

SOUTH WEST WALES COASTAL RECREATION AUDIT EXECUTIVE SUMMARY

Introduction

This study has been commissioned by the Pembrokeshire Coastal Forum on behalf of the following partners:

- Pembrokeshire Coastal Forum
- South West Wales Regional Tourism Partnership
- Pembrokeshire Coast National Park Authority
- Pembrokeshire County Council
- Countryside Council for Wales
- National Trust
- Environment Agency Wales
- Pembrokeshire Marine SAC Officer
- Pembrokeshire Marine Code and outdoor Charter Group Activities Liaison Officer
- Milford Haven Port Authority Water Ranger
- Carmarthenshire County Council
- City and County of Swansea
- Neath and Port Talbot Borough Council

The aim of the study was to inform strategic recreation management planning for the coast contiguous with the local authority areas of Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot by:

- Constructing a coherent picture of outdoor recreational activity along the coast
- Aiding the development of a framework for the future sustainable development and marketing of outdoor activities in the region

Methodology

The work consisted of three phases:

1. Data collection and identifying hotspots
2. More detailed research into the hotspots and research into trends in demand for activities
3. Identifying issues for consideration in future management

A list of 31 key outdoor recreation activities was agreed and the study area was divided into 122 sections in order to manage data collection and analysis.

Phase One

Information collection included the following:

- Collection and analysis of existing research
- Consultation with site managers through:
 - A series of workshops held with groups of managers on a geographical basis
 - Circulation of an information collection form to site managers
 - Circulation of an information collection form to activity providers

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- Consultation (face to face interviews and telephone interviews) with a wide range of stakeholders and interest groups

Thirty eight sites were identified as hotspots because:

- Recreational use is very high, and/or
- There are negative impacts on conservation designations, and/or
- There is user conflict, and
- Current management is inadequate

Phase Two

The hotspots and each of the 10 zones were considered in further depth through a combination of focus groups and consultation on the Phase One findings. In addition, trends in participation in existing and emerging activities were researched.

Phase Three

Finally, a description of recreation and the issues which should be considered in future management planning were identified and described.

Some difficulties were experienced, in particular:

- The size and complexity of the study area led to the collection of large amounts of information
- Little reliable information was available on levels of use and this was not comparable
- The only consistent information was collected from site managers and this is subjective

Information for each site (ownership, designations, facilities, level and nature of activities taking place & issues) has been entered into a database. This is linked to GIS mapping.

Demand, Provision, Impacts and Issues

In 2003, UK residents took 2.4 million tourism trips and overseas residents took 188,000 tourism trips to South West Wales, with a total of 12.7 million nights and £433 million of spending, which supports approximately one third of all tourism jobs in Wales.

For nine out of ten visitors to Pembrokeshire, beaches and the coast were the most commonly quoted factors attracting visitors to the county.

Key characteristics of tourism in the area are:

- Most visitors were not on a main holiday
- In the west of the study area, the proportion of holiday tourism (as opposed to business, visits to friends & relatives, etc) is higher than for Wales as a whole, but the profile is more in line with the national picture in the east
- In the west, self-catering accommodation is the most popular choice of commercial accommodation

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- Tourism in the study area is highly seasonal with 43% of trips taken in the summer quarter
- Almost 40% of domestic visitors are from Wales itself

Pembrokeshire

Six of the recreational zones used to manage information during the study are in Pembrokeshire.

Zone 1: Teifi to Strumble Head

This area is generally quieter than the rest of the Pembrokeshire Coast. The cliffs support important birdlife. Access to the coast occurs mostly on the large sandy beaches at Poppit, Newport Sands and Newport Parrog, at Goodwick Harbour/Fishguard and in the Dinas Island area. Strumble Head is also popular. Away from these locations, access is mostly on foot to small coves. Such access is easiest between Newport and Fishguard where the A487 runs within a kilometre of the coast. Though there are some concerns about safety on the busy beaches, the main issues here relate to boating activity. An estuary management plan is being introduced on the Teifi to minimise the impacts of boating on conservation designations. There is frequent conflict between users of Goodwick Harbour and between boaters and fishermen. This and the general level of activity will increase with the development of the new 540-berth marina.

Zone 2: St David's Peninsula

St David's and the beaches and coves of this rocky headland are hotspots for active pursuits and wildlife boat trips. Visiting is heavily peaked in the summer months and this places a considerable strain on the infrastructure. The road network becomes congested on busy days and car parks overflow regularly in the summer.

To a degree, growth in visitor numbers is constrained by the capacity of the infrastructure. The number and variety of vessels operating wildlife boat trips from St Justinians has increased. St Justinians is also used by activity operators. Car parking is inadequate (c 25 spaces) and a bus shuttle is not supported by the operators as customers would become cold waiting for a bus when returning from activities. There are no facilities for people undertaking activities and changing takes place in the car park or adjacent fields.

The waters are difficult to navigate and there are concerns that private boaters can easily get into difficulty. There is also concern about disturbance to wildlife on Ramsey Island by boats and the sheer number of commercial boat movements.

Zone 3: St Brides Bay

St Brides Bay has relatively good road access from Haverfordwest and there are a number of sandy beaches as well as smaller coves. In the main, different activities tend to zone themselves in time and space and there are relatively few problems.

Newgale and Broad Haven are the most popular beaches; they are busy and several activities take place generally without issues.

Horse riding takes place at Druidston Haven and large numbers of horsers (up to 60 at a time) riding on the beach conflict with other users.

Solva is a base for sea anglers, but there are few on shore facilities for boaters. Divers use the slipways to the south of the zone to gain access to diving in the Skomer MNR. There is frequent congestion at car parks and slipways. Sea litter and litter and lost tackle from anglers is an issue and there are concerns about disturbance to wildlife at Skomer.

Zone 4: Milford Haven

Milford Haven is a hotspot of watersports activity with several marinas, boat clubs, watersports schools and commercial boat operators. Most boating activity takes place in the middle reaches of the waterway where there are relatively few problems despite high numbers of craft – 700 yachts alone were recorded in 150 hours of surveying in 1999. The haven is also popular with sea anglers and divers.

However, there are a number of issues:

- Dale is very congested at busy times and there are difficulties with use of the slipway – 1,210 vessels were launched in August 2004
- Speeding vessels in the no-planing zone of the Daugleddau are a safety hazard and damage the banks
- Divers and anglers are sometimes in conflict at wreck sites
- Anglers sometimes conflict with boats wishing to come alongside pontoons

There is an opportunity to develop the use of Gelliswick by boat borne sea anglers and divers to help reduce pressure on Dale.

There is a concern that the economic impact of sailing and cruiser sailing in the zone might not be as high as many think as some vessels are rarely used and others are older vessels owned by lower spending visitors and local people.

Zone 5: West Angle to Manorbier

This zone includes the Castlemartin Ranges, in which access is restricted and a restricted area out to sea. In the north, Angle Bay is popular with local people for dog walking, etc. There are popular beaches at Freshwater West (probably Pembrokeshire's best surf beach), Braodhaven, Barafundle and Freshwater East. Some of the best sea cliff climbing in Europe can be found at Castlemartin,. The Stackpole area is popular for orienteering and kayaking by activity operators and the Stackpole/Barafundle area is very busy with general visitors (80% are holidaymakers) and this is probably the most intensively walker section of Coast Path.

The voluntary climbing restrictions in place at Castlemartin are a model example. Elsewhere, jet skis launched at Freshwater East and Lydstep are noisy and Freshwater East is becoming very congested on land and water. Dog fouling is also an issue on the beaches.

Zone 6: Tenby Area

This zone has the highest concentration of visitor accommodation in the study area – mostly in static caravan and chalet sites, though there are touring caravan and camping sites and serviced accommodation.

As a consequence, this zone has some of the busiest beaches in the study area, however, effective management means there are few conflicts.

Off-shore, Caldey Island, with its Cistercian Monastery and St Margaret's Island with its stacks and caves are popular with commercial and private craft. Thirteen boat operators run trips from Tenby and a commercial operator runs jet ski safaris. There is concern for safety from such high volumes of craft – some moving at speed. In addition, there is disturbance to birds and seals and pollution from boats manoeuvring into the caves.

Carmarthenshire

The coast of Carmarthenshire consists of two zones – the Three Estuaries and the Llanelli Coast. There are two popular beaches – Pendine and Pembrey, which attract large numbers of holidaymakers and day visitors.

Three Estuaries

The estuaries of the rivers Taff, Towey and Gwendraeth present a major barrier to east-west travel with the lowest bridging points at St Clears and Carmarthen. Visitor activity is concentrated at Pendine, where there is holiday accommodation and where recent changes in parking management have led to a changed pattern of parking in the town, at the attractive towns of the three estuaries area with more holiday accommodation at Ferryside/Kidwelly.

The beach at Pendine is subject to closure by the MoD for firing, but the future of the MoD presence is uncertain. The small towns of the three estuaries become congested at busy times. The major issue in this zone is disturbance of moulting common scoter ducks in the summer by recreational craft at Cefn Sidan.

Llanelli Coast

The north coast of the Burry Inlet has benefited from significant investment in infrastructure and facilities during the last 20 years, and continues to do so, including marina facilities at Burry Port, leisure facilities at North Dock, a new Discovery Centre, the Millennium Coastal Park and the National Wetlands Centre at Penclacwydd.

Sea angling is popular from the shore and from boats. Use of the Millennium Coast Park is increasing, but there are few user conflicts, The area is popular with birdwatchers in the winter and 100,000 people visit Penclacwydd each year. Pembrey Country Park attracts 400,000 visitors per year.

Issues include:

- Increasing numbers of fast craft using the north channel disturbing Scoter
- Illegal cockling
- Fragmented marketing of the Millennium Coast Park
- Anglers are concerned that much improved water quality is reducing fish stocks and threatening cockle beds

Swansea Mumbles and Gower

The Gower Peninsula and Swansea Bay are two contrasting zones located within the authority area of the City and County of Swansea.

Gower

Most of this zone is designated as an Area of Outstanding Natural Beauty. The south coast of the Burry Inlet is characterised by extensive marshes and is relatively little visited, except by cocklers and bait diggers, both of whom cause concern.

The coast from Whiteford Burrows round to Mumbles Head is varied and scenic and attracts large numbers of visitors for holidays and day visitors from nearby Swansea and further afield in South Wales. There are many popular beaches, most of which are backed either by dune systems or by cliffs. All are very busy in the summer and the rural road network becomes congested.

The west-facing beaches at the end of the peninsula are popular with surfers, and dune systems throughout the area are threatened by trampling and unauthorised parking.

Oxwich Bay becomes very busy in summer and is heavily used by education groups. Further east, Caswell and Langland Bays become very busy in the summer, but are well-used throughout the year by residents of Swansea.

Swansea Bay

The wide sweep of Swansea Bay has seen increasing recreational activity in recent years. Use of the beach, commercially and privately for new extreme sports has increased and with it the potential for conflict.

Mumbles, at the western end of the bay is a traditional resort, but has lost much of its hotel accommodation recently – replaced by new, modern hotel development in Swansea.

There is currently no strategic plan for the whole of the Bay and key issues include:

- Facilities for boaters are located at Mumbles and so visiting boaters have to travel all the way along the often congested coast road
- There is a lack of facilities at key points. There are opportunities to improve facilities for land and water users, and for provision of safe crossing points of the A4067
- SA1 and the marina development are significant opportunities
- Anglers are concerned about proposals to attract more angling tourism

To the east, Kenfig Burrows suffers from some mis-use.

Neath Port Talbot

The Neath Estuary has facilities for boats, which are mostly used by local people. There are concerns about illegal motorcycling and quad bikes.

The main focus of visitor activity is at Aberavon Sands. The beach, which is backed by a promenade and housing is busy with a variety of users from the local area and on day trips from South Wales.

There are few conflicts at present and opportunities to attract additional commercial development. Participation in potentially dangerous activities, including kite surfing, needs to be monitored.

Overview of the Region

Recreational activity is influenced by the geography of the area and trends in demand and other aspects of recreational activities.

Spatial Issues

In general, the west of the study area is scenically more attractive and draws higher numbers of visitors, yet it is more remote and in many areas the infrastructure is at capacity with limited opportunity to increase it.

In the east of the study area, Gower has the same characteristics, as to an extent, does the Three Estuaries of Carmarthenshire.

The Llanelli Coast and Swansea Bay (including Aberavon Sands) have capacity for increased use of existing facilities, or potential to develop additional coastal recreational activities and facilities.

Recreational Issues

A number of issues apply at many locations throughout the study area, these include:

- Increasing seaborne litter from commercial vessels and ferries
- Dog fouling of beaches
- Traffic congestion at busy times

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- Litter from sea anglers above and below the water

Demand Trends

Similarly, demand for visits to the study area and for most forms or recreation which occur there appears to be at least static or increasing. At the same time, advances in technology mean that immersion sports can take place over a longer season and new forms of recreational vehicles/activities are being developed.

There would appear to be some double counting within estimates of the overall demand for activity tourism in Wales as some people participate in more than one activity on a trip.

Impacts

Recreational activity clearly brings an immense economic benefit to the study area – currently more significant in the west than the east, where the economy is more diverse.

Negative impacts on nature conservation and landscape, and conflicts between users appear to be largely localised where certain uses, or combinations of uses occur, including:

Impacts on Nature Conservation and Landscape

- Cars and other recreation development intrude on the natural landscape
- Large numbers of visitors and their vehicles damage dune habitat
- Boats, and occasionally climbers and anglers, disturb birds and seals at specific locations

User Conflicts

- Noise from powered craft in otherwise essentially 'natural' areas
- Danger from congestion and heavy use of slipways
- Danger to swimmers from boats, jet skis, surfers, etc
- Conflict between horses and other beach users
- Danger from kite surfers and kite buggies to other beach users
- Conflict between divers and anglers (inadvertently casting onto divers or sharing of wreck sites/reefs)

Management and Capacity

Although major infrastructure developments such as marinas require significant capital, activity operators can enter the market cheaply. Some of the established providers in the study area started their operations from the back of a vehicle on the beach.

Though there is capacity for such business development in the east, much of the available capacity has now been taken up in the west and there is limited opportunity to increase provision without major infrastructure improvements (slipways, harbour facilities, etc). Operators here would prefer to see a spreading of seasonality than a general increase in business volume.

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There would appear to be greater potential for increasing the sustainable recreational use of the coast in Llanelli and Swansea Bay

Management of the coast is fragmented and there is limited communication between different organisations.

Next Stages, Further Information and Contact Details

Next steps should include:

- Determining draft strategies to address the strategic and localised issues identified
- Consulting on the draft strategies
- Maintaining and up-dating the recreation database
- Planning a systematic programme of research to address gaps in knowledge

For copies of this report or to make comments on recreational management of the West Wales Coast, contact:

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