



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Welsh Coastal Tourism Strategy



Draft Final Strategy Document
January 2007

Welsh Assembly Government



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1. Introduction

This consultation invites comments on the Welsh Assembly Government's strategy and priorities for developing Coastal Tourism. The preparation of a Coastal Tourism Strategy was identified as one of the key national actions within the Wales Spatial Plan.

The Spatial Plan forms one of the high level strategic guidance building blocks for the Welsh Assembly Government. Specifically the Wales Spatial Plan:

- Provides a framework for collaborative action between the Welsh Assembly Government and its partners to achieve the priorities it sets out nationally and regionally.
- Influences the location of expenditure by the Assembly Government and its agencies.
- Influences the mix and balance of public sector delivery agencies' programmes in different areas.
- Sets the context for local and community planning.
- Provides the evidence base for the public, private and voluntary sectors to develop policy and action.

The purpose of the Coastal Tourism Strategy is to identify a clear way forward for the development of Coastal Tourism, which realises and builds on the economic potential of the coastline of Wales whilst respecting its environmental quality and recognising the importance of achieving community benefits. The strategy will provide spatial guidance for the future allocation of funds to support coastal tourism in the regions of Wales through the Spatial Plan.

The strategy set out in this consultation is based on an analysis of the current coastal tourism offer, the quality of the coastal environment, including a detailed analysis of the environmental designations on the Welsh coastline, and trends that will affect future markets for coastal tourism activities and products. This information has been collated in a comprehensive technical report which accompanies the strategy.

The draft strategy has been drawn up in consultation with a wide representation of key stakeholders including the coastal local authorities, members of the regional spatial planning areas and the main environmental statutory agencies.

A Strategic Environmental Assessment (SEA) has been prepared and is subject to consultation along with this strategy. An initial assessment has taken place and has informed the strategy's proposed recommendations.

The strategy is structured as follows:

Chapter 2 – sets out the environmental and economic significance of the coast, reviews current and future trends affecting the market for Coastal Tourism and sets out the key challenges that the strategy will need to address.

Chapter 3 – sets the strategic context for the strategy and outlines the vision, aims and outcomes that the strategy will seek to achieve.

Chapter 4 - contains a more detailed analysis of the issues under the key themes of Coastal Towns and Resorts, the Rural Coast, Coastal Activities, Coastal Culture, and Coastal Management and puts forward a range of recommendations relating to each theme.

Chapter 5 – outlines implementation arrangements for the strategy and draws out the implications for the six spatial plan areas

The consultation's supporting document includes:

Technical report

Environmental Assessment

Policy Gateway Summary

Race Equality Impact Assessment

2. Analysis

In this chapter we set out the significance of the coast in both environmental and economic terms. We describe current trends in coastal tourism and review the trends that will affect future markets for coastal tourism. We then identify key challenges that need to be addressed when developing tourism on the coast.

2.1 Importance of Coastal Tourism

The Welsh Coast is vital to the tourism industry in Wales. Spending associated with a visit to the coast amounts to around £850 million – a quarter of total tourism spending in Wales. It attracts around 4.5 million staying trips each year together with an estimated 5.6 million tourism day trips. Taking account the average number of nights stayed per trip, around 27.8 million visitor days are spent at the seaside, equivalent to 30% of all tourism days in Wales. The greatest bulk of seaside tourism is for leisure and holiday purposes, although cities and resorts such as Cardiff, Swansea and Llandudno also attract business and conference tourism.

Within the regions, seaside tourism is particularly important for North and South West Wales where it accounts for half of all tourism activity. It is least important in the South East where it accounts for only an eighth of total tourism activity.

The direct and indirect impact of tourism amounts to an estimated 5.6% of whole – economy value added in Wales. The economic impact of tourism is much higher in many rural and coastal areas that, in relative terms, are more dependent on tourism.

2.2 Coastal Tourism Employment

Recent research has indicated that just under half of all full time jobs associated with the marine and coastal environment are in tourism related activities. The North Wales marine and coastal economy is predominantly, though not exclusively tourism based. In West Wales, tourism accounts for over a third of direct coast and marine employment and in South East Wales it accounts for over half of coastal and marine sector direct jobs.

2.3 The Coastal Environment

The coastal environment is a major attraction to visitors who are drawn by the quality of its landscape, wildlife and sea water. The environmental quality of the Welsh coastline is reflected in the wide range and large number of designations and protected sites that cover the coastline of Wales. Some 70% of the coastline has been designated for its environmental quality.

In terms of EU and international designations, many parts of the coastal and marine environment are designated as Special Areas of Conservation and Marine Special Areas of Conservation. These areas are chosen for being the best examples in the UK for containing habitat types and species listed in the EU Habitats Directive. Other parts of the coast are designated as Special Protection Areas to conserve the habitats of certain rare or vulnerable birds and regularly occurring migratory birds. (include CCW map of designations). The Dyfi Estuary is the only designated Biosphere Reserve in Wales. The Biosphere reserves are areas nominated by national

governments and designated under UNESCO's Man and the Biosphere (MAB) programme.

In addition, vast sections of the coastline are designated under UK wide designations including:

- National Parks - Pembrokeshire Coast and Snowdonia
- Areas of Outstanding Natural Beauty at Anglesey, Llŷn and Gower
- Heritage Coasts at Great Orme, Anglesey, Llŷn, Cardigan Bay, Pembrokeshire, Gower and the Vale of Glamorgan
- National Nature Reserves
- Marine Nature Reserves
- Sites of Special Scientific Interest

Important sites of archaeological and historic interest are also found along the coastline ranging from pre- historic sites to the Edwardian castles of Beaumaris, Caernarfon, Conwy and Harlech, which are a designated World Heritage Site. Registered historic landscapes, parks and gardens make a significant contribution to the distinctiveness of the Welsh coast and to its appeal to residents and visitors.

2.4 Current trends in Coastal Tourism

Over the past 15 years, it is apparent that holiday tourism at the Welsh seaside has experienced a decline in the number of UK trips and nights albeit at a slow rate and subject to year to year fluctuations. The fall has partly been due to an overall weakness in UK holiday tourism in Wales but also due to a loss of overall market share against competing destinations in cities, small towns and the countryside. Overall the seaside share of the UK holiday market in Wales fell from 61% in 1991 to 42% in 2001.

Within the seaside sector, long holidays declined in number from over 2.5 million in 1991 to less than 2m in 2001. The decline in long holidays was off set to some extent by a growth in short breaks which rose from a low point of less than 1m in 1993 to a high of over 2.3m in 2000. However, the overall number of nights declined with a fall of around 6 million nights over the decade, whilst the number of short holiday nights only rose by around 2million. Thus the total number of tourist nights fell by around 4 million over the decade - a fall of about 15%. More recent trends (2001-2005) suggest that there has been an increase in longer holidays, whilst the number of shorter stays has decreased.

In terms of visitor profile, figures suggest that between 2000 – 2003, 20% of staying seaside trips to the Welsh coastline originated in Wales. The North West (26%) and the West Midlands (21%) were the two main sources of staying visitors from England. Visitors to the North and Mid Wales coast tended to come from the North West of England, while visitors to South West and South East Wales came from a more varied origin base. Staying visitors to the seaside were more likely than the average holidaymaker to Wales to be travelling in large groups, with accompanying children and to be from lower socio-economic groups. On the other hand they were less likely than average to be in the 16-24 age group and to be travelling alone or in a couple.

Caravans and camping, particularly static caravans, were the preferred form of accommodation for tourists staying at coastal locations, accounting for 40% of all trips between 2000-2002. Staying in self catering flats and cottages was also more prevalent than the average while a smaller proportion of trips stayed with friends and relatives or used serviced accommodation.

The coast attracts a higher proportion of long holidays compared to other types of location, with 55% of seaside trips involving a stay of over 4 nights. Only 41% of all trips to Wales involve a stay of over four nights. .

Seaside holidays show a much greater seasonal peaking with 45% of trips being taken in the peak season compared with 29% and 30% for town and countryside trips respectively. The high seasonality reflects the relative importance of family holidays, many of which are governed by school holiday periods, as well as a preference for warmer weather for water based activities.

In terms of day visits, in 2002, family groups with children also accounted for a higher proportion of tourism day visits to the coast than for tourism day trips overall. In addition, a higher proportion than average of people over 55 years undertake day trips to the coast. There was less of a skew to the lower socio-economic groups amongst day visitors visiting the seaside. 50% of day trips to the coast originate in Wales.

Around 20% of UK holidaymakers come to the coast to undertake a specific activity as the main purpose of their holiday. However, a significantly higher proportion (80%) take part in an activity whilst staying on the coast. The most popular activities were shopping, walking, visiting heritage sites and swimming.

Table: Activities pursued by UK visitors whilst on holiday at the Welsh seaside

	Seaside
Walking over 2 miles	38%
Watersports	9%
Petrocentric	5%
Swimming	34%
Cycling	9%
Nature study	18%
Golf	4%
Sea angling	6%
Shopping	65%
Watching performing arts	13%
Visiting Heritage sites	35%
Visiting museums,	19%

galleries	
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Source UKTS 2003/4

Information on activities undertaken by overseas visitors was collected in a visitor survey undertaken in 2003. The survey suggests that overseas holiday makers undertake a wide range of activities and have a higher propensity to visit heritage sites and museums than UK holidaymakers.

Tourism day visitors were much less likely to be involved in individual activities than staying tourists. For day visitors to the coast, the main activity was beach related including sunbathing and paddling in the sea.

2.5 Future drivers and trends in Coastal Tourism

As with general tourism activity, future changes in visitor activity on the coast will be influenced by a number of common factors. These are likely to include:

Available leisure time

Holiday entitlement, after growing strongly in the decades after the war, it has remained relatively stable over the last decade. The working week has also stayed the same so that leisure time for the average family has not changed significantly in recent years. There appears to be little pressure for change, suggesting that for those in work, further expansion in the number of trips and nights spent away from home will be constrained by lack of leisure time. In contrast to those in work, there has been an increase in the number of retired people as a proportion of the total population. This sector has therefore experienced a growth in the total volume of available leisure time, but may in the future have fewer resources to significantly increase holiday taking.

Disposable incomes

Incomes for those in work have continued to grow faster than inflation, and are expected to continue to do so in the coming decade, with forecasts of around 2.5% growth in GDP per year. However, expectations about retired incomes are less certain given the changes in pension schemes in recent years.

Demographic change

The older age groups will increase both absolutely and as a proportion of the population. Children under 16 will increase in number but the proportion of family households will decrease.

Socio-economic change

There is likely to be an increase in the upper socio-economic groups with some decline in the proportion of DE groups. The proportion of the population benefiting from higher education is also increasing.

Lifestyle changes

A growth in the interest in personal health and fitness and in nature conservation has been apparent over the last decade. These trends are likely to continue, reinforced by concerns about climate change, sustainability, and the 2012 Olympics.

The Internet

The growth and take up of the Internet has had a major impact on customer's ability to research and book tourism trips at home and abroad. It is essential that the tourism industry on the coast maintains a strong presence on the Web to compete with other destinations at home and abroad, although the proliferation of sites will also underpin other forms of marketing activity such as word of mouth.

Technology

Information technology will also impact on information provision and distribution at the destination, through mobile phones and freestanding interactive panels extending the reach of traditional tourist information networks.

Transport issues

Rising car ownership and use is likely to be reflected in growing road congestion both in destination and origin areas, which could inhibit any growth in tourism day trips in particular. The continued growth in budget air travel will ensure fierce competition from overseas destinations both for long holidays and short breaks. The potential imposition of a fuel tax to meet climate change considerations could slow or reverse such growth.

Structure of the industry

Tourism infrastructure provided by the private sector is very fragmented and often disadvantaged by limited resources and/or skill bases. This factor may inhibit the private sector from playing a full role in taking up opportunities unless innovation and business development advice is available.

Future Demand

In terms of future demand for holidays on the coast, our available research indicates that the long term trends that have impacted on coastal tourism over the last fifteen years are likely to be sustained.

Long main holidays by UK residents to Wales are likely to be static in volume and are more likely to decline. Being relatively more dependent on the long main holiday, the seaside is likely to be more affected than other locations. Short breaks and additional holidays are expected to increase, but the growth may be slower as a result of fierce competition from overseas destinations and from the limited growth in paid holiday time. Tourism day trips are likely to remain static given the lack of growth in holiday entitlement and the potential effects of increasing congestion.

Demographic and income changes are likely to stimulate growth in higher value activities which are attractive to older age groups including yachting, motor boat cruising and golf. The same drivers will raise expectations of standards and quality of accommodation. Socio-economic and demographic drivers are also likely to increase interest in arts, culture and heritage opportunities, whilst lifestyle and income growth are likely to sustain the growth in food, local products and eating out.

Activities appealing to most age groups, such as walking will continue to dominate in terms of the volume of participants. Adventure sports such as kite surfing, sub aqua diving and similar activities will continue to grow and attract the younger active age groups, although there may be some displacement from older established sports.

2.6 Key Challenges for Coastal Tourism

The Tourism Market

One of the main challenges for many parts of the coastline and particularly noticeable in coastal resorts is the continuing need to adapt in line with changing visitor expectations. The traditional two week 'bucket and spade' holiday has changed, visitors' needs and demands are now much more diverse. In addition a number of coastal resorts in Wales are suffering from social and economic problems. These stem from a number of sources including:

- an oversupply of larger Victorian and Edwardian properties
- seasonality of employment
- a higher number of elderly residents
- poor accessibility in some cases
- out of date and aging tourism infrastructure

Accommodation

Many resorts are dominated by caravan accommodation. Much of the caravan stock is used by individual families and their friends rather than being available for holiday letting. This tends to make them more self contained with less local spend. The larger sites often provide shopping and recreational facilities on site, which again reduces local spend. The domination of static caravan sites in some resorts, while helping to retain a loyal market, has inhibited the development of other markets which primarily use serviced accommodation, and the development of a wider range of shopping and catering opportunities within the resort.

A broader range of serviced accommodation would allow more choice for the visitor. Similarly, high quality accommodation, in all sectors, will attract visitors with a higher purchasing power. Wales has many high quality self catering cottages, including complexes and individual properties. The challenge is for other self catering and serviced accommodation to meet the expectations of the visitor.

Skills and Labour resources

The seasonal nature of the tourism industry on the coast, together with the small scale nature of most tourism businesses poses challenges in retaining and equipping staff with the appropriate skills. Local people sometimes feel excluded from new establishments set up by entrepreneurs from outside the area. In the short term, labour gaps, particularly in low paid jobs are being filled up by workers from other countries with lower wage levels. However, as these countries develop, the source of labour is likely to decrease, increasing the importance of recruiting and retaining staff locally through improved working conditions and career prospects.

Access

The strategic access via the M4 and A55 has significantly improved journey times to many parts of the Welsh coast. However, there are still many areas of the West Wales coast perceived as difficult to access (due to journey times, the nature of the road network). Public transport access by rail to the coast is also relatively good with regular services along the North Wales and South Wales coast. However services become less frequent further west and throughout Mid Wales. Many coastal locations are accessed by narrow country lanes which can suffer from congestion during the summer and cause safety issues for walkers and cyclists. While the private car is likely to remain the main mode of travel for staying and day visits, the challenge is to develop innovative forms of public transport, to move people around local 'hot spots', to link sites and walking routes. There are a number of good examples already in Wales.

Coastal erosion

All coastlines are subject to change over time due to tidal and wind effects which can result in coastal erosion. Coastal erosion and falling sand levels have become an increasing concern around some parts of Wales. If such erosion continues, it could have a major impact on both the environment and the economy, and on tourism in particular. Coastal erosion takes place over many years, so it can often be perceived as stable on a human timescale. However, how we deal with the consequences of coastal erosion will be an important consideration in taking forward the Coastal Tourism Strategy.

Climate Change

Climate change will have a range of impacts and these will affect the coast significantly. Figures from the UK Climate Impacts Programme (UKCIP) and the Met Office indicate that

- Globally temperatures could rise anywhere between 1.5 and 5.8 by 2080 – between 2 and 8 times the rise already seen since 1990. In the UK, an average rise of 2 – 3.5c is anticipated.
- Winters will become wetter (20-30% wetter by 2080) and summers may become drier (35-50% drier by 2080). Heavier rainfalls will become more frequent.
- Relative sea level will continue to rise around most of the UK.

The potential impacts of climate change are likely to be various. An example is the possible increase in extreme weather events such as storminess which may have the effect of increasing flooding in low-lying areas and increasing erosion rates. A rise in sea level would have implications for low lying lands and coastal infrastructure.

The Wales Spatial Plan has identified a number of coastal areas at high risk of flooding. TAN 15 provides technical guidance and details the need, where appropriate for Flood Consequence Assessments. Shoreline Management Plans, prepared by Coastal groups, comprising representatives of maritime local authorities, the Environment Agency, Countryside Council for Wales and other interested bodies, set out a strategy for sustainable coastal defences. Plans are in place to update the existing Shoreline Management Plans over the next few years making use of the latest evidence.

The challenge is how to manage the increased risk of flooding and coastal erosion. Where coastal protection is appropriate, we will need to consider the potential of incorporating 'tourism' considerations into coastal defence schemes. This would cover visual aspects, effects on access, the current use of the coastal area and importantly whether there can be additional 'new' benefits/uses and funding. This may require innovative approaches with regard to evaluation and cost/benefit analysis. We will also need to consider how coastal protection might be factored into new developments, so that the future protection of a new asset is considered in deciding whether, and how to build it.

Climate Change is also likely to put pressure on vulnerable landscapes and is likely to further impair their ability to accommodate visitors. Responding to this challenge will require measures that sustain the environmental capacity of these landscapes whilst developing new opportunities in less vulnerable locations.

As well as affecting the physical coastline, climate change could affect tourism patterns. However the relationship between climate change and the visitor economy is complicated. A recent study into climate change and the visitor economy in the North West of England concludes that we cannot rely on climate change alone to boost the sector. There is little evidence to suggest at the moment that we would automatically give up our holiday abroad to become domestic tourists, rather than switching to other foreign destinations.

Managing and developing the coastline

There is increasing pressure on the coastal resource, and a growing recognition that the coastline should be managed in a more strategic and co-ordinated way. The impact of visitors on sites around the coast result in additional management costs to land owners and local authorities in terms of sustaining the quality of the environment and providing facilities for visitors to enjoy a safe experience. While some revenue costs can be recovered through car parking and other charges, much of the management costs arise in respect of public goods and spaces, with the costs having to be borne by the host authority. Resources required to cover the management costs arising from visitor activity are often under pressure from other spending priorities.

Conflict between activities

The potential conflict between specific activities is another challenge facing the coastline. The beach can be used for a variety of different activities ranging from sun bathing to physically demanding sports such as parakiting. The challenge is to manage the coastal area to the maximum benefit of all potential users. Conflicts between activities exist not only on land but also at sea. Activities such as bathing, windsurfing, surfing, sailing, angling, and the use of powerboats and personal watercrafts need to be properly managed.

The pursuit of such activities will undoubtedly have an effect on the natural environment. The challenge is to instil a sense of responsibility for the coastline amongst stakeholders. All cetaceans (dolphins, porpoises and whales) basking sharks, turtles and wild birds are protected by law against intentional taking, killing or injuring. Other animals including seal and plant life also receive legal protection. For many species, reckless disturbance is also an offence.

In Wales, a number of Marine Codes of Good Practice have been developed. These need to be further developed, supported and publicised in order to ensure a high level of compliance.

Partnership and Integration

The challenge for the Welsh Coastal Tourism Strategy will be to achieve a consensus on the way forward and to foster a collaborative approach to delivering the strategy. A range of organisations and interested parties have different responsibilities for the coast. Within Local Authorities alone, coastal related responsibilities are carried out by a wide range of departments including beach cleaning, coastal defence, licensing, tourism, countryside and recreation and some local authorities are also Harbour Authorities. Initiatives such as the Green Sea Partnership involving the public, private and voluntary sectors are already achieving coordinated action to improve the quality of Welsh beaches. The Partnership is in the process of finalising a Green Sea Development Strategy to cover the period 2006 to 2015. The target is to achieve 120 blue flag/green coast award beaches and 9 blue flag marinas by 2015, the year of the introduction of the new Bathing Water Directive. This is an example of successful partnership working on the coast which has involved the pooling of resources to deliver a set of agreed outcomes.

3. Developing the Strategy

In this chapter we set out the strategic context and outline the key policy objectives that the strategy will need to address. We outline a vision for the strategy and establish the aims and key outcomes that the strategy will seek to achieve.

3.1 Strategic Context

We have reviewed in the technical report all the key documents at national, regional and local level that will affect to some degree the development, use and management of the coast of Wales. The following have been identified as being of particular relevance to the development of coastal tourism.

Achieving our Potential – mid term review

The mid term review of *Achieving our Potential*, the national tourism strategy for Wales has set five strategic challenges for developing tourism in Wales. These are:

- Distinctive branding
- Higher quality
- Easier Access
- Better skills
- Stronger Partnerships.

A series of priorities and individual actions have been identified for each of these challenges to describe what needs to happen differently to ensure that sustainable growth is achieved within the industry. While all of the five challenges outlined above are important, arguably it will be the achievement of higher quality that will be the most critical and crucial. Tourism businesses which are most likely to succeed will be those that deliver a high quality experience to visitors, understand their markets and communicate effectively with them, invest in their products and staff and attract and retain a motivational and skilled workforce.

Catching the Wave

Catching the Wave (2004) is the Welsh Assembly Government's tourism watersports activities and facility development strategy. The strategy states that few UK destinations can match the diversity and all inclusive nature of the Welsh coastal offer in the watersports market. The strategy is underpinned by a number of targets for 2010 including:

- to grow the number of UK watersports trips and nights by 20% to just over one million trips representing around 5 million bed nights
- to grow the value of UK watersports tourist spending by 40% to over £200 million
- to grow the numbers of trips taken by the higher spend overseas market by 50% and to increase overseas visitor spend by 40% to £15 million.

In seeking to implement the aims and objectives of *Catching the Wave*, a Coastal Waterways Implementation Group has been formed, led by EIN with representatives from Visit Wales, WLGA and DELLS to address the funding and sustainability of the strategy.

The Coastal Waterways Implementation Group has encouraged local authorities and other organisations to prepare local maritime studies. To date, two studies have been prepared to investigate opportunities for investment in coastal regeneration and watersports in Cardigan Bay (St David's to Trefor) and Anglesey. A similar study is currently underway in Conwy and Denbighshire. A Waterfront Masterplan has also been prepared in the Swansea Bay Spatial Plan area. The Coastal Tourism Strategy will build on this work, and will link the opportunities that have been identified for watersport development with the wider tourism product on the coastline.

Integrated Coastal Zone Management

Wales' strategy for Integrated Coastal Zone Management *Making the most of Wales' Coast* is currently being finalised by the Assembly Government following a public consultation. Integrated Coastal Zone Management (ICZM) aims to provide a management framework to facilitate integrated working on the coast by the different interests involved in managing our coastal assets. It also sets out the links that must be made between diverse national and local policies and strategies so that people involved in managing and using the coast can do so in a way that takes into account the needs of others. A key objective of the ICZM process is to help ensure that all sectors and organisations successfully integrate ICZM management principles into the development of relevant policies.

Transport Strategy

The Welsh Assembly Government has recently published a draft Wales Transport Strategy *Connecting Wales*. The Transport Strategy will have a key role in improving accessibility in Wales and in helping to achieve a more sustainable tourism industry. The tourism sector will need to work closely with the four Regional Transport Consortia to ensure that tourism related solutions and innovative ideas are properly identified and prioritised. It will be important to consider the role of public transport and non vehicle modes in reducing the reliance on the private car.

Marine Bill

The proposed Marine Bill is likely to have a major influence on coastal tourism. The aim of the Bill will be to help develop the UK Government's vision for clean, healthy, safe, productive and biologically diverse oceans and seas. Proposals include developing a more integrated management regime for the marine environment through introducing the concept of marine spatial planning. Marine Spatial Planning would develop a much wider strategic approach to considering the needs, aims and possible locations of sectoral activities for the marine area as a whole. It would also look at the potential of cumulative effects of many different activities together, and the compatibility or conflict between activities, or between activities and environmental protection. It is also likely that the proposed Bill will strengthen mechanisms for the conservation of marine ecosystems and habitats that would include imposing controls on unlicensed activities.

Health Challenge Wales

The Welsh Assembly Government's approach to improving health recognises that the way forward lies in adopting an integrated approach in which different policies and programmes add value to each other. The Health Challenge Wales programme has been developed to provide a new national focus and a way to drive forward all efforts to improve health. It means that government at all levels, organisations in all sectors and individuals can be challenged to do more to take action to improve people's health.

Better Place to Play

The Environment Agency has produced a strategy for water-related sport and recreation for England and Wales - *A Better Place to Play*. The overarching objective is to plan and promote water related sport and recreation to achieve maximum economic, social and environmental benefits. With regard to coastal areas, there are four key areas where the Environment Agency considers it can make a difference to the quality of people's lives through improving the environment, improving access for all, making recreation sustainable and promoting the outdoors. The Environment Agency Wales is preparing a strategic plan for recreational access to inland and coastal waters in Wales that will deliver the aims of the strategy. This should identify existing as well as potential new opportunities for water-based recreation in Wales and should be finalised by autumn 2007.

3.2 Policy Objectives

Taking the strategies and policies analysed in the technical report, we have identified the following key Assembly Government policy objectives which the Coastal Tourism strategy can help to deliver.

Sustainable development

Tourism is an activity that can have a truly major impact on sustainable development, due to the unique relationship that tourism, compared with other economic activity, has with the environment and society. Tourism is highly dependent on a quality environment and cultural distinctiveness - qualities which can be destroyed if badly planned or managed. However, tourism can be a driving force for the preservation and promotion of these qualities through raising awareness and income to support them, and indirectly by providing an economic justification for the provision of such support by others.

More and better quality jobs

The tourism industry needs to continuously improve and develop new products to meet the evolving tastes and needs of consumers in order to increase business profitability and earnings. Increasing earnings and hence the quality of jobs within the industry through raising the average value created by each job is a critical challenge. Initiatives that contribute to extending the tourism season will also help support more year round jobs within the industry.

Helping more people into work

The tourism industry is well-placed to provide important opportunities for entry-level jobs and offers employment opportunities for many sectors of the working population, such as older people and females, who are not well represented in other industry sectors. Jobs in tourism are suitable for economically inactive people or other returners to work, with the right support and training. Community based initiatives that support tourism can also act as an entry point for people into the paid workforce. The Assembly Government has outlined its commitment to promote and encourage social enterprises in its Social Enterprise Strategy.

Improving Health

Clear advantages can be gained from linking the tourism and recreation agendas. It is therefore highly appropriate to link planning for leisure and tourism together and to develop approaches that ensure that local people are also able to benefit from facilities which visitors come to enjoy. Tourism businesses should also adopt policies and practices that promote health and well-being amongst their own employees.

Sustaining and Regenerating Communities

Tourism has been identified as providing a catalyst for wider economic and local regeneration activity. Spending by tourists supports the provision of a greater range of services in local communities thereby enhancing quality of life and creating a greater range of opportunities for all sectors of the community. Tourism can help support local services, shops and community amenities that would not otherwise be viable.

However, the Assembly Government recognises that in-migration and the purchase of second homes has influenced community structures in some rural and coastal tourist areas of Wales. The issue of the Welsh language being lost from rural communities is also one that has taken on increasing importance owing to the increase in net in-migration and pressures that this has placed on local housing markets in Wales.

The Assembly Government is addressing the issue of affordable housing through a range of measures outlined in its Housing Strategy and Planning Policy Framework. However, we should be mindful of the potential impact that tourism development can have on local housing supply. It will be important to engage local communities in the tourism planning process in order to identify local concerns and priorities. The impact of tourism on local communities also needs to be measured and addressed.

Equality

The Assembly Government has a statutory duty to promote equality and is committed to promoting gender equality, good race relations and tackling discrimination on the grounds of age and disability. Tourism is a major employer of women in Wales – with women representing nearly 60% of the workforce within the tourism, hospitality and leisure sector. This raises specific issues in relation to providing suitable training and working arrangements for women working in the industry. In addition women and men will do different activities on holiday and catering for women, men and families will be increasingly important for tourism providers. It is also essential that the tourism industry in Wales meets the needs of disabled visitors and other disadvantaged groups in society.

3.3 Vision, Aims and Outcomes

'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'.

The Wales Coastal Tourism Strategy needs to consider the vision above and clearly identify a way forward which realises and builds on the economic potential of the coastline of Wales while respecting its environmental quality and the importance of achieving local community benefits.

In order to prepare an Action Plan that will address the challenges facing coastal tourism and to move towards the vision presented above, the following strategic aims and outcomes have been identified:

Aim: To encourage economic, social and environmental benefits for coastal communities

Key outcomes

- **Tourism is making an increasing contribution to the economy of coastal communities**
- **Welsh coastal waters have the highest standards of water quality in the UK**
- **The quality of Welsh beaches is recognised by the high number of Blue Flag and Green Coast Awards**

Aim: To improve the quality of the visitor experience

Key outcomes

- **Visitors to the coast express high levels of satisfaction.**
- **The Welsh coastal tourism offer appeals increasingly to the under 25 age group and AB socio economic groups**
- **Wales is the leading UK watersports destination for the family and multi activity holiday maker.**
- **More visitors are coming to the coast to enjoy its biodiversity, heritage and culture.**
- **The coast offers a more diverse tourism accommodation base that is meeting visitor needs .**
- **Provision of marina berths is adequate to meet market demands without detrimental environmental or community impacts.**

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

Key outcomes

- **Local communities are actively involved in the management of the rural coast.**
- **Coastal resorts are managed and developed with the needs of visitors in mind.**
- **Local communities are involved in developing tourism in their area.**
- **Increasing numbers of visitors travel to and along the Welsh coast by sustainable means.**
- **There is a balance on the coast between tranquil areas and areas supporting a large number of people and a range of activity .**

Aim: Coastal Tourism is a year round industry

Key outcomes

- **There is a significant increase in the percentage spent by visitors staying at seaside locations outside the main season.**
- **Tourism supports more full time jobs on the coast.**

4. The Strategy

The following strategy has been developed to meet the vision, strategic aims, policy objectives and challenges identified in previous chapters.

It has been presented under five themes. The final theme, Coastal Management, covers areas relating to the whole coastline while the other themes concentrate on particular locations or activities. Inevitably, there is some overlap between the themes, which reflects the integrated nature of activities and responsibilities along the coast.

The themes covered are:

- Coastal Towns and Resorts
- The Rural Coast
- Coastal Activities
- Coastal Culture
- Coastal Management

4.1 Coastal Towns and Resorts

Towns and cities around the coast of Wales vary greatly in size and character from the capital city to small resorts and fishing ports. Tourism's contribution to local economies will vary with seaside resorts being particularly dependent on visitor spending.

4.1.1 Cities and Towns on the Coast

Larger cities and towns on the coast such as Cardiff, Swansea and Newport have a tourist offer that embraces a wide range of shopping, eating out, cultural, recreational and leisure attractions, as well as specific opportunities related to the coast for water and land based informal recreation. They also have a range of serviced accommodation to support business tourism and the short break leisure market.

Smaller towns such as Aberystwyth and Bangor also benefit from local economies which include a university sector as well as other services. The wider local economy provides a stronger base to support shopping and catering activity than those towns dependent primarily on tourism. As a result, they provide a focus for day visitor activity from home and holiday accommodation in the surrounding areas.

In addition, Aberystwyth, due to its location between North and South Wales, its increasing importance as a regional centre and the new location of the Welsh Assembly Government regional office, has the potential to strengthen its accommodation base. Initiatives to regenerate the town and to develop its tourism role are emerging from the masterplanning work that

is currently being undertaken which will enhance Aberystwyth's role as a coastal tourism town.

There are other coastal towns which have a distinctive appeal relating to their history, townscape and setting, such as Caernarfon and Conwy. Some other coastal towns such as Llanelli and Burry Port have not traditionally attracted much tourism activity, but the development of their coastal resources such as the Burry Port Harbour Development, Pembrey and the Millennium Coastal Parks provide opportunities for attracting a wider day visitor market as well as staying tourists.

Holyhead, Swansea, Pembroke and Fishguard provide points of entry for visitors using the ferry services from Ireland, as well as catering for UK visitors to Ireland. Apart from regular ferry services, there is potential to develop cruise ship facilities particularly at Holyhead and Swansea to meet the growing market for this form of tourism. Milford Haven also has potential in relation to the cruise market.

4.1.2 Coastal Resorts

Coastal resorts are those towns on the coast where the local economy is dominated by tourism. They include Prestatyn, Rhyl, Llandudno, Beaumaris, Pwllheli, Porthmadog, Barmouth, Tenby, Saundersfoot and Porthcawl. They vary greatly in terms of their size, character and accommodation base. Apart from staying tourists, many of the resorts attract substantial numbers of day visitors from home, particularly those located on the South East and North East parts of the Welsh coast. While coastal towns such as Colwyn Bay, Aberavon and Barry may have a wider economic base, tourism is still important.

Resorts will continue to be a major focus for visitor activity at the seaside. However, there will continue to be competition, not only from other seaside destinations at home and abroad, but also from city and countryside destinations in Wales and elsewhere. Moreover, many resorts have been adversely affected by changes in tourism activity, remaining over dependent on long family holidays and having limited appeal to the younger generation and overseas markets.

As a result, the tourism season in most resorts is short, with a high proportion of employment being seasonal and often poorly paid. Coupled with other economic difficulties, this has led to some of the most deprived economic and social wards in Wales being found in coastal resorts. The wards of Barmouth, Pwllheli South, Rhyl South and Rhyl West are amongst the 100 most deprived wards in Wales and are included in the Assembly Government's Communities First programme.

While leading resorts such as Llandudno and Tenby provide an attractive living environment for residents and visitors, others suffer from a poor or run down appearance reflecting low levels of investment and confidence by the private sector. The domination of static caravan sites in some resorts, while helping to retain a loyal market, has inhibited the development of other markets which primarily use serviced accommodation and the

development of a wider range of shopping and catering opportunities within the resort.

The future prosperity of resort communities will depend not only on tourism activity but also on strengthening the local economy to provide additional employment and income opportunities for residents. This will best be achieved by diversifying the local economy to provide a greater choice and range of employment opportunities, and by adding value from tourism activity. Successful regeneration schemes will depend on the public, private and voluntary sectors delivering a concerted package of projects tailored to meeting the needs and opportunities of individual resorts. They will need to build on the Assembly Government's approach to regenerating disadvantaged communities which focuses on building capacity within communities and engaging with all groups of residents to help understand the root causes of the problems that face individuals and households within the community. This process will help ensure that communities within resorts are empowered to take up the economic and social opportunities that are created. Some resorts have already benefited from regeneration programmes, which can provide lessons for future initiatives.

In supporting resort regeneration initiatives, priority at national level should be given to those resorts where:

- the local economy is particularly dependent on tourism activity.
- existing tourism infrastructure is not well adapted to changing market needs.
- there are opportunities for new development to meet emerging market demand.
- the community shows evidence of social and economic deprivation.

Bournemouth – a resort with a diversified economy

Amongst UK seaside resorts, Bournemouth has benefited by a diversification of its local economy over recent decades. In particular, the growth of the financial services sector and of Bournemouth University have widened the employment opportunities and generated additional income and spending in the town. This has resulted in the development of improved shopping, catering and leisure provision in the town, ensuring that the resort remains attractive to core markets while catering for the growth in short break tourism.

4.1.3 Providing an attractive Environment

A crucial objective for resorts will be to improve and maintain the public environment to ensure that they are attractive to residents, investors and visitors. The appearance of the approaches to the resort, the sea front and the town centre are crucial in forming the visitor's initial impressions of the

resort. An environment which is shabby, ill kept with ugly and poorly sited street furniture will detract from the visitor's enjoyment of the resort.

Resorts therefore need to ensure that they set high standards of design and landscaping for their public areas, including the provision of street furniture on the beach and adjoining areas. High standards of design, including innovatory architectural approaches should be encouraged for new development and redevelopment schemes while conserving the best of the resort's heritage, which contributes to the unique character of the place.

The private sector can also play an active part in maintaining public frontages in good order, and contributing towards the costs of landscaping and planting in the town centres and promenades. The existing public and partnership initiatives already being undertaken to improve the urban seaside environment need to be strengthened and expanded. The objective is to provide an attractive urban and seaside environment for the enjoyment of residents and visitors alike, which contributes to the unique character of each resort

4.1 4 Beaches and seaside

The beach and adjoining sea areas provide the unique attraction of seaside resorts. The Blue Flag and Resort Seaside Award schemes set standards for beaches used by the public including criteria relating to water quality, management of land and water recreation to avoid conflict between incompatible activities, safety and first aid provision, toilets, fresh water, litter and refuse disposal and environmental and safety information. A high proportion of resort beaches have attained the awards as referred to in [Section 4.1.2](#).

The beach and sea provide opportunities for a wide range of informal and active pastimes including swimming and sun bathing, sailing and beach games and more adventurous water based activities such as personal water craft and water skiing. The enjoyment of the beach experience can be enhanced by good management and provision of facilities such as launch points, fresh water showers and organised children's play provision during the peak periods for family holidays. Good design and landscaping of beach facilities, promenades and street furniture can also add to the experience.

The management of intensively used resort beaches is a complex task involving health, safety and environment issues, conflict resolution between different beach and water users, and co-ordination and liaison with private operators on an adjoining the beach.

The use of innovative management approaches could assist in enhancing the beach and seafront as a primary focus of visitor enjoyment. City and Town centre managers provide a possible exemplar. Beach masters or resort managers could be appointed with similar responsibilities and powers to manage and enhance the visitor enjoyment of the beach and immediate onshore and offshore areas, whilst involving the private, public

and voluntary sector stakeholders in a co-ordinated approach to facility provision and maintenance.

4.1.5 Accommodation

The quality, scale and type of tourist accommodation varies greatly from resort to resort. Many establishments were first developed over 50 years ago and struggle to match customer expectations and aspirations in the 21st Century. If resorts are to continue to attract staying tourists in competition with other destinations, then it is essential that the accommodation provided meets or surpasses their expectations.

While the total number of bed spaces around the coast of Wales may seem to be at an appropriate level – there are concentrations that mask the real picture. For example, Llandudno has a substantial stock of serviced accommodation whereas the lack of similar facilities on the Llŷn Peninsula can cause problems when the area is hosting national and international events. Similarly, there are a number of high density caravan/camping sites along the North Wales coast, but a lack of quality camping on certain stretches of Cardigan Bay.

In order to adapt provision to the changing needs, a multi-pronged approach will be needed including:

- investing in existing establishments to improve premises to attain high quality standards appropriate to their category and type, including serviced accommodation, caravan and camping sites and hostels
- the redevelopment or conversion of existing establishments which are not physically capable of being improved to appropriate standards to more viable uses
- the development of new establishments particularly where new opportunities and activities generate additional demand

Resorts should also encourage active networking between accommodation establishments to provide exchange of experience, mentoring, general business support and referrals.

Only accommodation meeting nationally recognised quality standards should be promoted to reinforce customer confidence.

4.1.6 Visitor attractions

In addition to the beach, resorts need to provide a wide range of activities and attractions for the visitor if they are to continue to attract and increase the volume of staying and day visitors. The coast already has a range of visitor attractions including the world heritage listed Edwardian castles in North Wales, the National Waterfront Museum in Swansea, steam railways, local museums and other sites.

However, resorts offer opportunities for developing additional activities and specialist attractions drawing on the concentration of visitors to resorts

without displacing visitors from existing attractions. In particular, there should be opportunities to:

- increase the number of opportunities for visitors to try new water and land based activities ranging from boat trips for wildlife watching to sports such as water skiing, dinghy sailing, paragliding and other activities.
- provide additional wet weather facilities such as indoor play areas, climbing walls, bowling greens and alleys and other recreational and leisure facilities.

There may also be opportunities to develop new attractions related to the heritage, culture or physical characteristics of the coast. However such developments will need a robust business plan including a consideration of the impact on existing attractions.

4.1.7 Retail and catering

Two thirds of visitors enjoy shopping, and even more enjoy eating out while at the seaside but the retail and catering offer in many seaside resorts is limited, reducing the potential level of expenditure by visitors. The development of a wider range of specialist shops offering local arts and craft products together with high quality local produce could widen the retail offer and attract greater visitor spending.

While there are individual restaurants which offer high quality cuisine in some resorts, there are no comparable concentrations of eating out opportunities in any of the Welsh resorts. There are opportunities to raise the quality and choice of all types of catering establishments, using local Welsh produce particularly fish and shellfish and traditional Welsh recipes.

Resorts should make special efforts to encourage a wider range of shops, particularly specialist shops selling local arts and crafts. Examples of resorts that have made such an effort include St. Ives and Padstow.

St Ives and Padstow

St Ives has built up a reputation as an arts and crafts centre in Cornwall. The flagship attractions are the Tate St Ives and the Barbara Hepworth Garden, but more than 40 other galleries, studios and workshops have been established in the town. A number of the establishments also provide opportunities for tourists to take short courses in the arts.

Padstow has similarly developed a reputation for its restaurants. The original Seafood Restaurant opened by Rick Stein has now been joined by four other eateries under the same banner together with a cookery school, while additional good food guide and Michelin starred restaurants have also opened in and around the resort.

4.1.8 Visitor access

Most visitors to resorts come by car. While staying visitors can be accommodated within the resorts, day visitors from holiday accommodation outside the resort or from home can cause congestion and pressure on parking facilities within the resort, particularly during the peak holiday season. Pressure within the resorts can be eased by promoting alternative methods of travel such as cycle routes and public transport, or by establishing seasonal park and ride systems. The provision of dedicated land trains or bus services connecting car parks and the main attractions within the resort can also assist in reducing car movements while helping to distribute visitors to the range of destinations.

Traffic management schemes can help to reduce congestion particularly at 'hot spots'. Advanced variable electronics signing on key approach routes can assist in directing traffic, as well as 'in car' traffic information or information from the Traffic Wales web site. Development in real time traffic information will be particularly relevant in dealing with peak seasonal traffic demands. Similarly public transport users (rail/bus/sea) require an integrated timetable and customer information system to provide them with 'real' information. There is a need to extend interactive tourism information points to include public transport hub and tourist locations remote from TIC's.

Proposed Recommendations

- **That towns and resorts should seek to strengthen their attractiveness for tourism by developing appropriate opportunities to provide land and water based recreation facilities which meet changing market demands.**
- **That resort regeneration programmes be 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.**
- **That local communities are involved in identifying local needs and solutions for regenerating of coastal resorts**
- **That resorts should be encouraged to prepare and undertake environmental improvement schemes for key areas to increase their attractiveness for visitors and residents.**
- **That the management of resort beaches, adjoining land and water areas should be encouraged to ensure that all beaches achieve or surpass existing and future blue flag requirements.**
- **That consideration is given to the introduction of resort managers or beach masters to coordinate management, activities and promotion.**
- **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.

- **That innovative local transport schemes should be identified to reduce seasonal congestion and the use of the car within resorts and other coastal towns.**

4.2 The Rural Coast

The rural coast of Wales is a magnificent resource for residents and visitors to enjoy, offering spectacular coastal scenery, attractive small towns and villages, opportunities for informal land and water based recreation and a wildlife environment of exceptional diversity and interest. The coast is also valued for its unspoilt scenery, peace and quiet. A balance needs to be struck on the coast between tranquil areas and areas supporting a large number of people and a range of activity.

4.2.1 Coastal settlements

Coastal towns and villages were often established as fishing ports or commercial harbours. Inshore fisheries remain an important function in some settlements and can add interest for the holiday visitor. While the commercial use of many harbours has declined, they often offer potential as safe havens for visiting boats, as well as bases for leisure activities such as sea angling, diving and leisure boat trips to watch wildlife as at Aberdovey, Aberaeron and New Quay. Other small coastal resorts include Tywyn and Borth.

Tourism is an important contributor to the local economy, with villages attracting both staying and day visitors, as well as acting as service points for the surrounding rural areas. Most have an attractive environment and ambience for the visitor as well as specific heritage attractions, cultural or historic associations such as Conwy, Caernarfon, Beaumaris, Criccieth, Harlech, St Davids, Pembroke, Laugharne and Llansteffan.

The establishment of the Wales Coastal Path, as well as rural cycle and riding routes, should help to underpin and develop existing tourism activity, while the combination of coast and countryside coupled with specific leisure or cultural activities should provide opportunities to attract niche and short break tourism markets.

4.2.3 Rural accommodation

There is already a substantial amount of holiday accommodation along the rural coast. Much of the rural accommodation is in self catering cottages and static caravan sites, together with individual owned and managed hotel and guesthouse accommodation.

The development of the Wales Coastal Path, as well as water and land based activities along the coast will provide opportunities to expand the accommodation base to cater for the changes in demand. In particular,

there should be potential for camping sites, bed and breakfast and hostel accommodation serving younger and more active visitors.

4.2.4 Rural beaches and the rural environment

The Welsh Coast is blessed with many attractive coves and beaches outside the main resort areas including: Red Wharf Bay, Newborough, Black Rock, Morfa Harlech, Morfa Dyffryn, Aberdovey, Newgate, Broad Haven, Barafundle, Freshwater East, Rhossilli, Oxwich, Pendine, Pembrey. Many of these sites attract substantial informal use for both passive and active recreation and leisure uses, but their management poses problems and costs for local authorities, the National Trust and local communities. Charging for car parking, voluntary donation schemes and other initiatives can help to offset such costs.

The high quality of the coastal environment is recognised by the large number of environmental designations covering the bulk of the coastline. The quality is a major attraction for visitors to the coast, and it is vital therefore that development and visitor pressures are controlled to ensure that the resource is not inadvertently damaged or degraded. Where damage is occurring as a result of overuse, then positive management measures should be taken to match the capacity of the site to the user pressure, and restoration measures taken to make good damaged areas.

Because of their rural character, the criteria for Blue Flag designation are not always appropriate for rural beaches. In order to provide a quality standard for such beaches, the Green Coast Award has been developed by the Keep Wales Tidy Group setting out a set of criteria designed to sustain the conservation value as well as visitor enjoyment of these areas. Wales is unique in developing the Green Coast award, thereby reinforcing the strong image of an unspoilt coastline for visitors to enjoy.

In addition to meeting the provisions set out in the criteria with regard to management, safety, information and conservation measures, local communities are also encouraged to set up local support groups to monitor and assist in the management of the beaches. The principle of involving the local community in the management and conservation of the local coastal environment should be encouraged through support for a range of possible organisations from voluntary associations to local trusts and companies. The Keep Wales Tidy Clean Coasts initiative encourages community participation through the establishment and operational management of voluntary Coastcare Groups. There are currently 66 active Coastcare groups and 4 project officers have been employed with funding from European Structural funds. Keep Wales Tidy has secured project funding from INTERREG IIIA until 2008. Tourism businesses can also play their part, through encouraging their employees to participate in volunteering schemes on the coast.

Such organisations working with local stakeholders could make a significant impact in helping to sustain and preserve the quality of the local environment.

4.2.5 Management of visitor pressures

Much of the natural coast already benefits from positive countryside management through the efforts of the National Park Authorities and the Areas of Outstanding Natural Beauty organisations. Many other sites benefit from ownership and management by the Countryside Council for Wales, local authorities, and voluntary organisations such as the National Trust, the Wildlife Trusts and the RSPB. While some organisations such as the National Parks and AONBs receive support from the Welsh Assembly Government, resources for visitor management in other cases have to compete with other revenue expenditure priorities. While it is possible to generate some revenue from car parking and catering concessions at some sites, the income rarely covers management costs and at open sites such opportunities are often limited. There are also issues in terms of linking site income to site expenditure within local authority funding mechanisms/regulations.

At some sites, there may be conflict between a group of activity users and wildlife interests in particular areas or at particular times, for instance, climbing on the sea cliffs at Holyhead during the breeding season, or the harassment of dolphins and seals by overenthusiastic pursuit by visitor boats. Voluntary agreements between the main user groups and/or operators to limit any environmental disturbance have been put in place in some instances and there is scope to seek to agree other similar arrangements at other sites with existing or potential conflict.

Where voluntary agreements are not viable, then it may be necessary to use physical or legal constraints. However, the latter are only effective where it is possible to provide the resources to enforce them. Physical measures could include restrictions on the number of car parking spaces, but could also include providing positive guidance to visitors. Thus the provision of boat trailer parking as well as car spaces can influence launching sites used by casual sailing or scuba diving activists. The provision of artificial reefs can provide new opportunities for sea fishing, scuba diving and/or surfing depending on its location and character.

4.2.6 Access

While access to the rural coast in many parts of North and South Wales is afforded by the M4 and A55 as well as the main rail routes, local access to individual rural sites is often reliant on narrow lanes and minor roads. As a result, congestion often occurs on routes providing access to popular sites during peak visitor periods. The heavy use of cars to reach those sites adds to pollution levels, as well as detracting from the visitor's experience of the visit.

There are a number of innovative public transport initiatives around the coast which provide visitors with alternative ways to enjoy the coastal experience. These include dedicated coastal bus services linking sites along the coast, and boat excursions along the coast and to islands off the coast. Such alternatives can help to reduce traffic pressures as well as adding interest and opportunities for the visitor.

The proposed development of the Wales Coastal Path will provide enhanced opportunities for walking along the coast, while the extension of existing cycle and riding trails, including the National Cycle Trail will also provide additional facilities to enjoy the coast in an environmentally friendly way as well as providing opportunities for tourism accommodation and carrying services. Such a transport initiative has been established in Pembrokeshire.

Pembrokeshire Coastal Bus Services

Pembrokeshire County Council provide Coastal Bus services with contributions from the Pembrokeshire Coast National Park Authority as part of the Pembrokeshire Greenways Project. The buses travel along the coast 7 days a week during the summer months. They are designed so that visitors and locals can access the coastline from any point with facilities for bicycles and surfboards. They also offer a 'hail and ride' service. Bus routes include the 'Puffin' and 'Strumble' Shuttles and the Celtic Coaster.

Proposed Recommendations

- **That community involvement through Coastcare groups, voluntary groups, trusts or other appropriate mechanisms be encouraged in the monitoring and management of their rural coast.**
- **That a higher profile be given to Marine Codes of Good Practice and Coastal Agreements on Uses.**
- **That visitor pressure should be managed in line with the capacity of the site/area.**
- **That innovative public transport initiatives should be promoted and developed to provide opportunities for visitors to visit the coast without using their cars.**
- **That the development of new and appropriate tourism accommodation should be encouraged, in support of the proposals for a Wales Coastal Path and the extension of existing cycle and riding facilities around the coast.**

4.3 Coastal Activities

There is considerable variation in volumes of participation, demand trends and spending for activities around the coast of Wales. By far the largest demand is for walking, (74% participating whilst on holiday) followed by visiting heritage sites (34%) and field study trips (22%). Cycling (11%) and boating (10%) have 'medium' levels of participation. Other activities include petrocentric sports (6%), golf (5%), water skiing (2%) and diving (1%).

The spatial distribution of activities along the Welsh coast is a function of the physical geography, the distribution of suitable terrain and attractive landscapes, and the location of infrastructure, transport networks, accommodation and other facilities.

It will be important to consider the needs and requirements of disabled people when developing and promoting coastal activities. Wales is establishing a good track record in encouraging equal opportunities for all participants. Where such facilities are provided they need to be adequately publicised via for example the Disability Wales or the Visit Wales website. Whilst information on the types of activities undertaken by men and women on holiday is currently unavailable, it will be important for the strategy to strike a balance between developing activities that appeal primarily to men such as golf or fishing and activities that have more appeal to women.

4.3.1 All Wales Coastal Footpath

Of all the activities undertaken at the coast, walking is by far the most popular. There are already a number of coastal paths, including the Isle of Anglesey Coastal Path, the North Wales Path, the Llŷn Coastal Path and the Edge of Wales Walk, Ceredigion Coastal Path, Carmarthen Bay Coastal and Estuaries Way, Glamorgan Heritage Coast Path, as well as the Pembrokeshire Coast Path, providing around 1000kms of footpath around the coast. Sixty one per cent of the coast currently has public access with a further 11% having either permissive access or access from the shore only. Five per cent of the coast is inaccessible (river, dock area, rail lines) and 23% of the coast has no public access.

The Welsh Assembly Government has announced a new coastal access programme to increase public access to Wales' superb coast. A key aim of the programme will be to eventually link all existing coastal paths to form an All Wales Coastal Path. As part of the programme, there will be opportunities to provide links and loops from the spine path and to improve access to cyclists and horse riders. The creation of circular routes from the spine route will enable local attractions and local communities near the coast to benefit from the Coastal Path, maximising the economic benefits from the investment.

It is envisaged that the coastal access improvement programme will last four to five years. The programme will aim to deliver enhanced public access by maximising existing path infrastructure. A number of key interests will be involved including the coastal local authorities, the National Trust, Countryside Council for Wales, Farming Unions, RSPB and the Ramblers Association.

It will be important to develop appropriate accommodation linked to the walking and cycling opportunities, including quality accommodation across all types from bunkhouses and Bed and Breakfasts to three and four star serviced accommodation. The Visit Wales Walkers and Cyclist Welcome scheme provides guidance and accreditation to accommodation providers that specifically cater for walkers and cyclists and provides information on

the additional facilities that are required, including drying areas and secure cycle storage.

By encouraging and enabling more people to enjoy physical recreation at the coast, the All Wales Coastal Footpath will bring significant economic benefits to local communities. It will enable more people to enjoy physical recreation at the coast, assisting the efforts to make Wales a fitter and healthier nation.

Best Practise Example: Hadrian's Wall Trail and Cycleway

With important wildlife resources, superb landscape and its World Heritage Site designation, Hadrian's Wall has great potential as a tourist destination. The Hadrian's Wall Trail, launched in May 2003, and the Hadrian's Wall Cycle Way opened in 2005, raised the profile of the area. However, because of its remote location, the mostly small-scale tourism businesses and the numerous local, regional and national institutions operating there, a new initiative was needed to realise the potential: a partnership which could use Hadrian's Wall as a strong brand for the wider area, not just a physical link between diverse settlements and regions. The Hadrian's Wall Tourism Partnership proved vital to the effective promotion of sustainable tourism on the Hadrian's Wall Trail.

4.3.2 Nature-Related Tourism

The coast of Wales has some of Europe's best landscapes and an abundance of maritime habitats, making it an attractive destination for visitors wanting to explore the natural environment and its human imprint. The dramatic cliffscapes and stacks of Holy Island and Pembrokeshire are prime bird nesting areas, the mudflats of the Dee and the Severn hold massive invertebrate populations; the estuaries of the Conwy, Mawddach, Dyfi and Tywi harbour a variety of saltmarsh dwellers, while the unique unglaciated landscape of Milford Haven offers further marine and freshwater sanctuary.

All the above invite wildlife and coastline exploration, and while it is difficult to assess the potential scale of the market, the Scottish Executive in 2002 estimated that the wildlife tourism market in Scotland was worth £57m and employed some 2000 people. The number of wildlife tourism operators in Scotland grew by 37% between 1997 and 2002. It is also estimated that wildlife watching is growing by some 10% a year across the world.

Wales' coastline also bears the impact of human activity. Ships have been built, harbours and seawalls constructed, bridges span treacherous waters, communities cling to sheltered inlets. Castles, lighthouses, pilots' cottages have all offered defiance and protection over time. The coastal heritage is abundant.

We therefore believe that **nature tourism** provides excellent opportunities for further development given its:

- close fit with the rich natural coastal and marine environment of Wales.
- growth potential as an all-season niche activity.
- the many and varied employment opportunities it can offer both directly and indirectly to the tourism industry.
- high potential for interpretation, information and environmental awareness raising.
- complementarily and overlap with coastal and marine heritage related tourism.

It will be important to develop a coastal recreation or green tourism activities programme which could include:

- wildlife and birdwatching events with wildlife organisations such as CCW, RSPB and the Wildlife Trusts in Wales.
- seawatching from the shore and from a series of specially designed and constructed coastal hides and viewpoints, with information on different species.
- a programme of coastal boat trips – seal and dolphin watching (although it will be important to observe Codes of Conduct)
- island explorations – e.g. Anglesey, Bardsey, Skomer and Skokholm, subject to environmental carrying capacity of the Islands.
- a series of seashore safaris – exploratory events for children, using interpretation techniques developed at Ynyslas and Oxwich NNRs.
- geology related activities – support Anglesey’s bid to become a UNESCO Geopark; work with bodies such as the British Geological Survey to promote petrocentric activities.
- maritime history – shipbuilding, trade, migration, wrecks and coastal structures (old and new).

Visitor management, particularly at the more sensitive locations, will be an important consideration in the development of nature tourism.

4.3.3 Other Coastal Land Activities

In addition to the walking and cycling activities mentioned, some parts of the coast are particularly renowned for certain land-based activities, namely golf, climbing and kite sports. Participation in climbing is growing steadily whilst participation in kite sports is growing rapidly from a small base. There would appear to be limited opportunity to further promote climbing or to provide additional facilities. It is already promoted as part of Visit Wales’ adventure tourism campaign. Kite sports on the other hand are an opportunity to attract a new, younger market to traditional resorts, though management will be needed to avoid conflicts with other beach users. Golf

is already being promoted by Visit Wales as a niche activity. However to take full advantage of the interest in golf which will be generated by the Ryder Cup in 2010, there is a need to increase the amount of high grade accommodation located close to premier golf courses and to consider the case for additional golf course provision.

4.3.4 Coastal Activities - Water

Levels of participation in water – based activities are relatively low in comparison to all tourism and in comparison to land-based activities such as walking and nature study. However, water-based activities have significant localised economic impacts where there are harbours or marinas or natural conditions suitable for specific activities such as surf beaches, dive sites or angling locations.

Angling in particular is an important contributor to a number of local coastal economies. Fishing Wales has demonstrated the high value of recreational fishing to the Welsh economy. The 2004/05 marketing campaign generated an additional £27m into the economy, contributing to the estimated £100m+ of angling tourism revenue. Coastal fishing pays an important element with 48% of angling visits being to the coast. Of these 69% are shore based anglers and 31% boat anglers. There are some 70 charter boat skippers operating from Welsh ports.

Boating and sailing generates significant economic impacts and helps to create a distinctive atmosphere. The economic impacts of boating tourism can be increased by building new marinas or improving the facilities at existing harbours and marinas to meet the growing demand for berths.

In other locations, new slipways or all-state-of-the tide landing stages could facilitate access to the water for sport use, nature cruises, coastal kayaking and angling boats. Other relatively minor improvements such as the provision of trailer parking and showers would bring additional use and the potential for local economic benefits. It should be borne in mind that facilities require maintenance and use can be very seasonal. It is, however, feasible to provide some facilities from May to September (temporary pontoons) and remove them for the winter. While there are locations where new slipways or pontoons are required, there is also a need to improve and increase the use of existing slipways. There is a need to review the capacity, condition and current management of the entire coastal network of launching and landing facilities to identify whether investment is warranted. Much work has already been done in some areas with the preparation of coastal recreation audits.

There are water activities that are particular to parts of the Welsh coast. Not only does this generate significant economic impact, sports such as surfing and wake-boarding provide a distinctive atmosphere. It is important to safeguard those markets by providing good quality facilities at key locations and increase numbers and spending where there is the opportunity to do so. There is also potential to initiate 'try it' opportunities to develop an interest, in particular, in watersports.

Various visitor surveys conducted around the coast have all highlighted that one of the main attractions of the Welsh coastline is its unspoilt scenery, peace and quiet. While boating and watersports are also important there should be a focus on activities that are less intrusive. Most complaints arise from the use of personal watercraft (PWC's) – noise and safety concerns. However, the use of PWC's is a legitimate leisure activity and is increasing. There is a need to explore whether a regional zoning and management system for the use of PWC's could be introduced which could cover registration, insurance cover and appropriate training/certification. Gwynedd Council has already instigated a registration scheme that has a significant number of PWC's registered.

With regard to developing watersports the following have been identified as opportunities:

- Provide access to water-based activities for new participants within harbours.
- Safeguard the markets in specific water activities and in the following activities increase numbers and spending:
 - Diving – Anglesey, Llŷn and West Pembrokeshire (improve slipway access and management) and develop the potential for Gelliswick as a Dive Centre
 - Surfing – Llŷn, Pembrokeshire, Porthcawl (provide better beach facilities, including showers and changing)
 - Climbing – Holyhead, South Pembrokeshire (continue to manage no-climbing agreements to ensure continued participation at important nature conservation sites)
 - Kite sports – Anglesey, Llŷn
 - Sea angling
 - Leisure boat trips for nature watching (dolphins, seals, sea birds) and other attractions (wind farms, island communities such as Caldey)

There may also be additional longer-term opportunities to develop or increase existing activities by the provision of artificial reefs to improve surfing, diving or sea angling activity. An example of such an initiative is HMS Scylla in Plymouth.

HMS Scylla

The National Maritime Aquarium at Plymouth with the financial support of the South West Regional Development Agency acquired and prepared HMS Scylla, a redundant navy frigate, before sinking it in Whitsand Bay off the Cornish coast close to an existing diving site at a total cost of £1.25 million. In the first full year after the sinking, the area attracted an increase of 20% in dive boat activity and a 30% increase in diver days, two-thirds of which were attracted from outside the South West region. It was calculated

that additional capital spending of £152,000 arose in the first year on boats and equipment, while additional revenue spending in local tourism and related businesses amounted to £1million.

4.3.5 Marinas and Harbours

Catching the Wave (August 2004) identified eleven marinas around the coast of Wales and some twenty three harbours (plus six commercial harbours and fifteen yacht stations). In addition to the above, the Swansea SA1 marina is now a commitment. An audit undertaken in 2003/4 by the British Marina Federation identified over 7500 moorings along the Welsh coastline with active proposals at different stages of development for a further 3500 permanent new berths. The technical report has identified some 16 schemes relating to potential marina/harbour developments which are at various of stages of consideration, including new marina developments and improvements to existing marinas. A key objective within *Catching the Wave* is to increase the supply of long stay and visitor berths and moorings. The need for this is strongly supported by waiting lists for berths at a number of locations. For example, Pwllheli has a waiting list of some 450 names.

In the past, in the UK and other European countries, most notably Spain and Portugal, marina developments have been supported by residential development in order to fund the cost of the infrastructure eg. seawalls, pontoons and on-shore facilities. Without such provisions, marina development is rarely financially viable without public sector support.

In many of the potential marina locations in Wales, significant marina related housing would not be appropriate and therefore public sector support towards the capital costs could be required. The scale and type of marinas most appropriate to the majority of the Welsh Coast is more on the lines of the Brittany experience in France ie marinas of a scale that do not require major residential development, but development that is restricted to marine related commercial development, some commercial leisure and limited ancillary housing. The size of the marinas will need to be sufficiently large to be able to generate sufficient income from mooring and related fees to cover the ongoing revenue costs arising from the management of the marina. This is thought to be in the order of 350-400 berths.

Various fact finding missions to Brittany have been undertaken where the following main lessons learnt have been:

- that any marina strategy is a long term strategy.
- that marinas and other watersports can be developed in tandem.
- that there are definite benefits to rural hinterlands from marina developments.
- marina and watersports should be linked to other tourism opportunities – such as heritage and golf
- there needs to be local support from the outset.

- the incorporation of visiting berths are important eg.Kernalva marina at Lorient has 680 berths with 100 reserved for visitors and generated 12000 yacht night visitors per year
- events play an important part of establishing profile and reputation.
- getting children onto water for fun and experience as early as possible is important. 9000 Breton children per year receive boat lessons through schools.
- innovative building methods and materials used in marina construction.
- facilities for boat waste disposal and drainage systems are important as are proper shower and toilets. EU regulations are increasingly setting higher standards.
- dual use of space – winter storage areas used as food markets in the summer.

Experience has shown that marinas and ancillary facilities can provide significant local economic benefits both in terms of jobs and spend. A recent study (May 2005) by the University of Glamorgan on the economic impact of Pwllheli Marina indicated that the direct income generated by the development in 2005 was £19m with a further £8.9m spent by berth owners outside the immediate area. With regard to jobs the study estimated some 260 direct and indirect jobs were supported by the income generated.

While the demand for berths currently exceeds supply, it would not be practical or desirable to build or improve all the marina opportunities that have been identified (see technical report) especially as many would require sizeable public funding. Therefore, it is necessary to evaluate schemes in order to determine best value for money, local benefits and fit with the wider environmental, economic and social policies of the Welsh Assembly Government and other national organisations.

It is recommended that possible new marinas and existing marinas and harbours that would benefit from improvement works are assessed by the Area Spatial Plan Groups to determine the most appropriate location for investment within their region.

Assessment Criteria

The assessment should consider the following:

- **Policy and Strategic**
 - Compatibility with the Wales Spatial Plan and other national environment and economic strategies
 - Compatibility with regional and local planning policies
 - Demonstrate strategic approach in relation to other coastal initiatives (including other marinas)
- **Environmental**

- Consideration of impact and relationship to environmental designated areas
- Compatibility with the environmental policies of national organisations (CCW, EA etc)
- Subject to satisfactory geophysical, sediment movement, wave/wind analysis and coastal/estuarial survey and modelling
- Subject to a comprehensive Environmental Impact Assessment
- **Physical**
 - That sufficient land is available for initial operation and potential future development (including winter boat and trailer storage)
 - Consideration with regard to access – both in terms of vehicle and pedestrian access and navigable boat access during much of the tidal period
 - Safety of operation
 - Where appropriate, should compliment existing harbour and shoreside facilities
- **Economic and Business**
 - A robust business case should be prepared including a cost plan, outputs/outcomes and a marketing strategy.
 - Must demonstrate proven user demand, proximity and accessibility to markets.
 - Should have a local employment policy and demonstrate level of local commitment.
 - Should identify appropriate training and skills development and local business support.
 - Should not be in direct and immediate competition with existing facilities, thus avoiding economic displacement.
 - Should demonstrate added economic value including direct and indirect tourism multiplier effects.
- **Social and Community**
 - Demonstrate significant local support.
 - Provide a consultation strategy that addresses a community engagement plan.
 - Should be able to demonstrate local community benefits.

Marina Development

Whilst it has not been possible to undertake a detailed financial viability or market demand assessment of the proposals to build new marinas or

extend existing marinas within the context of developing the strategy, a review has been undertaken of existing reports. Taking into account locational considerations, local support and a preliminary view of the criteria above, the following locations have been identified as having a number of attributes that merit further consideration by the Area Spatial Plan Groups.

Rhyl	Pwllheli	Swansea SA1
Beaumaris	Fishguard	
Holyhead	Burry Port	

Some of the above are well advanced with regard to obtaining planning permission and the required maritime approvals, but have certain land or dredging issues to resolve, while others are at the feasibility/business planning stage. The development of the above marinas would provide the Welsh coastline with 18 purpose built marinas in addition to a number of other mooring locations (ports/harbours and yacht stations).

Other potential sites, which are longer term opportunities for new marina or extended marinas include:

Pont Penrhyn, Porthcawl,

Pembroke Dock, Cardiff

Newport.

The development of these sites will need to be considered against the criteria established, the capital cost, the balance between public/private sector involvement, any impact from new marinas (on both side of the Bristol Channel) and the wider regeneration benefits.

Locations where major works may not be appropriate, but certain limited improvements to increase the number of moorings and/or facilities which could bring significant local benefits include:

Caernarfon Aberaeron

Porthmadog Cardigan

Barmouth New Quay

Aberdyfi Milford Haven

The types of improvements envisaged include improved parking, identified trailer parking areas, improved slipways, additional fixed shoreside moorings, pontoons to give 24 hour shore access from drying out harbours, toilet and shower facilities. A full list of marina/harbour related facilities are included in the technical report (2.24).

It will be important that any new provision or upgrading of existing facilities are made to a high quality and standard. This also applies to any ancillary activities related to accommodation, eating and drinking. Improved facilities will enable Wales to further develop its high profile with regard to international and inter-regional sailing and watersports events.

Visiting Berths

It will be important to ensure that any new mooring facility includes the capacity to provide an adequate supply of visiting berths, to encourage visits to other areas around the Welsh coast. Visiting berths are also very important for events, competitions and regattas.

It is appreciated that visiting berths which are only used occasionally (but frequently during the peak season) do not generate the same income levels as the annual renting of berths and that they require additional management. However, there are examples around the coast of Wales where proactive management of berths has made regular berths available to visiting boats whilst the regular user is away. It is important that there are opportunities for sailors to sail around the coast in the knowledge that visiting berths are available. These facilities would also provide 'safe haven berths' for any boats requiring refuge due to the weather, tide or mechanical failure. Marina operators and harbour master have however emphasised that boats would never be turned away. Over time, the interest in travelling around the coast of Wales could become as popular as the current cross Irish Sea ventures.

4.3.6 Cruising

Cruising is one of the growth sectors in international tourism. Passenger departures from British Ports rose from 50,000 in 1990 to over 270,000 in 2003. While the bulk of the cruises were to the Mediterranean, Atlantic Islands or Scandinavia, an increasing number of operators cruise around the British Isles, with the Irish Sea increasing in popularity particularly Dublin and Belfast.

The east coast Irish ports are receiving up to 70 cruise liner visits per year. In Wales, there were 15 calls in 2005 and 12 in 2006. 17 calls are currently planned for 2007. Any liner calling at an Irish port could also call at a Welsh port. Liverpool is currently building a £10 million cruise ship terminal scheduled to open in June 2007, which will strengthen the Irish Sea as a cruising itinerary. Dublin is currently considered a 'must see' port - Holyhead is well located between Liverpool and Dublin and may be able to benefit from being a mid way location point between these two city destinations.

There are a number of sub markets within the cruising market, including:

- Capitals of Europe – which could include Cardiff, Dublin and Belfast plus ports en route
- The four Country Round Britain cruise
- Short Irish sea cruises
- The Celtic Fringe – taking in northern Iberia Bay of Biscay, the Irish and North seas.

The size of the vessel also varies - from ships accommodating 600/700 passengers to the typical 2600 passenger liner. The trend is for larger

vessels, with the largest liner (new liner for Royal Caribbean) having a capacity of 6400 passengers. The new larger liners will be for the international market, in particular America and the Caribbean, but it will mean that existing cruise liners will be cascaded down to other market areas. The four ports in Wales with potential for developing the cruise liner market are Holyhead, Milford Haven, Swansea and Cardiff. Proposals are at an advanced stage, particularly at Holyhead and Milford Haven.

In order to maximise potential, shore side disembarkation is generally required, as this is preferred by cruise liner operators and passengers. Supporting facilities, including covered walkways, coach/taxi areas, information points and general reception areas are also desirable. The importance of alongside facilities and the provision of a cruise liner terminal cannot be overstated. The Port of Seattle, a major port for the Alaska cruise market, is an example of where providing these facilities has had a significant impact on passenger numbers. In 1999, 6,615 passengers sailed from the Port. Since the opening of a cruise terminal in 2000 passenger numbers have increased to 686,000.

The spend from cruise passengers and crew can benefit the port and immediate area, in addition to the income generated from port fees. There are various estimates for average spend by passengers and crew. Assuming that each passenger spends £50 and each crew member £30 a 600 capacity vessel would typically result in £25,000 - £30,000 spend per docking.

The Cruise Wales partnership was established in 2004 and involves the Welsh Assembly Government, the ports, local authorities and tourism operators. The partnership has achieved some success in attracting new cruise calls to Wales and in identifying the potential that is presented by the cruise liner market. A Wales Cruise Action Plan for 2006 – 2013 is currently being prepared.

Proposed Recommendations

- **That the profile is raised and opportunities promoted for increasing land and water recreation on the Welsh coast.**
- **That supply and quality of facilities for land and water recreation are improved.**
- **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).**
- **That nature tourism along the coast of Wales is further developed, especially where this adds value to the existing tourism offer, complements coastal and marine heritage tourism, provides direct and indirect employment opportunities and helps to increase environmental awareness and appreciation, subject to there being no adverse impact on wildlife.**
- **That a marketing campaign is developed to promote Wales as**

a destination for nature related tourism activities

- That the marina capacity be expanded where such development satisfies an agreed range of criteria.
- That a network of visiting berths be provided around the coast and promoted as a cruising opportunity.
- That consideration be given to the need to introduce a regional zoning and management system for the use of Pwc/and or powered boats which could cover registration, insurance cover and appropriate training/certification.
- That developments and improvements to cruise liner facilities are implemented particularly with regard to 'alongside berthing' at key ports around the coast of Wales.

4.4 Coastal Culture

The coast has been the muse of writers and poets from the mediaeval story telling of the Mabinogion to Dylan Thomas's *heron priested shore*. Today the coast is home to many different settlements and communities, each with its own distinctive historical and contemporary cultural identity. The Welsh language is still the living, working language in many of these areas and events and festivals such as those held at Aberdaron and Fishguard present a vibrant modern cultural life.

Cultural tourism can attract visitors at all times of the year to established and new places of interest. It can help to address seasonality and extend the offer beyond the usual destinations. It can also enhance the more established types of tourism, by adding an extra dimension to beach and resort holidays.

A Sense of Place toolkit is helping to assist all sectors of the tourist industry to promote the traditional and contemporary culture of Wales in ways which create a distinctively Welsh product. The coast and its people can contribute to that challenge.

4.4.1 Food

Food is an essential part of the tourism offer for Wales. In recent years, we have seen significant improvements and additions to the food offer, both in terms of local produce and its preparation and presentation in cafes, restaurants and other eating establishments around the coast. Restaurants such as those at Portmeirion in Gwynedd, the Harbourmaster in Aberaeron and St Brides in Saundersfoot are showing a modern confidence in local and regional cuisine.

There is an opportunity to further develop local and regional food cooperatives and consortia, capable of supplying a high quality regular supply of local produce and products such as fish, shellfish, and related foodstuffs.

There are a number of ways that support for regional and local food can be achieved, including:

- awareness campaigns using television, radio and website media, joint marketing with local supermarkets, production of recipe books and other publications.
- working with local growers, suppliers and others to develop local supply chains.
- working with food promotion agencies to promote particularly distinctive Welsh coastal foods, e.g. salt marsh lamb, Llŷn and Pembrokeshire lobster, local shellfish.
- work with hotels, restaurants and cafes to develop quality seafood menus.

There is also potential to develop the 'slow food' concept - building on the idea originally developed in Italy of quality ingredients cooked with love. Wales could develop a series of coastal town 'Convivia' which run courses, tastings, dinners, food and drink events, and local campaigns.

Food and seafood festivals also have an important role – building on existing festivals and introducing others, celebrating food from the sea and local area. A national Seafood Festival could be a premier event. It could be held at a different coastal location each year and in time gain a reputation such as the Brecon Jazz Festival, Abergavenny Food Festival or Hay-on-Wye Book Fair.

4.4.2 Events

Activities are an important part of the coastal tourism experience in Wales and special events and festivals can add an extra dimension and provide an incentive for visitors to visit and importantly participate. Events can also expand the peak season and in some cases 'weekend festivals' increase visitor nights.

An events programme could have a number of distinct advantages:

- It is an attractive way of presenting an active and dynamic destination to visitors who are looking for participatory holiday opportunities.
- It can provide interesting contact opportunities between residents and visitors.
- It can help to test and develop thematic ideas best suited to the interests of residents and visitors.
- It is a flexible way of market testing, if effective monitoring and feedback mechanisms are included.
- It can assist an area to develop a strongly themed identity.

In order to be viable and offer consistently high quality of information and provision, a degree of coordination and management would be required. It

would also have to demonstrate an element of financial independence. An Events, Sponsorship and Tourism Business Unit has already been established within the Welsh Assembly Government which could develop an overseeing/coordinating role, working closely with the Regional Tourism Partnerships. In order to develop an events programme the following will need to be addressed:-

- collecting and collating relevant events information.
- developing and introducing a suitable vetting scheme.
- providing minimal standards and guidance to event providers.
- developing and maintaining an events website, with links to other relevant sites including www.timelineforevents.co.uk which provides guidance and on line training for events organisers.
- liaising with participating organisations on effective marketing and promotional activities.
- seeking, wherever possible, areas for joint working and synergy between events.
- providing meaningful feedback to organisers and main sponsors.
- securing longer term financial support, especially from the private sector.

An audit of current provision indicates a patchy and sporadic spread of events along the Welsh coast. The most obvious are those run by local sailing clubs, such as regattas and competitive races. Other coastal events may or may not reflect a marine or maritime theme. In order to address this, a coastal events programme should be developed, which would:

- place events into a common accessible database which could be the basis for a coastal events website, or a dedicated page on a wider coastal tourism website for Wales, linked to an accommodation offer.
- filling the gaps (in space and time) - a strategic look at what's missing and the opportunities presented for new activities in different places at certain times of years.
- local celebrations of related themes – developing events based on maritime history, trade, food, culture, possibly under the banner of Sense of Place/
- a coastal cultural dimension, featuring literature, music, theatre and language.
- develop events celebrating the link between art and the sea, featuring traditional and contemporary work, involving public and private galleries and public art spaces. New public art work could be commissioned. Art-based holiday opportunities developed as part of a cultural tourism programme, possibly clustered around St Davids.

- a series of high profile local or regional maritime festivals, combining the best of local activities such as sailing, watersports, food and drink and related entertainment.
- introduce an initiative to celebrate the traditional seaside holiday – focused on Llandudno and Tenby, with historical and traditional beach activities, packaged with authentic and nostalgic imagery.
- develop a coastal ecotourism or green tourism activities programme, to include the elements described under the Welsh Coastline theme – nature tourism.
- introductory and non-competitive events on all aspects of watersports, from primary school level to lifelong learning.
- bring more national and international level competitive sailing and watersports events to Wales.
- build on Cadw's events programme on coastal properties and educational interpretation of sites especially World Heritage sites.
- explore the potential for developing suitable niche tourism products related to event programme opportunities.
- bring all the above together under a central banner of the **Festival of the Coast /Dathlu'r Arfordir**

The logistics, time and costs of coordinating an events programme should not be underestimated. It will be important that the following criteria is taken into account in developing an events programme.

- Will the tourism season be extended?
- Is there potential for generating additional bed nights?
- Will there be wider tourism benefits?
- Is the tourism infrastructure adequate to cope with the event?
- Is there potential media interest?
- Are there local benefits?

4.4.3 Heritage

Visiting a heritage site is amongst one of the most popular activities undertaken by visitors to the Welsh seaside. Virtually every mile of the coast of Wales bears the traces of Welsh history from prehistoric burials and forts to the coastal defences of the Napoleonic Wars and World War II. Some of the most enduring and iconic coastal images owe their drama and magic to the historic environment —from prehistoric Carreg Samson in Pembrokeshire, to Harlech Castle and Llandudno Pier. The castles of Edward I in North Wales are one of only two World Heritage Sites in Wales and are visited by half a million people a year.

The Victorian period brought engineering marvels such as the Telford and Stephenson bridges and the distinctive architecture, piers and promenades of many seaside towns.

The traces of prehistoric settlements and burials are part of what can be discovered when walking the various Coastal Paths. National and local museums hold many of the physical artefacts of Wales' seafaring tradition – fish traps and shipwrecks are monuments to fortune and misfortune.

Opportunities for promoting coastal heritage include marketing Wales' coastal history and heritage as part of the coastal tourism offer, and providing relevant information about coastal heritage in publications and websites, including website links to Cadw and other historical bodies. History and heritage are already key themes in local interpretation but could be developed as key themes in a coastal events programme for Wales.

It is essential that high quality interpretation is available at key coastal history and heritage sites, using both traditional techniques and new technology.

The historic environment can, however, be vulnerable to damage from inappropriate leisure activities – the grass banks of a prehistoric settlement may be a new challenge for BMX or trail bikes and a coastal fort may seem an attractive location for a summer evening bonfire or drinking session. Interpretation, information and local interests need to be aware of these dangers and be a positive force for considerate enjoyment.

4.4.4 Language

The Welsh language remains the everyday language of most communities along the western seaboard of Wales. It can be encountered in shops, on signposts and in many other day-to-day situations. It can add a real sense of local identity to a place or a situation. *Iaith Pawb*, a national action plan for a bilingual Wales, outlines the Assembly Government's aim of promoting Wales' modern bilingual nature. This work should be further supported in order to make the Welsh coast a truly bilingual holiday destination, helping to give it its unique selling proposition. Bodies such as the Welsh Language Board and Mentrau Iaith (county-based language bodies) are actively promoting the use of Welsh in tourism, through introducing initiatives that encourage tourism businesses to make more use of Welsh, adding a valuable dimension to the coastal tourism experience.

Tourism and other relevant economic activity can help to maintain the viability and sustainability of many of our traditional Welsh speaking communities. The Assembly Government recognises, however, that large scale developments can affect the linguistic balance within communities. Planning Policy Wales and the accompanying Technical Advice Note 20 on the Welsh Language affirm that policies for the location of such development should take into account which areas could best accommodate them to secure economic benefits whilst not eroding the position of the Welsh language.

Proposed Recommendations

- **That the potential of local food products including fish and shellfish should be realised.**
- **That the benefits of coastal events are maximised, including bilingual events which can be marketed as cultural tourism and local domestic tourism assets.**
- **That links are made between local tourism interests, Cadw and other relevant heritage organisations to promote, interpret and protect coastal heritage.**

4.5 Coastal Management

4.5.1 Managing Coastal Destinations

The visitor experience is made up of a wide range of individual elements provided by many different businesses, public organisations and individuals. It only requires a weakness in one or two of these elements to undermine the whole experience. If a destination can meet and even exceed the expectations of its visitors then it will have an advantage over prospective competitor destinations. In order to do this, destination stakeholders need to understand their market and its needs. They also need to understand and meet – even exceed – the expectations and needs of local residents. This can only be achieved through partnership working with tourism businesses, the voluntary sector and the community to ensure an integrated approach.

One technique that can help deliver an integrated approach to destination management is Integrated Quality Management (IQM) which the European Commission's Tourism Unit has sought to encourage destinations to adopt. Integrated Quality Management is an approach to managing a tourism destination which focuses on an ongoing process of improving visitor satisfaction, while seeking to improve the local economy, the environment and the quality of life of the local community. It is a tool which can be used by destination stakeholders to understand their markets and the communities living within the destination. It can help them identify needs and expectations, assess how the destination is performing against these needs and expectations and identify ways in which they can be met. An important part of the process is the monitoring of the impacts of tourism on the local economy, community and the environment.

Visit Wales is actively promoting the adoption of the IQM approach to managing destinations. The adoption of the IQM approach was made a condition of funding the Tourism Growth Areas, identified by WTB as having particular growth potential in tourism terms. Coastal destinations should seek to learn from best practice and barriers that have been identified during this process.

4.5.2 Managing Coastal Facilities

Resource Management

The Welsh Assembly Government's Environment Strategy outlines the importance of achieving a more sustainable pattern of consumption and production in order to reduce the impact that economic activity has on the environment. Tourism businesses have a key role to play through improving the way they manage their resources, through for example, reducing waste and water use.

It is recognised that smaller and medium sized businesses have limited technical and managerial capacity to improve resource management and a range of environmental management schemes have been developed to assist these businesses. One such scheme is the Green Dragon Environmental Standard, which is an environmental management system designed to meet the specific needs of Welsh organisations. It has, in recent years, been applied to the tourism sector and has been a condition of Visit Wales tourism grant support. Better environmental management can increase profits, improve efficiency, mitigate carbon footprints, reduce waste, improve local supply chains and provide a key marketing edge. Some of the main future challenges are:

- ensuring greater sign-up to environmental management schemes by tourism businesses
- ensuring a high retention and progression rate through schemes
- further adaptation of the Green Dragon scheme to meet the specific needs and characteristics of the tourism sector
- championing exemplary projects and businesses, illustrating clear actions and benefits
- appropriate siting of tourism facilities that takes account of the availability of water resources

Quality assurance

Accommodation standards are another consideration with regard to enhancing the visitor's experience. Customers demand high standards in tourism accommodation, and their expectations are continuously rising as their own standard of living rise at home and abroad. It is essential that operators provide high quality accommodation if coastal tourism in Wales is to compete successfully with other destinations. Visit Wales, together with other national partner bodies, operate quality assurance schemes for different types of accommodation, attractions and activity provision. Only accredited accommodation is promoted nationally and internationally by Visit Wales.

In compliance with the Disability Discrimination Act 1995, tourism businesses are required to make reasonable provisions to meet the needs of disabled people in terms of equality of access and employment. The UK population is aging and this will have further implications for facility provision and employment structures. The industry must be prepared therefore to invest in new facilities and promotional tools to cater for the

needs of all visitors. Specialist advice and financial assistance is made available to tourism businesses to prepare accessibility statements and to provide adequate facilities for people with special needs.

Best Practise Example: Scottish Tourism and Environment Forum

A partnership of public and private organisations was set up to promote sustainable tourism in Scotland. Its mission is *to bring long term business and environmental benefits to the Scottish tourism industry through encouraging sustainable use of a world class natural and built heritage*. The scheme offers research and market information including facts and figures about 'Green Tourism', specialist advice on how to 'go green' without costing the earth, tourism awards which are aimed at businesses, and a Green Tourism Business Scheme (broadly comparable to the Green Dragon scheme now being introduced to tourism businesses in Wales).

4.5 3 People Development

Tourism like other industries needs a skilled and experienced workforce and it is therefore crucial that the tourism industry in Wales invests in its people to ensure profitable businesses are developed and a high level of service is provided. Training and skills development will offer more rewarding and clearer career development opportunities, which are essential for retaining staff. Developing an appropriate qualifications structure for the industry will also help to professionalise the industry. The majority of tourism businesses in Wales are self employed operations or small business employing less than five people, which means that training and skills development is often difficult to fund and accommodate within working practices. Innovative training opportunities therefore need to be supported and developed that fit business needs.

We have identified the need for training and skills development in the following areas:

- Marine Environment and Conservation Management
- Management of coastal public sector resources
- Green tourism and ecotourism development and delivery
- Watersports management and marketing
- Management, Customer Service and communication skills (including multilingual welcoming skills) in the hospitality sector
- Craft Skills Development (particularly chefs)
- Interpretation and information provision, including Web-based services and wireless technology
- Marine engineering relating to the maintenance and repair of boats

It is important that opportunities are provided for local people to gain relevant skills and knowledge, in particular to undertake specialist roles such as outdoor activity leaders or to undertake management roles. Providing opportunities for local people, especially young people to experience activities that visitors come to enjoy will not only lead to improving health, but will increase employment opportunities for local people in activity related jobs and associated economic development opportunities in the longer term.

60% of the workforce employed in the tourism, hospitality and leisure sector in Wales is female. Many women are attracted by the part time opportunities offered by the industry, but part time working can have certain draw backs, including fewer advancement opportunities, lower pay per hour and less formal training. There are also implications for tourism employers in terms of providing flexible training and working arrangements and addressing childcare and elder care issues.

Unemployment in Wales is at a 30 year low. However the Welsh Assembly Government's Economic Development strategy, *Wales a Vibrant Economy*, demonstrates that the employment rate, although higher than in most European countries, is still lower than in many other parts of the UK. Higher levels of economic inactivity in Wales can account for the lower employment rate - 25 per cent of the working age population is economically inactive compared with an unemployment rate of less than 5 per cent. There is therefore a potential pool of indigenous labour which, with appropriate support and targeted training, could benefit the tourism industry.

Jobcentre plus is currently looking to roll-out the successful Pathways to Work pilot – an initiative aimed at helping claimants moving onto Incapacity Benefit to find work. A partnership between the Welsh Assembly Government and Job Centre plus is now extending the Pathways to Work pilot to other parts of Wales through a wider Want2Work initiative. The initiative involves providing financial incentives and flexible trial periods to encourage the economically inactive and employers to work together to their mutual advantage. There are opportunities for the scheme to be tailored to the needs of tourism and leisure employers.

Businesses also have a role in tackling the root causes of inactivity through promoting employee health. The two most common causes of sickness absence are stress and back pain. Much of this is preventable and can be addressed by workplace health promotion programmes, such as the Corporate Health Standard which is being promoted by the Assembly Government as part Health Challenge Wales. Tourism businesses should be encouraged to adopt this Corporate Health Standard.

4.5.4 Managing the Coastal Environment

The Welsh coastline is diverse in character from urban seaside resorts, working harbours and ferry ports, to small rural communities and isolated stretches of coast. The environmental quality is demonstrated by the fact that 70% of the coastline has an environmental designation. There are a number of landowners of the coastline, local authorities, the National Trust,

Ministry of Defence, and private owners and of course the Crown Estate is involved below the highwater mark.

As well as a range of landowners, there are a number of bodies with management or regulation responsibilities including Local Authorities (various departments), Harbour Authorities, Sea Fisheries Committees, Crown Estate, Environment Agency, Countryside Council for Wales, National Assembly of Wales and various UK Government Departments.

Whilst it is recognised that a strong policy framework is in place for the development and protection of the Welsh coastline, there is a need to strengthen visitor management at the coast to meet rising visitor expectations.

There are a number of locations around the Welsh coast which because of their character, the recreational opportunities they offer and/or their location, attract substantial numbers of visitors. They range from popular resort beaches such as Rhyl and Porthcawl, country parks such as Pembrey and areas such as Great Orme and Newborough Warren with wildlife and archaeological interest.

The popularity of these areas generates additional management costs over and above those which would otherwise be incurred by the land manager in meeting local demand. These costs arise from the need to :

- Provide visitor facilities such as toilets, freshwater showers at beaches and car parking for visitors. These involve capital costs as well as on-going revenue costs in maintenance, cleaning and supervision.
- Increased land management costs in providing and maintaining footpaths, styles and other access, which because of the heavy use require stronger provision and increased maintenance to avoid damage, erosion and other adverse effects.
- Water management costs including buoys and signage to separate different water use areas as well as enforcement costs of safety regulations and by laws.
- Cleaning and litter clearance from beaches and countryside areas.
- Safety provision ranging from lifebelts and first aid facilities to lifeguards and safety boats for water activities.
- Information and interpretive provision to increase visitor enjoyment of the site.

Some areas are able to recover some costs through car parking or launch fees, and/or the provision of catering and retail facilities on a franchise or self operated basis. However, the ability to recover costs is often limited by the costs of collection and/or the commonality of facilities such as beaches and open countryside where public access is freely available.

These sites are a vital resource for coastal tourism, absorbing pressures which might otherwise fall on more sensitive areas, and have a major impact on visitors' experience and enjoyment of the Welsh coastline. Yet

many managers struggle to find the resources to maintain existing facilities and sites, let alone consider exploiting potential opportunities to provide improved facilities and new recreational facilities within a safe and well managed environment.

It is therefore proposed that consideration be given to identifying coastal recreation areas that provide informal recreation opportunities for a substantial number of visitors. The management of these areas would be given a high priority with regard to a beach/coastal warden or if appropriate lifeguards. They would also be areas where minimum standards with regard to the range and quality of facilities would be set.

It is appreciated that there are a number of areas around the Welsh coast that attract a significant number of visitors and could be considered a 'Coastal Recreation Area'. It is therefore proposed that two pilot areas are identified, one reflecting visitor pressure from a range of beach/water sport users, and another where the main issue is visitor pressure and environmental capacity. Potential pilot areas should be put forward by the Area Spatial Plan Groups and funds identified for a 2/3 year pilot study. The pilot areas could encompass offshore areas attracting substantial recreation use as well as shore based areas of varying character.

The pilot coastal recreation area's principal aims would be the integration of resource planning and visitor management and the consideration of innovative but practical and fair ways of raising revenue from visitors.

The pilot areas could consider whether the income from car parking, use of slipways or franchising of refreshment facilities could be directly used to improve the general facilities, cleaning, life guard or beach wardens.

Water quality

Water quality and beach cleanliness is fundamental when looking to maintain or achieve standards. Substantial investment has been made over recent years to improve water quality around Wales, resulting in 100% compliance of Mandatory, and 90.1% of Guideline Bathing Water Standards being achieved at EU designated bathing waters around Wales in 2005. At non-EU identified bathing waters 93.5% complied with the Imperative standard whilst 53.8% complied with Guideline standards. Forty three beaches were awarded a Blue Flag in 2006; 107 beaches received Seaside Awards (62 rural and 45 resort); and 41 beaches were awarded the Green Coast Award. Such quality standard compliance and presentation of awards enhance the offering and attract tourists, particularly for family beach holidays, water sports and other water related activities. There are challenges ahead with tighter bathing water standards coming into place by 2015, together with the introduction of the Water Framework Directive requiring additional water quality monitoring and standards, but achievement of these standards will help promote the Wales coastline.

Proposed Recommendations

- **That coastal destinations are encouraged to adopt an Integrated**

Quality Management (IQM) approach to management

- That the highest standards with regard to facilities, information, accommodation and disabled access are achieved.
- That appropriate training and skills development programmes are established to assist environmental and conservation knowledge, activity pursuits, business management and career development
- That tourism business are encouraged and incentivised to adopt environmental management schemes
- That two pilot 'Coastal Recreation Areas' are identified with the aims of integrating resource planning, improving visitor management, establishing standards and consideration of revenue implications
- Where coastal protection is appropriate, 'tourism' considerations are incorporated into coastal defence schemes
- That consideration is given to how coastal protection might be factored into new tourism developments, so that the future protection of new assets is considered in deciding whether, and how to build it

5. Delivering the Strategy

The strategy has identified a wide range of opportunities that need to be considered and acted upon in order to realise the full tourism potential of the Welsh Coastline.

A delivery strategy has been prepared which presents the draft recommendations and identifies a series of actions necessary to implement or move forward the recommendations. It also identifies the most appropriate lead authority/organisation and other possible partners, the likely timescale for implementation and the strategic aims which the proposal is addressing .

In developing the delivery strategy and proposed actions, we have been mindful of the vision set out in Chapter 3 . As well as considering the vision, account has been taken of the strategic aims of the strategy, the practicality of the proposals, and possible sources of funding.

Delivery of the framework will depend upon cooperation and developing a partnership approach between a number of authorities/organisations. The resources required to implement the strategy are significant but reflect the importance and opportunities presented by the coast of Wales. The availability of funds cannot be guaranteed at this stage in the process, but will need to be considered by the various stakeholders. It is recommended that the funding implications for Local Authorities should be investigated jointly by the Welsh Assembly Government and the WLGA.

While it is appreciated that the final details of the EU Convergence Funding are still being finalised, it is likely that many of the coastal economic and regeneration projects could be eligible for funding under the themes of Environment for Growth and Building Sustainable Communities. There are also a number of other budgets that could be involved for different elements of the strategy.

The implementation of the strategy will only be achieved by the key players working together. We will seek to engage all groups involved in developing the economic, social and environmental aspects of the coast in the private, public and voluntary sectors, using existing structures and partnerships wherever possible.

The Spatial Plan Area Groups will have a particular role as they will be responsible for the preparation of the Strategic Frameworks for the delivery of structural funds. The role and potential of the coastline of Wales will feature in all six Spatial Plan Areas and detailed below are some of the elements that will need to be considered. In addition, the regional collaborative boards announced as part the Making Connections proposals for improving public services in Wales could have an important role to play in implementing the strategy, in particular for areas that call for collaborative activity between authorities."

5.1 North East Wales – Border and Coast

The coast includes a number of traditional seaside resorts which have suffered from a changing market and rising visitor expectations. There is a need to diversify their local economies and to improve their image and tourism offer as they still provide quality beaches. There is potential for a Deeside Regional Park at the eastern boundary of the area and Llandudno at the western boundary is not only a popular tourist town with a significant accommodation base, it is also a service, retail and conference centre.

Elements to consider in North East Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at existing seaside resorts
- to consider new and expanded resort regeneration programmes to diversify and strengthen local economies
- to consider and develop a programme of environmental enhancement schemes for key areas to increase their attractiveness for visitors and residents
- to consider whether any resorts in the north east area would benefit from the role of resort managers or beach wardens
- to encourage new accommodation stock and improvements to existing to meet changing demands and where appropriate conversion of non viable premises to other uses
- to consider the further redevelopment of conference tourism facilities at Llandudno based on the enhanced facilities at the North Wales Conference Centre
- to consider local transport schemes that would reduce seasonal congestion such as park and ride and road trains to link different attractions/destinations
- to ascertain the financial and market viability of developing further berths at Rhyl (Foryd Harbour)
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.2 North West Wales – Eryi a Môn

North West Wales has a strong sense of identity and an outstanding coastline. The quality of the coastline is recognised by its various environmental designations. The coastline provides quality beaches, popular marinas, potential for increasing nature tourism and a backdrop of Snowdonia National Park. There are a number of coastal towns where the local economy is dominated by tourism – Beaumaris, Pwllheli, Porthmadog, service towns, some with heritage attributes, such as Bangor and Caernarfon.

Elements to consider in the North West Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- to consider the potential for developing nature tourism within the environmental capacity of sensitive sites eg. Newborough Warren
- to consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- to consider new or expanded resort regeneration programmes to diversify and strengthen local economies
- to consider the opportunities for enhancing the role of beach wardens and voluntary/coastcare groups in the management and maintenance of beaches
- to consider how the accommodation stock in the Llŷn Peninsula and Bangor area could be improved
- to consider innovative public transport schemes that will reduce the pressure on particularly sensitive areas by providing an alternative to the private car
- to continue to develop the leisure/recreational cycle routes and to provide facilities for cyclists at strategic locations
- improve the facilities for watersport participants on Anglesey (in line with the Anglesey Maritime and Coastal Study), on the Llŷn Peninsular (for diving, surfing and kite sports)
- to consider the potential of a new marina at Beaumaris and an expansion of the berths at Holyhead and Pwllheli
- the provision of visiting berths at marinas, harbours and yacht stations around the north west coast
- to consider the benefits (for users and the local economy) of improving boating facilities and access at Caernarfon and Porthmadog and the development of further facilities at Bangor
- to consider the improvement of facilities for cruise liners (including alongside berthing) and for passengers in Holyhead.
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.3 Central Wales

The Central Wales has an extensive coastline from south of Porthmadog to south of Cardigan. There are a number of coastal settlements, Aberystwyth and Cardigan being the main service centres, with smaller settlements with a tourism role such as Barmouth, Aberdyfi, Aberaeron and New Quay. The coastline has a number of environmental designations including the Dyfi Valley which is a designated Biosphere Reserve. While

there are perceptions with regard to accessibility of the area, the area does have significant potential with regard to nature tourism.

Elements to consider in the Central Wales Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- to consider the potential for developing nature tourism both on land and at sea within strict environmental and protection criteria
- to consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- to consider new or expanded regeneration programmes for 'tourist' towns in order to diversify and strengthen local economies
- to consider how the emerging role of Aberystwyth and the masterplan proposals can benefit and expand its tourism role
- to consider the opportunities for enhancing the role of beach wardens and voluntary/coastcare groups in the management and maintenance of beaches
- to consider how gaps in the accommodation stock (ie. quality camp sites) can be addressed
- to consider innovative public transport schemes that will reduce the pressure in particularly sensitive areas or congested areas by providing an alternative to the private car
- the provision of improvements with regard to facilities, access to water, parking, including trailer parking at - Barmouth (24 hour access to shore from drying out harbour), Aberdyfi, Aberaeron, Cardigan and New Quay
- the provision of visiting berths at marinas, harbours and yacht stations around the Cardigan Bay coast
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.4 Pembrokehire – The Haven

The Haven spatial plan area has an exceptional coastal environment with much of the coastline within the Pembrokehire Coast National Park. Tenby is the main tourist town, but a number of other settlements have important tourism roles. Pembroke and Fishguard are important ferry ports and Milford Haven is a major fuel terminal. The Haven is a significant waterway with a range of boating and watersport activities, as do many of the beaches and coves around the Pembrokehire coast.

Elements to consider in the Havens Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- to consider the potential for developing nature tourism on the coast and at sea within the environmental capacity of sensitive sites/locations eg. dolphin watching, Skomer Island
- to consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- to consider new or expanded resort regeneration programmes to diversify and strengthen local economies
- to consider the opportunities for enhancing the role of beach wardens and voluntary/coastcare groups in the management and maintenance of beaches
- to build on the successful public transport initiatives to further reduce the pressure in particularly sensitive areas and to improve access to the coast
- to define a strategic network of access points to the sea and to improve the facilities for watersport participants in Pembrokeshire (for surfing, coast steering, diving – Gelliswick Centre)
- to consider how to maximise the benefits of a new marina at Fishguard and further consider potential for marina at Pembroke Dock
- to consider the improvement of facilities for cruise liners (including alongside facilities) and for passengers at Milford Haven.
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.5 Swansea Bay – Waterfront and Western Valleys

The area has an important coastline with the Gower Peninsula (recently celebrating 50 years as an Area of Outstanding Natural Beauty), Swansea Bay and areas of transformation – the Millennium Coastal Park and SA1 Waterfront, resort towns such as Porthcawl, areas of important sand dunes and river estuaries as well as important industrial/port areas.

Elements to consider in the Swansea Bay Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- to consider the emerging proposals from the Swansea Bay Waterfront Study
- to continue the regeneration and environmental enhancement projects at Burry Port, Aberaeron and Porthcawl in order to further diversify the local economies

- to consider whether there is a role for a resort manager or beach wardens or coastcare groups in the management and maintenance of beaches
- to consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- to build on the successful public transport initiatives to further reduce the pressure on particularly sensitive areas and to improve access to the coast
- to improve the facilities for watersport participants particularly on the Gower Peninsula and for surfers at Porthcawl
- the development of marina facilities and supporting infrastructure at Burry Port and further consideration of the potential and regeneration impact of a marina at Porthcawl
- the provision of visiting berths at marinas and yacht stations in Swansea Bay
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.6 South East – The Capital Network

South East Wales is the most populous area of Wales with the coast zone being a main economic driver. Cardiff and Newport are both coastal located cities and the former has an important tourism role as a capital city, regional shopping and cultural centre, a major sporting venue and increasingly as a conference centre and the Ryder Cup at Newport in 2010.

The regeneration of Cardiff Waterfront has created an important arc of leisure and recreation facilities around an impounded area of water. The area also has the more traditional seaside resorts of Barry and Penarth and in the Vale of Glamorgan an extensive length of Heritage Coast. In the east of the area the Gwent Levels are important for its wildlife particularly migrating birds.

Elements to consider in the South East Spatial Plan Area

- establish and implement standards with regard to tourism facilities, information, accommodation and visitor expectations at popular coastal locations
- to consider the potential of identifying a pilot area as a 'Coastal Recreation Area'
- to continue to support the waterfront regeneration initiatives in Barry, Cardiff and Newport
- to consider the opportunities for enhancing the role of beach wardens and voluntary/coastcare groups in the management and maintenance of beaches

- to consider the potential of additional or new berths at Cardiff and Newport and the provision of visiting berths at existing marinas
- To consider the improvement of facilities for cruise liners and for passengers in Cardiff.
- to consider opportunities for exploiting the potential of food, heritage and culture.

5.7 All Wales

In addition to the specific area related projects, there are a number of general elements that the six Spatial Plan areas will need to consider. They include:

- Raising standards and IQM
- Training and skills development
- Marketing and promotion
- The development of Marine Codes
- The possibility of a PWC registration scheme
- The development and opportunities of the All Wales Coastal Path
- The wider benefits of the cruise liner market
- The potential of a Festival of the Coast/Dathlu'r Arfordir

A list has been provided below of potential projects that have been identified in the strategy – the scale of funding and timetabling will need to be considered. As well as injection of capital funds into the Welsh coast, there will need to be revenue funding for maintenance to ensure that the high standards are achieved and kept. Visitor management will be a crucial element of the strategy. Revenue funding needs to reflect the length of the coastline and coastal responsibilities.

5.8 Implementation

It is proposed that Visit Wales, within the Department of Enterprise, Innovation and Networks (EIN) will act as the lead body within the Welsh Assembly Government for coordinating the implementation of the strategy at the national level. Other divisions and departments within the Welsh Assembly Government will also have a crucial role to play, in particular the Department of Environment, Planning and Countryside and the regeneration teams based in the regional offices of EIN. There are also a number of external partners who will have an active role in the delivery of the strategy including the local authorities, the Countryside Council for Wales, the Environment Agency, the National Trust and the RSPB. In particular, Local Authority Local Development Plans, which will form the basis for future planning consents, will have a key role in harnessing new development to implement the strategy.

It is therefore proposed that Visit Wales establish a national coordinating group to oversee delivery of the strategy at the national level. The regional offices of EIN could convene working groups at the area spatial plan level to coordinate delivery of the strategy at this level.

5.9 Monitoring

Progress in delivering the specific actions contained within the action plan will need to be monitored alongside the wider outcomes being achieved by the strategy in terms of its strategic aims and objectives. The outcomes that we are seeking to achieve through the implementation of the strategy will need to be monitored through appropriate indicators, which can provide a measure of progress.

The monitoring process will need to periodically review the continuing appropriateness of the strategic aims, objectives and actions in the light of changes in organisational structures, funding, market trends and the wider socio-economic context. It will therefore be essential that the strategy is monitored in order that it can respond appropriately to new challenges or areas of opportunity. This will enable strategic priorities, and performance measures, to be evaluated in the light of economic, market and tourism trends. We envisage the EIN Minister’s Tourism Advisory Panel taking a lead role in the monitoring of the implementation of the strategy.

5.10 Table of Possible Monitoring Indices

Outcomes	Monitoring Indices
Tourism is making an increasing contribution to the economy of coastal communities	The volume of UK staying visitors at the seaside – Source: UKTS
The quality of Welsh beaches is recognised by the high number of Blue Flag and Green Coast Awards	The number of annual blue flag and green coast awards
Visitors to the Welsh coast express high levels of satisfaction	Periodic visitor surveys to measure visitor satisfaction
Improved appeal of Welsh coastal tourism to the under 25 age group and the AB socio economic groups	Profile of UK staying visitors staying at seaside locations. Source: UKTS
More visitors are coming to the coast to enjoy its biodiversity, heritage and culture	The value and volume of nature and culture related holidays/activities Source: UKTS
Wales is the leading UK watersports destination for the family and multi activity	The value and volume of participation in watersports of coastal visitors Source: UKTS

markets.	
The coast offers a more diverse tourism accommodation base that is meeting visitor needs	Sustained improvements in the average accommodation grading score within each category – Source: Visit Wales
Provision of marina berths adequate to meet market demands without detrimental environmental impacts	Number of Marina Berths
Local communities are actively involved in the management of rural beaches.	The number of coastcare groups.
Coastal Resorts are managed and developed with the needs of visitors in mind	The number of coastal resorts adopting IQM
Local coastal communities are involved in planning tourism development within their area	The number of coastal destinations adopting IQM
A growing proportion of visitors travel to and along the coast by sustainable means c transport.	Proportion of visitors using public transport to travel to Wales as measured by UKTS. The proportion of visitors travelling within Wales by public transport would have to be measured by periodic Welsh level surveys supplemented by data from local visitor surveys
There is a balance on the coast between tranquil areas and areas supporting a large number of people and a range of activity	Change in number and extent of tranquil areas as defined in CCW mapping work
Coastal Tourism is a year round industry	The percentage spend by visitors staying at seaside locations during the period October to March (source UKTS)
Tourism supports more full time jobs on the coast	Tourism part time jobs as a percentage of coastal and marine related tourism employment Source – Valuing our Environment – Economic Impact of the Coast

Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale	Strategic Aims
Coastal Towns and Resorts					
<ul style="list-style-type: none"> that towns and resorts should seek to strengthen their attractiveness for tourism by developing appropriate opportunities to provide land and water based recreation facilities which meet changing market demands 	<ul style="list-style-type: none"> The opportunities to be identified and prioritised in the Local Development Plan process 	LA's	CCW EA SCW	2007 – 2012	1,3,4,5
<ul style="list-style-type: none"> that resort regeneration programmes be undertaken which seek to diversify and strengthen the resort economy while adding value to tourism activity. Such programmes will involve partnership between the public, voluntary and private sectors. 	<ul style="list-style-type: none"> A rolling coastal resort regeneration programme be implemented to identify required levels and types of investment The Spatial Plan Area Groups to identify those resorts to be given priority within the programme 	LA's SPAG	Welsh Assembly Government Private Sector Voluntary Sector Regional Tourism Partnerships -	2007 – 2010	1,2,3,4,5
<ul style="list-style-type: none"> that resorts should be encouraged to prepare and undertake environmental improvement schemes for key areas to increase their attractiveness for visitors and residents. 	<ul style="list-style-type: none"> The development of a programme of environmental, landscape and public realm improvements 	LA's	CCW Welsh Assembly Government	2007 – 2010	1,3,4,5
<ul style="list-style-type: none"> that the management of resort beaches, adjoining land and water areas should be encouraged to ensure that all beaches achieve or surpass existing and future blue flag requirements. 	<ul style="list-style-type: none"> Where appropriate coastal resorts to consider strengthening the management of their beach, promenade and sea front areas by identifying a beach manager or other innovative approach (a similar role to Town Centre Managers). 	LA's	Private Sector Voluntary Sector	Ongoing	1,3

Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
<ul style="list-style-type: none"> that consideration is given to the introduction of resort managers or beach masters to coordinate management, activities and promotion 	- the identification of resorts/beaches which would benefit from improved management modelled on the role of the town centre manager	LA's	Private Sector	2007-2012
<ul style="list-style-type: none"> 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 in the preparation of Local Development Plans	Private Sector	LA's Visit Wales	Ongoing
<ul style="list-style-type: none"> that innovative local transport schemes should be 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 in the context of their Regional Transport Plans	Regional Transport Consortia	LA's CCW Voluntary Sector Private Sector	2008

The Rural Coast

Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
<ul style="list-style-type: none"> that a higher profile be given to Marine Codes of Good Practice and Coastal Agreements on Uses 	- The promotion and, where appropriate, the preparation of new Marine Codes and Coastal Use Agreements	LA's NPA's	CCW EA Voluntary Sector User Groups	Ongoing
<ul style="list-style-type: none"> that community involvement through coastcare groups, voluntary groups, trusts or other appropriate mechanisms be encouraged in the monitoring and management of their rural coast 	To support and stimulate local initiatives	LA's NPA's Voluntary Sector	Welsh Assembly Government	Ongoing
<ul style="list-style-type: none"> that visitor pressure should be managed in line with the capacity of the site/area 	- The provision of facilities such as parking, slipways, highways, toilets and water facilities	LA's	CCW	2007 - 2012

	take account of the sites capacity to absorb visitor pressures	NPA's	EA	
<ul style="list-style-type: none"> that innovative public transport initiatives should be 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	Regional Transport Consortia	LA's CCW Private Sector Voluntary Sector	2008
<ul style="list-style-type: none"> that the development of new and appropriate tourism accommodation should be encouraged, in support of the proposals for a Wales Coastal Path and the extension of existing cycle and riding facilities around the coast. 	- Policies relating to new and appropriate forms of accommodation in rural areas be considered in the Local Development Plan process	LA's	Private Sector Welsh Assembly Government Regional Tourism Partnerships	Ongoing
Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
Coastal Activities				
<ul style="list-style-type: none"> that the profile is raised and opportunities promoted for increasing land and water recreation on the Welsh coast. 	<ul style="list-style-type: none"> - Development of marketing and publicity campaigns - Bring more national and international level competitive sailing and other watersport events to Wales - Develop introductory and non competitive events on all aspects of watersports from primary school to life long learning 	Welsh Assembly Government	LA CCW EA Private Sector Regional Tourism Partnerships	Ongoing
<ul style="list-style-type: none"> that the supply and quality of facilities for land and water recreation are improved 	- Identify the need and provide facilities such as showers, toilets, slipways, trailer parks and other supporting infrastructure	LA's	Welsh Assembly Government Private Sector	2007 - 2012
<ul style="list-style-type: none"> that the economic benefits of the All Wales Coastal Path are maximised by linking the path to local attractions and 	- support for the work of the Stakeholder Group	Welsh Assembly	LA's CCW	2007 – 2012

local communities (links and loops)		Government	Private Sector	
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Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
<ul style="list-style-type: none"> that nature tourism along the coast of Wales is further developed, especially where this adds value to the existing tourism offer, complements coastal and marine heritage tourism, provides direct and indirect employment opportunities and helps to increase environmental awareness and appreciation 	<ul style="list-style-type: none"> - work with existing ecotourism operators to develop and promote the product as a high quality and distinctive experience - Develop marketing and/or publicity campaigns - as part of the Sense of Place initiative, develop a series of seminars and workshops to encourage coastal operators to make more of their local environment - develop a series of vocational and tertiary level training courses on ecotourism and green tourism - coastal footpath walks – work with Heritage Coast and other countryside management bodies to enhance wildlife and heritage interpretation using appropriate traditional and innovative media and techniques such as IT trails – Ipods, MP3&4, downloadable sound and music programmes – electronic self-guided tours - develop a corresponding coastal towns and villages trails initiative, related to coastal heritage and featuring the historical and contemporary built and cultural environment, also using innovative media where possible - develop a coastal ecotourism or green tourism activities programme, 	<p>Welsh Assembly Government</p> <p>LA's</p> <p>LA's</p>	<p>LA's</p> <p>CCW</p> <p>Private Sector</p> <p>Regional Tourism Partnerships</p> <p>TTFW</p> <p>Leader Groups</p> <p>RSPB</p> <p>National Trust</p> <p>Keep Wales Tidy</p> <p>BTCV</p>	Ongoing

Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
	<ul style="list-style-type: none"> - develop a pioneering ecotourism project as an exemplar pilot within the proposed modernised Dyfi Valley UNESCO Biosphere Reserve. - conservation activities – where possible build these into the local and regional tourism offer, e.g. a voluntary Tourism and Conservation scheme to enhance local environments and habitats and 'put something back' - ensure that all participating tourism operators subscribe to Green Dragon environmental accreditation scheme 			
<ul style="list-style-type: none"> • that marina capacity be expanded to meet demand where such development satisfies an agreed range of criteria 	<ul style="list-style-type: none"> - The Wales Spatial Plan Groups identify priorities for their areas 	WSPG	LA CCW EA	Ongoing
<ul style="list-style-type: none"> • that a network of visiting berths be provided around the coast and promoted as a cruising opportunity 	<ul style="list-style-type: none"> - Marina operators and harbour masters identify berths and moorings available for visiting boats 	Marina Owners / Operators	LA's Private Sector	Ongoing
<ul style="list-style-type: none"> • that the development and improvement, particularly with regard to 'alongside berthing' of cruise liner facilities at key ports around the coast of Wales are implemented 	<ul style="list-style-type: none"> - that the required facilities at the key ports are identified and implemented 	Port Authorities Private Sector	LA's Welsh Assembly Government	2007 - 2012

Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
Coastal Culture				
<ul style="list-style-type: none"> that the potential of local food products including fish and shell fish should be realised 	<ul style="list-style-type: none"> awareness campaigns using tv, radio and website media, joint marketing with local supermarkets, production of recipe books and other publications working with local growers, suppliers and others to develop local supply chains work with food promotion agencies to promote particularly distinctive Welsh coastal foods, e.g. salt marsh lamb, Llŷn and Pembrokeshire lobster, local shellfish. work with hotels, restaurants and cafes to develop quality seafood menus 	Welsh Assembly Government	LA Private Sector Leader Groups Voluntary Sector	Ongoing
<ul style="list-style-type: none"> that the benefits of coastal events are maximised, including bilingual events which can be marketed as cultural tourism and local domestic tourism assets 	<ul style="list-style-type: none"> place events into a common accessible database which could be the basis for a coastal events website, or a dedicated page on a wider coastal tourism website for Wales, linked to an accommodation offer undertake a strategic review at the opportunities presented for new events in different places on the coast at certain times of years Develop a series of high profile local or regional maritime festivals, combining the best of local activities such as sailing, watersports, food and drink and related entertainment introduce an initiative to celebrate the 	Welsh Assembly Government	LA's Local Communities Private Sector Regional Tourism Partnerships Leader Groups Voluntary Sector	Ongoing

	<p>traditional seaside holiday focused on Llandudno and Tenby, with historical and traditional beach activities, packaged with authentic and nostalgic imagery</p> <p>Promote a Festival of the Coast / Dathlu'r Arfordir</p>			
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Proposed Recommendations	Actions	Lead Partner	Other Partners	Timescale
<ul style="list-style-type: none"> That links are made between local tourism interests, Cadw and other relevant heritage organisations to promote, interpret and protect coastal heritage. 	<ul style="list-style-type: none"> -- emphasise Wales' coastal history and heritage in wider coastal tourism marketing campaigns (eg watersports and walking) - provide relevant information about coastal heritage in tourism publications and websites, including website links to Cadw and other historical bodies. - Provide high quality interpretation at key coastal history and heritage sites, using both traditional techniques and new technology - build links between accommodation providers and heritage organisations 	WAG	<p>Cadw</p> <p>NGMW</p> <p>Local Museums</p>	
Coastal Management				
<ul style="list-style-type: none"> that the highest standards with regard to facilities, information, accommodation and visitor experience are achieved. 	<ul style="list-style-type: none"> - that the IQM concept is promoted - that the benefits of the Green Dragon Environmental Standard are promoted 	Welsh Assembly Government	<p>LA's</p> <p>Private Sector</p> <p>Voluntary Sector</p>	Ongoing
<ul style="list-style-type: none"> that coastal destinations are encouraged to adopt an Integrated Quality Management (IQM) approach to 	<p>promotion of the benefits of IQM with regard to visitor experience, business efficiency and</p>	Welsh Assembly	<p>Private Sector</p> <p>LA</p>	Ongoing

management	ensuring a quality product	Government	Voluntary Sector	
<ul style="list-style-type: none"> that appropriate training and skills development programmes are established to assist environmental and conservation knowledge, activity pursuits, business management and career development. 	- that discussions are held with further, higher and life long education providers to identify appropriate training opportunities	Welsh Assembly Government	Education Providers Tourism Training Forum of Wales Sector Skill Councils	Ongoing
Proposed Recommendations	Actions	Lead Partners	Other Partners	Timescale
<ul style="list-style-type: none"> that two pilot 'Coastal Recreation Areas are identified with the aims of integrating resources planning, improving visitor management, establishing standards and consideration of revenue implications 	- that the Spatial Plan Area Groups identify two pilot areas and review the outputs.	SPAG	LA's CCW	2007-09
<ul style="list-style-type: none"> Where coastal protection is appropriate, 'tourism' considerations are incorporated into coastal defence schemes 	- that Coastal Defence Groups consider impact of coastal defences on tourism when drawing up Shoreline Management Plans, covering visual aspects, effects on access, the current use of the coastal area and whether there can be additional 'new' benefits/uses and funding	Coastal Defence Groups	CCW EA WAG	2008-9
<ul style="list-style-type: none"> That consideration is given to how coastal protection might be factored into new tourism developments, so that the future protection of new assets is considered in deciding whether, and how to build it 	-to be reflected in Local Development Plans	LAs	WAG	2009