration programmes should identify implications of proposals for local infrastructure

12. That resorts consider opportunities for developing coastal spas and thalassotherapy

13. That an annual beach resort survey is undertaken that will provide an incentive for resort managers to improve their destinations

14. That the development of food and drink at the seaside is informed by initiatives outlined in the Assembly Government's Food Tourism Plan

15. That community involvement through Coastcare groups, biodiversity partnerships, voluntary groups, trusts or other appropriate mechanisms is encouraged in the monitoring and management of the rural coast

16. That a programme of work is developed to understand the impacts of different activities on the environment and the character of historic settlements to evaluate the ecological and social carrying capacity of different coastal areas

17. That innovative public transport initiatives should be promoted and developed to provide opportunities for visitors to visit the coast without using their cars

18. That rural beaches, where water quality meets the relevant standards, are managed to enable them to meet existing and, where possible, future Green Coast award requirements

19. That the development of new and appropriate tourism accommodation and infrastructure is encouraged, in support of the proposals along the rural coast

20. That the profile is raised and opportunities promoted for increasing land and water recreation on the Welsh coast

21. That supply and quality of facilities for land and water recreation are improved where appropriate and subject to the environmental capacities of the area

22. That the economic benefits of the All Wales Coastal Path are maximised by linking the path to local attractions and local communities (links and loops)

23. That wildlife tourism along the coast of Wales is further developed and promoted, subject to there being no adverse impact on wildlife or nature conservation

24. That marina capacity is expanded where such development satisfies an agreed range of criteria outlined in the strategy

25. That a network of visiting berths is provided around the coast and promoted as a cruising opportunity where such development is appropriate and subject to the environmental capacities of the site/area

26. That consideration is given to further expand regional zoning and management systems for the use of PWC/and or powered boats which could cover registration, insurance cover and appropriate training/certification

27. That developments and improvements to cruise liner facilities are implemented particularly with regard to 'alongside berthing' at key ports around the coast of Wales

28. That local food products including fish and shellfish are promoted to visitors as part of the coastal tourism experience and initiatives developed in line with the Assembly Government's Food Tourism Action Plan

29. That the benefits of coastal events are maximised through the development and implementation of a co-ordinated events programme

30. That there is improved integration and co-ordination of activities between the key organisations involved in promoting coastal heritage

31. That a more coherent approach towards providing information to visitors about the arts and heritage at the coast is adopted

32. That the overall interpretation of coastal heritage is improved

33. That links are made with the Rural Development Plan which will include development work on tourism, based on food, events, heritage and culture

34. That the support of the existing partnerships which have an interest in the coast of Wales is sought in order to achieve delivery of the strategy

35. Continued support for initiatives designed to improve bathing waters

36. That 'Coastal Recreation Areas' are identified with the aims of integrating resource planning, improving visitor management, establishing standards and consideration of revenue implications

37. That there is improved visitor management at the coast

38. Tourism considerations are incorporated into coastal flood risk management where coastal protection is appropriate

39. Proposals for tourism investment to recognise and take account of the implications of climate change impacts, particularly the increasing flood and erosion risks, and assist with adaptation to those impacts

40. Obtain a fuller understanding of the potential effects of climate change on coastal tourism and the adaptation measures that will be required

41. That coastal destinations are encouraged to adopt an Integrated Quality Management (IQM) approach to managing the destination

42. That the highest standards with regard to facilities, accommodation and disabled access are achieved

43. That appropriate training and skills development programmes are established, to assist environmental and conservation knowledge, activity pursuits, business management and career development

44. That schools are encouraged to provide outdoor adventure activities for school pupils at the coast

Partnership for Growth – The Welsh Government Strategy for Tourism 2013 – 2020 (June 2013)

http://gov.wales/topics/tourism/developmentl1/partnershipforgrowth/?lang=en

Welsh Coastal Tourism Strategy Draft Final Strategy Document; Welsh Assembly Government: (January 2007)

http://gov.wales/docs/drah/publications/Tourism/090612coastaleng.pdf

Health Challenge Wales: http://www.healthchallengewales.org/background

Creating an Active Wales (Welsh Government)

http://sport.wales/media/144469/creating%20an%20active%20wales.pdf

Planning Policy Wales Edition 9 (November 2016):

http://gov.wales/docs/desh/publications/161117planning-policy-wales-edition-9-en.pdf

TAN16: Sport, Recreation and Open Space (2009):

http://gov.wales/topics/planning/policy/tans/tan16e/?lang=en

Wales Spatial Plan: http://gov.wales/topics/planning/development-plans/wales-spatial-plan/?lang=en

Pembrokeshire Single Integrated Plan (2013 – 2018)

https://www.pembrokeshire.gov.uk/public-services-board/local-service-board-archive

Enjoying the Pembrokeshire Coast National Park Action Plan (2014 Revision)

http://www.walesactivitymapping.org.uk/wp-content/uploads/2011/03/PCNPA-Recreation-Plan-2011-Low-Res1.pdf

Rights of Way Improvement Plan 2007 - 2017:
http://www.pembrokeshire.gov.uk/content.asp?id=12443&d1=0

Pembrokeshire Visitor Survey 2012

http://www.tourismhelp.co.uk/content.asp?Language=&nav=4&parent_directory_id=1

Pembrokeshire Coast National Park Authority Management Plan:
http://www.pembrokeshirecoast.org.uk/default.asp?PID=196

Visit Wales (Welsh Government) Wales Accommodation Occupancy Survey 2013: Welsh Government: August 2014

http://gov.wales/docs/statistics/2014/140811-wales-accommodation-occupancy-survey-2013-en.pdf

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