Planning Pembrokeshire's Future

Local Development Plan

Cynllun Datblygu Lleol

Cynllunio Dyfodol Sir Benfro

Background Paper for Local Development Plan 2: Tourism

Development Plans

September 2019

Contents

1 Introduction

1.1 The review of the Local Development Plan 'Planning Pembrokeshire's Future' (adopted February 2013) commenced 5th May 2017. This background paper has been prepared to help inform the tourism strategy of LDP 2 and is part of a number of background documents which will update the evidence base for the Local Development Plan Review.

1.2 Tourism is a key industry in Pembrokeshire and makes an important contribution to the local economy. According to Pembrokeshire Tourism's website "*Tourism affects every type of business either directly or indirectly in Pembrokeshire. Our county's economy benefits from an injection of around £585 million per year from tourism and supports around 16,000 FTE jobs annually*". The Office of National Statistics indicated in 2016 that 8,000 people in Pembrokeshire were employed in the accommodation and food service activities alone, which equates to 18.2% of all those in employment (Wales average is 8.9%) (http://www.nomisweb.co.uk/reports/lmp/la/1946157391/report.aspx#tabjobs accessed 08/08/2019).

1.3 Planning has a key role to play in balancing the needs and desires of our County, balancing the vision and objectives of the LDP and its priorities. We must ensure tourism can grow whilst not undermining the environment that the visitors come to see. This Paper therefore provides a synopsis of the key documentation and evidence that has informed the Pembrokeshire LDP 2 in relation to this topic, and identifies the key legislative context in which the Plan is written.

Review of the Local Development Plan 2013-2018

1.4 The Annual Monitoring Reports of the LDP demonstrate that the policies of the Plan for tourism proposals are generally working well in respect of proposals coming forward. The only policy where any applications have been approved contrary to the policy is GN.19 Static Caravan Sites.

1.5 Although generally the tourism policies are performing positively it is important to consider how these policies interact with others in the plan:

- What is the impact do static and touring caravan sites and tent sites, for example, have on the Landscape – see Landscape Character Assessment SPG (draft consultation form https://www.pembrokeshire.gov.uk/have-your-say/draft-supplementary-planning-guidance-landscape-character-assessment)

- Should the policy approach be changed to allow modest extensions to existing caravan sites, and should there be a more positive approach to new caravan sites – see Camping and Caravan Landscape Capacity Study.

- What is the impact of loss of hotels - are policies needed to protect hotels? (Addressed in this paper)

- Are policies for new tourism related development, or extensions to existing businesses, appropriate (Addressed in this paper)

- Parking and the links between tourism policies and transport policies of the Plan – locating new facilities in locations accessible by a range of modes of transport (Addressed in this paper)

- Links to Marina and Harbour development and recreational assets such as these (Addressed in this paper)

1.6 A key strategic priority at LDP Review is to support the development of an all year, high quality tourism and leisure sector. This has to be balanced against other key strategic priorities including the protection and enhancement of Pembrokeshire's important environmental assets. With this in mind the Authority is progressing a Landscape Character Assessment for the area outside of the National Park and will to consider the capacity of the landscape to accommodate additional tourism development, this study will help inform the review of the Plan and evidence any changes to our policy approach.

2 Legislative Context

2.1 The LDP operates under a number of legislative requirements, and those that are key to tourism are summarised below:

European Legislation

2.2 In terms of European Legislation this mainly impacts upon tourism in terms of environmental policies which are covered by other background papers and are not repeated here.

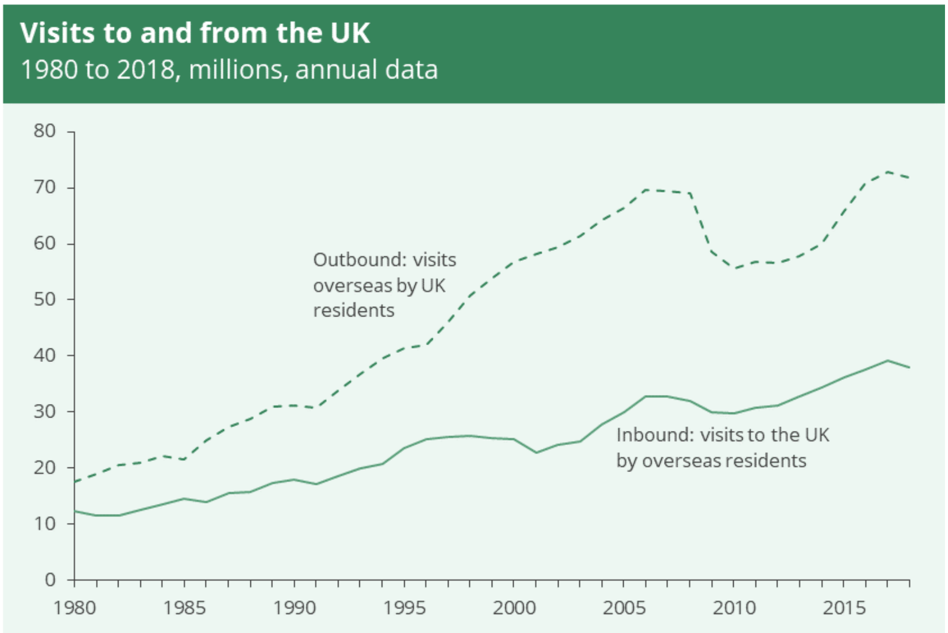
National Legislation

2.3 Although tourism is a devolved issue and therefore any legislation applicable to it is generally generated at a Wales level, it is interesting to read some of the national statistics and consider the latest national trends in the tourism sector. The International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on 20 July 2018 shows there were 39.2 million visits to the UK in 2017 (up 4% compared to 2016), and they spent £24.5 billion during their stay. However when this data is broken down into regions of the UK it is easy to see Wales is performing less well that others and spend is falling – see below (https://www.wta.org.uk/news# accessed 08/08/2018):

Uk Regional Highlights (Full Year 2017)

Region	Visits (000)				Spend £m)			
	2016	2017	Growth	New 2017 record	2016	2017	Growth	New 2017 record
London	19,060	19,828	4%	yes	11,869	13,546	14%	yes
Rest of England	15,979	16,496	3%	yes	7,818	7,814	0%	
Total England	32,970	34,304	4%	yes	19,686	21,360	9%	yes
Scotland	2,747	3,210	17%	yes	1,850	2,276	23%	yes
Wales	1,074	1,079	0%		444	369	-17%	
UK TOTAL	37,609	39,214	4%	yes	22,416	24,507	9%	yes

2.4 The House of Commons Library also publish statistics on inbound and outbound visitors to and from the UK, domestic tourism in the UK, and the contribution of tourism to the UK economy. Their 'Tourism: Statistics and policy' press release published on 24th September 2019 states that between 1980 and 2018, the number of inbound visits to the UK increased by 205%. The number of outbound visits from the UK increased by a greater proportion – 310% over the same period. From 2017 to 2018, however, the number of inbound and outbound trips fell, there were 37.9 million inbound visits to the UK in 2018, 3% fewer than in 2017 and there were 72.8 million outbound visits from the UK, a fall of 1% on 2016. Furthermore there were 118.6 million domestic overnight trips made in Great Britain in 2018, a decline of 2% on the number of domestic visits made in 2017 – see map below.



2.5 According to the report the significance of these figures economically are that in 2016 the economic output (direct GVA) of the tourism industry in the UK was £68 billion, 6% of total UK economic output, and the number of people directly employed in tourism in the UK was 1.5 million, 5% of all employment, but between 2015 and 2016 the number of people directly employed in tourism fell by 66,000 or 4.1% (file:///C:/Users/harriese/Downloads/SN06022.pdf accessed 25/09/2019).

Welsh Government Legislation

2.6 Tourism is a devolved issue that the Welsh Government has powers to legislate in relation to, its functions fall under two acts – The Tourism Act 1969 and the able to encourage and support the tourist industry in Wales by providing guidance and advice to tourist businesses, as well as capital funding through the tourism investment support scheme. According to the Welsh Government tourists spend around £14 million a day whilst in Wales, amounting to around £5.1 billion a year (Welsh Government https://www.businesswales.gov.wales/tourism/ accessed 23/09/2019). It touches all parts of Wales and the geographical spread of employment generated by the sector is one of its key strengths when compared to other sectors in the economy. In 2011, the Wales Tourism Satellite Account estimated that tourism related employment in some areas, including Pembrokeshire and Conwy, accounted for nearly 1 in every 5 jobs (The Welsh Government Strategy for Tourism 2013-2020 https://gov.wales/sites/default/files/publications/2019-04/partnership-for-growth-strategy-for-tourism-2013-2020.pdf accessed 23/09/2019).

2.7 **Planning Policy Wales 10** (December 2018) adopts a positive approach to tourism. It encourages the maintenance and development of well-located, well designed, good quality tourism facilities, and the enablement of complementary developments. It also encourages a positive approach to the re-use of previously developed land and water-bodies, particularly in relation to urban regeneration. It calls on planning authorities to embody a constructive approach towards agricultural diversification and acknowledges that in rural areas tourism-related development is an essential element in providing for a healthy and diverse economy (Section 5.5).

2.8 **Technical Advice Note 13 Tourism** (1997) addresses the topic of tourism more specifically and provides more detailed advice on hotel development, holiday and touring caravans and seasonal and holiday occupancy conditions which will not be repeated in LDP 2.

2.9 **Technical Advice Note 6 Planning for Sustainable Rural Communities** (2010) includes advice relating to diversification of farms and reuse/adaptation of rural buildings which has important links to tourism in Pembrokeshire. Policy advice contained in the TAN will be taken forward in the policies on barn conversions contained in LDP 2.

2.10 **Technical Advice Note 16: Sport, Recreation and Open Space** (2009) addresses leisure facilities forming part of a tourism development, including off-road recreational vehicles, water-based recreation, marinas and golf courses. Again this advice will be taken forward into LDP 2 where appropriate.

2.11 **Sustainable Tourism – A Framework for Wales** (2007) emphasises that sustainable tourism will need to consider the needs and quality of life of local communities, enhance and respect culture and local traditions, contribute to local economic prosperity as well as minimise damage to the environment. Its vision for Sustainable Tourism in Wales is that '*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*' (WG 2007 https://gweddill.gov.wales/docs/drah/publications/Tourism/090518stframeeng.pdf accessed 19/06/2019) There are four key objectives supporting the vision which are acknowledged in the objectives of our plan, they are:

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

2.12 **Welsh Government Coastal Tourism Strategy** (Visit Wales 2008 https://gweddill.gov.wales/docs/drah/publications/Tourism/090612coastaleng.pdf accessed 19/06/2019) highlights a clear way forward for the development of Coastal Tourism in Wales, including the development of cruise ship industry around Milford Haven. Although some of the visitor figures in this paper are dated, the principles and strategy behind it are still relevant, highlighting the importance of a high quality coastal environment to tourism and the rural economy. Its vision is of 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". It encourages a positive attitude to additional activities such as water sports, and also to wet weather facilities and leisure activities as well as a broadened food tourism offer.

2.13 **Welsh Government Strategy for Tourism 2013 – 2020 - Partnership for Growth** seeks to drive higher tourism earnings to deliver maximum value for the Welsh economy and to support the delivery of the following priorities for tourism defined in the Welsh Government's Programme for Government:

- Develop tourism activity and specialist markets and secure maximum benefit from major events in our high profile venues
- Promote Wales as a destination by making a high quality tourism offer
- Work to extend the tourism season and associated benefits
- Identify funding opportunities to improve the visitor infrastructure and product in Wales
- Support investment in staff training and management to support a high quality tourism industry.

<u>Regional Policy Context</u>

<u>Ceredigion</u>

2.14 Ceredigion's adopted LDP (adopted April 2013) has a positive approach to tourism and developing a "*year round sustainable, environmentally friendly tourism sector throughout Ceredigion*" and recognises the importance of tourism to employment in the County. The adopted plan has policies on static and touring caravans, camping pitches, cabins and chalets, and has a restrictive approach to new sites in coastal areas, they also have policies on other tourism accommodation, and tourism facilities and attractions (non-accommodation).

<u>Carmarthen</u>

2.15 Carmarthenshire's adopted LDP (adopted December 2014) recognises the potential economic and social benefits of year round tourism, with 5.9.126 stating "*Sustainable tourism developments will, where appropriate, be encouraged and supported where they increase quality and viability and contribute towards enhancing the diversity and economic sustainability of the County's tourism offer*". The adopted Plan has restrictive policies on new static caravan sites and chalets, it also has policies on extensions to existing static sites, policies on extensions to and new touring caravan and tent sites, small scale tourist development in the open countryside, visitor accommodation, and major tourism proposals in the open countryside.

Pembrokeshire Coast National Park Authority

2.16 Pembrokeshire Coast National Park recognises the importance of tourism and the visitor economy throughout its LDP (adopted September 2010), with para 1.49 stating "*Tourism and leisure are already a big part of the Area's economy but have the potential to be developed further, including through the implementation of the Tourism Opportunities Action Plan*". The adopted plan has strict policies on not allowing any new camping, caravanning or chalet pitches, and protects existing facilities such as hotels and guest houses.

2.17 PCNPA's 'Enjoyment' Background Paper March 2018 illustrates the regional approach to caravan and camping policies, as shown in the table below:

	Policy Approach	Pembrokeshire Coast National Park (current Local Development Plan)	Pembrokeshire County Council	Ceredigion County Council	Snowdonia National Park	Brecon Beacons National Park
1	New static caravan or chalet sites					
2	Increases to pitch numbers in existing static caravan or chalet sites					
3	Exchange of touring pitches to static pitches					
4.	New touring or tent/camping sites					
5.	Increases in pitch numbers in existing touring/tent sites					
6	Extensions to existing sites to make environmental improvements only (no increase in pitches)					
7	New Yurt/tipee/glamping sites					
8	Exchange of existing pitches to yurt/tipee/glamping pitches					

Key

Not permitted

Permitted in limited locations or in limited circumstances only

Generally permitted

2.18 The 'Enjoyment' Background Paper concludes that in terms of caravan and camping there is a general consistency of approach in the neighbouring authorities, with some new development being permitted in the inland areas within Pembrokeshire County Council's planning jurisdiction.

3 Local Context

Visit Wales

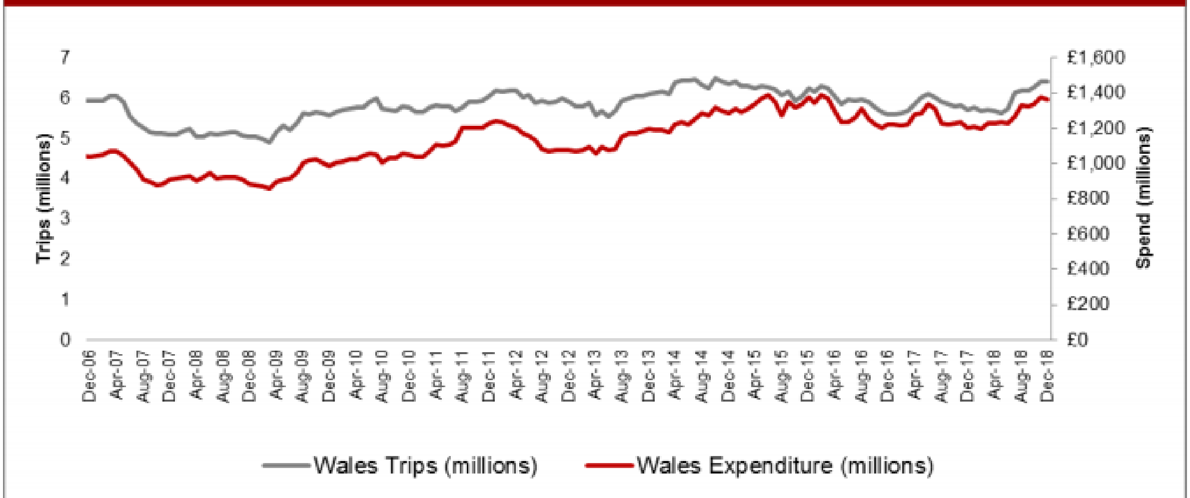
3.1 Visit Wales operates as part of the Welsh Governments Business, Economy and Innovation Section under the Deputy Minister for Culture, Sport and Tourism Lord Elis-Thomas. The importance of tourism and visitor spend in Wales is illustrated by the statistics and graph below. In 2018 there were:

- 10.021 million over-night trips to Wales by GB residents, generating a related expenditure of £1,853 million,

- 941,000 trips were taken in Wales by international visitors with an expenditure of £405 million, which was a decrease on previous years in the volume of trips by international visitors to Wales (12.8%), compared to a 3% fall across the UK as a whole, but an increase in expenditure by 9.7% in comparison to 2017,

- there were 95.7 million day trips taken in Wales with a related expenditure of £4 billion, a slight decrease in the volume and expenditure when compared to the same period 2017. (WG Statistical First Release 06/06/2019 https://gov.wales/sites/default/files/statistics-and-research/2019-06/wales-tourism-performance-report-january-to-december-2018.pdf accessed 19/06/2019).

Figure 1.3: Volume of Overnight Trips and Spend on Holidays Taken in Wales by GB Residents
Source GBTS: Rolling 12 month total.

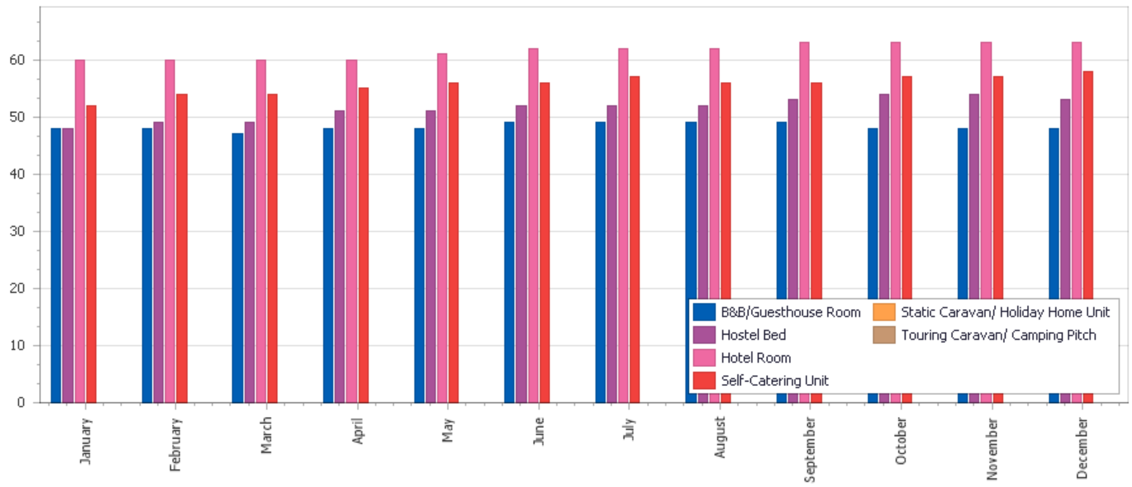


3.2 Visit Wales monitor the performance of the tourism accommodation sector, and monitor occupancy levels each month per year in the following types of accommodation:

Hotels
Guesthouses
Self-catering
Bed & breakfast
Hostels and bunkhouses
Static caravans
Holiday homes
Camping pitches
Touring caravan pitches

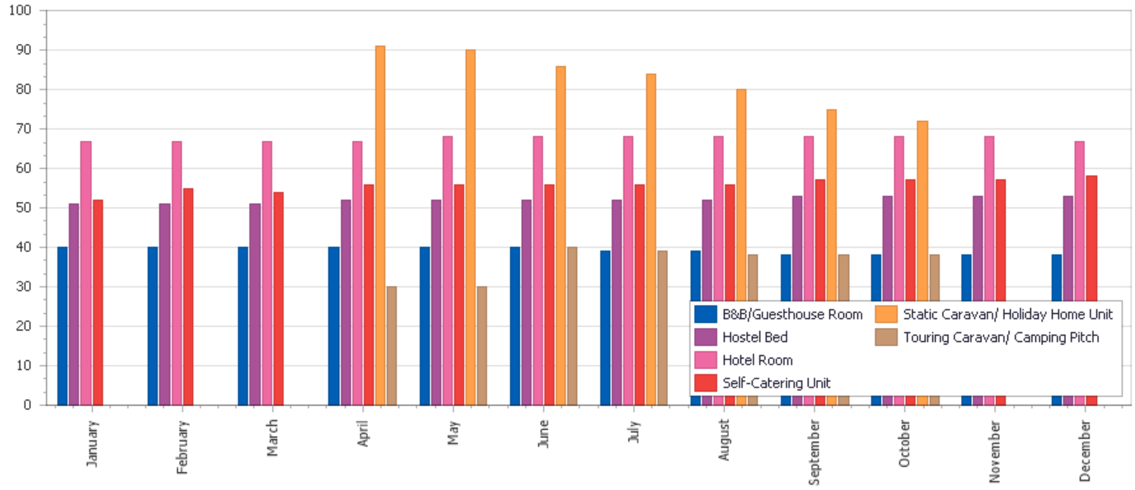
(Wales Tourism Accommodation Occupancy Survey, 2017 Welsh Government SFR 44/2018, 07/06/2018 https://gweddill.gov.wales/statistics-and-research/wales-tourism-accommodation-occupancy-surveys/?lang=en)

3.3 The tables below illustrates annual occupancy as a percentage of available accommodation in South West Wales for 2017 (excluding data on static caravans and touring caravans as this is unavailable).

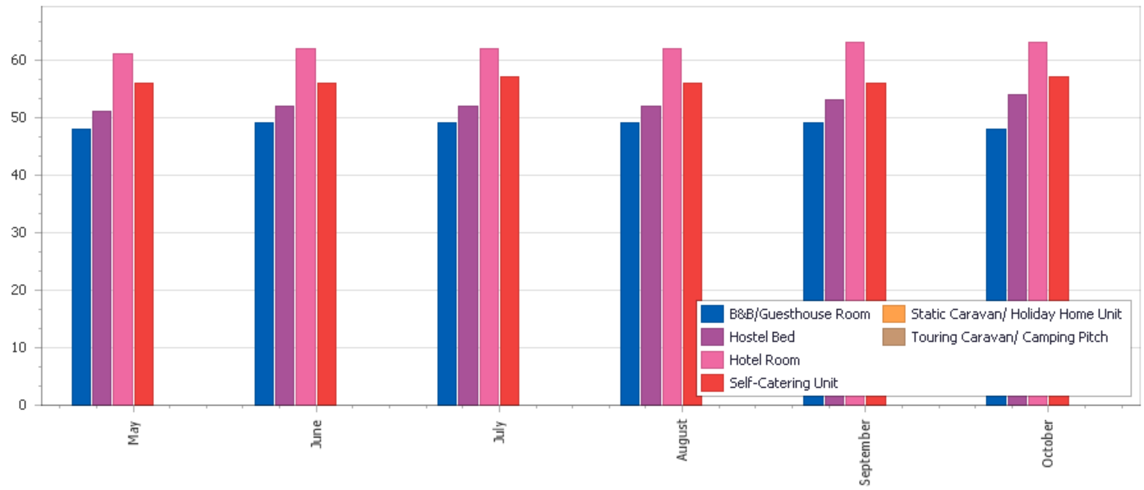


3.4 The table clearly illustrates a fairly steady occupancy across all accommodation types across the year. In comparison to Wales as a whole, illustrated below, south west wales has a higher occupancy than the welsh average in terms of B&B and Guesthouse rooms, about the same as the Welsh average on hostels, below the welsh average on hotel rooms and slightly below the welsh average on self-catering.

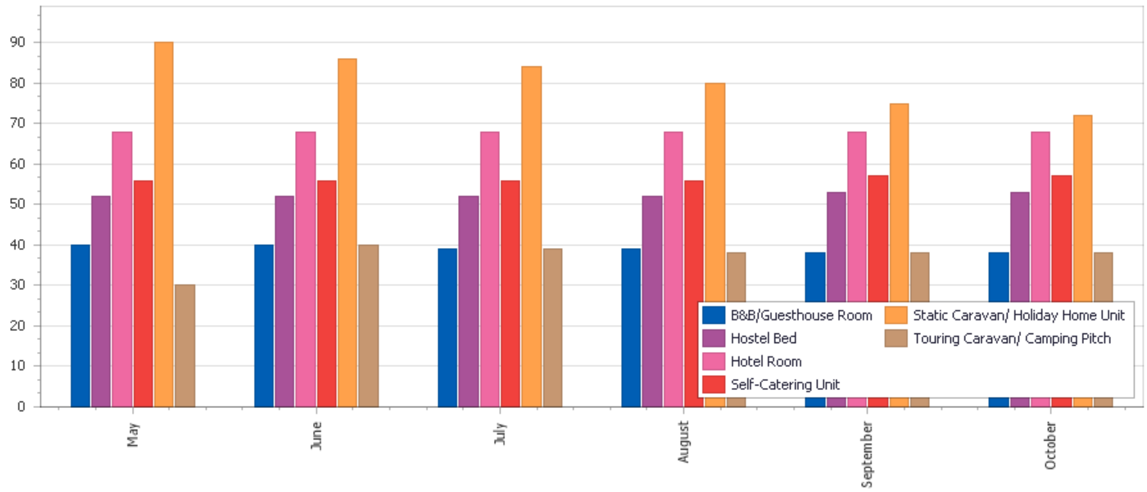
3.5 The tables below illustrates annual occupancy as a percentage of available accommodation in Wales as a whole for 2017.



3.6 Investigations into occupancy rates through the peak holiday months of May to October 2017, as a percentage of available accommodation in South West Wales for 2017 (excluding data on static caravans and touring caravans as this is unavailable), illustrated below, show strong performances across all sectors, in particular hotel room occupancy.



3.7 In comparison to the Wales average however, shown in the tables below, through May to October 2017 South West Wales performed strongest in the B&B and Guesthouse market.



3.8 In addition to the above Visit Wales also conduct a tourist attraction survey each year and the latest data from 2017 shows Folly Farm to be the biggest attraction in terms of paid for attractions in Pembrokeshire, second only to LC2 on a Wales level (Visit Wales – Visits to Tourist Attractions in Wales 2017 Beaufort Research 2018[1]). This attraction is hugely important to tourism both in Pembrokeshire and in Southwest Wales, it is significant in terms of employment within the area, and is readily accessible by private and public transport methods for both staff and visitors.

Top 10 paid attractions in Wales 2017

	Name	Region	Category	Owner	No. of visits 2016	No. of visits 2017	% change	£ Adult
1	LC Waterpark & Leisure Complex	SW	THEME	PO	784,522	**796,149**	+1.5%	£7.00
2	Folly Farm	SW	FARM	PO	490,000	**480,000**	-2.0%	£14.00
3	Cardiff Castle	SE	HP	LA	301,349	**319,131**	+5.9%	£13.00
4	Bodnant Garden	N	CP	NT	242,898	**255,949**	+5.4%	£14.60
5	Electric Mountain Visitor Centre	N	SC/T	PO	NP*	**250,000**	-	£9.00
6	Conwy Castle	N	HP	Cadw	208,887	**221,652**	+6.1%	£8.95
7	Great Orme Tramway	N	R/T	LA	208,850	**205,495**	-1.6%	£7.50
8	Caernarfon Castle	N	HP	Cadw	195,151	**204,675**	+4.9%	£8.95
9	Techniquest	SE	SC/T	PO	190,000	**189,000**	-0.5%	£8.00
10	Erddig	N	HP	NT	162,911	**163,758**	+0.5%	£8.80

* NP = not provided

3.9 The same report also looks at the top free visitor attractions, and for Pembrokeshire this includes St Davids Cathedral – see below (Visit Wales – Visits to Tourist Attractions in Wales 2017 Beaufort Research 2018). This attraction is also hugely important to tourism both in Pembrokeshire and in Southwest Wales.

[1] https://gweddill.gov.wales/docs/caecd/research/2018/181129-visitor-attractions-survey-2017-en.pdf

Top 10 free attractions in Wales 2017

	Name	Region	Category	Owner	No. of visits 2016	No. of visits 2017	% change
1	Wales Millennium Centre2	SE	MAG	PO	1,264,458	**1,082,494**	-14.6%
2	Snowdon Summit Visitor Centre	N	CP	PO	465,000	**654,077**	+40.7%
3	St Fagans National Museum of History	SE	MAG	AC - NMW	504,402	**553,090**	+9.7%
4	National Museum Cardiff	SE	MAG	AC - NMW	509,981	**539,550**	+5.8%
5	Pembrey Country Park	SW	CP	LA	491,641	**470,000**	-4.4%
6	Newborough National Nature Reserve	N	WL	NRW	492,259	**449,771**	-4.5%
7	Pontcysyllte Acqueduct	N	HP	PO	NP*	**333,363**	-
8	Cardiff Visitor Centre	SE	OTHER	LA	277,712	**322,671**	+16.2%
9	Gwydir Forest Park	N	WL	NRW	NP*	**317,405**	-
10	St David's Cathedral	SW	HP	PO	271,700	**287,000**	+5.7%

* NP = not provided

3.10 Out of the tourist attractions that responded to the Visit Wales research 'Visit Wales – Visits to Tourist Attractions in Wales 2017 Beaufort Research 2018'[2] the following are Pembrokeshire based, with Folly Farm performing the best in terms of visitor numbers, followed by St Davids Cathedral, then Oriel y Parc Visitor Centre (St Davids). All of the top performing attractions are well served by our road network and public transport. The table highlights in blue those located within Pembrokeshire County Council planning area.

Attraction	Private/Public	Visitors 2017
Caldey Island	Private Ownership	50,000 (est)
Canaston (Woods)	NRW	8,615
Carew Castle & Tidal Mill	Local Authority	48,744
Castell Henllys Iron Age Fort	Private Ownership	25,000 (est)
Colby Woodland Garden	National Trust	47,102
Dyfed Shire Horse Farm	Private Ownership	10,000 (est)
Folly Farm	Private Ownership	480,000 (est)
Last Invasion Tapestry, Fishguard	Private Ownership	20,000 (est)
Manor Wildlife Park	Private Ownership	78,562
Ocean Lab	Local Authority	3,970
Oriel y Parc	Local Authority	136,000 (est)
Pembroke Dock Heritage Centre	Private Ownership	8,081
Pembrokeshire Candle Centre	Private Ownership	2,000 (est)
Picton Castle & Gardens	Private Ownership	32,968
Solva Woollen Mill	Private Ownership	20,000 (est)

[2] https://gweddill.gov.wales/docs/caecd/research/2018/181129-visitor-attractions-survey-2017-en.pdf

St David's Bishop Palace	Cadw	26,802
St Davids Cathedral	Private Ownership	287,000
Tenby Museum & Art Gallery	Private Ownership	14,514
Tudor Merchant's House (Tenby)	National Trust	25,185

Destination Pembrokeshire Management Plan

3.11 The Destination Pembrokeshire Management Plan (Destination Pembrokeshire Partnership 2018) identifies the need for a quality, year-round sustainable tourism offer, supporting continual improvement in facilities and accommodation offer. This plan supports locally distinct projects and developments, and farm diversification and countryside access, something which our LDP aims to support. Furthermore the LDP will look to enhance tourism, and enable projects such as the 'Rediscovering Ancient Connections – The Saints' which is a collaborative, cross-border, arts and heritage programme led by PCC and in partnership with Pembrokeshire Coast National Park, Wexford County Council and Visit Wexford, it links North Pembrokeshire and County Wexford (Ireland) to promote prosperity.

STEAM Final Trend Report 2004-2015

3.12 STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection.

3.13 The 2015 data for Pembrokeshire County Council indicates that accommodation and food and drink tourism accounted for 44.5% of the economic impact of tourism, with accommodation alone accounting for almost half of sectoral employment. The food and drink sector accounted for 2,417 FTEs during 2015, and £111.10M of the sectors economic impact (Global Tourism Solutions Ltd 22/07/16).

3.14 In terms of the breakdown of accommodation data, in 2015 serviced accommodation accounted for £93.64M, whereas non-serviced accommodation accounted for £412.45M, which is significantly higher. Reflective of this serviced accommodation in 2015 directly employed 2,070 FTEs, whereas non-serviced accommodation 7,321 FTEs. Furthermore, in terms of the breaks down in the number of bed spaces per sector, STEAM data 2015 shows serviced accommodation accounting for 6,642 bed spaces, with over half of these being in establishments of less than 10 rooms. Non-serviced accommodation accounted for 78,972 bed spaces in 2015, of which 15,837 were self-catering accommodation, 8,163 were in static caravans and chalets, 21,921 were in touring caravan/camping sites and 33,051 in non-rental statics.

3.15 The STEAM data also breaks analysis into monthly data and unsurprisingly the largest impact in terms of economic activity and visitor numbers occurs during the months of July and August each year.

3.16 Looking at the longer term general trends the STEAM data from 2004-2015 generally since 2004 staying visitors and day visitors have increased to our County, with typically some years performing better than others due to factors such as the weather, and likely influences such as sporting events and significant celebrations and national holidays. This has been accompanied by a steady increase in the economic impact of tourism on our County even though the number of persons employed has fallen slightly during this time. Although a few years old this STEAM data is typical of the trends observed in the past and in terms of tourism policy highlights the area where planning policy needs to focus on being supportive.

LDP AMRs

3.17 As referenced in the introduction to this paper PCCs adopted LDP has undergone annual monitoring since adoption, with AMRs 1-6 demonstrating that the policies of the Local Development Plan for tourism proposals are generally working well.

3.18 An investigation of tourism policies and how they are performing indicate that since adoption there has only been 1 planning application that has sought to change the use of a hotel, and there have been a small number of applications to extend existing hotels, therefore it is not deemed necessary to have a policy specifically aimed at this issue.

3.19 In terms of our approach to self-catering, there have been 4 applications since plan adoption, consenting 65 self-catering units, 45 of these were on 1 single site near Tenby and a further 14 were located at a former caravan park at Broadmoor. Again with this in mind it appears the existing policy is working well.

3.20 Looking more generally at tourism policies there have been changes in the context of tourist accommodation in recent years with increased popularity of lodges, yurts, shepherds huts and glamping which the LDP policies successfully accommodate.

3.21 The only policy area identified under the AMRs as being in need of further investigation is GN.19 Static Caravan Sites, as applications were approved contrary to it in 2014-2015, 2015-2016 and 2017-12018. Specifically, AMR 5 (1 April 2017 to 31st March 2018) identifies 10 applications were approved under GN.19, and two of these were considered contrary to it and involved changes to existing tourism related sites, however both had material considerations that justified their approval[3]. There were no applications approved contrary to the tourism policies of the LDP in AMR 6, 2018-2019.

<u>LDP 2 Preferred Strategy</u>

3.22 Tourism is recognised as one of the key characteristics of Pembrokeshire in LDP 2 and employment opportunities linked to it are promoted in the Vision for the County going forwards. Tourism directly employs 10,176 FTE (2015) and with a total visitor spend of £585million (a rise from £515.54million in 2012). SP15 Visitor Economy aims to support tourism related activities provided that "*they are in an appropriate location, contribute to the diversity and quality of accommodation and attractions, and respect and protect the natural and built environment and surrounding communities*" (LDP 2 Preferred Strategy Pre-Deposit Consultation 17th December 2018 – 4th February 2019).

<u>Candidate Sites</u>

3.23 In total 30 Candidate Sites have suggested a tourism and/or leisure related use during the two rounds of public consultation that asked for suggested Candidate Sites in 2018/2019. Out of the 30 sites suggested almost all were generic suggestions of leisure use or holiday accommodation use, with one site suggested for a caravan park extension. As set out in the Candidate Site Analysis Methodology these sites will be subject to the Site Assessment process in 2019 and will be reported on in due course.

[3] There is a separate background paper identifying the current position following the August capacity study, and this study has been used as evidence in the Landscape Capacity Study being undertaken in Summer 2019.

4 Summary and Conclusions

4.1 The visitor economy is one of the most significant drivers of the local economy and both the Welsh Government and Pembrokeshire County Council recognise this and encourage a positive approach to well-located, well designed, good quality tourism facilities, supporting agricultural diversification and the re-use of previously developed land and water-bodies in appropriate locations.

4.2 LDP 2 will build upon the policies of LDP 1 and follow the positive ethos of the Welsh Government in terms of supporting the industry. The LDP will continue to support a range of accommodation types, catering for all pockets. Any amendments to the caravan policies, if needed, will be identified and addressed as part of the caravan capacity paper and consequent policy review.

4.3 Tourism and tourism related uses are of paramount importance to the County as economically they are a large employer and are therefore important socially, they also have a significant impact on the environment and landscape character. The policies relating to tourism in LDP 2 therefore must balance these needs effectively and embrace a positive and proactive approach with the aim of supporting a diverse, sustainable year-round tourism industry.