About This Document

This document is one of series of **Topic Papers** which provide the supporting evidence to underpin the preparation of the City and County of Swansea Council’s Local Development Plan (LDP). Each Topic Paper provides in-depth analysis of a particular issue that the LDP needs to respond to, including the national policy context, a review of local policy, current circumstances and trends, and also suggests appropriate polices for inclusion within the Plan. As further evidence and information becomes available each Paper will be revised and updated as appropriate.

Who to Contact for Further Information?

Further information on the LDP process is available to view on the Council’s website: [http://www.swansea.gov.uk/ldp](http://www.swansea.gov.uk/ldp)

The Council’s Planning Policy Team is available during normal office hours to discuss any aspect of the LDP.

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## Appendices

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1.0 Background

1.1 The purpose of this Topic Paper is to provide background information and evidence for the City and County of Swansea (CCS) Local Development Plan (LDP) in relation to tourism issues, including national and regional planning and tourism policies; evidence regarding the number of tourists that visit the County each year and how much revenue they contribute to the local economy; the number of existing tourist facilities (including accommodation); and whether there is a need for the LDP to help facilitate additional facilities.

1.2 The Strategic Environmental Assessment (SEA) and Sustainability Appraisal (SA) Scoping Report sought to present baseline information relating to social, economic and environmental factors in Swansea and highlight associated issues. The Scoping Report was published in May 2012 and the main issues identified in relation to tourism were the need to increase tourism revenue by extending the holiday season and encouraging low impact sustainable tourism\(^1\). Associated with this is the need to promote and diversify the rural economy whilst reconciling pressures on the natural environment and landscape. This Topic Paper will elaborate on the issues identified within the Scoping Report.

1.3 The Topic Paper will be updated, if necessary, throughout the process of preparing the LDP as/when further data/information emerges. For example, if new legislation is produced, new guidance emerges from the Welsh Government or new planning permissions are granted. Any updates will take the form of supplementary papers, addendum sheets or a revised version of the Topic Paper.

1.4 The Paper has links with other Topic Papers, including economy, recreation, cultural heritage, and rural housing need (see: www.swansea.gov.uk/ldpps). Caravan and camping will be discussed in this Paper, but examined in detail within a separate Topic Paper due to its complexity and the volume of background information involved.

\(^1\) Sustainable Tourism is defined as “Tourism that meets the needs and interests of visitors, the local community and the local economy without compromising natural heritage and culture (where possibly enhancing it) for now and in the future”.

**Natural heritage** refers to geology, landforms, biodiversity, natural beauty and amenity. It embraces the relationships between landform and landscape, habitat and wildlife, and their capacity to sustain economic activity and to provide enjoyment and inspiration. It statutorily designated sites, urban areas, the countryside, the coast and open water features.
2.0 Introduction

2.1.1 The County’s natural landscape beauty is a primary tourism resource, ranging from sandy beaches to upland moors and this rich and varied scenery has attracted visitors for many years. There are a large number of areas designated because of their natural beauty and environmental qualities, including the Gower Area of Outstanding Natural Beauty (AONB), the Gower Heritage Coast and Clyne Country Park.

2.2 The County is also ecologically rich - approximately 17% of the County’s land area is protected by designations at a European level and a further 30% has been identified as being of significant local ecological interest, with designations such as Local Nature Reserves, Wildlife Trust Sites and Sites of Importance for Nature Conservation (SINCS).

2.3 With regard to the built environment, Swansea itself offers a vibrant City Centre adjacent to a five mile stretch of sandy bay, offering a distinctive visitor attraction in its own right, as does the historic fishing village of Mumbles, to the west of the city. The County’s rich cultural and historic industrial heritage also provides a unique legacy which acts as an important tourist draw.

2.4 Tourism has a key role to play in the County’s economy and in 2012 tourism expenditure was £337.13million and supported some 5,390 jobs (STEAM 2012) The Council is seeking to increase tourism revenue and extend the tourist season to create a year round destination. Tourism and leisure, allied to culture, sport and major events, have the potential to improve health and quality of life, raise economic activity, enhance regeneration and conservation and improve overall sustainable development (People, Places, Futures: Wales Spatial Plan, 2008 Update).

2 http://www.swansea.gov.uk/index.cfm?articleid=22846
2.5 There is, however, a need to ensure that tourism does not have a harmful impact on the very environment that attracts visitors in the first place. It will be the role of the LDP to ensure that tourism is sustainable, compatible with national planning and tourism policies and balances the development of tourism facilities to support economic growth with the protection and enhancement of the natural environment.
3.0 National and Local Policy Context

3.1 The numerous documents and strategies which relate to the tourism industry and provide the planning policy framework for tourism policy can be found in Appendix 1. The key visions and objectives for tourism are set out below:

3.2 The Welsh Government recently published a new tourism strategy ‘Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020’. The strategy has the following vision for tourism:

‘Wales will provide the warmest of welcomes, outstanding quality, excellent value for money and memorable, authentic experiences to every visitor’.

The goal is for:

‘Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales’.

The ambition is to:

‘Grow tourism earnings in Wales by 10% or more by 2020’.

3.3 One of the main visitor draws to the County is the outstanding coastline and pristine beaches. The Welsh Government’s Coastal Tourism Strategy, 2008 sets out the following vision for coastal tourism:

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

3.4 National land use planning policies in relation to tourism facilities and infrastructure are contained within Planning Policy Wales (PPW) (5th Edition) and Technical Advice Note (TAN) 13: Tourism (1997). A revised draft copy of the TAN was issued for public consultation in 2006, but has no formal status and the contents of the TAN have not been included within any subsequent revisions of PPW.

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3.5 The local tourism strategy has run its course and is being replaced by a Destination Management Plan\(^4\) in accordance with Welsh Government recommendations and as required for all local authority areas. The existing objectives of the ‘Tourism Strategy for the City and County of Swansea, 2006 – 2011 (CCS)\(^5\), are to:

- increase tourist revenue,
- extend the season to create a year round destination,
- bring benefits to communities throughout Swansea whilst ensuring that distinctive identity is enhanced,
- ensure that tourism contributes positively to environmental sustainability.

3.6 The draft Destination Management Plan (DMP) has been produced in partnership with major tourism stakeholders to address some of the existing issues and to identify future issues facing tourism in the area. The main focus of the DMP will be an action plan consisting of a series of deliverable actions addressing the strategic issues - which remain seasonality, quality of the product, funding and sustainable development.

\(^4\) http://www.swansea.gov.uk/media/word/e/a/FULLDOCUMENT.doc
\(^5\) http://www.swansea.gov.uk/media/word/b/a/Tourism_Strategy_Finalversion1206.doc
4.0 Constraints and Opportunities

The Gower Area of Outstanding Natural Beauty

4.1 Gower was designated as the first Area of Outstanding Natural Beauty (AONB) in England and Wales in 1956. The AONB is considered an important asset for tourism in Swansea with over 18 million people living within a 4 hour travelling time of the AONB. Many people come to enjoy the area’s natural beauty, which is clearly demonstrated in the CCS’s 2008 Swansea Bay visitor survey when 22% of visitors stated that Gower’s status as an AONB was a factor which most influenced their decision to visit Swansea Bay.

4.2 AONBs are different from National Parks in that National Park Authorities have a statutory duty to promote opportunities for the public to understand and enjoy the area. No such duty exists for AONB Authorities, whose primary duty is to conserve and enhance the natural beauty of the area. Development within the AONB must be viewed within the context of national planning policy which states that development plan policies affecting AONBs should give great weight to conserving and enhancing the natural beauty, wildlife and cultural heritage of AONB’s, although it will also be appropriate to have regard to the economic and social well-being of the area. Local authorities have a statutory duty to have regard to AONB purposes and the AONB must be afforded the highest status of protection from inappropriate developments.

Worm’s Head, Rhossili, Gower AONB
© Swansea Bay Futures Ltd
4.3 Agriculture is one of the main traditional economic activities in the Gower AONB and has the biggest single role to play in safeguarding its landscape and special qualities. The combination of an agreeable climate and relatively good soils has enabled agriculture to thrive. A significant amount of the enclosed farmland in the AONB is grade 1 or 2, which together with grade 3a, is classed by the Department for Environment, Food and Rural Affairs (DEFRA) as the best and most versatile, and should be conserved as a finite resource for the future. National planning guidance contained within PPW6 states that considerable weight should be given to protecting such land from development and it should only be developed if there is an overriding need for the development, and either previously developed land or land in lower agricultural grades is unavailable, or available lower grade land has an environmental value recognised by a landscape, wildlife, historic or archaeological designation which outweighs the agricultural considerations.

4.4 Traditional farming enterprises have focussed on rearing livestock (mainly cattle and sheep), and horticulture for the local markets. In recent years many have diversified into tourism and/or the production of goods for sale through farm shops. For example, most of the caravan sites on Gower are on farms. Currently there are relatively few full-time farmers, and as elsewhere, the average age is increasing as less young people are entering farming. There are also few working farms where the majority of the income is gained from agriculture. The dairy industry is currently struggling and there are only a handful of dairy farmers left working within the AONB and on its fringes. Opportunities for farm diversification may help buffer Gower’s farms from future European Union structural changes and thereby ensure that the positive land management practices which protect Gower’s landscape and special qualities continue (Gower AONB Management Plan, 20067).

The Coast

4.5 Swansea is Wales’ maritime city and coastal tourism forms a major part of the County’s economy. The quality of the coastline and beaches are one of the major attractions for visitors and tourists, as evidenced by the findings of CCS’s Visitor Survey 20128 and outlined in more detail in the next chapter. The County has 89km of coastline including the Gower peninsula. The environmental quality of the County’s coastline is reflected in the wide range and large number of international, national and local designations and protected sites that cover the coastline.

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6 http://wales.gov.uk/docs/desh/publications/121107ppw edición5en.pdf
7 http://www.swansea.gov.uk/index.cfm?articleid=10990
8 * http://www.swansea.gov.uk/index.cfm?articleid=53604
4.6 National guidance states that Development Plan policies should aim to protect or enhance the character and landscape of the undeveloped coastline. PPW clearly states (paragraph 5.6.3) that local planning authorities should establish what the coast means for them and develop, or apply, specific policies which reflect the characteristics of their coastlines. In doing so local planning authorities should acknowledge the interrelationships between the physical, biological and land use characteristics of their coastal areas and the impacts of climate change.

Three Cliffs Bay and Oxwich Bay, Gower
© City and County of Swansea

4.7 The Swansea Bay Strategy\(^9\) (2008) focuses on Swansea Bay Waterfront, from the West Pier to Mumbles Pier and considers what the area can offer in terms of recreation and tourism. It seeks an improved range of visitor facilities along the bay, with food and drink, public art, lighting, toilets and shower facilities, events space, facilities for boating activity and children’s play facilities, together with information signs that celebrate the industrial heritage and historical rail links between Mumbles and the City.

Swansea Bay
© Pix Aerial

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\(^9\) [http://www.swansea.gov.uk/media/pdf/l/b/SwanBayStratFinalMarch09.pdf](http://www.swansea.gov.uk/media/pdf/l/b/SwanBayStratFinalMarch09.pdf)
4.8 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 and to ensure there is a balance between the needs of the user and the environment. The County is home to a host of watersports including surfing, kite surfing, open water swimming, sailing, canoeing, paddle boarding and coasteering\(^{10}\) and it is important to ensure that businesses meet the changing demands and expectations of visitors without having a detrimental impact on the coastline and landscape.

4.9 There are many pressures on the coast, both landward and seaward, for example, the proposed Swansea Bay Tidal Lagoon, offshore windfarms, additional recreational uses and coastal developments such as visitor facilities/accommodation and housing. The impacts of such activities can be widespread and very careful consideration needs to be given to assessing any proposals which would impact upon the movement of sand along the coastline in order to protect the quality and beauty of the County’s beaches.

**Culture/Heritage Tourism**

4.10 The Welsh Governments’ Cultural Tourism Action Plan 2012 – 2015\(^{11}\) states that the culture and heritage offer is a significant contributor to the Welsh visitor economy. In 2010, £144 million was spent on holidays where culture was the main activity for the holiday, and £590 million was spent on holidays where a cultural activity was undertaken as part of the holiday.

4.11 Visit Wales has approached cultural tourism from the viewpoint that all tourism has culture as an intrinsic part of the total visitor experience. In practical terms, all aspects of Welsh culture make up the cultural tourism product of Wales including:

- Performing, visual and literary arts, museums, built and social heritage, historic landscapes and gardens, crafts, architecture, design, film, religion, broadcasting and food. Included in these are the Welsh and English languages, traditional, contemporary and emerging, professional and amateur forms of cultural expression\(^{12}\).

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\(^{10}\) Coasteering is an activity involving swimming, climbing and jumping off cliffs into water. It is a blend of 'coast' and 'orienteering'.


\(^{12}\) Cultural Tourism Strategy 2003, Welsh Assembly Government
4.12 Swansea has a rich diversity within its built environment and is fortunate to have a wealth of historic and cultural heritage, with over 4000 records of historical and archaeological importance on the County Sites and Monuments Record (SMR), including 13 Historic Parks and Gardens within the County and 2 Historic Landscapes. Opportunities exist to enhance the experience of visitors to local heritage attractions, museums and cultural venues to sustain their long term viability. One such scheme is the ‘One Historic Garden Project Centre of Excellence’ which aims to form a trail through existing Historic Gardens attractions in South West Wales. Penllergaer Valley Woods and Cwmdonkin Park form part of the trail. The sensitive refurbishment and re-use of historic and vernacular buildings presents particular opportunities for tourism and leisure facilities. A prime example of this within the County is the conversion of the grade II* listed Harbour Trust Building into Morgans Hotel (Valuing the Welsh Historic Environment, 2010, WAG).

A Register of Landscapes, Parks and Gardens of Special Historic Interest in Wales, Cadw, ICOMOS UK and CCW
Industrial Heritage

4.13 By 1823, the Swansea Valley’s various Copperworks (together with coal and shipping interests) supported 10,000 people out of an entire population of approximately 15,000. The Tawe Riverside area is arguably the ‘crucible’ of Swansea’s industrial heritage and there is no comparable concentration of industrial heritage on the South Wales coastal plain. Whilst there are some large-scale features that are visible, much of the industrial heritage needs some ‘interpretation’ and financial investment to re-activate it. Future strategy for the area will require developments to celebrate this industrial heritage via appropriate interpretation, refurbishment of the Hafod Copperworks and opening the area to the public.

Welsh Language

4.14 Welsh is spoken throughout the County, but predominantly in the north within the Mawr and Pontarddulais wards. More than 20% of the resident population in the community of Clydach are Welsh speakers, whilst Welsh also plays an important role within the communities of Llangyfelach, Loughor and Kingsbridge, where up to 1 in 5 of the population speak the language. It is important that the language is not diluted and should be celebrated and highlighted within the built fabric, providing a distinct ‘sense of place’.

Activity Tourism

4.15 Swansea Bay and Gower have an international reputation for exceptional walking, mountain biking and surfing opportunities. There are also an increasing number of endurance and multisport events which attract visitors and competitors to the area, including locations for kitesurfing, sailing, climbing, renowned fishing and golf courses. The County is therefore well placed to take advantage of the economic benefits that activity tourism can bring and hosts a number of ‘multisport’ events such as triathlons which attract a large number of visitors.

Walking, Cycling and Horse Riding

4.16 The Welsh Government’s ‘A Walking and Cycling Action Plan for Wales 2009-2013’ has two specific aims relating to tourism:

- ‘to maximise the contribution that walking and cycling can make to increase tourism’
- ‘to make Wales a premier destination for walking and cycling events’

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4.17 The County is very fortunate to have a large number of walking routes from the Mawr uplands, urban parklands and the Wales Coastal Path (that follows the entire coastline of the County) which are promoted and maintained by the Council. The economic benefits of walking tourism are clear, as spending by walking visitors is estimated to bring over £550 million into Welsh rural and coastal economies (Best Foot Forward; A Walking Tourism Strategy for Wales, 2002, Welsh Tourist Board).

4.18 Walking visits can contribute to reducing seasonality and offer potential for extending the tourist season as experienced walkers and hill walkers also visit out of season, generating much needed additional spend at this time of year. Walking visits can contribute to the development of sustainable tourism and the promotion of walking opportunities from accommodation bases, or linked with public transport, can play an important role in reducing visitor use of their cars during their stay (Best Foot Forward; A Walking Tourism Strategy for Wales, 2002, Welsh Tourist Board).

4.19 The Swansea Bay Tourism Strategy, 2006-2011, aimed to encourage visitors to use the Council’s countryside access facilities by developing specific enhanced walking and cycling trails and the importance of walking to the County’s economy is highlighted by the results of the 2012 visitor survey (see paragraph 5.20). The Gower Walking Festival and Wales Valleys Walking Festival promote walking within the County and cycling is promoted by the Gower Cycling Festival.
4.20 For cyclists, as well as having the right to use bridleways and byways, the County has a network of cyclepaths, including national bike routes. There are also numerous mountain bike routes and the internationally renowned Afan Forest Park Mountain Bike Trail is located nearby in Neath Port Talbot County Borough. The Cycling Strategy for Wales - Selecting the Right Gear17 aims to promote the cycling product in Wales and identifies that there are opportunities to grow cycling breaks and holidays. The Strategy is complemented by the Wales Mountain Bike Marketing Strategy 2012 – 2017 which recognises that by encouraging tourism within Wales, mountain biking activity contributes to the economy by supporting an array of small businesses, many in rural areas. There is an opportunity to promote Wales’ mountain biking trails to a growing market of casual cyclists as an element of their holiday, in addition to those for whom it is the main reason for coming to Wales.

![Cycling through Clyne Valley Woods](image)

Cycling through Clyne Valley Woods © Rob Wachowski

4.21 The County has approx. 80miles of bridleways and many equestrian facilities, such as riding schools and trekking centres. There is therefore scope to enhance equestrian tourism, such as packaged riding holidays, riders travelling to the County with their own horses to ride on bridleways, going to a trekking centre for a hack, or a riding centre for a course of training or weekend break. These activities are important aspects of the tourism product and can be an important tool in attracting first time riders to participate and enhance riding as a family activity. Action 18 of ‘The Strategy for the Horse Industry in England and Wales’, 2005, British Horse Industry Confederation, WAG, DEFRA, DCMS18) seeks to:

‘Encourage a cohesive approach to promoting equestrian tourism through local authorities, regional tourism councils and national bodies; publish a national register of riding holidays and equestrian tourism opportunities on the internet; and establish a national descriptive grading system for equestrian tourism’.

/desh/publications/090223walkingactionplanen.pdf

Golf

4.22 The Welsh Government have indicated that the economic impact of golf tourism in Wales during 2010 was nearly £42m\textsuperscript{19}. This represented an increase of 21\% from 2009 at a time when total rounds played across the UK decreased by 5.3\%. Furthermore, the total number of golf visitors to Wales exceeded 200,000 - an increase of 9\% compared with 2009 (2010 Visit Wales Golf Tourism Monitor). The County is in a good position to capitalise on this growth with six 18-hole golf courses in Swansea: Clyne, Fairwood Park, Gower, Langland, Morriston and Pennard. Four of these are situated within the AONB. There is a 9-hole golf course at Allt Y Graban Golf Club, Pontlliw and at Gowerton Golf Course which also has a driving range, whilst the Council operate a 10-hole pitch and putt at Ashleigh Road, Blackpill.

\textsuperscript{19} http://wales.gov.uk/newsroom/tourism/2011/110314golf/?lang=en
City Breaks/Major Events

4.23 There is potential to increase levels of ‘City Break’ tourism by providing a good range of attractions and facilities that complement the retail offer and provide an all round destination for short term visits. The City Centre and urban waterfront provide ideal locations to develop cultural and leisure facilities, enhancing the existing range of museums, galleries and theatres. The County also hosts many events which draw visitors to the area, for example the Wales National Airshow, the Admiral Swansea Bay 10km run and the Waterfront Winterland.

4.24 Weekend football breaks are an important asset to the County’s tourism economy, particularly in the tourism ‘off-season’. A study by Cardiff Business School estimated that Swansea City FC’s first season in the Premier League was worth over £58m to the local economy. Some £50.6m of the economic benefit was generated by Swansea City FC, safeguarding or creating an estimated 125 jobs. Non-football club activity generated around £7.9m of economic impact, creating or safeguarding an estimated 295 jobs, most of them in Swansea. The most significant element of the non-totalling activity was the spending power of away fans that visited pubs, clubs and restaurants and stayed in hotels as a direct result of attending games at the Liberty Stadium. The Study also states that hotel occupancy had risen 9% between September 2011 and March 2012 on the previous year - outperforming Wales and the rest of the UK. It is important to capitalise as much as possible on the number of away fans who are coming to the area and encourage return visits. Premier league status also provides opportunities to market the County via global media coverage which has enormous value in raising the awareness of the County as a visitor destination.

Accommodation

4.25 The County has a variety of accommodation to offer visitors, from boutique City Centre hotels, budget hotels, self catering accommodation and caravan and camp sites. The facts and figures relating to accommodation are presented in section 5. Similar to the rest of the country there is a trend away from small, family run B&B's to budget hotels and a decline in the traditional self catering seaside holiday. There has been a small growth in the number of 'boutique', ‘designer’ or ‘townhouse’ hotels and rural accommodation, targeting the higher-end of the market in terms of holiday costs and there maybe scope for this type of accommodation to grow further.

4.26 Caravan and camping is a long established and key sector of the accommodation offer throughout the County. There are a number of static sites, where many of the caravans are owned and used by individual families and their friends rather than being available for holiday letting. The larger sites often provide shopping and recreational facilities on site, which reduces local spend. Many of the sites have historic permissions and are located in sensitive locations on the coast, where, due to a lack of screening, they are visually prominent in the landscape. Many touring sites are moving towards offering ‘seasonal’ pitches, where touring caravans can be parked for the whole season and guarantee the operator income. This does, however, reduce the number of touring pitches available and results in demand for additional pitches. The specific and complex issues relating to the caravan and camping sector are considered within a separate Camping and Caravanning Topic Paper.

Caravan and Camping Sites at Horton and Port Eynon, Gower
© Pix Aerial
Second Home Ownership

4.27 There is continued concern about the degree to which second home ownership within coastal communities is adversely affecting the capacity of visitor accommodation and the affordability and availability of housing for the local workforce (Coastal Tourism Strategy, 2008, WAG\(^{21}\)).

4.28 The LDP Scoping Report\(^{22}\) records from the 2001 Census that just over 0.7% of all homes in Swansea are holiday homes or second residences (the Census does not differentiate between the two). However that number varies greatly across the area, with the greatest concentration being located in the Gower ward (over 13% of all homes in the ward), whilst Oystermouth, Newton and Bishopston wards have between 4% and 5% of all homes classed as holiday homes/second residences. Across the wards there are higher concentrations of holiday homes in certain villages, which can impact on the availability of houses for local people, lead to community erosion and house prices being raised beyond local capability. Balanced against this is the benefit to the locality arising from associated tourism spend.

4.29 The Welsh Government recognises that in-migration and the purchase of second homes has influenced community structures in some rural and coastal tourist areas of Wales (Coastal Tourism Strategy, 2007). There has however been no local study to analyse the costs and benefits of the provision of holiday lets, particularly where there is a concentration in certain villages. This would help inform the baseline evidence for the LDP.

4.30 To date, the 2011 Census data for second home ownership is only provided at overall County level and has not been broken down into ward data. It differs from the 2001 Census in that it subdivides second home ownership into ‘work’, ‘holiday’ and ‘other’ and therefore can provide a clearer picture of the total number of second homes used as holiday homes in the County. Overall, 1,570,224 usual residents in England and Wales (2.8%) listed themselves as using a second address for more than 30 days a year, which was located in a local authority other than that where they were usually resident. The Census reveals that Swansea has a higher than average number of people who usually reside outside the local authority area and have holiday homes within Swansea (5 per 1,000 usual residents, 2 more than the England and Wales mean of 3 per 1,000 usual residents).


\(^{22}\) [http://www.swansea.gov.uk/media/pdf/e/0/LDP_Scoping_Report_-_track_changes_accepted.pdf](http://www.swansea.gov.uk/media/pdf/e/0/LDP_Scoping_Report_-_track_changes_accepted.pdf)
Climate Change

4.31 Tourism businesses and visitors will need to contribute to reducing the County’s carbon footprint. Predicted changes in climate across the world may affect the tourism market in Wales, whilst potential local impacts, such as the availability of water supply during periods of drought, increased storminess, risk of flooding, increased erosion rates leading to a loss of beaches, and changes in wildlife distribution will all need to be considered carefully when planning tourism developments and infrastructure.

4.32 Development proposals should have regard to the Swansea and Carmarthen Bay Shoreline Management Plan (SMP2)\(^\text{23}\) which aims to reduce flood risks along the coastline of South Wales. It is a high level policy document which provides an objective, large-scale assessment of the risks to people, the developed, historic and natural environment resulting from the evolution of the coast and estuaries and seeks to discourage inappropriate development in areas at risk from flooding or coastal erosion. Flooding issues are addressed in greater detail within the Strategic Flood Consequences Assessment: http://www.swansea.gov.uk/index.cfm?articleid=37447

\(^{23}\) http://staffnet.internal.swansea.gov.uk/index.cfm?articleid=9027
5.0 Local Evidence – Facts and Figures

Tourist Numbers and Expenditure

5.1 Since 1992, the County has been using the Scarborough Tourism Economic Activity Monitor (STEAM) to monitor the scale of tourism and trends in the County. STEAM quantifies the local economic impact of tourism from both staying and day visitors by factoring in figures such as bed stock analysis and accommodation offer, revenue and visitor estimates, and amount of employment supported. This Model is used by all 22 Welsh Unitary Authorities and the 3 National Parks in Wales, so can provide a meaningful comparison of the value of the tourism economy between counties. STEAM approaches the measurement of tourism at the local level from the supply side, which has the benefit of immediacy and relative inexpensiveness. STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends. The latest report was issued in March 2013 and contains data for 2012.

5.2 The following tables provide a six year summary comparing expenditure, revenue, number of tourist days, tourist numbers and employment by sector for the County.

5.3 Table 1 illustrates that total tourism expenditure fell in 2012 (£337 million) compared to 2011 (£348 million), but has risen from 2007 levels.

Table 1: Analysis by Sector of Expenditure (£’s millions)

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<td>28.7</td>
<td>29.5</td>
<td>29.7</td>
<td>29.3</td>
<td>29.8</td>
<td>27.8</td>
</tr>
<tr>
<td>Indirect Expenditure</td>
<td>108.4</td>
<td>111.9</td>
<td>111.2</td>
<td>107.5</td>
<td>108.4</td>
<td>105.2</td>
</tr>
<tr>
<td>VAT</td>
<td>38.1</td>
<td>39.4</td>
<td>35.0</td>
<td>33.9</td>
<td>34.3</td>
<td>33.2</td>
</tr>
<tr>
<td>TOTAL</td>
<td>337.1</td>
<td>348.4</td>
<td>346.4</td>
<td>335.1</td>
<td>339.0</td>
<td>328.4</td>
</tr>
</tbody>
</table>

All £’s 2012 indexed
(Source: City and County of Swansea STEAM Report 2012)
5.4 Table 2 indicates that serviced accommodation revenue fell during 2012 compared to the previous 2 years and non-serviced accommodation revenue was the lowest since 2007. Day visitor revenue decreased slightly compared to 2011 but showed an increase from 2010-2007 and revenue from those Staying with Friends and Relatives (SFR) increased to £38.4 million.

**Table 2: Revenue by Category of Visitor**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced Accommodation</td>
<td>109.7</td>
<td>114.0</td>
<td>117.4</td>
<td>106.5</td>
<td>100.9</td>
<td>107.3</td>
</tr>
<tr>
<td>Non-Serviced Accommodation</td>
<td>98.7</td>
<td>105.8</td>
<td>104.7</td>
<td>102.0</td>
<td>112.4</td>
<td>103.7</td>
</tr>
<tr>
<td>SFR (Staying with Friends and Relatives)</td>
<td>38.4</td>
<td>37.4</td>
<td>37.2</td>
<td>36.9</td>
<td>36.7</td>
<td>36.5</td>
</tr>
<tr>
<td>Day Visitors</td>
<td>90.9</td>
<td>91.2</td>
<td>87.0</td>
<td>89.8</td>
<td>88.9</td>
<td>80.9</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>337.1</strong></td>
<td><strong>348.4</strong></td>
<td><strong>346.4</strong></td>
<td><strong>335.1</strong></td>
<td><strong>339.0</strong></td>
<td><strong>328.4</strong></td>
</tr>
</tbody>
</table>

All £’s 2012 indexed (Source: City and County of Swansea STEAM Report 2012)

5.5 Table 3 illustrates that although the number of tourist days was higher in 2012 (7,180,000) compared to 2007 (6,971,000), the number is continuing to decrease from a peak of 7,488,000 in 2008. Table 4 demonstrates that total visitor numbers fell slightly in 2012 to 4,182,000 compared to 2011 (4,235,000) which recorded the highest number of total tourist numbers for the previous few years.

**Table 3: Tourist Days**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced Accommodation</td>
<td>1,005</td>
<td>1,018</td>
<td>1,022</td>
<td>924</td>
<td>879</td>
<td>886</td>
</tr>
<tr>
<td>Non-Serviced Accommodation</td>
<td>2,466</td>
<td>2,771</td>
<td>2,806</td>
<td>2,726</td>
<td>3,003</td>
<td>2,730</td>
</tr>
<tr>
<td>SFR</td>
<td>879</td>
<td>855</td>
<td>850</td>
<td>842</td>
<td>839</td>
<td>835</td>
</tr>
<tr>
<td>Day Visitors</td>
<td>2,831</td>
<td>2,841</td>
<td>2,711</td>
<td>2,792</td>
<td>2,767</td>
<td>2,521</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>7,180</strong></td>
<td><strong>7,485</strong></td>
<td><strong>7,389</strong></td>
<td><strong>7,284</strong></td>
<td><strong>7,488</strong></td>
<td><strong>6,971</strong></td>
</tr>
</tbody>
</table>

All £’s 2012 indexed (Source: City and County of Swansea STEAM Report 2012)
Table 4: Tourist Numbers

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced Accommodation</td>
<td>605</td>
<td>621</td>
<td>618</td>
<td>561</td>
<td>532</td>
<td>534</td>
</tr>
<tr>
<td>Non-Serviced Accommodation</td>
<td>377</td>
<td>414</td>
<td>418</td>
<td>405</td>
<td>451</td>
<td>411</td>
</tr>
<tr>
<td>SFR</td>
<td>369</td>
<td>359</td>
<td>357</td>
<td>354</td>
<td>352</td>
<td>351</td>
</tr>
<tr>
<td>Day Visitors</td>
<td>2,831</td>
<td>2,841</td>
<td>2,711</td>
<td>2,792</td>
<td>2,767</td>
<td>2,521</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,182</td>
<td>4,235</td>
<td>4,104</td>
<td>4,112</td>
<td>4,102</td>
<td>3,817</td>
</tr>
</tbody>
</table>

All £’s 2012 indexed  (Source: City and County of Swansea STEAM Report 2012)

Table 5: Employment Supported Sectors

<table>
<thead>
<tr>
<th>Sectors in which Employment is supported (FTE’s)</th>
<th>2012</th>
<th>2011</th>
<th>2010</th>
<th>2009</th>
<th>2008</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Employment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>1,463</td>
<td>1,530</td>
<td>1,422</td>
<td>1,371</td>
<td>1,237</td>
<td>1,292</td>
</tr>
<tr>
<td>Food and Drink</td>
<td>1,149</td>
<td>1,197</td>
<td>1,211</td>
<td>1,185</td>
<td>1,214</td>
<td>1,139</td>
</tr>
<tr>
<td>Recreation</td>
<td>423</td>
<td>444</td>
<td>449</td>
<td>443</td>
<td>459</td>
<td>427</td>
</tr>
<tr>
<td>Shopping</td>
<td>651</td>
<td>672</td>
<td>675</td>
<td>670</td>
<td>685</td>
<td>642</td>
</tr>
<tr>
<td>Transport</td>
<td>263</td>
<td>271</td>
<td>273</td>
<td>270</td>
<td>274</td>
<td>256</td>
</tr>
<tr>
<td>Total Direct Employment</td>
<td>3,950</td>
<td>4,115</td>
<td>4,030</td>
<td>3,939</td>
<td>3,869</td>
<td>3,756</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>1,440</td>
<td>1,487</td>
<td>1,509</td>
<td>1,459</td>
<td>1,471</td>
<td>1,428</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>5,390</strong></td>
<td><strong>5,602</strong></td>
<td><strong>5,539</strong></td>
<td><strong>5,398</strong></td>
<td><strong>5,341</strong></td>
<td><strong>5,184</strong></td>
</tr>
</tbody>
</table>

All £’s 2012 indexed  (source: City and County of Swansea STEAM Report 2012)

5.6 The importance of tourism to the economy is clearly illustrated within Table 5. 3,950 people were directly employed in tourism in 2012 (a rise from 3,756 in 2007), within a variety of sectors such as accommodation, food and drink, transport or recreation. Indirect employment has increased with 1,440 people employed in 2012 compared to 1,428 in 2007, but fallen slightly compared to 2010. Seasonality is a major issue within the tourism sector, as can be seen in Figure 1 relating to the economic impact of tourism. There are clear peaks and troughs, with most revenue being generated from May to September.
Figure 1: Tourism Revenue Swansea 2011

Accommodation

5.7 The STEAM tourism figures indicate that there has been a slight increase in bedstock within the County between 2011 and 2012 within both the serviced and non-serviced accommodation sector. Tables 6 and 7 illustrate.

Table 6: 2011 STEAM figures

<table>
<thead>
<tr>
<th>BED STOCK (number of beds)</th>
<th>Average Available Sleeping Spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Serviced Accommodation</td>
<td>3,179, 3,389, 11,957, 20,458, 19,310, 13,318, 20,764, 20,764, 20,464, 18,766, 8,039, 6,063, 20,766</td>
</tr>
<tr>
<td>Total BED STOCK (number of beds)</td>
<td>7,508, 7,768, 16,342, 24,866, 23,717, 25,189, 25,189, 24,866, 23,163, 12,464, 10,391, 25,159</td>
</tr>
</tbody>
</table>

Source: STEAM Report 2012, City and County of Swansea

Table 7: 2012 STEAM figures

<table>
<thead>
<tr>
<th>BED STOCK (number of beds)</th>
<th>Average Available Sleeping Spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Serviced Accommodation</td>
<td>3,293, 3,001, 12,039, 20,808, 19,438, 19,438, 20,839, 20,839, 20,634, 18,866, 8,211, 6,177, 20,638</td>
</tr>
<tr>
<td>Total BED STOCK (number of beds)</td>
<td>7,861, 8,122, 16,629, 25,176, 24,078, 24,086, 25,486, 25,486, 25,182, 22,394, 12,811, 10,743, 25,486</td>
</tr>
</tbody>
</table>

Source: STEAM Report 2012, City and County of Swansea
5.8 By comparison, the Council’s latest accommodation bedspace figures (April 2013) provided by CCS Tourism indicate that there are 31,669 bedspaces in the County, provided among the following types of accommodation:

- Self Catering: 4385
- Serviced: 5929
- Caravan and Camping: 21,355

5.9 This database is kept as up to date as possible, but it is acknowledged that it may not be one hundred percent accurate. There is an obvious discrepancy compared to the STEAM data, which arises from the standard bedspace calculations that STEAM uses for non-serviced accommodation. The reason for this is that STEAM uses unit/pitch occupancy, so is interested in the average number of people actually occupying the unit/pitch, rather than its theoretical capacity. Also, the slight discrepancy in the serviced bedspaces is due to the fact that not everything is open all year round.

5.10 Figure 2 illustrates the spread of tourist/visitor accommodation throughout the County and shows the greatest concentration of serviced accommodation is within Swansea City Centre and Mumbles and the majority of self catering and caravan/camping sites are within Gower.

Figure 2: Tourist Accommodation in Swansea

Source: Appendix 7, Draft Destination Management Plan 2013-2016, City & County of Swansea
5.11 The most recent accommodation study, looking at supply and demand in the City Centre/urban area was published in 2009 (Swansea Accommodation Study, Market Planning Associates). At the time of writing the Study is in the process of being reviewed and the Topic Paper will be amended to reflect the findings when published.

5.12 The County has a range of hotels and bed and breakfast (B&B) accommodation and the 2009 Study showed that there were then 20 properties and 1242 bedrooms within the City Centre/urban part of Swansea. Two of the hotels included within the Study are in fact located outside the County, within Neath Port Talbot, but they were included as it was considered that, for visitors, they represented a realistic and convenient option for overnight stays when visiting Swansea.

5.13 Since the survey was published a 132 bedroom hotel has opened in the SA1 area of the City. Furthermore, planning permission was granted in 2009 for a 164 bedroom hotel at Swansea Point in the City’s Maritime Quarter, and although the site has been cleared, construction work has yet to commence. In addition, planning permission has been granted for a 70 bedroom hotel and or 32 residential apartments in Mumbles. Again work has yet to begin, so it remains to be seen whether a hotel is constructed or if the scheme will only supply private residential properties, but it is not thought that the hotel, if constructed, would draw business from the existing City Centre/urban hotels (Swansea Accommodation Study, 2009).
5.14 The 2009 Study estimated that overall room occupancy was 74% for 2008. Business and conference markets accounted for just over 50% of demand; short breaks, social leisure and coach business 35%, events 8% and banqueting 4%. However there has been a downward trend in hotel occupancy since 2008 partly due to the economic recession. It was projected that by 2014 there would be an occupancy rate of 70%. This rate will decrease further if permission is given to develop more hotels in the City Centre/urban area. The Study concluded that there is no need for further Limited Service (such as Premier Inn or Travel Lodge) supply to 2014 and the requirement for additional Full Service (AA/Tourist Board graded 3/4 star hotels) rooms would be met by the outstanding planning permission for a 164 bedroom hotel at Swansea Point or by extensions to existing hotels.

5.15 There is little evidence in the Study to suggest that as the Limited Service supply expands the B&B Service sector contracts. There is however a trend away from small, family run B&B’s to budget hotels. The suggestion is that the extremely inexpensive and high quality supply is probably less vulnerable than mediocre quality/price accommodation. This is evidenced by the conversion of some traditional B&B’s into Houses of Multiple Occupancy (HMO’s) or flatted accommodation. The results of the 2013 Study may however, provide a different picture of the current market.

**Caravan and Camping**

5.16 There are many caravan and campsites located within Gower, particularly on the southern and western coasts. It is current planning policy to restrict further growth in sensitive coastal locations and to encourage new operations away from the coast and within the north of the County, where provision is sparse. However, this policy has been criticised by some operators in the restricted areas who claim that it is preventing economic growth.

5.17 In order to obtain a clearer picture of this sector’s needs and issues the Local Planning Authority (LPA) undertook a caravan and camping survey in 2012 followed by a Landscape Capacity Study for the provision of caravan and camping within the AONB. This sought to assess the affect of existing caravan and camping on the landscape quality of the AONB and ascertain whether landscape capacity exists to expand/develop new sites. The data gathered, together with interviews that were conducted with site operators, is being used as part of the evidence base for formulation of camping and caravan policies for the LDP.

5.18 There are many issues surrounding caravan and camping and these are examined in greater detail in the Caravan and Camping Topic Paper.

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24 http://www.swansea.gov.uk/index.cfm?articleid=25596
WHY PEOPLE VISIT THE CITY AND COUNTY OF SWANSEA

The Quality of the Scenery/Landscape and Coast

5.19 Tourism Visitor Surveys were undertaken by the Council in 2008 and 2012\textsuperscript{25}. The importance of the natural environment was highlighted in the 2012 Swansea Bay Visitor Survey\textsuperscript{26}, when 44.3% of visitors (a 6.3% increase since 2008) named scenery/landscape, 44% named the coast (a 5% increase since 2008), beaches (35.5%) and visiting friends and family (19.8%) as a main factor which influenced their decision to visit Swansea Bay. **The most popular and main influential factor for visiting Swansea Bay was the scenery/landscape** (18.3%, a 9.3% increase since 2008).

5.20 The 2008 survey found that 22% of visitors stated that Gower’s status as an AONB was a factor which most influenced their decision to visit Swansea Bay. The option of Gower’s status as an AONB as a main influence on their decision to visit Swansea Bay was unfortunately not replicated within the 2012 survey.

5.21 The importance of the County’s landscape and beaches in attracting visitors is therefore of utmost importance and there is a need to capitalise on this natural beauty without causing harm. This is clearly a key point with visitors who agree that **Gower should continue to be protected as an AONB** (91.4% strongly agreed and 7% agreed in 2012, a significant change compared with the 2008 survey when 75% strongly agreed and 23% agreed.

What Visitors Do

5.22 The main activity visitors took part in (45% of those surveyed in the 2008 visitor survey) was low-level walking (2 to 8miles). This is significant and demonstrates that the County is underperforming in attracting walkers in relation to the rest of Wales (almost three quarters of UK holiday visitors and two thirds of overseas holiday visitors to Wales go walking at some point during their stay, and over half of all day visits in Wales include walking (Best Foot Forward’; A Walking Tourism Strategy for Wales).

\textsuperscript{25} http://www.swansea.gov.uk/index.cfm?articleid=53604

\textsuperscript{26} http://www.swansea.gov.uk/index.cfm?articleid=53604
5.23 This highlights the importance of low level impact tourism to the local economy and the need to better promote the many walking routes throughout the County, not just the Wales Coastal Path. The present registered path network within Swansea is 400 miles (617km long) and is mostly comprised of footpaths (78.9%). There are also 80 miles (128km) of bridleways (20.8% of the network) and one and a quarter miles of byways open to all traffic (0.3%). The Gower AONB contains approximately 66% of the overall path network. Approximately 5% of the path network is on land owned by and therefore wholly under the control of, the Council. There is also 60km² of access land.

5.24 Due to the very wet summer of 2012 (which may go someway to explain the slight tourism downturn last year as illustrated in Tables 1-5), levels of walking were down as evidenced by the Council’s automated footpath counters, but there is scope to do more amongst tourism operators and organisations, such as the increased and more widespread provision of drying rooms in campsites and B&B's, walking themed holidays, the provision of cafés and public toilets (particular along the north coast) linked to the footpath and bus services to enable greater access to the paths, more circular routes and much greater promotion of the opportunities in order to establish the County as a recognised walking holiday destination.
5.25 The County has approximately 60km of cyclepaths, including the national bike routes 4 (the Celtic trail west and east) and 43 (Celtic trail east) and proposed route 439. Figure 2 illustrates the location of the National Cycle routes 4 and 43. Cycle route counter data at Blackpill Lido recorded 149,300 people using the cycle track at that location in 2009, an increase on the 2008 figure of 148,600 (total figures extrapolated from 24 hour averages). Combined data at a further five counters across the network (at Ashland Sports Club, Fabian Way, Tawe Sail Bridge, Swansea Civic Centre and Blackpill) also recorded an increase in user levels, from 350,000 in 2008 to 394,000 in 2009. (The 2009 figures are based on data from February to July).

Figure 2
Other Plans and Strategies

5.26 In 2006 the City and County of Swansea published a Gower AONB Management Plan as required under the Countryside and Rights of Way Act 2000. Theme 9 of the Plan contains a vision statement to promote sustainable tourism in which the special qualities of the AONB have top priority. Specifically, Objective 36 states the intention to apply for the EUROPARC Federation Sustainable Tourism Charter by 2009. However, this was not achieved due to lack of resources. The AONB Management Plan is now being revised and this objective will be carried forward into the revised document. In February 2013 the Council commissioned the development and publication of a Sustainable Tourism Strategy and Five Year Action Plan. The Strategy and Action Plan will be based on consultation with tourism business providers, community groups, landowners and other stakeholders to explore tourism issues and future initiatives. The Strategy and Action Plan will be submitted for the EUROPARC Federation European Charter for Sustainable Tourism in Protected Areas status. One of the objectives of the Strategy is to advise on how it could inform both the Tourism Destination Management Plan for Swansea Bay and the LDP.

5.27 The Countryside Access Plan 2007 – 2011 is the Rights of Way Improvement Plan for the County. It addresses public access in the countryside in the broad sense. The Plan seeks to promote walking tourism by aiming to ‘make the most of the path network and access land to benefit the health and well being and economic prosperity of the people of the City and County of Swansea’.

5.28 This is supported by three actions:
- The Authority will continue to expand the present network of promoted walking routes by producing further ‘walking by bus’ leaflets.
- The Authority will promote the Gower Coast Path from Crofty to Mumbles and associated linear and circular walks.
- The Authority will create and promote a network of walks located close to villages and the urban fringe to provide increased tourism and health benefits.
- The Authority will consider, in consultation with all users, the promotion of off-road cycling routes and horse riding routes.
The Swansea Bay Strategy (2008) focuses on the 8.5 kilometres of waterfront at the eastern end of Swansea Bay from West Pier in the east to Mumbles Pier in the west. The Strategy consists of three elements:

- **A Vision for the Bay**, which presents an holistic view of what it can offer in terms of recreation and tourism;
- **An Action Plan**, which considers the potential development at identified key destinations, and environmental and infrastructure enhancement proposals between those destinations; and,
- **A Delivery and Implementation Plan**, which sets out the potential mechanisms for bringing forward development and enhancement.

The vision will be delivered over the next fifteen years through a series of initiatives both on a bay-wide level and specific to the six key destinations:

- City Waterfront
- St Helen's
- Sketty Lane
- Blackpill
- Mumbles
- Mumbles Pier

### Problems Experienced by Tourists

Visitors surveyed for the 2012 Visitor Tourism Survey stated that the main priorities for improvement should be *cleanliness of streets* (17.7% in 2012 and 16% in 2008), *cleanliness of public toilets* (20.2% in 2012 and 20% in 2008), *availability of public toilets* (19% in 2012 and 17% in 2008), and *the standard of tourist signposting* (*road signs and pedestrian signs*) (35.3% in 2012 and 32% in 2008). The above figures are based on those rating average, poor and very poor.

In 2012, only 1.3% (4% in 2008 and 3% in 2006) of visitors said they would not recommend a visit to Swansea Bay, with the main problems being: difficulty parking and the car parking charges; traffic congestion; not enough wet weather activities; and lack of shops in the City Centre.

Solutions to all these problems relate to physical development, from the creation of new car parks to increased signage, which may have impacts on the landscape.

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27 http://www.swansea.gov.uk/media/pdf/l/b/SwanBayStratFinalMarch09.pdf
5.33 The Council has commissioned a Gower Interpretation Plan to guide the future interpretation of Gower for both visitors and residents. The Plan covers the Gower AONB and the communities of Crofty, Penclawdd and Gowerton, which have significant industrial heritage interest. The Interpretation Plan is accompanied by an Audience Development Plan which identifies current and potential audiences and looks at the most effective ways of providing opportunities for audiences to be involved in accessing, learning about and understanding the landscape and heritage of Gower, as well as contributing in practical ways to its conservation and enhancement.
6.0 Current Unitary Development Plan (UDP) Policy

6.1 The current Unitary Development Plan (UDP) was adopted in 2008 and contains one strategic tourism policy and eight detailed policies relating to tourism development. The policies are presented in Appendix 1. They seek to support the development of new, and improvement of existing, facilities and attractions, to extend the tourism season, and to protect the natural heritage of the area.

6.2 The UDP recognises the prime natural tourism resource is the landscape, in particular Gower’s countryside and beaches, the upland countryside areas and Swansea Bay. Other resources include the City Centre, the Maritime Quarter/SA1, Lower Swansea Valley, the resort of Mumbles, and a network of cultural, historical, archaeological, built heritage, leisure and sports facilities.

6.3 The UDP objectives that relate to tourism are:

- To protect the countryside from development that would cause material harm, particularly where the undeveloped coastline or other areas of high landscape quality are concerned (1.c)
- To avoid significant adverse environmental impacts from new development (1.j)
- To develop Swansea as a major Waterfront City capitalising on the opportunities provided by SA1 (2.b)
- To provide sustainable employment opportunities for rural communities (2.g)
- To improve, expand and diversify tourism infrastructure (2.h)
- To develop sustainable tourism initiatives and improve the quality and range of the accommodation base (2.i)
- To improve the quality of caravan and camping sites and reduce their intrusiveness in the landscape (2.j)
- To extend and improve appropriate access to and enjoyment of the countryside and urban greenspace (3.h)
6.4 The UDP’s tourism proposals complement and support the Council’s Tourism Strategy. The proposals help facilitate:
   i. An extension and reinforcement of the attractions base, whilst protecting and improving the tourist environment,
   ii. The development of locally distinct places and themed tourism attractions,
   iii. A quantitative and qualitative improvement to the accommodation base,
   iv. The introduction of sustainable tourism schemes,
   v. Promotion of tourism in all seasons.

6.5 Officers in Development Management Control advise that the policies have worked well and there have been no issues with their implementation. However a gap has been identified in relation to existing leisure facilities, such as fish farms, where applications were submitted for complementary tourist accommodation on site, but as the schemes did not fall within the definition of agricultural diversification there was no specific policy support.

6.6 A further concern that become apparent during surveys and discussions with some caravan and camping accommodation operators during 2012, was the very negative perceptions they held of the Planning System and their belief that the Planning System restricted their businesses development. However, it is important to note that on further discussion, it was clear that these negative perceptions date back many years and did not reflect full understanding of current aims and policies as set out in the UDP. It is therefore vital that the policies within the UDP are made clear now and for the emerging LDP policies to be understood by operators through more inclusive dialogue between operators and the LPA as to what form of development may be considered appropriate within the AONB, the City Centre and the rest of the County.

6.7 For certain operators however there will always be a conflict between their business aspirations and the protection of the landscape and environment within which their businesses are located, especially within the AONB. This is discussed further in the next section.
7.0 Issues for the LDP

How can rural business demands/tourist pressures and protection of the natural environment be reconciled?

7.1 The Gower AONB together with the County’s coastline and beaches are clearly the main draw in attracting visitors to Swansea, and it is important that the integrity of the landscape and seascape is maintained in order to continue to attract visitors. Furthermore, the Council has a duty to have regard to the purposes of the AONB and the primary objective is the conservation and enhancement of the area’s natural beauty and the protection or enhancement of the character and landscape of the undeveloped coastline. However, there are also clearly issues in relation to the wishes of some businesses to develop and expand, the potential impacts of this expansion on the landscape, and the needs and demands of tourists and visitors. Furthermore, enabling the few remaining working farms remaining on Gower to diversify into tourism businesses may be one of the only ways of maintaining such farms within the AONB. Tourist related developments can also contribute to the maintenance of local communities in rural areas and new facilities should be accessible to residents and visitors (considered further within the Social and Community Infrastructure Study: www.swansea.gov.uk/ldpps). Seeking to identify ways to reconcile these issues (where possible) may include supporting development away from sensitive coastlines, enabling land swaps on some caravan and camp sites to move visually intrusive developments away from sensitive landscapes, the restoration of permitted development rights for small (1-5) unit caravan and campsites, and the continued support for farm diversification schemes. These issues will be further explored during the preparation of the LDP.

Does the County have capacity to accommodate more facilities and/or tourists without damaging the natural environment?

7.2 There are areas, such as Mawr, with a beautiful uplands landscape which are underused as a tourism resource, whereas areas of Gower are arguably at capacity in terms of both landscape and physical infrastructure. A Landscape Capacity Study for caravan and camping in the AONB has been commissioned and will help to provide evidence in the evolution of future planning policies within this area. Outside the AONB policies should continue to encourage developments in the north of the County, where there is greater potential for tourist related schemes within or adjoining existing communities without damaging the natural environment and can help aid the regeneration of former industrial areas.
Tourism Infrastructure

7.3 Tourism infrastructure such as waymarking, signposting, car parking, beach management, toilets and litter collection was identified as a problem by visitors to the area in the 2012 Survey. There is a need to maintain a high standard of design, landscaping and maintenance of public areas, including the provision of consistent and appropriate style of street furniture, cleaning of the beaches and adjoining areas, as these are highly visible and add to a positive visitor experience. This will require a more focussed, coordinated approach by the Council, ensuring cross-departmental working in order to ensure that these issues are addressed to enhance the environmental quality, positive perceptions and visitor experience.

Cumulative Effect

7.4 Tourism puts pressure on a variety of resources, such as water supply, sewerage and waste disposal systems and also the road network and car parks can become degraded by frequent and increased use. This is particularly true for the Gower Peninsula which has in the past suffered with low water pressure during hot weather when visitor numbers have increased, causing problems for visitors and locals alike.

7.5 There are a number of issues relating to the road network as a result of increased traffic during the tourist season which have been highlighted by colleagues in highway management. An increased volume of traffic to Gower puts pressure on arterial transport routes particularly the Mumbles Road and Gower Road Corridors and Fabian Way. Improvements to junction 47 of the M4 would improve access to North Gower leading to reduced volumes of traffic on the Fabian Way / Gower Road corridors. Narrow roads at Parkmill, Gower are an issue during the tourist season as they cannot accommodate two-way traffic, particularly caravans. Increased public transport provision and park and ride facilities to Mumbles would help tackle congestion along Mumbles Road during the tourist season. Car parking is increased at popular destinations and/or links are developed between park and ride sites and popular Gower destinations via a dedicated and regular bus service.

7.6 Such issues need to be taken into account when assessing proposed tourism developments and any identified problems addressed before a scheme is brought into beneficial use.

7.7 The cumulative effect of tourist facilities has the potential to damage the environment over time, with increased visitor numbers contributing to footpath erosion and destruction of fragile ecosystems, such as sand dune habitat. This is also true of the built development, where a single development in isolation may have limited impact on the landscape; however a number of new developments in close proximity may cumulatively have a negative impact to the detriment of the landscape and visual beauty of the area.
The LDP will need to identify areas likely to be suitable for development, those subject to significant constraints and those considered to be unsuitable for development. Areas subject to constraints or considered unsuitable for development may include those where conservation or enhancement of the natural and historic environment requires development to be limited, where visual intrusion will need to be considered carefully, and where there may be risks of erosion, flooding or land instability. In other areas the economic potential of the coast may be unlocked in a sustainable manner, such as specific locations along Swansea Bay.

Lack of Indoor Attractions

One of the ‘problems’ identified within the latest Visitor Survey was the lack of indoor attractions. The County has a number of indoor tourist facilities or facilities that include indoor areas, such as the National Waterfront Museum, LC2, Oystermouth Castle, Mumbles Pier, cinemas, ten pin bowling, soft play areas, go-karting and other small-scale attractions which draw tourists as well as locals. However, the majority of these facilities are located within the urban area. The relative lack of indoor tourist attractions within the main tourist destination – the AONB - was highlighted within the AONB Management Plan, 2006, and is a problem which still has not been addressed. At present, the following indoor recreational facilities are present on Gower:

- Gower Heritage Centre
- Perriswood Archery Centre
- Soft Play area, Gower Holiday Village
- Small swimming pools at various campsites
- Clyne Farm Activity Centre

There is scope for the development of additional tourist developments; either within the AONB or on the fringe of the AONB to provide attractions such as indoor play areas, climbing walls, bowling alleys etc which can be accommodated within barn type structures as part of farm diversification. There may also be opportunities to develop new attractions related to the heritage, culture or physical characteristics of the coast and keep visitors within the County during wet weather periods. Any such proposals would have to ensue they were of an appropriate scale, relate acceptably to the existing development pattern, did not have a significant adverse impact on landscape quality or sensitive locations and would not put additional pressure on infrastructure such as roads.
Accommodation

7.11 Work is currently being undertaken to establish whether there is capacity for a new (or alterations to existing) caravan/campsites within the AONB, and more importantly, if there is a need for additional/expanded sites. There is certainly capacity for new sites outside the AONB, especially within the urban area, for example, within Clyne Country Park where the revenue generated could go towards the management of the Park which does not presently have a maintenance budget.

7.12 It is important for new accommodation to offer visitors something different than the existing offer and in particular new proposals should seek to encourage high quality ‘niche’ accommodation. A broader range of serviced accommodation would allow more choice for the visitor and appeal to the growing short-break market. Similarly, high quality accommodation in all sectors will attract visitors with a higher purchasing power. There is a need to ensure new developments are maintained for tourism purposes and do not become ‘second homes’, which detract from communities and do not ‘bring’ as much money into the local economy.

Gap in UDP Policy

7.13 UDP policies have generally worked well and there have been no issues with their implementation when proposals have been brought forward. However, the number of new proposals has been low – possibly reflecting lack of local knowledge. Furthermore, a gap has been identified in relation to supporting existing leisure facilities/attractions, which are not a form of agricultural diversification and where applications are submitted for complementary tourist accommodation.
7.14 Linked to the above are the negative perceptions of Planning amongst many operators, believing that the Planning System is restricting their economic growth by limiting expansion or development. However, there has to be a balance between promoting tourism and protecting the natural environment. A role for the Council, through the LDP and the Destination Management Plan, is to emphasise the importance of the landscape and environment in attracting visitors to the County and the revenue that is linked to those visits. If development is allowed which destroys the landscape of the area, visitors and the revenue they bring will be lost forever. The short term needs of individual operators must therefore always be weighed against the longer term needs of the area and wider community.
8.0 Strategic Policy

8.1 The existing strategic policy for tourism contained within the UDP, is:

Proposals to develop or improve the variety and quality of tourism facilities will be supported where they contribute to the growth of the local economy, and where they do not have a significant impact on natural heritage and the historic environment or the amenity of local communities.

8.2 The aims of this policy are still relevant, accord with national tourism strategies and should be reflected in the LDP. Any future policy must also follow the LDP Vision and relevant objectives to:

- Improve expand and diversify appropriate sustainable tourism facilities and infrastructure
- Conserve and enhance the County’s natural heritage
- Preserve and enhance the County’s high quality cultural and historic environment
- Promote and enhance a diverse and sustainable rural economy
- Improve access to healthcare, lifelong learning, leisure, recreation, and other community facilities
- Reinforce and improve the City Centre as a vibrant regional destination for shopping, culture, leisure, learning and business
- Facilitate growth and diversification of the local economy and an increase in high value, skilled employment

8.3 Planning policy must always recognise the importance of maintaining and enhancing the quality of the environment – the aspect which attracts visitors to the County in the first place, whilst supporting the economic benefits that tourism brings to the local economy and the important role it plays, for example, in helping to maintain working farms in the countryside, thus enabling the rural economy to diversify and remain sustainable. Proposals should seek to improve the quality and variety of accommodation available and enhance the County’s destination offer all year round. Leisure and cultural facilities can help reinforce the vibrancy of the City Centre and provide skilled, high value employment. The draft Strategic policy should be read in conjunction with other draft strategic policies contained within the Preferred Strategy and the detailed policies which will be contained within the Deposit LDP.
Suggested LDP Strategic Policy

Policy 12: Tourism

The natural beauty of the County, combined with a vibrant City Centre and urban waterfront, makes Swansea an attractive destination for sustainable tourism. Development that capitalises upon the areas distinctive assets and creates a year round destination with broad appeal will be encouraged.

Tourism, leisure and cultural facilities that contribute towards the revitalisation of the City Centre and urban waterfront, and enhance ‘City Break’ tourism, will be supported.

Proposals for rural tourism related development that seeks to conserve and enhance the County’s unique natural heritage will be supported.

Key Objectives:
- Improve, expand and diversify appropriate sustainable tourism facilities and infrastructure
- Conserve and enhance the County’s natural heritage
- Preserve and enhance the County’s high quality cultural and historic environments
- Promote and enhance a sustainable rural economy
- Reinforce and improve the City Centre as a vibrant regional destination for shopping, culture, leisure, learning and business

Supporting text

8.4 Tourism has a key role to play in the County’s economy. The Council is seeking to increase tourism revenue and extend the tourist season to create a year round destination. Tourism, leisure, culture, sports and major events all have the potential to raise economic activity, enhance regeneration and conservation and to improve overall sustainable development, good health and quality of life. There is, however, a need to ensure that tourism does not have a negative impact on the very environment that attracts visitors in the first place. The Deposit LDP will seek to ensure that tourism is sustainable, compatible with national planning and tourism policies and balances the development of tourism facilities to support economic growth with the protection and enhancement of the natural environment.
8.5 The City Centre and urban waterfront provide an ideal location to develop additional cultural and leisure facilities, offering attractions and facilities to complement the natural beauty of the County’s countryside and contribute to the growth of the visitor economy. There is potential to increase levels of ‘City Break’ tourism by providing a good range of quality attractions and facilities that complement the retail offer and provide an all round destination for short term visits.

8.6 Any proposed development must be appropriate to its location and surrounding environment and not have a negative landscape impact. The Gower AONB landscape capacity study will be used to help assess proposals within, and on the edge of, the AONB. In rural areas, the cumulative effects of proposals will be taken into account. Developments which aim to extend the tourist season, add to the tourism offer and establish the County as a high quality destination will be encouraged, where appropriate. The LDP will seek to ensure that proposals for new tourism related developments are located in sustainable and accessible locations and that local communities are not adversely affected. Specific policies addressing caravan and camping will be contained within the Deposit LDP.
APPENDIX 1

NATIONAL AND LOCAL POLICIES, ADVICE AND STRATEGIES RELATING TO TOURISM

NATIONAL


PPW states that ‘tourism is vital to economic prosperity and job creation in many parts of Wales. It is a significant and growing source of employment and investment, based on the country’s cultural and environmental diversity. Tourism can be a catalyst for environmental protection, regeneration and improvement in both rural and urban areas’.

The Assembly Government’s objectives for tourism are:

- to encourage sustainable tourism in Wales, promoting local prosperity and supporting community well-being and involvement, while protecting and giving value to natural heritage and culture; and
- to manage the tourism sector in ways which minimise environmental impact.

The planning system should encourage sustainable tourism in ways which enable it to contribute to economic development, conservation, rural diversification, urban regeneration and social inclusion, recognising the needs of visitors and those of local communities. In addition to supporting the continued success of existing tourist areas, appropriate tourist-related commercial development in new destinations, including existing urban and industrial heritage areas, should be encouraged.

PPW recognises that in some places there may be a need to limit new development to avoid damage to the environment (for example in undeveloped coastal areas), or to the amenity of residents and visitors. In others there will be scope to develop well-designed tourist facilities so as to help bring about regeneration, particularly of former industrial areas.

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

Planning authorities should provide the framework for well-located, good quality tourism, sport, recreational and leisure facilities. The areas and facilities provided in both rural and urban areas should be sensitive to the needs of users, attractive, well-maintained, and protected from crime and vandalism. They should be safe and accessible, including to deprived or disadvantaged communities and to people whose mobility is restricted, by a variety of sustainable means of travel, particularly

walking, cycling and public transport. Long-distance routes, rights of way, disused railways and waterways are important tourism and recreation facilities, both in their own right and as a means of linking other attractions.

**Technical Advice Note (Wales) 13: Tourism (WAG, 1997)**

Technical Advice Notes (TANs) supplement PPW and, together with PPW, form national planning policy. TAN 13 provides advice on hotel development, holiday and touring caravans and seasonal and holiday occupancy conditions.

**Technical Advice Note (Wales) 13: Tourism (Draft revision, WAG, 2006)**

The WG consulted on a draft revised version of TAN 13 in July 2006. The revision acknowledged that tourism has significant social, environmental and economic implications in different areas. The document also recognised the importance of sustainable tourism.

As the TAN has not been adopted it can be used for information but doesn’t carry any formal status. The contents of the TAN have not been included within any subsequent alterations of PPW.

**People, Places, Futures: The Wales Spatial Plan 2008 Update (WAG)**

The document updates the original Wales Spatial Plan which was adopted in 2004. Local Planning Authorities must have regard to the Wales Spatial Plan when preparing their LDP’s, though it does not form part of the statutory development plan. It does however, set the context for the LDP.

The Wales Spatial Plan sets out the WG’s vision for Wales for a twenty year period (from 2004). There are six priorities highlighted for the Swansea Bay - Waterfront and Western Valleys region, including a specific tourism priority:

- Developing a strong leisure and activity based tourism industry.

There are a number of other tourism related priorities identified within different topic areas for the region:

**Economic Development**

- Maximising the coastal route for tourism growth creating a Swansea Bay Coastal Path
- Developing centres of excellence for sport, recreation and activity holidays
- Strengthening conservation and interpretation of culture and heritage in its own right while also providing a leisure and tourism resource.

**Valuing our Environment**

- Maximising the tourism and recreation opportunities provided by our high quality environment without causing it damage
- Facilitating and supporting the forestry and agriculture sector to continue to become more sustainable, protecting valuable habitats, developing greater synergy with tourism and leisure, and developing local products that add to the Area’s appeal.

Sustainable Tourism: A Framework for Wales (WAG, 2007)
The purpose of the sustainable tourism framework is to outline what sustainable development means for the tourism sector in Wales and to ensure that the tourism industry contributes to sustainable development.

The Framework recognises tourism’s reliance upon the integrity of the natural environment and how, in Wales, beautiful landscapes and coastlines are the very foundation of tourism. Realising the potential of the environment will always be a key priority in the development of tourism. However, sustainable tourism, unlike eco or green tourism, addresses social, cultural, economic and environmental issues. Sustainable tourism considers the needs and quality of life of local communities, enhances and respects culture and local traditions, contributes to local economic prosperity and minimises damage to the environment. The Framework uses the World Tourism Organisation definition of Sustainable Tourism, which is: “Tourism which meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future”.

The Welsh Coastal Tourism Strategy (WAG, 2008)
The document’s preparation was identified as a key national action in the Wales Spatial Plan. The Strategy identifies a clear way forward for the development of Coastal Tourism which realises and builds on its economic potential whilst respecting its environmental quality and recognising the importance of achieving community benefits. The Strategy aims to achieve an integrated approach to the development and management of coastal tourism, recognising that it is a year round industry. The aims of the Strategy are:

- to ensure that sustainable tourism is making an increasing contribution to the local economy of coastal communities
- to improve the quality of the visitor experience
- to achieve an integrated approach to the development and management of coastal tourism
- to safeguard and protect the environment and cultural heritage as a key resource for coastal tourism

Partnership for Growth: the WG Strategy for Tourism 2013-2020\textsuperscript{30}
The Strategy replaces ‘Achieving our Potential, 2000-2013: Tourism Strategy for Wales, which was published by the Welsh Government in 2000. The new Strategy identifies a product led approach to developing and marketing tourism in Wales. There will be a focus on more luxury and branded hotels; more well-being facilities such as spas; more heritage hotels that utilise historic and distinctive buildings; more all year round attractions, activities and cultural experiences; more innovative, unusual and distinctive products. It focuses on five key areas:

- Promoting the Brand
- Product Development
- People Development
- Profitable Performance
- Place Building

\textsuperscript{30} http://wales.gov.uk/docs/drah/publications/Tourism/130613partnershipforgrowthen.pdf
Swansea Bay Tourism Strategy 2006-2011

This Strategy will be replaced by the Swansea Destination Management Plan. The Tourism Strategy highlighted that Swansea’s natural and cultural resources, together with its strategic location and accessibility, give it unique scope to drive the region’s tourism economy.

The Strategy sees Swansea’s main strengths as being:

i. The underlying quality of the area’s existing natural, cultural and heritage resources;

ii. Swansea’s accessibility to the core UK markets of the South East, the South and the West Midlands, together with its accessibility to the Irish market;

iii. The unique location at the ocean’s edge with the close proximity of the urban centre to outstanding countryside and coast of Gower, Mawr and beyond;

iv. The wide range of activities associated with sport, culture, learning and well-being that take place within this high quality environment.

The Strategy sought to capitalise on the area’s maritime setting, its access to highly valued landscapes and traditions of creativity and innovation whilst, at the same time, strengthening its sense of place and celebrating its rich, distinctive cultural heritage, all the qualities that make Swansea a vibrant, healthy and interesting destination. However, despite the quality and range of developments which have taken place, tourism activity has remained relatively static. It has not grown at the rate envisaged by the Tourism Strategy or the STGA report and, therefore, not met the targets envisaged.

Swansea Destination Management Plan (draft) 2013-2016

The Destination Management Plan (DMP) will replace the Tourism Strategy. It has been produced in partnership with major tourism stakeholders to address some of the existing and identify future issues facing tourism in the area. The main focus of the DMP is an action plan consisting of a series of actions addressing strategic issues, which remain seasonality, quality of the product, funding and sustainability.

Swansea Bay Strategy, 2008

The Swansea Bay Strategy is one of a series of interrelated initiatives that seek to improve the long-term performance of the city and the facilities for residents, visitors and businesses. It was adopted as supplementary planning guidance in 2008. The other initiatives are:

• City Centre Strategic Framework (adopted as supplementary planning guidance in 2007);

31 http://www.swansea.gov.uk/index.cfm?articleid=54629
32 http://www.swansea.gov.uk/media/pdf/l/b/SwanBayStratFinalMarch09.pdf
• Tawe Riverside Corridor; and,
• Swansea Tourism Strategy.

The Swansea Bay Strategy focuses on the 8.5 kilometres of waterfront of Swansea Bay from the West Pier in the east to Mumbles Pier in the west. The strategy consists of three main elements:
• A Vision for the Bay, which presents an holistic view of what it can offer in terms of recreation and tourism
• An Action Plan, which considers the potential development at identified key destinations, and environmental and infrastructure enhancement proposals between those destinations; and,
• A Delivery and Implementation Plan, which sets out the potential mechanisms for bringing forward development and enhancement.

**Gower Area of Outstanding Natural Beauty Management Plan, 2006**
Gower was designated an AONB in 1956 and the main purpose of the designation is to conserve and enhance the natural beauty of the designated area, including flora, fauna, landscape and geology. The Management Plan seeks to conserve and sustain these intrinsic qualities, defining Gower’s character and underpinning a successful tourism industry. A new management Plan is currently under preparation and will inform the Deposit version of the LDP.

**City and County of Swansea Unitary Development Plan, 2008**
The eight detailed policies which specifically relate to tourism are presented below, without their accompanying amplifications, for information purposes. During the preparation of the LDP Deposit Plan, the policies will be reviewed to assess whether they reflect current national policy and guidance and to consider their appropriateness for inclusion in the LDP

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### Strategic Policy SP4
Proposals to develop or improve the variety and quality of tourism facilities will be supported where they contribute to the growth of the local economy, and where they do not have a significant impact on natural heritage and the historic environment or the amenity of local communities

### URBAN TOURISM
**Policy EC15**
Proposals that consolidate the urban tourism resource, by improving the quality and range of attractions, destinations, accommodation and services, will be supported at the following locations:
• City Centre,
• Maritime Quarter,
• Lower Swansea Valley,

- Tawe Riverside Basin, and
- Mumbles and specific destinations around Swansea Bay (see Policy EC16).

### SWANSEA BAY RECREATIONAL AND TOURISM FACILITIES

**Policy EC16**

New or improved recreational and tourism facilities at specific destinations around Swansea Bay are proposed which capitalise on the seafront aspect and contribute towards the regeneration of the Bay.

Between these areas of appropriate development, the emphasis is on safeguarding and enhancing the environment of the Bay and other waterfront areas.

### RURAL TOURISM

**Policy EC17**

Proposals for tourism and recreation developments of an appropriate scale in locations which relate acceptably to the existing pattern of development and/or their surroundings in terms of the nature of the proposal concerned will be permitted provided they:

i. Are in keeping with the scale and character of the surrounding area and are of a high standard of design,
ii. Do not have significant adverse effects on landscape or nature conservation interests,
iii. Do not create a significantly harmful level of visitor pressure at sensitive locations,
iv. Can provide safe access for a variety of modes of transport without harming the character of adjacent lanes, and
v. When located on a farm would not lead to the loss of the best and most versatile agricultural land.

### SERVICED TOURIST ACCOMMODATION

**Policy EC18**

Development that improves the range and quality of serviced tourist accommodation will be permitted:

i. Within the urban area, particularly in support of City Centre regeneration initiatives,
ii. Outside of the urban area within existing villages, groups of farm or other buildings, or
iii. Where required to upgrade facilities at existing tourism operations.

### UNSERVICED TOURIST ACCOMMODATION

**Policy EC19**

The creation of well-designed unserviced tourist accommodation through the
conversion of existing appropriate rural buildings will be supported.
NEW CHALET, STATIC CARAVAN, TOURING UNIT AND CAMPING SITES  
Policy EC20
Development of new chalet, static caravan or touring unit sites will only be permitted where:

i. It would not materially adversely affect the natural beauty of the AONB, Heritage Coast or other nationally or internationally designated areas,
ii. There would be no material harm to the landscape character and environmental quality of the surrounding area, either individually or cumulatively with other sites in the vicinity,
iii. There are satisfactory service arrangements in terms of access roads, sewerage, power and water supply, surface water disposal and waste disposal,
iv. The site is well located in relation to an adequate road system which can accommodate the traffic generated, and where possible has convenient access to frequent public transport,
v. Holiday occupancy is ensured by condition, and
vi. Within the AONB, it can be demonstrated that the site contributes towards meeting an identified unmet need.

EXISTING STATIC CARAVAN, TOURING UNIT AND CAMPING SITES  
Policy EC21
At existing camping, touring unit and static caravan sites:

i. Improvements to the environmental quality, condition and facilities will be encouraged, and small increases in the number of pitches may be permitted where it is justified in the context of the environmental improvements proposed and where it would not significantly increase the overall scale of the operation,

ii. Material changes to the type of accommodation provided on existing sites or small increases in site area will only be permitted where:
   a. There would be no significant adverse impact on the landscape, particularly in coastal locations,
   b. The change or extension would bring about environmental improvements, would not require extensive additional infrastructure and services, and would result in significant overall benefit to the character and appearance of the area in cases of limited change to static caravan pitches or to chalets,
   c. There would be no harm to natural heritage, and
   d. It is subject to a condition ensuring holiday occupancy,

iii. Overflow areas for camping or touring unit pitches as extensions to existing sites on a short term basis during peak holiday periods may be permitted provided they would not require additional infrastructure and would not cause significant harm to local amenity or traffic congestion. In addition, proposals will be considered with reference to criteria (ii) (a), (c) and (d) above.
SMALL CARAVAN AND CAMPING SITES ON FARMS, PERMITTED DEVELOPMENT RIGHTS AND STORAGE OF CARAVANS
Policy EC22
Planning permissions for camping and up to 5 touring caravans on farms for temporary periods and camping/caravan rallies will be conditioned to minimise significant impacts on the environment, road network and utilities. The storage of touring caravans will only be permitted within existing barns, sheds or other enclosed buildings within the AONB, or in unobtrusive locations outside the AONB.