Papur Testun 9: Twristiaeth

9

CYNGOR SIR YNYS MÔN ISLE OF ANGLESEY COUNTY COUNCIL

CYNGOR GWYNEDD COUNCIL

Cynllun Datblygu Lleol ar y Cyd Gwynedd & Môn

Chwe 2015

Background

This is one of a range of topic papers prepared to offer more detailed information and explain the approach of the Plan to different topics and issues affecting the Joint Local Development Plan Area. This paper will look specifically at ***'Tourism'***. It will explain the background which will help to identify the issues, objectives and options for the Deposit Plan.

The Deposit Plan is the second statutory stage in the preparation of the Joint Local Development Plan (JLDP). The JLDP shapes the future growth of communities in the Joint Local Development Plan Area and will set out the policies and land allocations against which planning applications will be assessed.

The Deposit Plan will be submitted to the Welsh Government, which will appoint an independent inspector to assess the soundness of the Plan in the Examination in Public. If the inspector considers the Plan to be sound it will be recommended for adoption. When adopted the JLDP will supersede the Gwynedd Unitary Development Plan (2009) for the Gwynedd Local Planning Authority Area and the Gwynedd Structure Plan (1993) and Ynys Môn Local Plan (1996) for the Ynys Môn Local Planning Authority.

This topic paper can be read in isolation or in conjunction with the other Topic Papers and Background Papers that have been prepared to give a full picture the Joint Local Development Plan Area.

You may refer to the Topic Paper as a basis for making comments about the Deposit Plan. It must be noted that only comments on the Deposit Plan will be considered by the Inspector at the Examination in Public rather than specific comment made on the Topic Papers.

If you have any questions or would like to discuss any of the Topic Papers or Background Papers with a member of the Joint Planning Policy Unit you can contact us:

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1.0 BACKGROUND AND PURPOSE OF THE TOPIC PAPER

1.1 Tourism is a dynamic sector and is subject to continuous change. Tourism patterns and trends are constantly changing. Consequently, it is important that the tourism strategy and policies contained in the Anglesey and Gwynedd Joint Local Development Plan (JLDP) are developed to reflect the changing requirements of the industry. However, this needs to be balanced against the competing needs of other environmental and economic interests which are also the subject of the JLDP.

1.2 The purpose of this topic paper is to provide part of the evidence base and rationale for the tourism strategy and policies advocated in the JLDP. The information and issues raised within this topic paper will be used as the basis for tourism related matters contained within the JLDP and will:

- Identify key messages from national, regional and local strategies/policies;
- Present baseline information about tourism in the Gwynedd and Anglesey Local Planning Authority areas (the JLDP area);
- Outline emerging issues for the future, which will need to be addressed through the JLDP.

1.3 The conclusions reached in this paper are based on specific information and evidence for the Isle of Anglesey County Council and Gwynedd Council area (or the Gwynedd Planning Authority area when specific information is available).

1.4 As this paper deals with a continuously changing situation, there will be a need to update it periodically up until the point when the information is submitted to the Inspector prior to the Public Examination. This will mean that the information provided and the conclusions derived from it will be concurrent, thus ensuring that the JLDP is as relevant and 'sound' as possible.

2.0 NATIONAL, REGIONAL POLICY AND STRATEGIC FRAMEWORK

2.1 NATIONAL

National Planning Framework

2.1.1 The national planning policy framework for addressing tourism issues in preparation of LDPs is set out in Planning Policy Wales (PPW) (Edition 7 2014) with additional advice given by Planning Guidance (Wales), Technical Advice Note (Wales) 13, Tourism – October 1997 (TAN 13).

Planning Policy Wales (Edition 7) July 2014, Welsh Government

2.1.2 The Welsh Government's aim 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.

2.1.3 Paragraph 11.1.4 states that *"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".*

2.1.4 Paragraph 11.2.1 states that *"Development plans should establish a strategic framework for the provision and enhancement of well designed tourism, sport, recreation and leisure facilities in the areas they cover. They should consider the scale and broad distribution of existing facilities and activities and provide for the accommodation and management of future needs in ways which limit negative environmental impacts (including the consequences of climate change), protecting the landscape, biodiversity, the coast, the historic environment and areas of special interest, and the interests of local communities. They should take into account the environmental, economic and social implications of likely future changes in the provision of these facilities and have regard to objectives for urban regeneration and rural diversification".*

Technical Advice Note (TAN) 13: "Tourism", Welsh Government, 1997

2.1.5 Tourism compromises a range of different, but interdependent activities and operations which over lap with sport, entertainment, the arts and other recreation and leisure activities. It makes a major contribution to the Welsh economy, provides employment in a wide variety of occupations and can bring benefits to local economies and communities in urban and rural areas, It is subject to change in the type of holiday taken and the length of the holiday season.

2.1.6 TAN 13 recognises that *"While it cannot be regarded as a single or distinct category of land use, the issues it raises should be addressed in preparing or revising development plans and may feature in development control decisions. Development plans may provide guidance on opportunities for larger scale or innovative projects, appropriate facilities for the countryside or designated areas and the provision of facilities in historic towns and seaside* *resorts."* Section One of TAN 13 discusses issues in relation to hotel developments, whilst sections two and three of TAN 13 set out the problems associated with the provision of appropriate sites and facilities for holiday and touring caravans. It also discusses the imposition and enforcement of seasonal and holiday occupation conditions attached to planning permissions.

2.1.7 TAN 13 states that the planning system can respond to changes in tourism without compromising policies to safeguard the countryside and, in exceptional cases, holiday occupancy conditions can meet these two objectives.

Technical Advice Note (TAN) 6: "Planning for Sustainable Rural Communities", Welsh Government, 2010

2.1.8 Paragraphs 3.6 (Holiday conversions) and 3.7 (Farm diversification) which are of particular relevance to this paper:

Holiday conversions:	▪ "Whilst residential conversions have a minimal impact on the rural economy, conversions for holiday use can contribute more and may reduce pressure to use other houses in the area for holiday use." 3.6.1
Farm diversification:	▪ "When considering planning applications for farm diversification projects, planning authorities should consider the nature and scale of activity taking a proportionate approach to the availability of public transport and the need for improvements to the local highway network. While initial consideration should be given to converting existing buildings for employment use, sensitively located and designed new buildings will also often be appropriate." 3.7.1 ▪ Many economic activities can be sustainably located on farms. Small on-farm operations such as food and timber processing and food packing, together with services (e.g. offices, workshop facilities, equipment hire and maintenance), sports and recreation services, and the production of non-food crops and renewable energy, are likely to be appropriate uses." 3.7.2

Main messages:	▪ 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; ▪ That sustainable tourism in the LDP should be encouraged 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; ▪ That the LPA will need to establish a strategic framework for the provision and enhancement of well designed tourism, sport, recreation and leisure facilities; ▪ LDP's should consider the scale and broad distribution

of existing facilities and activities;
- That future tourism should be planned in ways which limit negative environmental impacts (including the consequences of climate change), protecting the landscape, biodiversity, the coast, the historic environment and areas of special interest, and the interests of local communities;
- Considerations to be given towards whether the LDP needs to provide guidance on opportunities for:
  - larger scale or innovative projects,
  - appropriate facilities for the countryside or designated areas,
  - the provision of facilities in historic towns and seaside resorts.

National Strategic Framework

People, Places, Futures: The Wales Spatial Plan - Update 2008. Welsh Government, 2008

2.1.9 The strategy highlights the important, key role tourism has to play in the economy of Wales both on a national and local scale. Within the Plan there is a defined focus on the need for sustainable tourism and the important role that it has to play in the prosperity of a place.

2.1.10 The Plan outlines the agreed priorities established by the 'Partners' for the different areas. For both 'Central Wales' and 'North West Wales – Eryri a Môn' areas the priorities for tourism are:

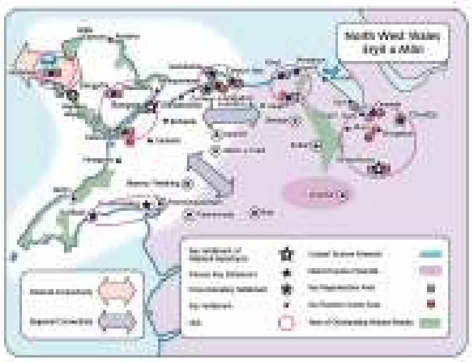
Central Wales: *"Realising the full potential of the Area's diverse environment and its unique cultural identity as a means of maintaining the region's rural and natural integrity, to build higher value sustainable tourism and to enhance its role in responding to the effects of climate change."*	
North West Wales – Eryri a Môn: *"Capitalising on the region's outstanding environment, including the coast, ecological and historical heritage, and strong cultural identity to promote and develop healthier communities and build higher-value sustainable tourism. The latter includes the development of the Area as a quality destination, including improving the accommodation stock and realising the potential of marine leisure and outdoor activities."*	

Figure 1 – Regional Strategies, Wales Spatial Plan, WG,2008

2.1.11 The area has a strong cultural identity and unique sense of place, and is an established visitor destination with a wealth of visitor facilities. The tourism industry is a key employment sector and has the potential to improve quality of life, reduce economic inactivity, and enhance regeneration and conservation.

2.1.12 However for the area to reach its potential it will be necessary to enhance the built environment and tourism facilities through regeneration, to bring it up to par with the exceptional and dramatic natural environment, for example to further develop outdoor activities, golf, eco-tourism and events, and the development of one or two regionally significant, quality all-weather attractions that can be accessed by sustainable modes.

Partnership for Growth: Strategy for Tourism 2013-2020, WG, 2013

2.1.13 This strategy sets the vision for the us and the industry to work in partnership to increase visitor spend to Wales. The strategy focuses on 5 key areas:
promoting the Brand

- product Development
- people Development
- profitable Performance
- place Building.

The strategy identifies a product-led approach to developing and marketing tourism in Wales. This means working with iconic, high quality, reputation-changing products and events. We will be focussing 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.

Sustainable Tourism: A framework for Wales. WAG 2007

2.1.14 The purpose of this framework is to outline what sustainable development means for the tourism sector in Wales. Its purpose is to guide those involved in promoting and developing tourism in the public, private and voluntary sectors, nationally, regionally and locally to ensure that the tourism industry contributes to sustainable development in Wales. WG's vision for Sustainable Tourism is:

'Wales is recognised internationally as a leading sustainable tourism destination that promotes local economic prosperity, supports community well being and engagement, enhances its natural environment and culture and delivers a high quality experience to visitors.'

2.1.15 There are four key objectives supporting the vision:-

- Promoting local prosperity
- Supporting community well being and involvement
- Minimising tourism's environmental impact
- Protecting and giving value to natural heritage and culture

2.1.16 The strategy states that *"Managing and adapting to climate change will be critical to the future of sustainable tourism in Wales. Tourism businesses and visitors will need to contribute to reducing Wales's carbon footprint. Predicted changes in climate across the world may affect the tourism market in Wales, whilst local impacts such as the availability of water supply during periods of drought, increased storminess and risk of flooding, and changes in wildlife distribution will need to be considered carefully when planning tourism developments."*

Coastal Tourism Strategy. WAG 2008

2.1.17 The strategy 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'.

2.1.18 The strategy identifies the following strategic aims:

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

2.1.19 The strategy outlines specific elements that should be considered for the different spatial areas highlighted in the Wales Spatial Plan. For the North West Wales – Eryri a Môn and Central Wales spatial areas these are as follows:

North West Wales – Eryri a Môn:	▪ to consider the potential for developing nature tourism and heritage within the environmental capacity of sensitive sites e.g. Newborough Warren, Holyhead Mountain ▪ to implement coastal resort and town centre physical improvement programmes ▪ to diversify and strengthen local economies at Holyhead, Caernarfon and Bangor ▪ to consider how the accommodation stock in the Llŷn Peninsula and Bangor area could be improved ▪ to improve the facilities for watersport participants on Anglesey and on the Llŷn Peninsula (for diving, surfing and kite sports) ▪ the creation of a sailing academy and events facility at Pwllheli ▪ to explore sustainable forms of visitor transport across the Menai Strait and to consider opportunities to enhance the summer bus service on the Llŷn peninsula ▪ the provision of visiting berths at marinas, harbours and yacht stations around the north west coast ▪ to consider the benefits (for users and the local

economy) of improving boating facilities and access at Caernarfon and Porthmadog and the development of further facilities at Bangor

- to consider the improvement of facilities for cruise liners (including alongside berthing) and for passengers in Holyhead
- to work with Nant Gwrtheryn to invest in cultural/business tourism on the Llŷn Peninsula
- to continue to develop the tourism potential of the heritage of Caernarfon in particular the Castle and Town Wall
- to develop the heritage tourism potential of Anglesey.

Central Wales:

- to improve accommodation provision at the coast in line with the Central Wales tourism study
- to consider providing improvements with regard to facilities, access to water, parking, including trailer parking at - Barmouth (24 hour access to shore from drying out harbour)
- the provision of visiting berths at marinas, harbours and yacht stations around the Cardigan Bay coast
- the preparation of an events and promotion strategy for Cardigan Bay
- to consider the improvement of beach access and facilities at beaches along the Cardigan Bay coastline.

Main messages:	▪ That tourism has a key role to play in the national and local economy; ▪ That the future tourism product should be based on the principles of sustainable tourism and its role in responding to climate change; ▪ The implications of climate change will be a critical issue to be considered in planning tourist developments; ▪ That the future tourism product should be based on providing a quality tourism destination area which is responsive to the changing needs of its customer; ▪ That the area’s unique and diverse natural environment and historic and cultural identity should be used as a basis for developing a high value tourism product; ▪ Consequently it is important that these assets are safeguarded from inappropriate developments; ▪ The traditional coastal resorts and coastline are still a major focus for tourism in the area but require significant investment if they are going to meet the needs of the future tourism market; ▪ That there is a need to improve quality, variety of the holiday accommodation stock which meets the future holiday requirements of visitors, in particular within coastal towns and resorts; ▪ That tourism is still primarily seasonal and that the LDP should be promoting the area as an all year round tourist destination;

	▪ Need to develop a quality tourism product which is responsive to changing needs.

2.2 REGIONAL

Tourism Strategy North Wales 2010 – 2015. (Tourism Partnership North Wales (TPNW), 2010

2.2.1 The vital importance of tourism to the regional economy is recognised within the **North Wales Tourism Strategy 2010-15**. The sector generates £1.8 billion of income in North Wales each year, and supports over 37,000 jobs. The Strategy sets out how the area can maximise and grow its tourism potential through building on its existing strengths - natural beauty, heritage and culture.

2.2.2 The strategy covers the whole of North Wales, defined as the six counties of Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd and Wrexham. It is a strategy for the region as a whole, rather than a detailed delivery plan for each county, with a focus on issues of strategic importance.

2.2.3 The strategy identifies an overall aim and vision for tourism within North Wales, which is:

Aim - *"Develop a successful and sustainable tourism industry in North Wales which generates wealth for the region, draws on and sustains its special environment and culture, contributes to quality of life and brings enjoyment to visitors."*

Vision – *"One of the top 5 UK tourism destinations, internationally known for its natural beauty, dramatic scenery, heritage and distinctive culture. A place you can boast about visiting, easy to get to but rewardingly different. A centre of excellence for adventure sports and the market leader for activity tourism of all sorts. Plenty going on at all times of the year, whatever the weather, with a lively, living culture and thriving arts scene. A place that is often talked about and features in the media for the quality of its food, hospitality and interesting places to stay. A region that is proud of its heritage and culture, cares for its natural assets and welcomes visitors."*

2.2.4 The strategy notes that achieving the aims and vision will require a significant and concerted effort from all those involved in the region's tourism sector. To focus this action the strategy identifies 4 strategic objectives. These are as follows:

1. Projecting our distinctive strengths
2. Investing in product excellence
3. Providing an outstanding experience
4. Working together in partnership

2.2.5 The priorities for North West Wales are as follows:

1. Projecting our	Priorities and actions listed under this heading which have implications for the JLDP are:

distinctive strengths	▪ The main market potential lies with family holidays, activity-related tourism and short breaks. This area has potential to be the UK's leading destination for outdoor activities and has enormous strengths for family holidays. Short breaks also have potential. Other market segments of importance in this area include cruise ships in Holyhead and drawing on its strong cultural heritage. ▪ Key messages to project are the ease of access, especially in the A55 corridor, the combination of coast and rugged scenery, the range of things to do, exhilarating outdoor activities for all levels. These need to be co-ordinated across the region through adoption of common brand guidelines. ▪ Make more of eye-catching elements and connections such as centres of excellence for activities, Welsh Historic Sites castles and walled towns, Isle of Anglesey, narrow gauge trains/network, slate/industrial heritage. The extension of the Welsh Highland Railway provides a good opportunity. ▪ Strengthen the presentation of coherent sub-areas as destinations in their own right e.g. Llŷn and Anglesey.
2. Investing in product excellence	Priorities and actions listed under this heading which have implications for the LDP are: ▪ Encourage and support the improvement and upgrading of all types of accommodation and attractions through promotion of the quality assurance schemes, business support and mentoring, recognition of good practice and financial assistance. ▪ Review the concentration of caravan parks on the Cambrian coast to explore ways in which the environment and appeal of these sites can be improved. Influence current planning policies in the light of this. ▪ Use leisure drives, themed routes and clusters to raise the profile of smaller attractions and add critical mass. The heritage and narrow gauge railway lines offer a major opportunity. Work with CADW to increase visitor appeal of castles and other heritage sites. Pursue projects such as cultural centre in Caernarfon, Park Paden in Lamberts and Copper Kingdom in Anglesey. ▪ Identify sites and seek to attract some additional branded 3-4 star, full service hotels. Preferred locations include Bangor. Potential also exists for new or extended hotels in association with spa/golf provision. ▪ Explore the potential for creating a new high quality self-catering / holiday village development adjoining the national park. ▪ Activity development in this area should focus on watersport, outdoor pursuits and adventure activities, although golf, walking, cycling and fishing also have potential. Key projects include a sailing academy at Pwllheli, development and promotion of key outdoor sectors in Gwynedd, mountain biking in Blaenau

	Ffestiniog. ▪ Fill missing links in the footpath, cycleway and bridleway network, looking at both longer distance routes and encouraging the development of short circular routes connecting into villages and clusters of attractions. ▪ Implementation of the coastal action plan projects to improve access and management.
3. Providing an outstanding experience	Priorities and actions listed under this heading which have implications for the LDP are: ▪ Local authorities to draw up destination management plans for their areas to provide an integrated framework for managing tourism and the general environment in these places and prioritising investment. ▪ Identify and designate tourism hubs where there are particular problems or concentrations of activity and focus attention on these. Initial candidates will include Holyhead, Bangor, Caernarfon, Porthmadog, Blaenau Ffestiniog, Llanberis and Llŷn in Gwynedd and Amlwch, Moelfre and Holyhead on Anglesey. ▪ Support and encourage locally generated activity which adds to visitor interest and vitality. This includes festivals, arts events, heritage interpretation, local food, and activities which enhance sense of place and distinctiveness. Projects include the Mona Antiqua project on Anglesey to link sites of cultural and natural heritage. ▪ Encouraging greater use of public transport by visitors. Also need to encourage greater use of walking and cycling. Taxis and car hire are an important link in public transport provision and need to be factored into the equation. ▪ Develop multi-use berth for cruise liners in Holyhead ▪ Encourage further development of air passenger services at Anglesey.
4. Working together in partnership	Priorities and actions ▪ Local authorities to maintain their support for the marketing and management of tourism in their areas. ▪ Support tourism industry involvement in community initiatives.

2.2.6 The strategy states there is scope to strengthen and expand tourism and the contribution it makes to regional prosperity. The future lies in capitalising on what makes this area special and stand out from the ordinary – its spectacular natural beauty, the diversity of its landscapes, its distinctive heritage and culture.

Vision	Strategic Objectives	Principles
Growth in volume, value and local benefit	Projecting our distinctive strengths	Sustainability

More first time visitors to refresh the market	Investing in product excellence	Quality
A broader market base to counter cyclical variations	Providing an outstanding experience	Distinctiveness
Increased visitor satisfaction	Working together in partnership	Innovation
An extended season		
Better jobs and more retained value		

Mid Wales Tourism Strategy Review Naturally Different (Tourism Partnership Mid Wales, 2003)

2.2.7 This strategy supports the objectives as set out in Achieving our Potential, 2000-2013: Tourism Strategy for Wales but sets it into a regional context. The vision for tourism in Mid Wales is:

"A competitive market-led tourism industry that contributes to the region's economy and sustains its communities, culture and environment"

2.2.8 The Vision provides the context from which the Strategic Imperatives flow and these guide the Objectives and the Actions that are outlined in the strategy, which will turn the Vision into reality. The Strategic Imperatives are as follows:

- Meet the needs and expectations of the different markets
- Increase the contribution that tourism makes to the local communities
- A more customer focussed approach to branding and marketing
- Achieve excellence in the performance of tourism businesses
- Improving the quality of the region's infrastructure
- Ensuring excellence in data collection and dissemination in understanding and monitoring the markets
- Capitalizing on the potential of tourism in Mid Wales through partnerships between all tourism stakeholders.

TraCC Regional Transport Plan (RTP) TraCC[1] - (2009)

2.2.9 The TraCC vision is:

'To plan for and deliver in partnership an integrated transport system in the TraCC region that facilitates economic development, ensures access for all to services and opportunities, sustains and improves the quality of community life and respects the environment'

2.2.10 TraCC recognises that another important issue with regard to sustainable travel is the fact that a major component of the Mid Wales economy is tourism. The main attraction being the environment – the Brecon Beacons and Snowdonia National Parks, the Cambrian Mountains, the Cardigan Bay coast and the regions historic/market towns. TraCC will need to address not only tourism trips to the area but once visitors are based in Wales to provide appropriate alternatives to the private car for visiting and exploring the area's

[1] Trafnidiaeth Canolbarth Cymru (TraCC) is the local authority Regional Transport Consortium for the Mid Wales Region and is a partnership between the three Mid Wales local authorities of Ceredigion, Gwynedd and Powys.

attractions. TraCC sees providing sustainable travel options as a major challenge in its RTP.

2.2.11 TraCC fully appreciates that land use policies will be fundamental in implementing its strategies for transport. It will be important that the major service providers consider accessibility in the evaluation of development options rather than trying to improve public transport, walking and cycling modes once a site is developed. TraCC see the relationship of land use and transport as having a major impact on achieving its longer term vision.

North Wales Regional Transport Plan (RTP) TAITH[2] (2009)

2.2.12 Taith's Vision for Transport in North Wales is as follows:

"Taith will deliver safe, sustainable and efficient transport networks to support the economic and social activities of North Wales' diverse communities and businesses having regard to its strategic European role."

2.2.13 Its objectives:

1. Optimise accessibility to employment, education, health and services for all the diverse communities of North Wales
2. Improve the quality and provision of passenger transport throughout North Wales and to and from the Region
3. Facilitate the efficient movement of freight supporting the Region's industry and commerce and its International Gateway functions
4. Provide, promote and improve sustainable forms of transport and infrastructure to minimise the negative impacts of transport on the local and global environment
5. Improve safety of all forms of transport
6. Enhance the efficiency and use of the transport network
7. Upgrade and maintain the transport infrastructure, providing new where necessary

Main messages:	▪ The need to take account of the environmental (including climate change), economic and social implications whilst managing the development of the tourism industry; ▪ That the main market potential lies with family holidays and short breaks; ▪ The area has potential to become a leading destination for outdoor activity holidays and the need to identify and designate tourism hubs; ▪ The area has a strong cultural and historical heritage which should be considered as important tourism assets; ▪ Need to consider how encouragement can be given towards the improvement of all types of accommodation and activities; ▪ Need to examine ways to improve the environment and appeal of caravan parks; ▪ Additional branded full serviced hotels are required in the area and that consideration should be given towards

[2] Taith is a transport partnership of the six Local Authorities in North Wales – Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd and Wrexham.

	new or extended hotels in association with spa/golf facilities. ▪ Encouraging the greater use of public transport and the need to support alternative modes of transport other than the private car.

2.3 LOCAL

1) Gwynedd

Gwynedd Destination Management Plan

2.3.1 The Destination Management Plan sets out a wide-angle vision for the future, exploring the connections between various elements related to the experience of visitors and residents, and mapping out a positive common direction. This destination management plan covers the period up to 2020 and includes an integrated and rolling three year action plan which allows all those concerned with tourism in Gwynedd to play their effective part in delivering a quality experience which does full justice to the magnificence and grandeur of this most beautiful part of Wales. It concerns all aspects of the visitor experience, from pre-visit and decision making, to the visit itself through to the journey home and lasting impressions.

2.3.2 The underpinning vision of the Gwynedd Destination Management Plan is:

“Gwynedd as a top class integrated quality visitor destination valued for its internationally renowned special landscapes, its spectacular built environment and its unique Welsh culture.”

The main aims of the Gwynedd Destination Management Plan are:

- to extend the tourism season,
- to increase visitor spend,
- to improve the quality of the visitor experience,
- to improve integration of tourism with other aspects of life,
- to enhance the natural, built and cultural environment,
- to build and maintain quality public infrastructure and amenities,
- to provide well paid, year-round quality jobs and skills development.

Llŷn AONB Management Plan (2010 - 2015)

2.3.3 The management plan contains a number of ‘visions’ on a variety of issues. The most relevant one to this paper is that relating to the ‘economy’ which states as follows:

VISION – That agriculture, fishing and quarrying continue to provide work and quality local produce. Tourism and other small rural industries to contribute to the local economy without impairing the area’s special environment.

Regeneration Framework (part 1 and 2) – Part 1: Gwynedd Regeneration Strategy 2007 – 2013 & Part 2: Area Plans

2.3.4 The Regeneration Strategy is an element of Part 1 of the Gwynedd the regeneration Framework. The strategy’s ‘Vision’ is as follows:

"Our aim is to develop and support active, sustainable, healthy and viable communities, with the confidence to venture, and with the desire and ability to contribute their own solutions to the challenges and make the most of new opportunities."

2.3.5 Part 2 of the Framework will comprise of eight Area Plans which will gives local direction to regeneration and are based on eight areas within the County (areas adopted through the Unitary Development Plan). The Area Plans will serve as a means of highlighting unique local tendencies, including local opportunities and threats. They will identify the most relevant challenges to the area in question, and identify local geographical priorities.

The Snowdonia National Park Management Plan 2010-2015 (2010) [3]

2.3.6 The Plan's vision is:

"By 2035 Snowdonia will continue to be a protected and evolving landscape, safeguarded and enhanced to provide a rich and varied natural environment; providing social, economic and well-being benefits nationally and internationally."

2.3.7 Under the heading of 'Supporting Sustainable Communities' one of the Plans 'objectives' is:

"Assist in delivering regional objectives relating to sustainable tourism" (Objective 22).

The Eryri Local Development Plan 2011, Snowdonia National park Authority

2.3.8 The Plan's 'Objectives' in respect of 'Supporting the Rural Economy' are:

"Encourage sustainable economic growth by supporting a rural economy that provides employment opportunities and maintains thriving communities.

Support tourism and recreation activity which maximise local economic benefits, minimise environmental impact and safeguard the 'Special Qualities' of the National Park"

Gwynedd UDP (2009), Gwynedd Council

2.3.9 The existing UDP recognises that:

- The significant effect on the economic prosperity of Gwynedd from the seasonal nature of tourism causes a considerable variation in the demand for employees during the year.
- The need to respond to people's expectations of tourism services also change as regards standards and diversity.

[3] The SNP Management Plan and the Eryri LDP encompass the whole of the Meirionnydd area of Gwynedd which is outside the JLDP area. However, there are no geographical boundaries between the JLDDP area and the SNP plan area and that there are some strategic issues, including tourism, that affect both areas. It is therefore important to consider the inter relationship between both areas.

- It is a dynamic industry, with constantly changing market requirements and that in future a great deal more emphasis will be required on providing tourism produce of the highest standard and value for money in order to satisfy visitor expectations.
- In order to meet the requirements of domestic and foreign visitors and to encourage them to visit the area year after year, it is vital for Gwynedd to offer tourism produce of the highest standard which is able to compete with other parts of Britain and abroad.
- Biodiversity, the standard of the landscape and townscape, the cultural character and amenities of local communities make up the Area's primary resources, and it is vital that these assets are not threatened by over-development or by incompatible tourist activities.
- These aspects should be used as a basis for the creation of a sustainable tourism base unique to Gwynedd.
- That the development of 'niche' markets involving the wealth of natural, historic and cultural resources found in the County, will be a central part of ensuring that this target is achieved.
- That various destinations within Gwynedd have already developed, or have the potential to develop tourism produce based on specific themes (e.g. historic heritage in Caernarfon, industrial heritage in Blaenau Ffestiniog, sailing in Pwllheli). Developing specific themes for various destinations will help them develop tourism produce with a strong local identity, whilst at the same time varying the tourist destinations in Gwynedd.
- The need to protect the character of coastal towns and holiday resorts by safeguarding their self serviced accommodation stock.
- A moratorium on new static holiday caravan and chalet sites.

2.3.10 Plan's tourism Objective is:

"to enable the development of a strong tourism sector that is sustainable, of a high standard and flexible, and which meets the needs of visitors and distributes the benefits seasonally and geographically"

2.3.11 Strategic planning policy 17 promotes proposals to develop or improve the variety and quality of tourist facilities and attractions provided they do not significantly harm the environment, the area's cultural characteristics or the amenities of nearby residents.

Main messages:	▪ Promote tourism on a sustainable basis; ▪ Need to consider the challenges and implications of climate change within the JLDP; ▪ Take more effective advantage of the area's unique environmental assets, whilst respecting and contributing to its special qualities; ▪ Improve the local transport infrastructure so as to reduce the overreliance on the private car; ▪ The need to identify and support the various tourism initiatives in the area (e.g. The Eryri Centre of Excellence project and Pwllheli Sailing Academy and Events Centre); ▪ Ensure that the JLDP is consistent with the requirements of all the local strategies, plans and projects outlined in

this discussion paper;

2) Anglesey

Isle of Anglesey Destination Management Plan (DMP), IoACC 2011

2.3.12 Destination Management is a process of coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the meeds of visitors, local residents, businesses and the environment. *"A DMP is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take."*

2.3.13 The Aim of the Anglesey DMP Plan is to:

Develop a successful and sustainable tourism industry in Anglesey which generates wealth for the island, draws on and sustains its special environment and culture, brings enjoyment to visitors and at the same tome contributes to residents' quality of life.

2.3.14 The vision for Anglesey is through developing and implementing the DMP, Anglesey will become:

A destination, internationally known for its beautiful coast, heritage and distinctive culture; easy to get to but rewardingly different. A family holiday destination and a market leader for outdoor activity tourism of all sorts. Plenty going on at all times of the year, whatever the weather, with a lively, living culture. A place that features in the media for the quailty of its food, hospitality and interesting places to stay. An Island that cares for its natural assets and welcomes visitors.

2.3.15 The DMP have set indicitive targets to measure progress over the next four years. Given the current situation of tourism on the island a realistic target of 1-2% growth per year or 5% over the next 4 years . Using the STEAM figure, this would equate to a growth of 200 to 400 FTE jobs.

2.3.16 Four strategic objectives have been set in order to achieve the targets which are:
1. To promote Anglesey's image and distinctive strengths
2. To invest in product excellence
3. To provide an outstanding experience for visitors
4. To work together in partnership with local stakeholders

The Energy Island Programme

2.3.17 The Energy Island Programme aims to establish Anglesey and a centre for excellence for producing and servicing low carbon energy. The programme has the potential to bring in more than £2.3 billion to Anglesey and North West Wales over the next 15 years through a range of energy related projects[4].

[4] Wylfa Nuclear New Build: Accommodation Facilities for Construction Workers Study, DTZ, February 2011

2.3.18 In order to quantify the potential opportunities and impacts of the Wylfa nuclear new build development, the IACC have commissioned a number of evidence base studies over past 18 months. These include:

- Energy Island Programme: Potential Opportunities and Economic Impacts (May 2010)
- Energy Island Programme: Potential Outcomes and Performance Measures (August 2011)
- Construction Workers Accommodation Position Statement (March 2011)
- Transport Study and Transport Position Statement (October 2011)

2.3.19 In March 2010 Horizon Nuclear Power (joint venture between EON and RWE) announced Wylfa as their preferred site for their first nuclear development in the UK. In October 2012 Horizon was sold to Hitachi. The new power station will safeguard skills locally, and provide multiplier effects in related industries such as construction, with positive effects on Anglesey, North Wales and the Welsh economy. The estimated six year construction period will provide extensive job opportunities, reaching 6,000 workers at its peak in 2017. It also has the potential to create additional jobs from supply chain demand and other employment spin offs, as well as significant numbers of permanent jobs (approximately 1,000) once the Nuclear New Build is operational. A final investment decision on the new build proposal will be made at the end of 2013 with construction beginning immediately after.

2.3.20 Meeting the accommodation needs of construction workers associated with the proposed Nuclear New Build is an integral part of delivering the objectives of the Energy Island Programme and will help ensure that:

By 2025 Anglesey will be a prosperous economy with a high quality of life which attracts and retains the economically active population and revitalizes priority areas of need

2.3.21 DTZ were commissioned to identify the accommodation needs of the construction workers associated with the Wylfa Nuclear Power New Build Programme. They were asked to:

- Provide an evidence base to underpin strategic decision making, including an identification of the quantum of housing by type required to meet demand year-on-year during the construction period
- To develop and appraise options for meeting this accommodation demand
- Provide a Position Statement that articulates the Council's preferred position on meeting demand which can be used to inform policy and as a negotiating tool with developers and investors.

2.3.22 The Council has identified a number of objectives that will provide the Strategic Framework for guiding its actions and interventions in supporting the delivery of the Nuclear New Build. To ensure that a sustainable legacy and the objectives of the Strategic Framework are met the Council and key stakeholders have identified and assessed a number of potential options to support the development of the Wylfa New Build.

2.3.23 The preferred option is for the Council to work with key partners to support a mix of accommodation to meet the needs of the construction worker. The working mix of accommodation is as follows:

- 1/3 of workers accommodated in purpose built accommodation (a minimum on-site to meet operational requirements but the majority off-site)
- 1/3 in private rented accommodation (mix of new and existing)
- 1/3 in tourist accommodation (mix and existing)

2.3.24 The following table estimates the accommodation demand for the Wylfa Nuclear Power New Build Programme:

Year	Number of Temporary Units Required			Permanent Dwellings Required	Total
	Purpose Built Accommodation	Private Rented Sector Units	Tourist Units		
2013	9	21	21	14	**65**
2014	15	35	35	23	**109**
2015	43	99	99	63	**304**
2016	180	421	421	267	**1289**
2017	282	659	656	419	**2019**
2018	138	321	321	204	**984**
2019	38	88	88	56	**271**

Table 1 – Estimated Accommodation Demand at Wylfa, DTZ, Feb 2011

2.3.25 Through their position statement the Council recognises the significant opportunity that the proposed Nuclear New Build offers to enhancing the Island's tourism offer. However, the fragility of the tourism market on the island is acknowledged. The Council wishes to work with key partners and the tourism industry to ensure that the benefits are maximised and the negative impacts are minimised.

2.3.26 The existing supply of tourism accommodation across the Island has the potential to provide part of the solution to meet the needs of the construction workers. However, it is equally recognised that if too much of the existing supply of tourism accommodation is taken up by construction workers between 2013 and 2019 the local tourism market could be undermined.

2.3.27 The Isle of Anglesey County Council (IACC) wishes to commission a tourism impact assessment of the proposed nuclear new build at Wylfa and associated developments. This impact assessment will ensure the County Council (and all relevant stakeholders) have an informed understanding of how this major strategic development is likely to affect the Island's visitor economy. The output will be utilised to underpin future policy development and the formulation of initiatives/ programmes to mitigate potential negative impacts and develop visitor infrastructure. This impact assessment will direct any thinking on other developments linked to tourism, and the visitor infrastructure on the island.

2.3.28 It is considered that the Nuclear New Build could support the tourism offer of the Island in the following ways:

- Provide a new source of income which supports the viability of existing accommodation providers and enables them to reinvest some of their additional income to improve the quality of the stock, particularly to upgrade stock from static caravans to higher quality accommodation, such as cabins, supported by additional amenities and facilities on site
- Encourage new operators to enter the market to increase the overall tourism bed stock

- Provide additional spend within existing leisure and entertainment facilities such as bars, pubs and restaurants and potentially encourage the establishment of new facilities

2.3.29 The Council have acknowledged that the tourism industry will need to work collaboratively to ensure that whilst some of them are able to benefit from the short term injection of additional income from workers looking for temporary accommodation (particularly to take up capacity during the week and the winter session) that this does undermine the Island's tourism offer in the longer term. A regular visitor who is unable to book their usual accommodation may decide to look elsewhere.

2.3.30 The greatest potential to support a step change in the tourist offer of the Island is through the development of an off-site temporary workers camp which meets the needs of construction workers in the short term but can be refurbished in the longer term to become tourist accommodation. This type of camp would require supporting leisure and food/drink facilities to meet the needs of the workers which could also in the longer term meet the needs of visitors.

2.3.31 The Council welcomes the identification of proposals that support the creation of a new resort for the Island. Any proposals will need to be carefully reviewed to ensure that the proposed site(s) is appropriate in terms of its location, proximity to existing communities, the environmental implication, the traffic implications, its long term viability and its ability to support further investment such as new facilities on the Island that will attract more day and staying visitors.

Isle of Anglesey Single Integrated Plan (2013-2025), IoACC

2.3.32 The aim of the plan is to improve the quality of life of local people and communities by enhancing the island's economic, social and environmental well-being over the next 12 years. The vision identified in the plan is: *"Anglesey – working together to create jobs, improve health and deliver a safe and sustainable place to live".* To achieve this vision the plan identifeies several big issues to tackle over the next few years. The issue most relevant to this topic paper is 'Economic Performance and Skills'. Under this heading tourism is identified as a major contributor to the island's economy and must make the most of opportunities to develop the tourism industry and maximise the island's potential.

Corporate Coast and Countryside Plan, IoACC 2005

2.3.33 The IACC's Coast and Countryside Strategy Group was established in 2005 in recognition of the need to integrate and coordinate more effectively all managaement activities relating to the coast and countryside throughtout the authority. The Vision of the Strategy is to *"strengthen our partnership work to help protect and promote the Island's coast and countryside, not only for its own sake, but in order to help regenerate the local economy and to secure a sustainable and better quality of life for local communities."*

Increasing the Economic Benefit of the Môn-Menai Coast – An Action Plan, IoACC

2.3.34 The purpose of the study is to consider the best way to deliver economic benefit from the coastline of the Môn-Menai study area. The specific terms of reference to the study team stated that the purpose of the study was to develop proposals to make best use of the spectacular Anglesey coastline (in terms of both onshore and offshore activities) in order to maximise economic benefit.

2.3.35 The study area is shown on the map below. It includes the whole coast of Anglesey and the Gwynedd shore of the Menai Strait running from Dinas Dinlle in the west to Hirael Bay and Port Penrhyn in the east. In total, the study has considered approximately 240 km or 125 miles of coastline. In terms of coastal definition, the study has given consideration to onshore activities, inshore activities and those classified as offshore.

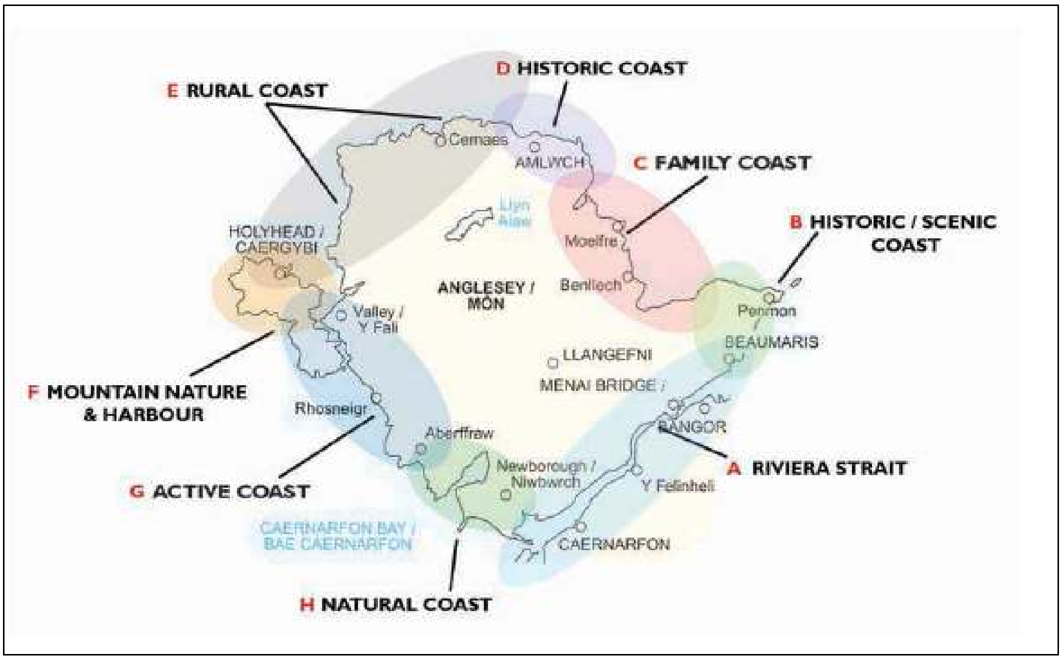


Figure 2 - Increasing the Economic Benefit of the Môn-Menai Coast – Zone Map

2.3.37 The whole of the Welsh coastline has been assessed and zoned as part of the Welsh Coastal Tourism Strategy. Due to the scale of the national study, the national zones were set using geographical characteristics. It identified five different zones for the Môn-Menai study area, namely Menai Strait, East Anglesey, North Anglesey, Holy Island & Holyhead and Western Anglesey.

2.3.38 Stage 1 of the Môn-Menai study complemented the national strategy zones and added further detail by splitting the study area into eight different zones. These zones were identified by usage rather than geographical description:

A. Riviera Coast
B. Historic / Scenic Coast
C. Family Coast
D. Historic Coast
E. Rural Coast
F. Mountain Nature & Harbour
G. Active Coast
H. Natural Coast

Isle of Anglesey Area of Outstanding Natural Beauty (AONB) Management Plan 2009 - 2014, IoACC

2.3.39 The Isle of Anglesey's AONB Management Plan evaluates what the special qualities and features of the AONB are, and then determines what actions are required to ensure that these qualities are conserved and enhanced for future generations.

2.3.40 Section 4 of the Mangement Plan sets out the vision for the AONB. The Vision Statement for the AONB specifically addresses seven inter-related themes. The most relevant theme to this paper is the theme titled "Visiting and Enjoying the AONB". They aim to achieve the vision by encouraging opportunities for people to participate in sustainable and safe activites that do not detract from the natural beauty and special qualities of the AONB.

Ynys Môn Local Plan (YMLP) (1996), IoACC

2.3.41 The YMLP recognises that tourism is not a single or distinct category of land use and plays a key role in the island's economy. The policies in the plan aims to find a balance between maximising the benefits associated with tourism and recreational activities whilst minimising the adverse effects which can occur.

2.3.42 The YMLP also recognises that the environment and heritage of the island are key factors attracting visitors to the area therefore an emphasis on high-quality tourism compatible with this environment and heritage is therefore justified. Positive benefits can be gained from tourism if accompanied by careful planning and visitor management to reduce pressure on more sensitive areas and features.

2.3.43 The need to promote high quality tourism and extend the tourist season are seen as key issues within the plan.

Stopped Unitary Development Plan (UDP) (2005), IoACC

2.3.44 Although never formally adopted, the stopped UDP can be used as a material consideration when dealing with planning applications. The stopped UDP reflects the Council's Economic Development Strategy that embraces a strategic objective for tourism which seeks to develop tourism strategies and programmes which ensure the sustained development of the tourism sector on the island.

2.3.45 This reflects three key themes:

- Quality – ensuring the development and maintenance of a quality tourism product and experience for visitors.
- Diversity – building a diverse tourism product, particularly focusing on those niche markets which help build activity in the off-peak periods.
- Sustainable – a sustainable product which develops the industry in harmony with its environmental setting.

2.3.46 The Council wishes to see these themes reflected in the tourism industry on the island. The industry is underpinned by the natural resources of the area.

The tourism brand provided by the fact that Anglesey is an island is important and tourists value the cleanliness, beaches and peace and quiet. These are all attributes which must form the focus of future development. In addition, the island needs to make more of its Celtic inheritance and inherent 'Welshness', which gives the area an important difference in the marketplace.

2.3.47 In particular, the vision for future activity will seek maximum benefit from tourism, which can build upon these attributes in key sectors: bird watching, angling, cycling, walking, heritage interests and enjoying peace and quiet. Eco- tourism is an important element of the industry. This can be complimented by the role of the port of Holyhead and the possibility of increasing cruise liner activity into the port. The marina at Beaumaris will allow the area to strengthen its profile in the leisure sailing market. In addition, the development of the coastal footpath around the island is a prestige product which complements the tourism profile.

2.3.48 A key issue identified in the stopped UDP is to exploit the island's strategic position as a stepping stone between Ireland, the UK and Europe. The Council would like to maximise the potential visitor/ passenger expenditure by those travelling through Anglesey.

"In land use terms this can be achieved through the vital upgrading of infrastructure and the move to develop integrated transport systems including an improvement in rail connections. The pivotal role of Holyhead as a Celtic gateway must be reinforced,"

Main messages:	▪ Promote tourism on a sustainable basis; ▪ Need to consider the challenges and implications of climate change within the JLDP; ▪ Take more effective advantage of the area's unique environmental, cultural and heritage assets, whilst respecting and contributing to its special qualities; ▪ Improve the local transport infrastructure so as to reduce the overreliance on the private car; ▪ The need to identify and support the various tourism initiatives in the area); ▪ Ensure that the JLDP is consistent with the requirements of all the local strategies, plans and projects outlined in this discussion paper; ▪ Make the most out of the potential opportunities arising from the Energy island project. There may be potential for support of sustainable eco-tourism parks in the JLDP. The legacy from the proposed Wylfa new nuclear power station may present opportunities for workers accommodation to be converted into holiday parks after use.

3.0 THE CURRENT SITUATION

3.1 Tourism Trends

3.1.1 Tourism is a dynamic industry. On a national level taking long holidays has declined and is likely to do so in the future[5]. This has serious implications for those sectors of the industry which remain heavily dependent on the traditional peak season holiday market such as the traditional seaside holiday. Conversely, the numbers of short breaks, usually weekend oriented, are increasing and represent an opportunity to extend the holiday season. The short-break market is predominately dominated by pre and post family couples; either young adults seeking activity holidays or older couples seeking relaxation or specialist breaks. It is important that the tourism industry within the JLDP Area adapts to meet the challenges of the changing expectation of visitors.

3.2 Tourism Expenditure

3.2.1 The tourism industry is extremely important to the JLDP area and visitor expenditure benefits the whole economy. Visitors to the area make the use of a wide range of services, not only those directly catering for the tourist industry. These include:

- traditional tourism businesses – e.g. visitor accommodation providers, visitor attractions etc;
- leisure businesses – e.g. cafes, pubs, restaurants, cinemas, theatres and sporting facilities;
- transport facilities - e.g. railways, bus and coach companies, taxis, car hire and petrol stations;
- the local services – e.g. local shops, banks, post offices, car and coach parks, public conveniences;
- other local businesses – e.g. farmers, fishermen, food and drink suppliers, construction and building maintenance.

3.2.2 In 2013 the tourism industry was worth a total of **£907.04**[6] million to Gwynedd's local economy (including the Snowdonia National Park) and **£256.44**[7] to Anglesey's local economy. The following table outline the importance of tourism to the JLDP area's economy.

	Gwynedd			**Isle of Anglesey**		
(FTE's)	**2012**	**2013**	**% change**	**2012**	**2013**	**% change**
Direct Employment						
Accommodation	3655	3675	1	1045	1063	2
Food & Drink	2758	2815	2	712	737	4
Recreation	1291	1319	2	329	344	5
Shopping	3349	3408	2	860	892	4
Transport	606	618	2	153	160	4

[5] Tourism Strategy North Wales (2010-2015)
[6] STEAM 2013
[7] STEAM 2013

Total Direct Employment	**11659**	**11835**	1	**3099**	**3196**	3
Indirect Employment	**2853**	**2938**	3	**813**	**847**	4
TOTAL	**14512**	**14773**	1	**3912**	**4043**	3

Table 2 - Sectors in which Employment is supported (STEAM 2013)

	Gwynedd			**Isle of Anglesey**		
(£'s millions)	**2012**	**2013**	**% change**	**2012**	**2013**	**% change**
Serviced Accommodation	126.66	138.96	10	36.38	39.58	9
Non-Serviced Accommodation	596	612.01	3	176.62	182.58	3
SFR	13.64	13.67	0	7.80	784	1
Day Visitors	144.31	142.40	1	24.84	26.44	6
TOTAL	**851.69**	**916.09**	**3**	**245.64**	**256.44**	**4**

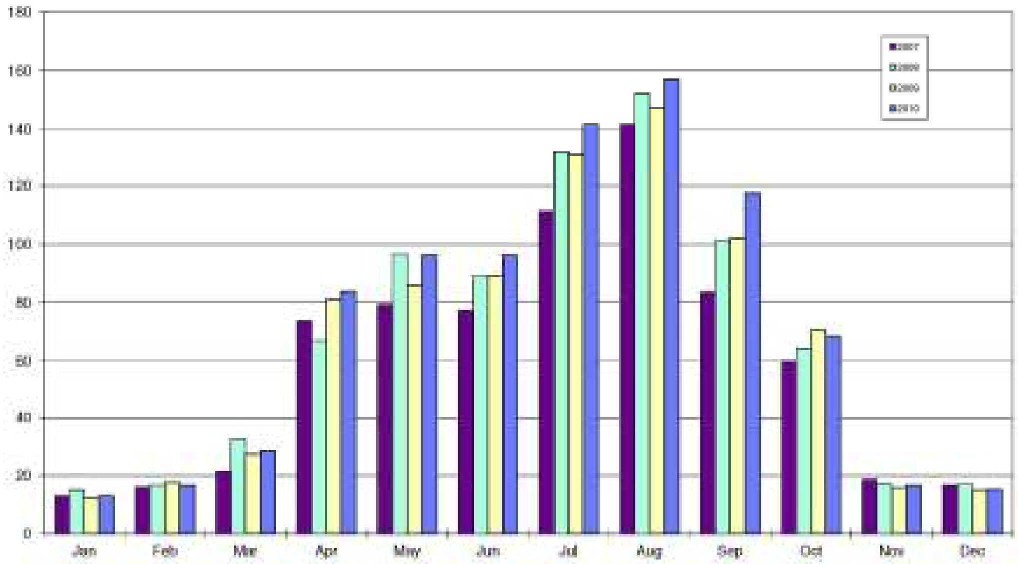
Table 3 – Revenue by Category of Visitor (STEAM 2013)

3.2.3 From 2006 to 2010 there had been a small and steady rate of growth across most sectors in both Gwynedd and Anglesey. Most noticeably, between 2012 and 2013 there has been a significant increase in the revenue created by serviced accommodation on Anglesey and Gwynedd. However, these growth rates are only a 'snapshot' over a very limited time period and should not be taken as an indication to suggest that the serviced accommodation industry is experiencing rapid rates of expansion. Consequently, it is believed that there may be a requirement for more investment in high quality accommodation, tourist attractions and recreational activities to encourage a larger customer base to the JLDP area.

3.3 Seasonality

3.3.1 'Seasonality' of the tourism industry within Gwynedd and Anglesey is still a major issue as is illustrated by Tables 6 and 7 below, with the peaks still associated with the summer months and school holidays.

Gwynedd



Anglesey

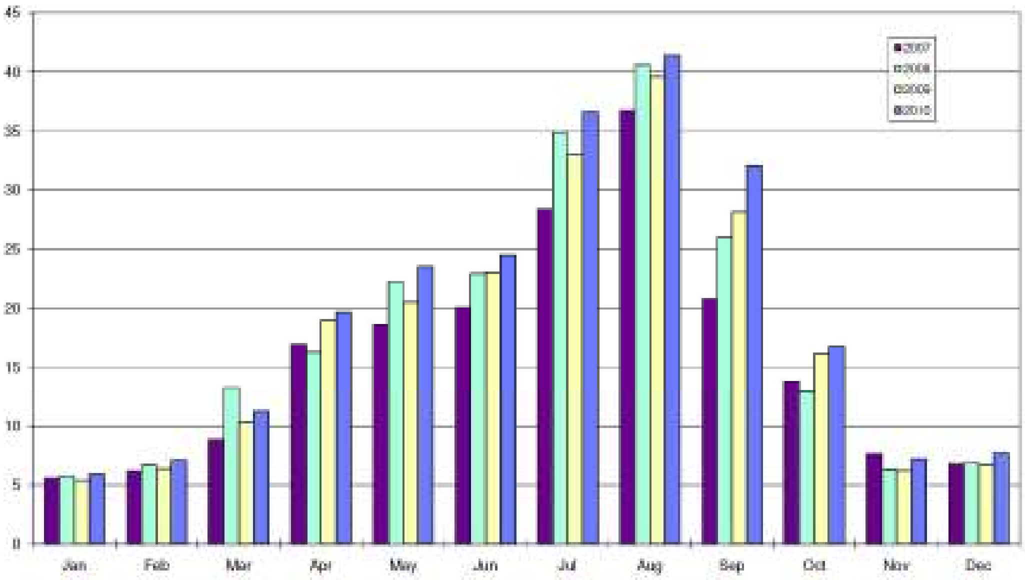


Figure 3 – Tourism Expenditure 2007-2010 – By month (£M's) (STEAM)

3.3.2 The high seasonality reflects the relative importance of family holidays, many of which are governed by school holiday periods, as well as a preference for warmer weather for camping /caravanning and for water based activities.

3.3.3 With regards to the future the "North West Wales Economic Futures" (2006) report prepared by ESYS consulting on behalf of the WAG projected that future growth in FTEs in hotels and restaurants is projected to increase to 1% pa. The reports projections also suggest significant levels of growth in leisure and tourism, specifically recreational, cultural and sporting activities.

3.4 Accessibility

3.4.1 Improvements to the A55 trunk road has significantly improved journey times to many parts of Gwynedd and Anglesey. Future improvements to the A487 with the development of the Caernarfon/Bontnewydd bypass will improve journey times to the Llyn and alleviate traffic congestion for the local communities. Local improvements such as the A499 Aberdesach to Llanaelhaearn and the A497 Afon Wen to Abererch has also improves accessibility to the region. However, there are still many areas of North West Wales perceived as difficult to access due to journey times and the nature of the road network. Public transport to the larger settlements is also relatively good with regular rail services along the north west coast but bus services become less frequent the further west visitors travel. Meirionnydd is also an area that experiences less frequent services. Many coastal locations are accessed by narrow country lanes which can suffer from congestion during the peak season and cause safety issues for walkers and cyclists. Congestion problems also occur over the Britannia Bridge to Anglesey during peak season, work hours and ferry times.

3.4.2 Transport and traffic issues should not however deter visitors from staying in the JLDP area. Innovative solutions should be found to tackle any traffic issues arising in tourist hotspots. *"While private car is likely to remain the main mode of transport for staying and day visits, the challenge is to develop innovative forms of public transport, to move people around local attractions and to make it easier for visitors to walk and cycle around destinations."* Coastal Tourism Strategy (WG, 2008).

3.4.3 Examples of local public transport initiatives include the Snowdon Sherpa which is a unique bus service that travels around the foot of Snowdon creating a valuable link between the six main routes up the mountain.

3.4.4 "Lonydd Las" are multi user recreation routes that allow the user to travel around communities and tourist destinations on car free paths. Gwynedd currently has 6 Lonydd Las: Mawddach Trail, Lôn Las Eifion, Lôn Las Menai, on Las Ogwen and Lôn Las Peris. There are currently two Lonydd Las on Anglesey: Lôn Las Cefni and Lôn Las Copr.

Main messages:	▪ That the long holiday market has declined, whilst short break holidays are on the increase; ▪ Many areas and sectors remain heavily dependent on the traditional peak season holiday market such as the traditional seaside holiday; ▪ It is important that the tourism industry within the Plan Area adapts to meet the challenges of the changing expectation of visitors; ▪ The short-break market represents opportunities to extend the holiday season; ▪ The tourism industry is extremely important to the JLDP area and visitor expenditure benefits the whole economy. Visitors to the area make the use of a wide range of services, not only those directly catering for the tourist industry.

	▪ Seasonality' of the tourism industry is still a major issue; ▪ The "North West Wales Economic Futures" (2006) report projections suggest significant levels of growth in leisure and tourism, specifically recreational, cultural and sporting activities.

4.0 VISITOR ACCOMMODATION

4.1 A successful tourism destination is highly dependent on the quality, level and type of accommodation available within that area. 'Providing quality accommodation' is one of the key priorities of the 'Tourism Strategy North Wales 2010-2015' and therefore aims to *"ensure there is a sufficient supply and range of quality accommodation to meet changing market needs, accommodate growth and support a thriving tourism economy."* Furthermore, it is also recognised that a broader range of serviced accommodation would allow more choice for the visitor and appeal to the growing short break market (Coastal Tourism Strategy, WG 2008).

4.1.1 For those people who choose to stay in the JLDP area their choice of the holiday accommodation can form an important part of their overall experience. The JLDP area offers a wide range of accommodation opportunities. The ability of Gwynedd and Anglesey to continue competing for their market share will depend upon the continuing provision of a range of accommodation. That accommodation needs to be able to respond to changing market conditions and providers should be encouraged to continue improving their facilities.

4.1.2 As seen from table 4 below in 2010 Gwynedd tourism bedstock accommodation (3,422 properties) accounted for around 15.3% of the tourism bedstock accommodation in Wales and 55.1% of the tourism bedstock accommodation in North Wales. In 2010 Anglesey's tourism bedstock accommodation (1,599 properties) accounted for approximately 7.1% of the tourism bedstock in Wales and 25.6% of the tourism bedstock in North Wales.` Compared to the figure for the whole of Wales there is less serviced accommodation properties and caravan and camping establishments in Gwynedd and Anglesey but slightly more self-catering properties. The proportion of alternative accommodation in Gwynedd is similar to the Wales but less in Anglesey.

Main Category	Ynys Môn		Gwynedd		North Wales		Wales	
	No.	%	No.	%	No.	%	No.	%
Serviced	161	10.1%	368	10.7%	1,147	18.3%	4,098	18.3%
Self catering	1,349	84.4%	2,866	83.3%	4,670	74.7%	16,696	74.4%
Caravan & Camping	88	5.5%	187	5.4%	400	6.4%	1,502	6.7%
Alternative	1	0.1%	21	0.6%	34	0.5%	141	0.6%
Total	**1,599**		**3,442**		**6,251**		**22,437**	

Table 4 - Total Accommodation Stock 2010, Source: Euro stat

4.1.3 In 2010, Gwynedd's tourism bed spaces (64,900) accounted for around 15.5% of the tourism bed spaces in Wales and 42.4% of the tourism bed spaces in North Wales. In comparison Anglesey 's tourism bed spaces (39556) accounted for approximately 9.4% of the tourism bed spaces in Wales and 25.9% of tourism bed spaces in North Wales

Main Category	Ynys Môn		Gwynedd		North Wales		Wales	
	No.	%	No.	%	No.	%	No.	%
Serviced	2,225	5.6%	6,483	10.0%	24,629	16.1%	73,449	17.5%

Self catering	7,324	18.5%	13,019	20.1%	22,163	14.5%	70,254	16.7%
Caravan & Camping	30,003	75.9%	43,251	66.6%	103,438	67.6%	261,751	62.3%
Alternative	4	0.01%	2,147	3.3%	2,724	1.8%	14,415	3.4%
Total	**39,556**		**64,900**		**152,951**		**419,869**	

Table 5 – Total Tourist Bed spaces 2010, Source: Euro stat

4.1.4 The following tables highlight that the non-serviced accommodation sector is by far the largest sector in Gwynedd and Anglesey.

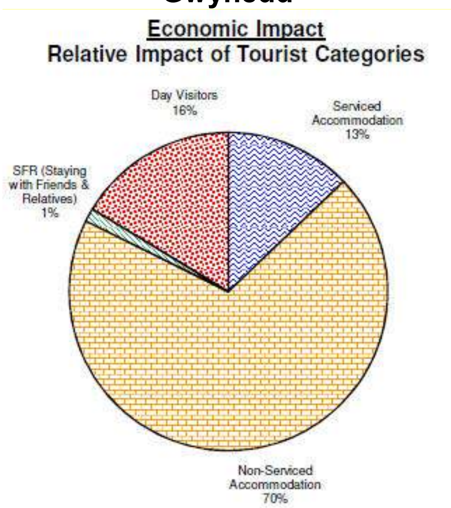
	Gwynedd			**Isle of Anglesey**		
(Thousands)	**2012**	**2013**	**% change**	**2012**	**2013**	**% change**
Serviced Accommodation	1280	1423	10	329	356	8
Non-Serviced Accommodation	14670	14970	2	3966	4081	3
SFR[8]	448	449	0	256	258	1
Day Visitors	3404	3363	-1	587	625	6
Total	**19802**	**20205**	**2**	5138	5320	3

Table 6 – Tourist Days (STEAM 2013)

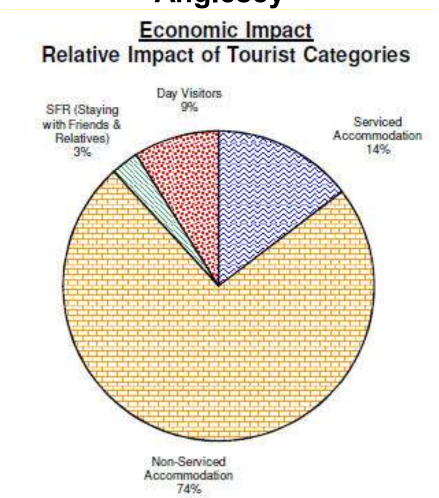
	Gwynedd			**Isle of Anglesey**		
(Thousands)	**2012**	**2013**	**% change**	**2012**	**2013**	**% change**
Serviced Accommodation	723	809	11	189	205	8
Non-Serviced Accommodation	2224	2269	2	608	631	4
SFR	188	188.6	0	108	108	0
Day Visitors	3408	3363	-1	587	625	6
Total	**6543**	**6624**	**1**	**1492**	**1569**	5

Table 7 – Tourist Numbers (STEAM 2013)

Gwynedd



Anglesey



[8] SFR = **S**taying with **F**riends or **R**elatives

Figure 4: Relative Impact of Tourist Categories, STEAM 2011

4.1.5 The 2010/2011 'Gwynedd Bedstock Survey' (December 2011) is the most recent County wide survey undertaken in Gwynedd and highlights that:

- There are 2807 known properties offering tourist accommodation in Gwynedd with 33.5% located within Snowdonia National Park.
- 14.3% of properties (400) are serviced establishments whilst 85.7% are non-serviced (2047). Of the 2407 properties which are non serviced 84% are self catering (2023), 14.1% are caravan and camping (340) and 1.8% are alternative accommodation (44).
- Across all sectors there is an estimated 125,273 bed spaces in the county, with 78.1% coming from caravan and camping accommodation.

(An update to the bedstock survey has been undertaken but the results are not yet available)

4.1.6 The following chart highlights the breakdown of tourism bed spaces (%) per accommodation type in Gwynedd.

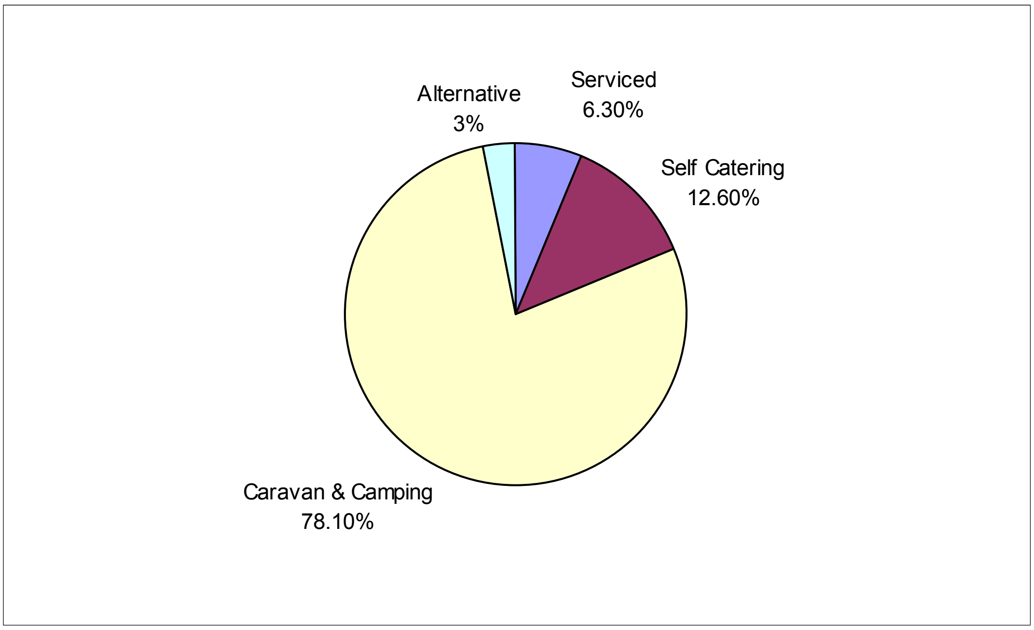


Figure 5 - Breakdown of bed spaces by main category in Gwynedd

4.1.7 In Anglesey the most recent survey was 2008. 92% of the 518 accommodation providers contacted provided the authority with bedstock information. The survey highlighted that:

- There are 1422 known properties offering tourist accommodation on Anglesey.
- 9.8% of properties (140) are serviced establishments whilst 90.2% are non-serviced which includes the caravanning and camping sector (1282).
- Across all sectors there is an estimated 37,602 bed spaces in the county, with the caravanning and camping sector accounting for 76.4% of bed spaces

4.1.8 The following chart highlights the breakdown of tourism bed spaces (%) per accommodation type in Gwynedd.

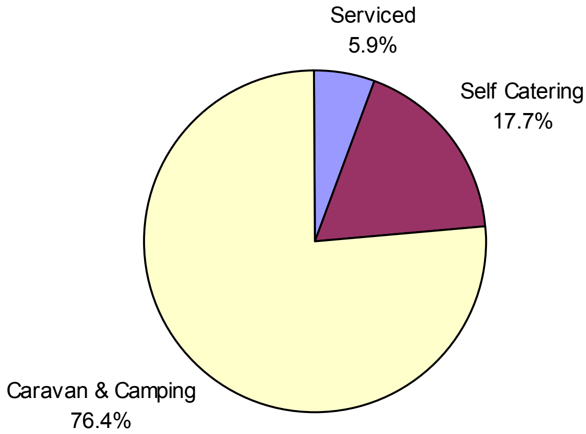


Figure 6 - Breakdown of bed spaces by main category in Anglesey

4.1.9 Data on tourist accommodation for Gwynedd is available back to 1975. Since 1975 serviced accommodation bed spaces have declined across all areas, with Dwyfor and Meirionnydd witnessing a reduction of over half (-59.5% and -55.9% respectively). Across all area, self catering bed spaces have witnessed a growth, with substantial growth witnessed in Arfon (+577%) and Dwyfor (+453%), and slightly less growth witnessed in Meirionnydd (+48.5%). Caravan and camping bed spaces have increased in Arfon (+33.3%) and Dwyfor (+6.8%), but have decreased in Meirionnydd (-2.1%), whilst alternative accommodation bed spaces have declined in Dwyfor (-66.2%) and Meirionnydd (48.1%), yet increased in Arfon (+71.0%)[9].

4.1.10 In Anglesey comparing the 2000 and 2008 bed stock survey provides a useful indicator of growth, the 2008 study was more extensive and received significantly more responses to the business survey, as such the rate of growth may be considered to be over exaggerated and should be treated with extreme caution.

4.1.11 There are currently 37,602 tourist bed spaces on the Island indicating a significant increase of 70.7% on the 2000 figure, equating to 15,578 new bed spaces. The largest growth (251%) has been within the self-catering sector, which includes chalets and residential holiday lettings and now accounts for 17.7% of tourist bed spaces within 1,187 establishments on the Island. Camping, static and touring caravan pitches continue to dominate the local tourism accommodation offer accounting for 76.4% of bed spaces, a growth of 59.2% on the 2001 figure. Serviced accommodation which includes B&B's, hotels, guest houses and inns with rooms represents the smallest number of bed spaces at 2,237 or 5.9% within 140 establishments. This sector has also experienced the lowest level of growth at 7.2% since the previous survey in 2000. In terms of the quality of accommodation on Anglesey, the majority of accommodation is of 3 and 4 Star standard.

[9] Corporate Research and information Service, Gwynedd Council

4.1.12 Looking more closely at the camping and caravanning sector on the Island, 12,202 of the bed spaces, representing 42% of the total in the sector are static caravans[10], the majority of which are privately owned and unavailable for public hire. Planning policy is adverse towards the development of further new static caravan sites.

4.2 Serviced Accommodation

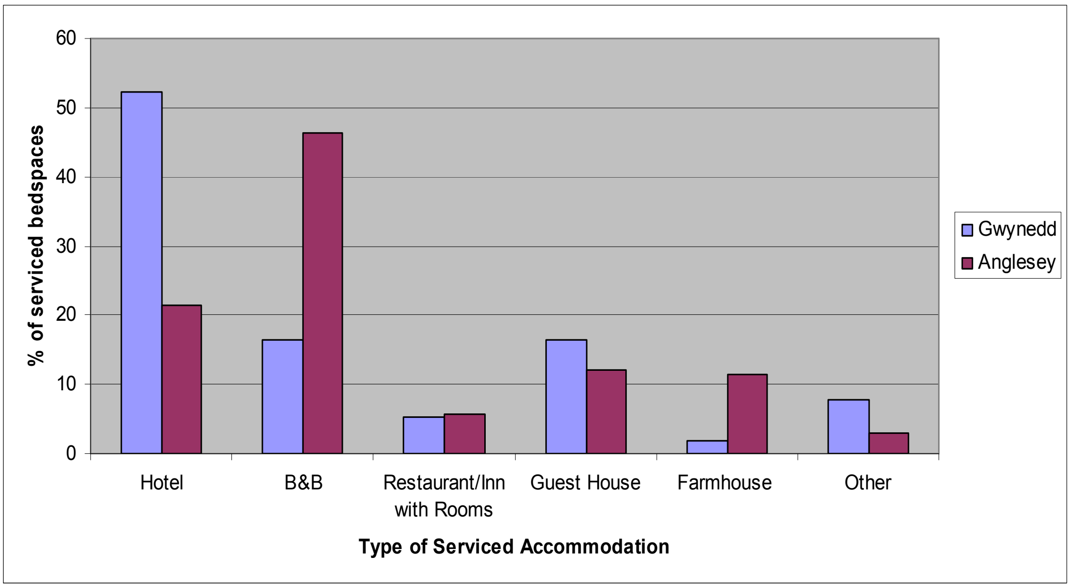
4.2.1 Hotel development can bring benefits for the local community and support amenities and activities for residents and tourists. Such developments should be compatible with neighbouring uses. The conversion of hotel stock to alternative uses can weaken a seaside town's ability to retain its resort status, and this issue should be addressed in development plans for such areas. Care should be taken not to use the planning system to perpetuate outdated accommodation for which there is no longer a market demand.

4.2.2 The importance of serviced accommodation to coastal resorts is highlighted by the Coastal Tourism Strategy (WAG 2008) which states that:

"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. Consumer expectations are rising, making it imperative to invest in the quality of accommodation in order to attract and retain visitors to the coast."

4.2.3 A key priority for action in the North Wales Tourism Strategy is the improvement and upgrading of all types of accommodation in the region, and for the identification of sites with the potential to attract some additional branded 3-4 star, full service hotels, particularly in Llandudno and Bangor. Potential also exists for new or extended hotels in association with spa/golf provision and a new high quality self-catering/holiday village development adjoining the National Park.

4.2.4 The following chart gives a breakdown (%)



[10] Tourism and Marketing Department, Isle of Anglesey County Council

Figure 7 - Breakdown of serviced accommodation bed spaces (%), Source: Gwynedd Council Bedstock Survey 2010/2011, Anglesey Bedstock Survey 2008

4.2.5 Serviced accommodation in Gwynedd is primarily provided by small independent hotels, guesthouses and B&Bs. There are relatively few branded hotels and national chains in the area, although a number of budget chain hotels have been developed at Porthmadog, Caernarfon and the Bangor area in recent years. However, based on their marketing strategies, these are more likely to be targeted towards the business sector rather than the tourism market. Due to the increasing amount of national and international events being held in Gwynedd, it has been recognised the need for hotels which have the capacity to cater for large scale events and groups. There is a lack of business and conference hotels in Gwynedd and the Coastal Tourism Strategy draws particular attention to the lack of such facilities in the area.

4.2.6 The situation in Anglesey is similar with a high number of serviced accommodation establishments in Holyhead catering for the commuters to Ireland. The island has a rich variety of historic buildings. Many of these buildings offer a country location and have the potential to demand high tariffs and offer high quality accommodation to tourists.

4.2.7 The map below shows the distribution of serviced accommodation establishments in Gwynedd and Anglesey.

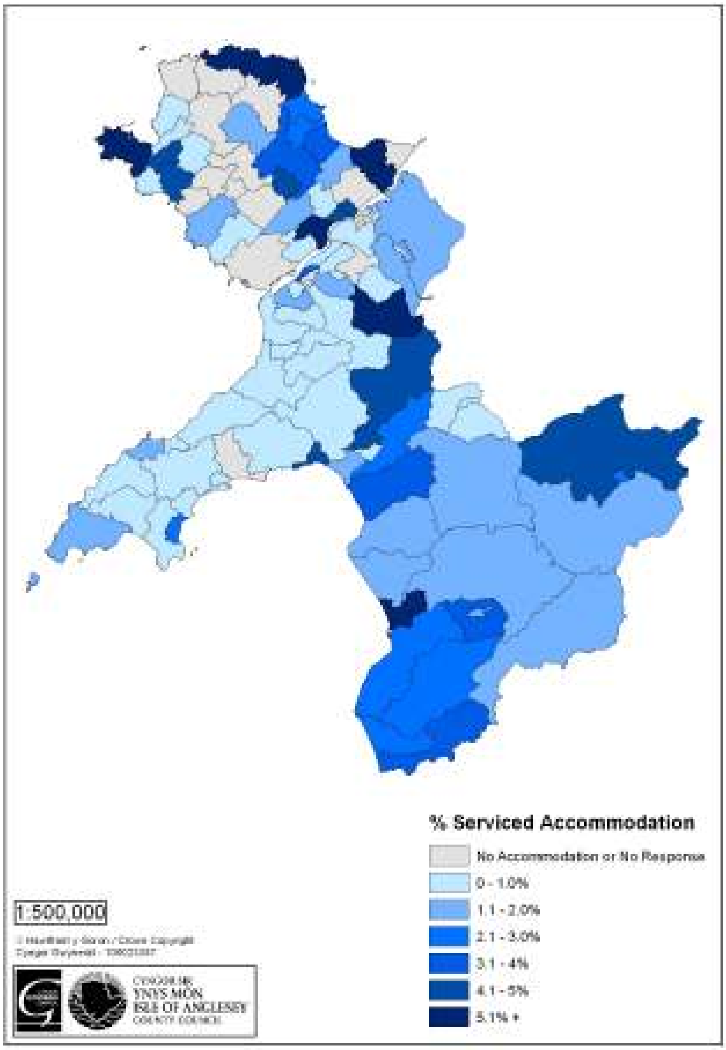


Figure 8 - Distribution of Serviced Accommodation per Community Council

4.2.8 Policy D14 of the GUDP takes a positive approach towards the provision of serviced accommodation and states that subject to specific criteria supports for proposals for new permanent serviced holiday accommodation, or the conversion of existing buildings into such accommodation, or extending existing serviced holiday accommodation establishments. All developments have to be high quality in terms of design, layout and appearance.

4.2.9 Policy 8 of the YMLP covers both Serviced and Self Catering (including Chalets) and states that applications for high quality holiday accommodation will be permitted where they do not conflict with other policies within the plan. In particular, the council will favourably consider proposals which form an integral part of an overall scheme which adds to tourism and recreation facilities in the area.

4.2.10 Policy 8 is designed to encourage the development of high quality visitor accommodaton in the right place. In considering proposals for holiday accommodation, the impact on the local economy, landscape, environment and cultural character of the area will be important considerations. The council will not support proposals for badly sited development. The stance is repeated in policy TO2 of the stopped UDP.

4.3 Self Catering Accommodation

4.3.1 This sector (excluding caravan and camping) accounts for 6.3% of all bed spaces within Gwynedd and 5.9% of all bed spaces on Anglesey. The sector has seen growth, particularly via diversification and conversion of rural buildings, a trend which has become increasingly popular. This reflects the national and local planning policy stance towards giving precedence to seeking economic use for redundant rural buildings. Agricultural diversification into tourism is seen as a way of supplementing farm incomes and can contribute to the rural economy. Despite the opportunities which arise from successful agricultural diversification there is a risk of over supply. The self catering sector is currently ill-equipped to capitalise on the growing short break market as the majority traditionally offer week long holidays.

4.3.2 The map below shows the distribution of self catering accommodation establishments in Gwynedd and Anglesey.

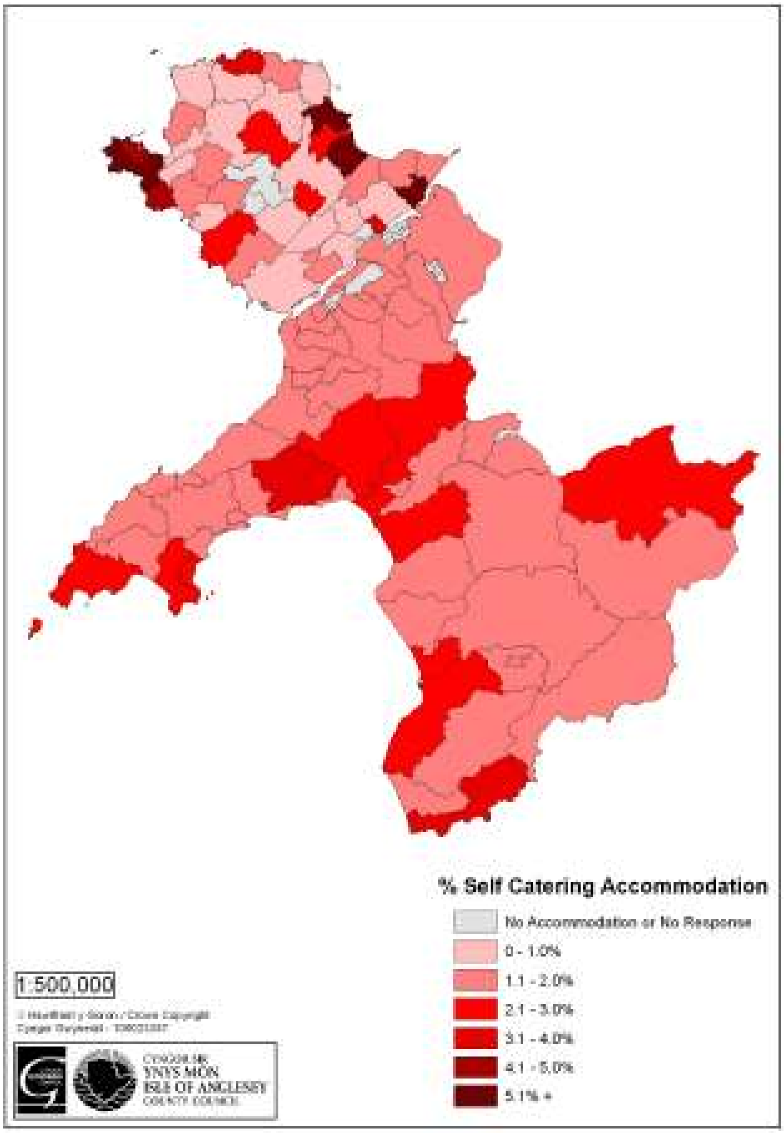


Figure 9 - Distribution of Self Catering Accommodation per Community Council

4.3.3 Whilst Policy D15 of the existing Gwynedd UDP takes a positive approach to the provision of additional self serviced accommodation, it does recognise that some areas within the Plan area contains a sufficient supply of this type of accommodation. For this reason the SPG on 'Holiday accommodation' establishes a threshold whereby further self serviced accommodation within a City/Town/ Community Council will not receive favourable consideration in the context of policy D15 of the UDP will be where 10% or more of:

- the housing stock are second homes (2001 Census), or where
- all holiday accommodation are self catering units

4.3.4 Policy 8 of the Ynys Môn Local Plan (see paragraph 4.2.8) covers new build self catering establishments on the island. Policy 55 'Conversions' in the Local Plan permits the conversion of redundant rural buildings to a dwelling or holiday accommodation provided the application conforms to the strict criteria within the policy. This includes that the building is structurally sound and capable of conversion without extensive rebuilding or extension tantamount to the erection of a new dwelling and that any conversion scheme respects the character, scale and setting of the existing building, and involves only minor external alteration, unless it can be demonstrated that significant enhancement of the appearance of the building will be secured.

4.4 Caravan and Camping

4.4.1 Holiday and touring caravan parks are an important part of the self-catering holiday sector and can contribute as much to the local tourism economy as serviced holiday accommodation, while using less land for the purpose. However, holiday caravan sites can be intrusive in the landscape, particularly on the coast. Special consideration needs to be given to proposals for new sites, especially in National Parks, Areas of Outstanding Natural Beauty, Heritage Coast and sites of national and international importance designated for their natural features.

4.4.2 The caravanning and camping sector dominates the tourism accommodation within the JLDP Area. According to the most recent surveys caravan and camping establishments provide 78.1% of bedstock in Gwynedd and 76% in Anglesey. The Welsh Coastal Tourism Strategy (WG, 2008) states that caravans and camping, particularly static caravans, were the preferred form of accommodation for tourist staying at coastal locations, accounting for 44% of all trips in 2006.

4.4.3 The following map highlights the predominantly coastal location of caravan and camping sites in the JLDP area.

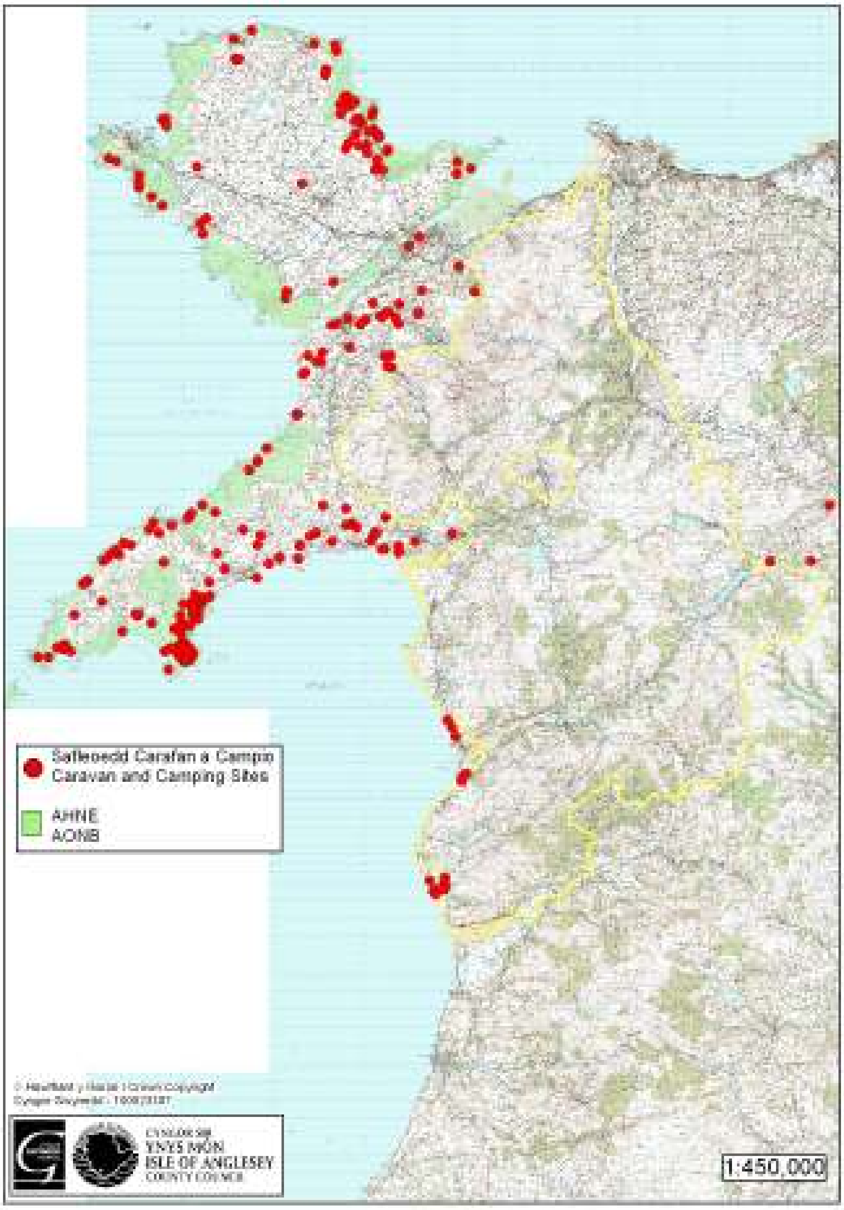


Figure 10 – Distribution of Camping and Caravan Sites in JLDP Area. Source: Caravan and Camping Site License Register

4.4.4 The JLDP aims to support the provision of sustainable tourism through the policies within the plan. Many of the sites are located away from settlements and are poorly served by public transport or have no public transport provision at all. An increase in sites in these areas could result in an increase in private car use.

Static Caravans

4.4.5 Many of the caravanning and camping bed spaces are in static caravans, with the majority located on or near the coast. A desktop exercise was undertaken using the Councils' Geographical Information System (GIS) and aerial photography (2006) to identify the approximate number of static caravans within the JLDP area. The results revealed that there were 9442 units within Gwynedd with 8678 (91.9%) located within 2km of the coastline and 1833 (19.4%) located in the Llŷn AONB. There were a total of 3857 units on

Anglesey with 3181 (82.5%) located within 2km of the coastline and 1944 (50.4%) located within the Anglesey AONB.

4.4.6 The number of potential bed spaces provided by the static caravans within the JLDP area could exceed 78,000 (based on an average 6 berth caravan). If the caravans within the Snowdonia National Park is taken into consideration (SNPA Background Paper 23: Static Caravans, March 2011) the number of possible bedspaces fro the region could exceed 110,000 bedspaces.

4.4.7 The demand of sites has concentrated on the most popular holiday areas, particularly on the coast. The predominance of static caravans within the coastal area is typical of most coastal areas in Wales and is particularly dictated by market demand for caravans close to the beach. However they can have a very intrusive impact upon our coastlines. Many of the sites were developed in the 1950's and early 1960's and are generally sites in visually prominent locations. A number of sites are located away from settlements and are poorly serviced by public transport or have no public transport provision at all.

4.4.8 The general impact and high visibility of many of these sites has affected attitudes to caravans, particularly static vans ever since. Planning policy since the early 1970s has been very restrictive towards static caravans. The aim has been to prevent the development of new sites and curtail changes to existing sites.

4.4.9 A number of the sites fall within the Llyn or the Anglesey Area of Outstanding Natural Beauty (AONB). A recent public consultation of the annual review of the Llyn AONB Management Plan received numerous comments regarding static caravan sites. In particular the AONB Joint Advisory Committee wished to raise concerns regarding permitting new caravan sites and extending existing caravan sites within the AONB.

4.4.10 The bed space analysis undertaken by both authorities does not distinguish between owned and rented static caravans. The caravans which are owned may or may not be available for hire but those caravans which are operated for hire are most likely to represent available tourist bed spaces. The Economic Impact Assessment of the Holiday Park Industry in Wales (September 2011) was jointly commissioned by the British Holiday and Home Parks Association and Visit Wales. It's main objectives was to:

- Provide an independent, evidence based understanding of the direct and indirect economic impact / contribution of the holiday park sector in Wales.
- Provide the economic impact / contribution from different types of accommodation unit provided in holiday parks.

4.4.11 The main findings from the Economic Impact Assessment was that the total turnover and visitor expenditure as a result of the Wales holiday park industry is £727 million per annum. Its total economic impact to Wales has been calculated as a Gross Value Added (GVA) contribution of £317 million per annum, supporting a total of 10,645 direct and indirect jobs in Wales.

4.4.12 The estimated total park and visitor expenditure and GVA by accommodation type is shown in the following table:

	Accommodation Type		
	Owned Static Unit	Rented Static Unit	Touring Pitch
Park expenditure per unit	£3625	£5900	£200
Visitor expenditure per unit	£3900	£9400	£2600
Total spend per unit per annum	£7525	£15300	£2800
Total GVA per unit per annum	£3390	£6900	£1340

Table 8 - Expenditure & GVA by Accommodation Type per annum (Wales Holiday parks Economic Impact, September 2011)

4.4.13 The difference between expenditure between accommodation types can be explained by looking at the required expenditure by parks on rented static units such as marketing, cleaning, additional maintenance and more frequent unit replacement than is the case with owned units. Visitor expenditure is also higher for rented static units due to their higher occupancy rates than owned static units. Touring pitches require the least amount of park expenditure and had he lowest occupancy rates, reflecting the generally shorter season for tourers.

4.4.14 Working under the same assumptions of the Wales holiday parks Economic Impact Assessment it can be assumed that 80% of static caravans in the JLDP area are privately owned and not available for rent by tourists.

4.4.15 There is great variation in the scale and quality of caravan and camping sites across the JDLP Area. The majority of caravan parks have invested in central facilities and landscaping and therefore offer a quality tourism product. However, there remain many lower quality sites which require significant investment to meet future market requirements.

4.4.16 There is currently a presumption against new static holiday caravan sites in both local authority areas because both authorities believe that there is sufficient overall provision of static caravan sites. However local policy does allow for a 10% increase in the number of units on an existing static caravan site providing that any proposals are part of a comprehensive scheme to improve the appearance of the whole site and reduce its impact on the surrounding landscape. The aim of the policy is to foster development that will lead to the improvement and upgrading of existing sites NOT to promote the increase in the size of business in terms of the number of units on the site.

Touring and Camping

4.4.17 Similarly to static holiday caravan sites a high concentration of these located on the coastline. A high proportion of the holiday caravan sites were established pre 1960's and are sited in visually prominent locations along the coastline and within the AONBs, some of which have a high visual impact, when busy, during the summer period.

4.4.18 In the past touring caravan sites have been considered acceptable in land use planning terms as having less impact on the landscape than static caravan sites because, by their very nature, they have transient features which do not impose permanent, year round effects on the local environment. Their impact has to be assessed alongside other relevant considerations including landscape, impact on the local community, highway safety and existing levels of provision.

4.4.19 However, modern touring caravan sites are becoming more similar to static sites providing hard standing pitches and electric hook up points, with a tendency for the touring caravan to be left on the site for the whole duration of the touring holiday season.

4.4.20 In terms of touring units both Gwynedd and Anglesey have permissive policies allowing for new sites and extension to existing sites providing that certain criteria within the policies are met. The criteria includes factors such as accessibility and highway pressure, the effect on public amenity and resources and any impacts upon the local landscape and environment.

4.6 Luxury Camping or Glamping

4.6.1 **'Glamping'** - A more recent development has been planning applications/enquires for dome/bell tents, yurts, tepees and wooden tents which are collectively known as 'glamping'. This reflects a nationwide trend whereby traditional camping and caravan operators are diversifying and many businesses are now offering alternatives to standard/ traditional caravanning and camping accommodation which are aimed at providing customers with the camping experience but in a more luxurious environment.

4.6.2 It's expected that planning applications for more non traditional forms of accommodation is likely to increase in the future. Examples of such developments which have received planning permission within the last five years include yurts, near Bala, wooden tents (Wigwams, near Bryncir) and dome tents, near Y Ffôr.

4.6.3 Currently there is no specific local policy in Gwynedd or Anglesey's existing development plan framework which deals specifically with such developments. However, guidance has been provided in the Gwynedd Council SPG on Holiday Accommodation. In its current form the guidance divides such developments into two groups namely:

- Wooden tents or similar structures
- Yurts and Tepees or similar low impact structures

4.6.4 **Wooden tents or similar structures -** These are generally considered to meet the statutory definition of a caravan[11]. Given their degree of permanency

[11] Section 29 (1) of the Caravan Sites & Control of Development Act 1960 defines a caravan as:

"Any structure designed or adapted for human habitation which is capable of being moved from one place to another (whether being towed, or by being transported on a motor vehicle or trailer) and any motor vehicle so designed or adapted, but does not include any tent."

The SPG's position in respect of this issue reflects the stance that other LPA's e.g. Lake District National Park has adopted. At present this position has not been tested in planning case law and the on the site such structures are regarded to be similar in nature to 'static caravans'. Currently these are considered against the requirements of policies D16 and D17 of the Gwynedd UDP.

4.6.5 **Yurts and Tepees or similar low impact structures -** These are not considered to fall within the statutory definition of a caravan. In the case of a 2007 planning appeal relating to a permaculture holding near Totnes in Devon, the Planning Inspector concluded that Mongolian-style yurts on the site were not operational development as they were more akin to temporary structures. This suggests that yurts, tepees and similar low impact structures might be considered in planning terms in the same way as tents. However, if an operator wishes to embellish yurts, e.g. with a fixed wooden floor, wood burning stove or veranda, a planning authority may have a case to describe such yurts as permanently sited structures that would constitute operational development that requires planning permission. The degree of permanence is thus likely to be a key principle in deciding on the planning status of a yurt, tepees and similar low impact structures.

4.6.6 Currently, such proposals are considered against the requirements of policies D19 or D20 of the Gwynedd UDP and Policy 8 or 12 of the Ynys Môn Local Plan. One of the main policy considerations is the degree of permanency of the structure and whether it can be removed when not in use. Consequently, under the existing policy framework only those proposals whereby the structure will be removed off site when not used by visitors will be supported. This policy approach may be considered by potential developers as overly excessive, since the luxurious nature such visitor accommodation makes it virtually impossible to erect and dismantle them on a regular basis throughout the tourist season. Potential investors are primarily interested in being able to erect such structures and leave them on site during the whole duration of the holiday season

4.6.7 If the area is going to respond the demand from visitors for different types of non traditional forms of camping sites then the JLDP needs to provide a policy framework which deals specifically with such developments.

4.7 Seasonal and Occupancy Conditions

4.7.1 The location of many self catering holiday units, static and touring caravan sites on Anglesey occur in areas where the provision of permanent housing would be contrary to national and local planning policies which seek to manage development, for example in order to safeguard the open countryside. Some sites may not be suitable for year round occupation because of the quality of their facilities. Placing conditions on these developments can ensure that holiday accommodation is used for its intended purpose and does not become a permanent place of residence .

4.7.2 As standards of the holiday units and facilities on sites improve, and demands within the holiday industry change there is pressure for the holiday occupancy period to be extended. Both Local and National Policy Guidance allows for proposals to extend the occupation period of holiday units subject to some conditions. These include:

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question of whether such structures met the definition of a caravan has been questioned whilst undertaking formal consultation on the Draft SPG.

- It can be demonstrated that the accommodation is being used exclusively for holiday purposes and does not become the occupant's main or sole place of residence,
- Extending the occupation period will not have a detrimental effect on local amenity and/or the local environment.
- The accommodation and site is deemed suitable for occupation during low season (especially the winter months).

4.7.3 Gwynedd currently allow for a 10 and a half month occupancy and Anglesey Local Policy allow for 10 month occupancy of holiday units – but national planning guidance (TAN) is more flexible. Guidance in TAN 13: Tourism states that a holiday occupancy condition would seem more appropriate than a seasonal occupancy condition where there is a need to reduce pressure on local services. It also states that Authorities should continue to use seasonal occupancy conditions to prevent the permanent residential use of accommodation which, by the character of its construction or design, is unsuitable for continuous occupation especially in the winter months.

4.7.4 Keeping an up to date register of the names of all owner/occupiers of the units and their main home address in order to ensure that the holiday units do not become the owner/occupier's main place of residence is an example of a condition that is used in Anglesey and Gwynedd. However this does have implications for the Planning Service in terms of resources required to rigorously monitor and enforce the matter.

4.7.5 The Anglesey Planning Service's Development Team, an internal group of Senior Officers, requested that research was undertaken by the Policy Section in 2007 over the use of a condition limiting the occupancy of holiday units by the same individuals to 28 consecutive days. It concluded that this condition was not upheld at appeals by Inspectors unless supported by relevant evidence over the economic benefits for such restrictions.

Main messages:	▪ The need to provide an appropriate level of high quality of the right type visitor accommodation within the JLDP area; ▪ Over dependency on the self service sector; ▪ The lack of business and conference hotels in JLDP area ▪ That maintaining a broad range of serviced accommodation within the traditional coastal holiday resorts will make an important contribution to the accommodation sector and to the prosperity of those resorts; ▪ There is a risk of oversupply of self serviced accommodation in certain locations; ▪ The negative impact of some of the caravanning and camping parks on the visual environment, in particular along the coastline; ▪ Local Planning Policy Guidance adopts a moratorium on new static holiday caravan and holiday chalet sites due to the high concentration of such sites within the Plan Area – is this still a reasonable approach; ▪ There may be potential for support of sustainable eco-tourism parks in the JLDP. The legacy from the proposed Wylfa new nuclear power station may present

	opportunities for workers accommodation to be converted into holiday parks after use. ▪ There is a need to consider whether ‘seasonal’ occupational condition is the most appropriate means of regulating the use of static holiday caravan and holiday chalet sites; ▪ Whether new touring caravan sites should be permitted or should they be restricted within specific locations e.g. Llŷn AONB; ▪ Need to consider whether the current approach adopted in the current development framework in respect of the fact that tourism caravan should be moved off site when not in use is still appropriate; ▪ Whether unobtrusive sited touring and camping sites should be permitted to operate on an all year round basis; ▪ Need to consider the land use policy implications of new forms of visitor accommodation e.g. wooden tents.

5.0 TOURIST ATTRACTIONS AND FACILITIES

5.1 Tourist attractions are an important element of the overall product which contributes to the quality of the visitor experience. Visit Wales (VW) have been conducting the Survey of Visits to Tourist Attractions since 1973. The remits of the research are to:

- determine and report visit numbers to attractions throughout Wales
- analyse collected data on visit numbers to identify current trends
- provide additional comparative analysis of data contained in the Survey of Visits to Tourist Attractions including visit figures, operations, funding, revenue, marketing and human resources
- analyse data according to attraction categories, the four economic regions of Wales, and admission charging policy.

5.2 According to the North Wales Visitor Survey 2003 people visit Gwynedd because of:

- Scenery and Landscape (41%)
- Been before (40%)
- Mountains and valleys (27%)
- Snowdon (20%)
- Beaches and Coast (19%)
- Engage in Outdoor Pursuits (18%)
- Lots of things to do (15%)

The “likes” noted by the survey were:

- Scenery/Views/beautiful (44%)
- Hills/countryside (36%)
- Sea/Coast/Cliffs (19%)
- Peace and quiet (14%)
- Friendly people/laid back (8%)
- Walks/walking (8%
- Castles/abbeys (7%)

5.3 The tourism product within Gwynedd and Anglesey is clearly focused on the quality of the area’s landscape and natural environment. The coastal environment is a major attraction to visitors who are drawn by the quality of its landscape, wildlife and sea water. 155 sq km of Gwynedd is covered by the Llŷn Area of Outstanding Natural Beauty (AONB) and 88 kilometres of the coastline has been designated as Heritage Coastline. Furthermore, the Plan Area borders the Snowdonia National Park. The majority of Anglesey’s coastline is designated as AONB (220sq km) and has 3 areas of Heritage Coast.

5.4 The natural environment also provides opportunities for walking, cycling, water sports and other outdoor pursuits. Gwynedd has witnessed a considerable growth in activity based tourism over recent years and it is regarded as a major future growth area within Gwynedd. Furthermore, activity tourism offers great opportunity to develop an all year round tourism product in that it is least affected by changes in the weather

5.5 The number of tourists taking part in an activity as part of their visit has doubled with 80% of staying visitors taking part in an activity whilst on holiday[12].

Activity	%
Walking (under and over 2 miles)	69%
Adventure Sports (surfing, diving, kitesurfing, kayaking, climbing, windsurfing)	8%
Sailing	5%
Cycling	4%
Wildlife Watching	5%
Zoo/safari/theme parks	4%
Golf	5%
Sea angling	6%
Shopping	16%
Watching performing arts	5%
Visiting Heritage sites	21%
Visiting museums, art galleries	6%

Table 9 - Activities pursued by UK visitors whilst on holiday at the Welsh Seaside, Source: Coastal Tourism Study(2008) WAG

5.6 Table 9 shows that the most popular activity undertaken by holidaymakers staying on the coast is walking. There are Coastal paths covering both the Llŷn and Anglesey coastline. When the Wales Coast Path was opened on the 5th May 2012, it made Wales the first country in the world to have a formal trail covering the whole way around its coastline.

5.7 The Lonely Planet Travel Guide Book has described the Welsh Coastline as one of the 10 places to visit worldwide in it's 2012 edition.

"What a wonderful thing: to walk the entire length of a country's coastline, to trace its every nook, cranny, cliff-face, indent and estuary. Well, in 2012 Wales will become the only country in the world where you can do just that. The All Wales Coast Path (AWCP) will squiggle continuously from Chepstow in the south to near Queensferry in the north - via dramatic serrations, sandy bays and domineering castles - making 1,377km of shore accessible." [13]

5.8 The report "Economic Impact of the Wales Coast Path Visitor Spending In Wales 2012" (November 2012) estimated that from October 2011 to September 2012 the path had:

- Provided a £16 million boost to the Welsh economy
- Attracted 1.6 million day visitors
- Been responsible for 835,000 over night stays

5.9 As table 9 reflects 16% of visitors enjoy shopping but the retail and catering offer in many tourist resorts is limited, reducing the potential level of expenditure by visitors. The development of a wider range of specialist shops offering local products together with high quality local produce could widen the retail offer and attract greater visitor spending.

[12] Coastal Tourism Strategy (WAG,2008)
[13] BBC Wales News Website (http://www.bbc.co.uk/news/uk-wales-15482233)

5.10 Whilst the quality of the natural environment is undoubtedly the area's main attraction there are a number of man made tourist attractions[14] such as:

- Beaumaris Court House (4208)
- Beaumaris Jail (9439)
- Caernarfon Air World (6090)
- Dingle Local Nature Reserve, Llangefni (54950)
- Electric Mountain, Llanberis (220000)
- Ffestiniog Railway, Porthmadog (131767)
- Glasfryn Parc (27304)
- Green Wood Forest Park, Y Felinheli (135646)
- Gwynedd Museum and Art Gallery (12212)
- Gypsy Wood Park, Bontnewydd (11209)
- Holyhead Breakwater Country Park (11000)
- Inigo Jones Slateworks, Groeslon, Caernarfon (27250)
- Llanberis Lake Railway (80997)
- Oriel Plas Glyn-Y-Weddw, Llanbedrog (81089)
- Oriel Ynys Môn, Llangefni (83267)
- Padarn Country Park, Llanberis (109942)
- Plas Newydd, Llanfairpwll (96721)
- Portmeirion, Penrhyndeudraeth (249815)
- Snowdon Mountain Railway (157570)
- Talyllyn Railway (44227)
- Welsh Highland Heritage Railway, Porthmadog (21942)
- Welsh Highland Railway, Caernarfon (72159)

5.11 Heritage (historic and industrial[15]) tourism is a significant part of the tourism product in Gwynedd and Anglesey and has the potential to attract a greater amount of overseas visitors. Some of the main attractions include:

- Beaumaris Castle (80645)
- Caernarfon Castle[16] (193683)
- Criccieth Castle (37196)
- Llechwedd Slate Caverns, Blaenau Ffestiniog (99168)
- National Slate Museum, Llanberis (136144)
- Penrhyn Castle, Bangor (186875)
- Plas-yn-Rhiw, Rhiw, Aberdaron (13322)

5.12 Another area which has been identified nationally, regionally and locally, as important growth area is 'cultural tourism'. The fact that the area is predominantly Welsh speaking provides an opportunity to capitalise on its rich cultural heritage and use this as basis to develop the area's 'distinctiveness'.

5.13 In Gwynedd tourist attraction and facilities developments are currently covered by policy D13 of the UDP which generally aims to facilitate new tourist attractions and facilities, or to improve the standard of existing facilities within development boundaries. Also subject to specific circumstances the policy supports such developments outside development boundaries. With

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[14] The figures in brackets are the number of people who visited the attraction according to WG's 'Visit to Tourist Attraction 2009 Survey)

[15] In May 2010, the Council agreed to a request to lead on the first, tentative steps towards investigating the possibility of attaining UNESCO World Heritage Site status for the slate industry of North Wales.

[16] Caernarfon's castle and walled town has been designated World Heritage Sites by Unesco as and is regarded as one of North Wales' major attractions.

the exception of attractions or facilities ancillary to existing tourist enterprises, all proposals have to be consistent with the development of ‘niche’ markets or support the development of an identified theme for a specific destination as identified in the Gwynedd Tourism Strategy[17]. Whilst the policy aims to support the variety and standard of tourist attractions and facilities in general, it also recognises that this needs to be achieved in a way which does not cause significant harm to the area’s natural/historical/cultural environment, the local economy and to local indigenous communities.

5.14 The equivalent policy for tourist attractions and facilities on Anglesey is covered by policy TO1 of the stopped UDP which states that proposals to further develop existing or create new tourist attractions will be permitted providing they do not cause significant harm to the environment. The policy aims to introduce a positive approach to visitor attractions and facilities and aim to secure employment, generate income and increase the marketability of the area. The policy also aims to increase the range of facilities open to local people. Proposals for the development of all-weather attractions, attractions based on the island’s history, culture and environment, and attractions which help build niche markets to attract additional visitors will receive particular support.

[17] ¹The Gwynedd Tourism Strategy (2003-8) identifies three ‘niche’ markets in which Gwynedd has a clear advantage over other areas, namely, activity tourism, cultural tourism and events tourism. The strategy aims to develop the tourism product in Gwynedd by giving priority to these ‘niche’ markets and specific geographical initiatives, for example the Welsh Assembly Government (WAG) Visit Wales designated Tourism Growth Areas (Caernarfon – Regional Tourism Growth Area, Bala, Dolgellau and Trawsfynydd – Specialist Interest Tourism Growth Area, the Dyfi Valley Tourism Growth Area) and the ‘cycle hubs’ being developed in the Dolgellau and the Llŷn Peninsula as part of the Visit Wales and Gwynedd Cycling Strategies.

6.0 CONCLUSION

The main matters/messages arising from this subject paper are as follows:

6.1 Tourism Trends and Expenditure

- That the long holiday market has declined, whilst short break holidays are on the increase;
- Many areas and sectors remain heavily dependent on the traditional peak season holiday market such as the traditional seaside holiday;
- It is important that the tourism industry within the Plan Area adapts to meet the challenges of the changing expectation of visitors;
- The short-break market represents opportunities to extend the holiday season;
- The tourism industry is extremely important to the JLDP area and visitor expenditure benefits the whole economy. Visitors to the area make the use of a wide range of services, not only those directly catering for the tourist industry.
- Seasonality' of the tourism industry is still a major issue;
- The "North West Wales Economic Futures" (2006) report projections suggest significant levels of growth in leisure and tourism, specifically recreational, cultural and sporting activities.

6.2 Visitor Accommodation

- The need to provide an appropriate level of high quality of the right type visitor accommodation within the JLDP area;
- Over dependency on the self service sector;
- The lack of business and conference hotels in JLDP area
- That maintaining a broad range of serviced accommodation within the traditional coastal holiday resorts will make an important contribution to the accommodation sector and to the prosperity of those resorts;
- There is a risk of oversupply of self serviced accommodation in certain locations;
- The negative impact of some of the caravanning and camping parks on the visual environment, in particular along the coastline;
- Local Planning Policy Guidance adopts a moratorium on new static holiday caravan and holiday chalet sites due to the high concentration of such sites within the Plan Area;
- There may be potential for support of sustainable eco-tourism parks in the JLDP. The legacy from the proposed new nuclear build at Wylfa may present opportunities for workers accommodation to be converted into holiday parks after use.
- There is a need to consider whether 'seasonal' occupational condition is the most appropriate means of regulating the use of static holiday caravan and holiday chalet sites;
- Whether new touring caravan sites should be permitted or should they be restricted within specific locations e.g. the AONBs;
- Need to consider whether the current approach adopted in the GUDP in respect of the fact that tourism caravan should be moved off site when not in use;

- Whether unobtrusive sited touring and camping sites should be permitted to operate on a all year round basis;
- Need to consider the land use policy implications of new forms of visitor accommodation e.g. wooden tents.

6.3 Tourist Attractions and Facilities

- Importance of the natural and historical environment as the basis for tourism;
- The need to develop the area's 'distinctiveness' as a high quality tourism destination;
- The opportunities presented by the activity holiday market to develop all year round tourism.