

DRAFT TOURISM, RECREATION AND ACCESS TOPIC PAPER

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GENERAL OVERVIEW

Since the decline in the traditional manufacturing, mining and farming industries, Wales' principal industry is now tourism. Tourism in Wales at £2.0 billion in direct visitor spending contributes more to the Welsh economy at 7% than agriculture and forestry (2.4%) or the construction industry (5.3%). 100,000 jobs in Wales (10% of total) are supported directly or indirectly by tourist spending. Through a "multiplier" effect, the total contribution of tourism to the Welsh economy could be as much as double the direct spend by visitors. (Source: "*Achieving Our Potential*", Wales Tourist Board Strategy Document, 2000)

Many businesses, particularly in rural areas, are dependent on tourism with 7% of farms, for instance, being involved in some form of tourism activity. Wales is more dependent on overnight tourism than any other part of the UK and there is a marked seasonality in demand with 60% of all holidays spent in Wales occurring in June, July and August. This pattern of seasonality is likely to be particularly marked in coastal areas and between October and March the industry operates well below capacity. This all-Wales pattern is mirrored in Pembrokeshire. Another feature of the "tourism" market common to both Pembrokeshire and to rural / coastal Wales as a whole is the influx of holiday home purchasers. This has driven up property prices in many areas, leading to the exclusion of many indigenous people and the threatened breakdown of communities.

A useful comparative analysis of Welsh and UK tourism statistics and economic values can be found in the "*Tourism Trends Digest*" November 2002 produced by the Wales Tourist Board. The statistics suggest that whereas there was a downturn in visitor numbers to Wales in 2001 compared to 2000, 2002 showed a small recovery. The downturn is likely to be in part a reflection of the impact of the Foot & Mouth outbreak on visits to rural areas and demonstrates the fragility of the tourism markets to outside events.

Increasingly, the market for activity-based, short break holidays or visits is growing. Wales Tourist Board statistics showed that short holiday trips accounted for half of all holiday trips taken in Wales. Wales has long been a destination for those interested in the outdoor and adventurous activities with walking, climbing and fishing being at the top of the list. Whilst these probably still head the list of most popular activities, the range is increasing rapidly with water/beach sports of many types, some not developed until recent years, now becoming increasingly important. North Wales has acquired a good reputation for sailing, particularly at Pwelli and marinas are now being developed at a number of locations around the Welsh coast. Coasteering is growing in popularity in areas of cliffs and rugged coastline and on beaches and open waters surfing, sand yachting, sailboarding, jet skiing, water skiing, etc. are widely practised. Watersports tourism in Wales is a significant specialist market sector. In 2001, UK and overseas visitors' holiday participation in watersports in Wales accounted for an estimated 880,000 trips, 4.45 million visitor nights and a spend of £160 million. UK holiday participation in watersports in Wales accounts for approximately 3.8% of market share and over 10% of all spend, proportionately higher figures than for the UK as a whole. In addition, British Marine Federation estimates suggest that revenue generated directly by

sales of watersports goods and services is worth just under £40 million in Wales but with considerable growth potential. (Source : - 'Catching the Wave' A Watersports Tourism Action Plan for Wales – Draft Final Report to Wales Tourist Board, 2003, L&R Consulting)

Recreation is increasingly becoming an integral part of daily life as people find they have more leisure time, regular exercise is seen as being an important part of a healthy lifestyle, retirement comes at an earlier age and the general health and fitness of many elements of the population improves. Easy access to high quality outdoor recreational facilities in attractive surroundings is also one of the reasons that influences people to move to the area. Environmental awareness and an interest in wildlife and wild places is also a driver for many visitors, and eco-tourism, both organised and self-managed, is important in many areas. Such activities are more the province of those without the responsibilities of young families and therefore they are less dependent on the school holiday periods for their participation. This assists in spreading the season away from the peak holiday times and thereby extending the season into quieter months.

A growth in outdoor activity and eco-tourism markets leads to increased demand for facilities and access to the areas most suited to the specialist activities. In the case of eco-tourism and some outdoor activities, this generally means gaining access to wilder, less populated areas. Whilst this can spread the visitor pressure away from more traditional holiday areas, it can lead to risk of disturbance of and interference with the needs and activities of resident or temporary wildlife and human inhabitants who are not used to the new influx and demands of visitors. There is also a trend towards increasing public access to the open countryside as evidenced by the recent passage into law of the Countryside and Rights of Way Act 2000, the full implications of which have yet to be realised. The successful management of these changing trends and their effects is a challenge that Wales must meet if it is to retain and develop the economic benefits.

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WHAT DO WE HAVE IN PEMBROKESHIRE?

Tourism

Tourism is Pembrokeshire's largest industry and employer with approximately 9,150 actual jobs (6,672 fte jobs) supported directly or indirectly by visitor spending, or 28% of the total number employed in the County (Pembrokeshire County Council, 2001). According to figures prepared by Pembrokeshire County Council for the year 2001, the tourism industry is worth £272 million to the Pembrokeshire economy and visitor spending equates to 20% of the GDP of West Wales. Within Pembrokeshire, the coastal and resort areas account for just over a third of all staying trips, with the rural areas hosting just under a half and the towns less than a fifth. (Source: *Tourism in Pembrokeshire, Wales and the UK 2002*, PBI.)

The strong image of Pembrokeshire in the field of tourism is based on its natural and built environment and its cultural history. Pembrokeshire's attraction, whilst being dominated in the minds of the majority of tourists by the coastal areas, is also about the mountains, the castles, the waterways, the culture, the ambience of peace and tranquillity and the patterns of rural life. It is also about the wide range of activities available for the visitor from active outdoor pursuits to the more sedentary artistic and contemplative pursuits. The Joint Unitary Development Plan for Pembrokeshire 2000 – 2016 (PCC / PCNPA, February 2002) recognises that one of the most important features attracting visitors to Pembrokeshire is the spectacular, unspoilt coastline. The attraction

of the coast and especially the beaches will have a significant but decreasing effect on rural communities as the distance from the sea increases, but, as no part of the county is more than 12 miles from the sea, this will always be a prime attraction. The lack of development along the coastline compared to other UK coastal destinations will be an increasingly important factor for maintaining visitor numbers and spending in the future.

Tourism businesses in Pembrokeshire are for the most part SMEs with micro-businesses forming an important proportion of the total. The majority is owner managed. The total annual staying tourist bed nights in 2001 was 6.3 million and the largest provider at 44% of this total was the caravan and camping site sector. The larger sites and many of the smaller sites are almost self-contained resorts and the present trend is for many of these units to be privately owned. They therefore make little direct economic contribution to the County.

Self-catering accommodation in Pembrokeshire has a high reputation and in 2001 provided 24% of the total staying tourist bed nights. The demand for top quality accommodation in this sector is strong. Hotels and serviced accommodation provide 13% of the total and predominate in the more urban resorts of Tenby and Saundersfoot. A relatively large number (15%) of visitor nights are spent with family or friends. While the number of long stay visitors (often families) is decreasing, as they are throughout Wales and the UK generally, they remain an important segment of the market.

On the other hand, the number of short stay visitors is increasing, reflecting one of the UK's growth markets and they are higher yield and less seasonal in nature. Pembrokeshire offers a wide range of opportunities in this market and there is a growing number of activity and special interest holiday providers to meet the demand. These and other niche markets are recognised as growth areas that also offer opportunities to overcome the marked seasonality of tourism in Pembrokeshire that results in under-utilisation of existing resources. In this context, the arts and cultural sectors have been identified as growth areas and, given its wealth of artistic activity and cultural heritage, Pembrokeshire is well placed to promote year-round tourism activity in these fields.

Detailed facts and statistics relating to tourism in Pembrokeshire can be found in *Marketing Information – Tourism in Pembrokeshire, Wales and the UK, 2002* produced by the Pembrokeshire Business Initiative, from which the above information was collated.

In recognition of the importance of tourism to local economies, a number of area initiatives have begun in Pembrokeshire, either to look at local tourism specifically or as part of a wider review. These include Pembroke, in which a survey of local businesses and the community was carried out to stimulate interest in revitalising tourism in the town. The results were published in a report, "*The Future of Tourism in Pembroke – a community perspective*", Stevens & Associates, February 1999, which identified a perceived decline in peak season visitor numbers but an increase in 'shoulder' visitors. The report identified a raft of measures to improve and market the image of the town.

Tenby / Saundersfoot, a recognised 'honeypot' area for visitors was selected by the Wales Tourist Board in 2001 as one of six Regional Tourism Growth Areas (TGAs) within Wales. A Tenby TGA Strategy and Action Plan (SAP) was produced to enable the area to realise its role under this designation through meeting the needs of selected target markets and on meeting the requirements of an Integrated Quality Management approach to destination management. IQM is defined as a process of progressively improving the quality of the visitor experience while securing economic, cultural and

environmental benefits for the destination, a process which has merit as a valuable approach for any of the County's local areas. The Tenby SAP reports that the town has bucked the national trend not only maintaining its traditional family holiday market but now also attracting more affluent visitors. It claims that the TGA is now the leading destination for a short holiday in Wales and that it has achieved this through more focused marketing and new award winning accommodation and restaurants such that it now exceeds expectations. The 6 year Action Plan for the Tenby TGA is to be managed by Pembrokeshire County Council through the employment of a full time project manager and with direction provided by a Steering Group. The WTB is ring fencing up to £1 million of its capital grants budget over the next 6 years to support the delivery of the Plan.

Increasing demand for adventure tourism and wildlife cruises has led to increased activity in these sectors in Pembrokeshire in recent years. Indications are that these sectors have potential for significant further growth, as they are currently under-developed locally. Pembrokeshire currently has 14 wildlife boat trip operators and 5 dive boat operators who have wildlife watching as an element of the experience. At least 50% of these operators are seeking to expand over the next year with one of the larger operators planning to conduct 51 trips per day in the height of the season. (Source: - *Pembrokeshire Outdoor Charter & Martine Code – Project Plan* , April 2003, *Pembrokeshire Coastal Forum*.) In recognition of this trend and the potential for conflict between man and the wildlife and environments which are the focus of the activity, the Pembrokeshire Outdoor Charter Group (POCG) and the Pembrokeshire Marine Code Group (MCG) have been established as partnerships between the public private and voluntary sector to promote the sustainable use of the Pembrokeshire environment for outdoor activities in marine and terrestrial environments.

Recreation and the Recreation / Tourism Link

An increasing awareness in society of the need for healthy and active lifestyles is creating an increasing demand for the provision of active leisure and outdoor recreational pursuit opportunities. Increasingly, people are also wanting to re-establish a connection with nature and wild places. Pembrokeshire, with its combination of wild and beautiful landscapes, clear and warm seas, long and rugged coastline and wide range of natural features, is an ideal place to get away from it all and to get active.

The range of activities practiced within the coastal zone of Pembrokeshire is considerable. **A summary of the principal activities, the areas in which they are most commonly practiced and a numerical estimate of the rate of activity has been specially prepared for this paper by Steve Quinton of Pembrokeshire College and is reproduced as Appendix 1.**

In recognition of the importance of recreation as a key element of destination selection by visitors, the Wales Tourist Board has commissioned a number of studies and produced Strategy documents covering some of the principal activity sectors. Two strategies relating to horse riding have been produced by the Wales Tourist Board. *Saddling Up for Success – A Riding Strategy for Wales*, 2002 estimates that 800,000 riding occasions are taken by visitors in Wales annually and that direct visitor spend arising from the activity totals £18.55 million. *Towards a Riding Strategy for Wales – Long Distance Horse Riding in Wales, Stage 1 Research Report*, 2002, *inter alia*, identifies the scope for the possible development of a long distance riding trail from the

Welsh Border through the Brecon Beacons National Park on to the Preselis and ending at the coast at Fishguard or St. Davids.

The *Walking and Cycling Strategy for Wales Consultation Document* produced by the National Assembly for Wales in July 2002 identifies the links between walking, cycling and horse riding as a means of both recreation and transport, sustainability and personal health. It also stresses the need for an integrated approach to the provision and development of these activities and the public transport network which would be of benefit to Pembrokeshire in overcoming the perception of peripherality and inaccessibility. Improved development and maintenance of major facilities and networks such as the Pembrokeshire Coast Path and the Celtic Trail will also have benefits for the tourism industry in Pembrokeshire. *Best Foot Forward – A Walking Tourism Strategy for Wales 2002 – 2010* produced by the Wales Tourist Board develops this theme further.

Time for Action – A Strategy for Adventure Tourism in Wales 2003-2010 identifies adventure tourism as being a growth area that Pembrokeshire is extremely well positioned to take advantage of with a strong existing image, an extensive natural resource base and several commercial operators already active in this field. There is strong demand for activities such as sailing, sea kayaking and canoeing; power boating and water skiing; rock climbing, walking/trekking and coasteering; diving and snorkelling; fishing; and horse riding. This element of the tourist market tends to be highly labour intensive and less weather/season dependant and therefore offers significant job creation potential for the County as well as sustainable characteristics in the long term.

Moving Up a Gear – A Cycle Tourism Strategy for Wales 2000 – 2007, WTB, 2000 aims to increase the income that Wales derives from Cycle Tourism to over £41 million by 2007 through the development and promotion of four key cycle tourism products for Wales, namely Mountain Biking in Wales, Wales Cycle Breaks, Family Cycling and Cycle Touring in Wales. This Strategy suggests that Pembrokeshire does not have the same potential for mountain biking development as other, wilder areas of Wales and the Strategy does not propose any key mountain biking destinations or facilities for the County. On the other hand, the Strategy suggests that Pembrokeshire is ideally suited to cycle breaks, family cycling and cycle touring. The creation of the 214 mile long Celtic cycle trail (Lon Geltaidd) between Fishguard and Chepstow and the London to St. Davids National Cycle Route 4 has opened up considerable potential for these categories. Further cycle route provision is underway in the County through Sustrans and other initiatives, e.g. Landsker Cycleways. Landsker Countryside Holidays, providing 3 and 8 day fully supported cycle tours in and around the Pembrokeshire Coast National Park, and the Menter Preseli Bluestone cycle tour are seen as two examples of enterprises with an important role to play in developing the potential in the County.

With its extensive coastline and major bays, inlets and estuaries, it is hardly surprising that Pembrokeshire offers a wide range of opportunities for water sports. *'Catching The Wave' A Watersports Tourism Action Plan for Wales – Draft Final Report*, July 2003 produced by L&R Consulting for the Wales Tourist Board is a useful reference source for statistics, facilities and targets for watersports in Wales and includes the following information about activities in Pembrokeshire. Out of a total of 60 beaches in the region, moorings are available at 19, bathing at 36, diving at 23, canoeing at 42, surfing at 13, sailing at 30, windsurfing at 21, water skiing at 11 and power boating at 16. Pembrokeshire offers some of the best diving and snorkelling in Britain, especially around the Marine Nature Reserve of Skomer Island. Dale is a popular centre for a

range of water sports activities and tuition including windsurfing, sailing and kayaking. Freshwater West is the regular venue for the national and European surfing championships while good surfing can also be found on Manorbier, Whitesands, (St. Davids) and Newgale beaches. Marinas are located at Milford Docks and Neyland, whilst further marina development is planned for Saundersfoot, Pembroke Dock and Goodwick (Fishguard). The intention is to create a chain of high quality, accessible marinas / safe harbours around the South Wales coastline to link in with those in North and Mid Wales and in Ireland to create a resource for cruising. A valuable recent reference publication is 'A Sea Guide to the Pembrokeshire Coast – Boaters Guide', 2003, Tom Bennett, which gives a detailed and practical description of the facilities available and activities carried out around the coast of Pembrokeshire.

Pembrokeshire currently lacks a national centre of excellence for a recreational activity such as exists in North Wales at Plas y Brenin (climbing), Plas Menai (water sports) and Canolfan Trewern (canoeing and white water rafting) to act as a focus and to boost the area's image.

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HOW IS IT MANAGED?

The overarching body managing tourism in Wales is the Wales Tourist Board. The Welsh Assembly Government sponsors the Wales Tourist Board which enacts the policies of the Government with regard to promoting tourism in Wales. The role of the Wales Tourist Board is : - "to encourage visitors to Wales from the UK and beyond and people who live in Wales to also take their holidays there; to encourage the provision and improvement of tourist amenities and facilities in Wales". Its responsibilities and powers arise from the Development of Tourism Act 1969 and the Tourism (Overseas Promotion) (Wales) Act 1992 which empowers the Board to undertake the following activities :

- It can promote or undertake publicity in any form including overseas to supplement its work
- It can provide advisory and information services
- It can provide financial assistance to any significant tourism project it believes will provide or improve tourist facilities or amenities
- It can promote or undertake research and give advice on policy matters relating to tourism

Planning policy is a major determinant of change and strategic development. The Regional Planning Guidance – South West Wales prepared by a number of local authorities in the south west Wales area in April 2000 identified that : -

"The broadening of the tourism base through the development of year round attractions; initiatives to increase the range, quality, vitality and viability of existing resorts; and initiatives to improve existing tourist facilities are to be encouraged. The need to locate strategic tourist attractions close to major roads and public transport routes whilst resisting inappropriate tourism development in sensitive environments is referred to." The Joint Unitary Development Plan for Pembrokeshire 2000 – 2016 proposes the following Strategic Policy: -

"Policy 4 Tourism Development. The development of tourism should normally be based upon visitor enjoyment and understanding of the County's distinctive scenic, cultural, linguistic, historic and environmental character. Development will be encouraged where it will meet an economic need but will not be allowed where it would prejudice the County's environmental quality, including the intrinsic qualities of the National Park."

Pembrokeshire County Council's Tourism and Community Regeneration Unit has the responsibility with others, including the National Park Authority, for delivering national, regional and local Strategies and Action Plans on the ground and for monitoring their progress and results.

Recreation / activity tourism

As the above planning policies / guidance recognise, increasing promotion and development of tourism, particularly where that tourism leads to increased activity in sensitive areas, can contribute to the degradation of the resource on which the continuation and expansion of the tourism depends. In addition, increased activity can lead to conflict of interests and antagonism between different recreational activities and between those activities and other users or local interests. Careful management and regulation of recreational / activity tourism activities is therefore required.

Such legislative regulation is applied through local Byelaws which are established and implemented by the National Park Authority for National Park owned/leased land including most of Pembrokeshire's foreshores, the National Trust for National Trust owned land, and Pembrokeshire County Council for swimming, beaches, boat operation and boat hire licensing. Protection of areas designated under UK or international conservation legislation and Directives is the responsibility of the Government with advice and enforcement through the Countryside Council for Wales and, in the case of Special Areas of Conservation and Special Protection Areas, through the legislative and enforcement powers of Relevant Authorities. Within the Milford Haven Waterway, Milford Haven Port Authority and Pembrokeshire County Council Byelaws regulate navigation and the National Park Authority administers Byelaws on the foreshore. The Milford Haven Waterway Recreation Plan 2000 sets out area recreation management policies and prescriptions in order to ensure that the activities in the Haven Waterway are managed in an integrated manner. Local Harbour Authorities which exist in some harbours such as Saundersfoot and Solva have jurisdiction over activities within the area of the harbour through the application of Byelaws. The Harbour Authority for Tenby and Lower Town Fishguard is Pembrokeshire County Council.

Recreational angling in freshwater and, for migratory salmonids, also out to the 6 mile limit at sea is regulated through licensing and Byelaws by the Environment Agency Wales. Recreational angling for sea fish is regulated by the South Wales Sea Fisheries Committee through Byelaws. There is cross warranting between the SFC and the EAW in respect of regulation of bass nursery areas.

In the wider area, both the National Park Authority and the National Trust recognise the importance of areas for specialist recreational activities, e.g. rock climbing and coastering, and the need to manage such sites on the basis of the capacity of the site rather than on the demand for the activity. Management of such sites and activities is carried out successfully by voluntary agreements with groups or representative bodies such as the British Mountaineering Council and the Pembrokeshire Outdoor Charter Group.

Access

The Countryside and Rights of Way Act 2000 (the CROW Act) is a far reaching legislative provision, the full implications of which have yet to be experienced and understood. The Act seeks to extend the public's ability to enjoy the countryside while also providing safeguards for landowners and occupiers and is managed and enforced

in Pembrokeshire by the County Council and the National Parks Authority. As well as strengthening and extending existing conservation legislation, the Act :

- o Gives the public a new right of access to mountain, moor, heath, down and registered common land, whilst recognising the needs of managers and landowners
- o Improves the rights of way legislation by encouraging the creation of new routes and clarifying the uncertainties about what rights currently exist

Responsibility for ensuring the suitability, availability and maintenance of access is shared between the respective landowner and the local authority. Access to paths can either be by public right or permissive, but the latter, whilst providing valuable extra resources, are less desirable as the permissive right can be withdrawn at any time. Pembrokeshire County Council and the National Park Authority are working together to increase and optimise the provision of Public Rights of Way (PROW) in the County and are currently compiling a PROW Improvement Plan for publication by 2004. In 2000 the length of the PROW network open and accessible to the public in Pembrokeshire totalled 550 km (70% of the total network) and the target figure for 2006 is 582 km (74% of total). The National Park Authority is working on a programme of improvements to the Coast Path for the benefit of disabled users and to minimise the need for stiles and on-road walking. Improvements are also being made to the paths linking the Coast Path with the rest of the PROW network. In 2000, 88% of these link paths were open compared to 78% in 1995 and the target for 2006 is 98% open. (Source: - *Pembrokeshire Coast National Park Management Plan 2001-2006 and State of the Park Report 2001*) Improved access for cyclists and horse riders is also being undertaken where feasible and appropriate around the County.

The Pembrokeshire Army Training Estate (ATE P), managed by the Ministry of Defence, is spread over 4 sites in the south of the County. They comprise the Castlemartin Range, RAR Manorbier, Penally Training Camp and Templeton Airfield, the first 3 being located on or near to the coastal zone. General access is restricted on these sites although unaccompanied access to the Coast Path is permitted on the Range East section of the Castlemartin Range on weekends, Public Holidays and during non-firing times. Access to Range West is only permitted as part of National Parks Authority official guided walks. Access by climbers to the cliffs in the Range East section is subject to complex restrictions designed to protect nesting birds for which the cliffs are of considerable importance, but most sections are open to climbing between August and the following February. Access for climbers, surfers and fishermen to Range West but permission is subject to attendance at an annual briefing and very rigid restrictions due to the risk of unexploded shells. RAR Manorbier is a small 100 acre cliff top, land based site from which missiles and shells are fired out over the sea. The public are excluded from the site and which a large Sea and Air Danger Area totalling approximately 570 sq. km. of restricted access extends out to sea. The Sea Danger Area can extend to a maximum of 21 km and restrictions are covered by Byelaws. The Air Danger Area is permanently notified as being active from 08.30 to 17.00 hours on weekdays.

Access by dogs and horses onto beaches is a matter of concern to some for public health and safety and nuisance reasons. Local Byelaws have been introduced over the years by local authorities banning access by dogs to all or part of certain beaches and these are now the responsibility of the County Council. Requests for consideration of further restrictions are still being made and it is possible that additional "dog free" zones will be introduced in the foreseeable future. Access by motor vehicles is also controlled

by the local authority, with special provision often being made for the launch and recovery of boats.

Organisations and other Interests Involved

Pembrokeshire Beaches Group – This group was initially established to look at the general management of all of the county's beaches in response to beach award criteria. Broader issues are now considered within the group. Representatives include CCW, PCNPA, NT, EA, KWTC and several departments of PCC. The focus of the group is very much on practical improvements to beaches including the provision of bins, beach cleaning, infrastructural improvements, disabled and able bodied access, information provision, water safety provision and water quality sampling. Limitations of this group are due to limited budgets and lack of integration and strategic vision at senior management levels.

Pembrokeshire Tourism – An organisation representing all sectors of the privately owned tourism product working in partnership with the WTB and PCC.

Pembrokeshire Active – A private sector partnership to include TYF and Dale Sailing. The main focus of this group is marketing.

Community Action Forum's – There are a number of community forums established throughout the county looking at a broad range of issues and where possible seeking funding to implement projects to address the issues e.g., Tenby 2020

Green Seas Initiative – A partnership of the public private and voluntary sector, this group was established to safeguard and enhance the coastline of Wales. A great deal of work has focused on obtaining the funds for the sampling of non-identified beaches for water quality and improving infrastructure along the Welsh coast. The initiative has a working group consisting of operational staff and a Forum which involves senior managers from a broad range of organisations making more strategic decisions about the work undertaken. A recent successful Objective One project co-ordinated by Pembrokeshire County Council has enabled a series of projects for infrastructural improvements be implemented this year.

Pembrokeshire Outdoor Charter Group – A partnership of outdoor activity providers, statutory bodies and the Field Studies centres working to develop outdoor activities in Pembrokeshire sustainably ensuring protection of the natural environment. The group have an environmental code of conduct, liaise closely with statutory bodies over changes in activities, events and use of new sites.

Pembrokeshire Marine Code Group – A partnership of all of the wildlife boat trip operators, dive boat operators with a wildlife element to their trips and the main statutory bodies. Currently the group are developing a marine code of conduct, environmental training and awareness raising to the wider community including other recreational water sport enthusiasts using the Pembrokeshire coast and waterway.

Greenways - an initiative to "promote access and enjoyment by local people and visitors to Pembrokeshire's coast and countryside through bus and train travel, walking and cycling rather than by the use of the private car." Pembrokeshire Greenways is managed by a Partnership of: Countryside Council for Wales, Environment Wales, National Trust, Pembrokeshire Access Group, Pembrokeshire Coast National Park Authority, Pembrokeshire County Council and PLANED.

North Pembrokeshire Transport Forum –

Local Access Forum – a group representing access and landowning representatives meet regularly. They have a statutory role in application of CROW and considerable potential to elp integrate and develop access and recreation policy in the future.

Sustainable Pembrokeshire Environmental Education Liaison – A partnership of individuals and organisations in Pembrokeshire who are working in the field of sustainable environmental education.

Freshwater West Working Group – Established in response to concerns about the management of the beach and led by National Trust this group consist of all interests at the beach including public private and voluntary organisations.

Freshwater East Working Group – Established following the purchase of the Freshwater East burrows by the PCNPA. The group represents all interests at the beach including public private and voluntary organisations. The aim of the group is to improve the future management of the beach environment.

Milford Haven Recreation Plan Group –

Cliff Climbing Liaison Group –

Caving Liaison Group –

Newport Footpath Group –

St Dogmals Footpath Group –

Arfordir Glan / Clean coasts Project – The Arfordir Glan/Clean Coasts project consists of 3 main elements: Coastcare, Green Coast Awards and the Tidy Tackle Campaign. The project's main aim is to enhance the value of the coastline of Wales by reducing the impact of litter. This will restore the aesthetic appeal and increase the amenity and economic value to the community and visitors.

Coastcare - The project focuses on the establishment of local community, voluntary, coastcare groups who 'adopt' and manage stretches of coastline.

Green Coast Award - Piloted in 1999 following the demand for recognition of rural beaches with guideline water quality and good environmental management. It recognises standards of excellence for non-resort beaches, which did not fulfil the categories required for other beach awards.

Tidy Tackle Campaign - established in response to wide spread concerns at the amount of fishing and angling litter found around the coast. Evidence of this has consistently come from the Project's Coastcare Groups and the Marine Conservation Society's annual Beachwatch Surveys.

Any others??

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INTERACTIONS

The principal interactions relevant to Tourism, Recreation and Access are as follows: -

- Tourism and activity-related tourism are major sources of employment and income not only to coastal communities but also throughout the County
- Recreational activity within the coastal zone is an important attractant for visitors and residents and brings income and jobs to coastal communities
- Increased tourism and recreational activity within the coastal zone, whilst bringing economic benefit, carries a risk of increased environmental degradation which in turn could affect the sustainability of the tourism / recreational business
- Where there is spatial overlap between recreational and other activities there can be conflict of interest both between the different recreational interests

themselves and between the recreational users and other interests which will detract from the pleasure of the experience

- Some forms of recreational and tourist activity can create disturbance or damage to wildlife and the environment and require appropriate management and regulation to avoid or mitigate against such impacts
- High tourist activity at key times and at key locations can create congestion, excessive demand on infrastructure, e.g. water supplies and sewage systems, and the risk of litter problems

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ISSUES

The issues identified below have been gathered via a variety of means including Topic Group meetings, Coastal Surgeries, other reports and plans, questionnaires and general communications. They are not the views of the Forum, but instead a culmination of concerns from a broad range of individuals as well as organisations from the public, private and voluntary sector. These issues will now be further analysed and will form part of an 'Issues Report'. It is not the purpose of Forum to resolve each of the individual issues identified, but instead to pass on the concerns to each of the relevant organisations responsible. Where these bodies do not exist, or where there is a need for a more collaborative approach, this will form the focus for the strategy, action plan and future Forum work.

1. Water quality

- Bathing water quality Guideline Standards are not met in some areas
- Toxic anti-foulant use on the hulls of some vessels can cause environmental damage
- Poor water quality at Freshwater East - inadequate sewage treatment
- Many recreational water users use areas that are not designated as bathing beaches yet they still require high water quality
- More beaches should be designated as bathing beaches, e.g. Castle Pill and Milford Beach
- Bathing water quality needs to meet EC Bathing Water Quality guideline standards in all areas where immersion water sports are carried out
- Riding of horses on beaches, e.g. Nolton Haven and in the Milford Haven, are believed by some to cause pollution and habitat disturbance

- Inappropriate effluent disposal (sewage) and other pollution from vessels can have adverse impacts on the marine environment and on biodiversity

2. Litter & Dog Waste

- Lost / discarded recreational fishing gear creates a hazard for humans and wildlife and is aesthetically intrusive
- There are a lack of litter bins in some areas
- Inorganic refuse and litter dumped by recreational boat users can create an environmental and human nuisance and hazard
- Inorganic litter and other forms of pollution left by visitors on land or sea
- Litter on our beaches is unsightly and deters visitors.
- Dog fouling is a major problem the majority of our county's beaches
- Dog mess at Freshwater West is getting worse each year, possibly due to the number of beaches now with dog restrictions, placing increased pressure on dog friendly beaches
- Zonal separation of dogs and children on Newport Beach is needed
- Unrestricted use of beaches by dog walkers can lead to public health and nuisance issues through the accumulation of dog faeces in some areas
- There are insufficient dog mess bins in many areas

3. Inadequate infrastructure and management provision

• Infrastructure & services

- Potential inadequacy of services, e.g. water / sewage treatment during peak tourist season
- Public toilets only open during tourist season for limited time yet at the same time extending tourist season
- Inadequate provision of accommodation at peak times of the year
- Launching costs for private boat owners at Lydstep are too high
- There are a lack of safe havens – places of refuge – around the Pembrokeshire coast
- There is a perceived shortfall in the provision of moorings for recreational boats in the Milford Haven Waterway
- Mooring / berthing / shoreside facilities for recreational vessels are inadequate in the County
- Lack of showers on beaches for Watersports activities

- There are inadequate specific facilities for cycling in the County
- **Transport & traffic management**
 - Traffic congestion in rural lanes and in urban areas, particularly Tenby, during peak season
 - Public transport provision in coastal areas is inadequate to persuade visitors to reduce the use of private transport
 - There is inadequate car parking provision in some 'honey pot' areas, e.g. St.Brides and St. Justinians
 - Parking by abled bodied recreational users in disabled parking spaces at Dale
 - Parking on the hill at Freshwater East to avoid paying for parking in PCNPA car parks
 - Parking, viewing and picnic facilities are perceived to be too few and not adequately signposted.
 - Parking should be prohibited on Newport Beach

4. Information / interpretation / education

- The availability of tourist friendly, accessible information could be improved
- Some areas lack adequate signposting and information boards
- There is a need for improved education of the public re recreational impacts and regulations
- There is a need for improved education of all water users regarding their own personal responsibility and polluting impacts as some lack awareness of environmental and H&S issues relevant to their activities
- There is inadequate provision of signposting and information boards in some areas

5. Lack of strategic vision for tourism management and marketing

- There is a marked seasonality in tourist numbers which is undesirable
- Changing patterns of tourism activity and demands need to be recognised and catered for
- Improvements can be made to the effectiveness, quality and targeting of marketing generally and by specific sectors
- Quality and effectiveness of marketing
- There is a lack of an integrated strategic framework for recreation in the County
- The County lacks any Centres of Excellence for recreational activities

6. Negative tourism & recreation impacts on communities

- Inappropriate tourism development can impact on the environmental and aesthetic value of an area
- The socio-economic impact of holiday home markets on resident communities in coastal areas can lead to the breakdown and loss of communities and the loss of community culture and enterprise

7. Interactions between tourism & recreational user groups

- Use of jet skis amongst surfers at Manorbier poses a safety risk
- Jet skis launched at Freshwater East are causing unnecessary disturbance to other beach users as a result of using excessive speed within the bay
- Noise pollution from mechanical recreational activity (air, land and water) is an issue for some
- Divers, bathers and fishermen – St Brides Haven
- Divers, windsurfers, sailors and bathers – Dale
- Multi usage at Fresh Water East – especially with powered craft and bathers
- Jet skis disturb kayakers and yachts both in terms of safety and noise
- There is perceived to be inadequate enforcement of byelaws and zonation in the Milford Haven Waterway

8. Interactions between tourism, recreation and other user groups

- **Recreation and fisheries**
 - Bait collection practices can impact on the environment and on human safety
 - Recreational rod and handline fishing can impact on the sustainability of some fish stocks
 - The distinction between recreational and commercial angling activity is sometimes blurred.
 - The illegal sale of fish and shellfish by “recreational” anglers is undermining the businesses of some licensed commercial fishermen
- **Recreation and archaeology**
 - Some forms of recreational activity can have adverse effects on archaeological and landscape features and the tranquility of some areas
- **Recreation and the environment**
 - Seals and other marine species can be disturbed by recreational power craft in some areas

- Collection of marine species for the aquarium and curio trade can damage wildlife populations and reduce bio-diversity
- There are concerns about the potential effects on the environment / landscape arising from increased access to coastal areas
- Recreational shooting activity can disturb nesting birds and other wildlife in some areas
- Potential conflict between uses within restricted areas (e.g. power boats/ sailing boats; canoeing/angling)
- Environmental damage can result from anchoring of recreational craft, particularly in rocky areas and over coral and Zostera beds
- Environmental damage can result from discharge of effluents and rubbish at mooring sites
- Trampling by recreational and tourist activity can result in environmental disturbance/damage
- The use of power boats in the Daugleddau area can have adverse effects on wildlife particularly during the nesting season

9. Safety

- Use of jet skis in the Burton/ Beggars Reach area of the Milford Haven Waterway can cause concern over safety and noise levels
- Poor VHF reception in some areas is perceived as being a safety risk
- There is a need to enforce speed restrictions within the Milford Haven Waterway for large powered craft
- Redundant jetties in the Milford Haven Waterway are perceived to be a nuisance and hazard to recreational boat users
- Any area of quicksand at Freshwater West beach is perceived to be a public safety risk
- Diving boat trailers left on beaches can create obstructions and hazards to other beach users
- Safety provisions at Martin's Haven embarkation point for Skomer Island are perceived to be deficient
- Safety and signposting aspects at Marloes Beacon and Musslewick Beach / Marloes Sands are perceived to be deficient

10. Concerns over limited access to the sea / coast

- Access provision for the less able is inadequate at many beaches and facilities Gaps in the Coast Path around the Milford Haven Waterway should be filled
- Access to open sea from some ports and harbours is not possible at all tidal stages
- There is a mooring and landing facilities shortfall around Carmarthen Bay

11. Limited MOD access to range for recreation

- Restricted access to MOD land and adjacent marine areas is deemed by some to be inappropriate and impacts on the ability of commercial fishermen and recreational users
- Restricted MOD access to Frainslake is viewed by surfers as unnecessary, particularly when MOD staff and families (including dogs off leads and children) are regularly seen using the beach. Sends out the wrong messages to the local community
- Walking passes to the West Range are long overdue

12. Need for implementation of CROW Act

- a. Inland rights of way and new access opportunities need to be reviewed following the introduction of the Countryside and Rights of Way (CROW) Act 2000
- b. Farmers and landowners get little or no financial assistance to comply with the requirements of the CROW Act or to maintain and manage facilities for public access onto their land
- c. The public liability of farmers and landowners for members of the public whilst on their land is little recognised and understood
- d. The resources available to deal with access and recreational demands are limited

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Last amended 30th December 2003

Approximate numbers (best guesses) and details for outdoor activities

Appendix 1

ACTIVITY	Numbers of participants	Locations	Association/organisation	Contacts for further info.	Issues and access
<p>Surfing</p> <p>Including Longboarding and Body Boarding</p>	<p>c. 10,000 surfer-days per year, approx. 300 – 500 local surfers, 100-300 regular visitors mainly from South and mid Wales.</p> <p>+ beginners using surf hire and surfing lessons 1,000-2,000 surfer-days per year</p> <p>i.e. total of up to 12,000 surfer days per year or average of about 32 per day throughout year.</p>	<p>Depends on swell size and wind direction.</p> <p>Freshwater west Whitesands Newgale Manorbier Broad Haven (North and South) Aberiddy Abermawr Freshwater East West Dale Monkstone Point</p>	<p>British Surfing Association</p> <p>Welsh Surfing Federation</p>	<p>Outer Reef Surf School outerreefsurfschool.com 01646 680070</p> <p>welshsurfingfederation.co.uk</p>	<p>Access to surf breaks on MOD areas e.g. ‘The Pole’ and Frainslake beach, south of Freshwater West currently by pass after attending an MOD briefing.</p>
<p>Wave Skiing</p>	<p>About 2 – 3 local wave skiers + visitors, mainly at beginner level, some hiring plastic wave skis at the beach, occasional club trips and there have been</p>				<p>As above</p>

	competitions at Freshwater West. Approx. 500-700 wave-skier-days per year.				
Wind surfing	Busy weekends with good conditions = 50 – 60 windsurfers out, locations depend on wind. Winter numbers = 10-15 if conditions are good 2,500 windsurfer-days per year + 600-1,000 learner-days per year = total of 3,300 windsurfer days per year, (average 9 per day through year)	Dale, Broad Haven North, Newgale, Tenby depending on wind direction	RYA	West Wales Windsurfing and Sailing 01646 636642	
Kite surfing	3-6 on good weekends 1-2 in winter + Instructed groups at Newgale C. 150-200 kite-surfer days per year	As above	British Kite Surfing Association	Ben H + Kirsty Jones	Access to beaches, large amount of room per kite-surfer required, new kite surfing school just started at Newgale
Inland canoeing/kayaking	Cilgerran canoe trips on Teifi + occasional open boats and sea kayaks on Cleddau. Approx. 2,000 paddler days per year	Upper reaches of Cleddau, Coshaston Pill, River Teifi	BCU/WCA	Chris Berry	Lack of access to other inland waterways.

<p>Sea Kayaking (including surf kayaking)</p>	<p>20-30 on busy weekends at TYF + Preseli Venture 10-20 + Army groups mid-week + Princes trust + College Groups + Pembs. Watersports?? + West Wales ...? + Pembrokeshire Paddlers + visiting clubs + individuals Individuals,clubs etc. 5,000 – 6,000 paddler days per year + 5,000 learner-days per year = 10,500 paddler days per year or average of 29 paddlers per day throughout year</p>	<p>All of the coast, mainly St. Davids area, Ramsey Island, Skomer area, Fishguard Bay, Abermawr – Abereiddy, Surf kayaking at most surf beaches, particularly at Newgale and Whitesands</p>	<p>BCU/WCA</p>	<p>Nigel Robinson (WCA)</p>	<p>Restrictions around Skomer and Ramsey, occasional crowding at some surf beaches, pressure on parking and water during white water rodeo events at the ‘Bitches’ (Ramsey Sound). Recent increase in participation likely to continue with more use of ‘sit on top’ boats</p>
<p>Climbing</p>	<p>About 100 - 150 local climbers. Approx. 4,000 climber-days per year + groups of climbers on courses e.g. Pembs. College, Princes trust, TYF, Sealyham etc. = approx. 2,500 – 3,500 climber days per year</p>	<p>Castlemartin Range East and West, Lydstep to Giltar, Porthclais – Carreg-y- Barcud, St. Davids Head, + minor crags on Coastline from Pen Berry – Pwll Deri.</p>	<p>BMC</p>	<p>www.thebmc.co.uk Pembrokeshire climbing Club Secretary: Mr. P Morgan, 40 Heol Derwen, Merlins Bridge, Haverfordwest, Pembrokeshire</p>	<p>Access to MOD ranges (Castlemartin), in-situ equipment e.g. belay stakes. (NT and POCG have replaced some stakes with a belay boulder at Porth-y-Ffynnon). Restrictions during bird nesting season. Area needs an indoor facility to take pressure off the cliffs and provide winter training for climbers.</p>

	= c.7,000 climber-days per year or average 20 per day throughout year				
Rowing (Celtic Longboats training and racing)	14 clubs in pems. Approx. 350 active members + visiting clubs from Aberystwyth (150 members) Races throughout summer starting with Cleddau river race May, approx. 120 rowers	Cleddau river and the Haven, Fishguard Bay, Newport, Cardigan, Little Haven, Tenby, Solva, Dale bay	Wales Longboat Rowing Association	Chairman – Pete Fletcher (01239 881295) Secretary – Paul Brant paulbrant@WLRA.f reeserve.co.uk	Clubs attract an even balance of males and females and most participants are in the older age groups (typically 30s – 40s) Lack of facilities at Black Tar, Solva and Little Haven – needs showers/changing rooms in order to attract visiting clubs for races. Other clubs generally use sailing club facilities
Coasteering (including cliff jumping and wetsuit-clad sea-level scramblers)	5,000 coasteerers-days per year, mostly in organised groups, a few unorganised groups mainly cliff jumping	St. Nons Bay, Abereidly, Aberbach, Lydstep	No NGB or association	Andy Middleton TYF 01437 721611	Potential for overcrowding on some routes (Abereidly), possible safety issues for non-organised groups that are usually ill-equipped, possible conflicts with seals and other wildlife is being managed through outdoor Charter Group, Some localised erosion at access points.

