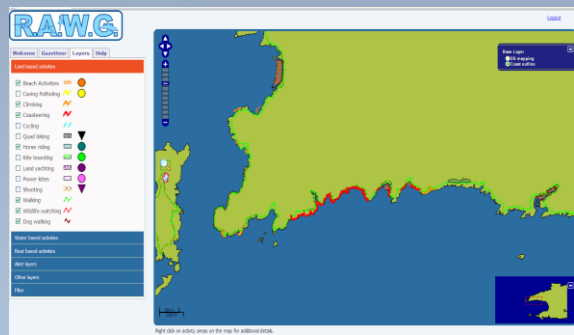
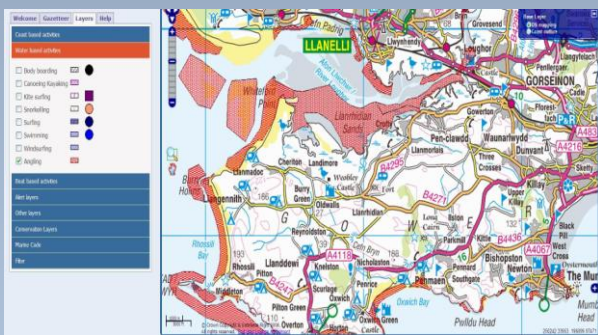


South West Wales Coastal Recreation Audit

Annual Progress Report 2010/11



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1.0 Introduction

1.1 Purpose of the report

This interim report has been provided to give details on the progress made during the South West Wales Coastal Recreation Audit (RA) project. The report is intended to provide feedback to the Recreation Audit Working Group (RAWG) and as background information to a wider audience.

1.2 Context

The Welsh Coast is vital to the tourism industry in Wales with the greatest bulk of seaside tourism being for leisure and holiday. Visits to the coast account for 41% of all overnight trips in Wales with the direct impact of tourism amounting to an estimated 3.2% of whole – economy value added in Wales.¹

The Welsh Assembly Government (WAG) in the Coastal Tourism Strategy state that “Activities appealing to most age groups, such as walking, will continue to dominate in terms of the volume of participants. Adventure sports such as kite surfing, sub aqua diving and similar activities will continue to grow, although there may be some displacement from older established sports.”

Further, “The potential conflict between specific activities is another challenge facing the coastline. The beach can be used for a variety of different activities ranging from sun bathing to physically demanding sports such as parakiting. The challenge is to manage the coastal area to the maximum benefit of all potential users. Conflicts between activities exist not only on land but also at sea. Activities such as bathing, windsurfing, surfing, sailing, angling, and the use of powerboats and personal watercrafts need to be properly managed. The pursuit of such activities will undoubtedly have an effect on the natural environment.”¹

The RA seeks to assist in the management of the coastal area to the maximum benefit of all potential users by constructing a coherent picture of outdoor recreational activity within South West Wales and aiding in the development of a framework for the future sustainable management of outdoor activities in the region.

This is also synonymous with the proposed Marine Bill that includes details on the development of a more integrated management regime for the marine environment through introducing the concept of marine planning. Marine planning would develop a much wider strategic approach to considering the needs, aims and possible locations of sectoral activities for the marine area as a whole. It would also look at the potential of cumulative effects of many different activities together, and the compatibility or conflict between activities, or between activities and environmental protection.

1.3 Project History

Recent years have seen significant changes in the number and range of outdoor activities participated in within South West Wales. This has led in some areas, to increased pressure on resources and in turn has caused conflict between and within some activities. Activity tourism throughout the UK is currently growing and with recent strategic developments within WAG to develop these activities further, this trend is likely to continue. The Sport and Physical Strategy: Climbing Higher outlines its aim of ‘increasing the numbers of Welsh people using the natural environment for outdoor activities’² whilst Catching the Wave aims to increase the number of Watersports trips by 20%.³ It is therefore crucial to take a proactive approach to managing these activities to ensure the long term sustainability of the tourism and recreation industry.

Pembrokeshire Coastal Forum (PCF) formed the RAWG in 2004, a partnership of organisations involved in the management of recreation across South West Wales. The group recognised that there was a lack of adequate data on capacity of individual activities, interaction between them, impacts on resources and subsequent management needs. It was also clear that there was an urgent need for greater integration between organisations responsible for managing and promoting recreation. Initial work of the group was to gather data

within the study area using consultants. This work served to demonstrate the need for a much longer term and more intensive audit which would need regular updating.

Whilst the report contained some valuable information, the nature of the document and supporting excel spread sheet rendered the information not easily accessible and therefore impractical as a management tool. It was decided that in order to make the spatial data more user friendly it would need to be in the form of layered GIS maps and contained within a database.

1.4 Project Aim

The aim of the project is to gather the necessary information in order to:

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

1.5 Objectives

The main objectives for the project are:

- To obtain a clear understanding of the key recreational activities within the study area
- To determine the scale and distribution of key activities on a site by site basis
- To ascertain actual and perceived negative impacts of activities on a site in terms of the environment, community and human safety and identify conflicts between users and user groups
- To identify the greatest pressures on the resource including impacts on designated sites and protected species
- To provide an indication of likely future trends
- To identify opportunities for recreation

This will assist in:

- development of long term strategies and planning
- management of recreational activities so as to eliminate or prevent user conflicts between participants; between different activities; between recreational participants, local communities and business interests
- spatial planning to minimise or prevent conflicts between recreation, conservation features and socio-economic activities, planning for enhancement, development and marketing of coastal recreation development and management of infrastructure and facilities relating to recreational activities

1.6 Structure

The work of the project is steered by the RAWG (Table I) which consists of recreation, environmental and tourism managers from a range of organisations. Four working group meetings take place each year allowing representatives to contribute to the development of the project and receive details on progress made.

Bridgend County Borough Council	Neath and Port Talbot Borough Council
Carmarthen Bay & Estuaries European Marine Site	Pembrokeshire Coast National Park Authority
Carmarthenshire County Council	Pembrokeshire Coastal Forum
City and County of Swansea	Pembrokeshire County Council
Countryside Council for Wales	Pembrokeshire Marine Code and Outdoor Charter Group
Environment Agency Wales	Pembrokeshire Marine SAC Officer
Milford Haven Port Authority	Planned
National Trust	South West Wales Regional Tourism Partnership

Table I RAWG members

1.7 The Study Area

The project covers the coastal region of South West Wales to include Pembrokeshire, Carmarthenshire, Swansea, Neath Port-Talbot and Bridgend .The coastal region being defined as near shore waters to 3 or 6 miles off shore, the intertidal, coastal land immediately above the shoreline and the hinterland inland from the coast as far as is appropriate to the activities under consideration. The study has been taken inland in the Pembrokeshire Coast National Park.

1.8 Activities under study

A list of activities to be considered throughout the survey area was drawn up and agreed upon by the working group and can be seen in Table II.

beach activities	mountain biking
body boarding	power boats
canoeing/kayaking	power kite flying
caving/potholing	quad biking
Climbing	Rowing
Coasteering	sea angling
cruiser sailing	Shooting
Cycling	Snorkelling
dingy sailing	Surfing
Diving	Swimming
dog walking	wake boarding / water skiing
horse riding	Walking
jet skiing PWC	wildlife boat tours
kite boarding	wildlife watching
kite surfing	Windsurfing
land yachting	other non listed activity

Table II Activities under study

1.9 Potential benefits and uses

Potential uses for the project data are wide ranging and are summarized in Table III.

<p style="text-align: center;">RECREATION MANAGER</p> <p>Accurate data on recreational activity numbers, distribution, trends and management linked with detailed information on activity sites enables:-</p> <ul style="list-style-type: none"> • ID capacity of sites allowing appropriate marketing • ID 'hotspot' areas where management effort needs to be focussed • ID opportunities for more / different recreational activity at site • Reduction of user and other conflicts • Effective allocation of resources for facilities, infrastructure, health & safety and marketing • Tailoring of management plans accordingly 	<p style="text-align: center;">TOURISM MANAGER</p> <p>A clear understanding of the scale and distribution of recreational activity, capacity and facilities at sites in SW Wales enables:-</p> <ul style="list-style-type: none"> • Effective marketing of coast for recreational activities (Catching the Wave etc.) • Effective direction of visitors away from sites already at capacity • Help reduce seasonality of visitors to the coast • Reduction of conflicts at sites • Effective allocation of resources • Realistic long-term tourism strategies • Improved visitor enjoyment means repeat visits / word of mouth recommendation
<p style="text-align: center;">ENVIRONMENT / CONSERVATION MANAGER</p> <p>Accurate data linked with spatial information will enable:-</p> <ul style="list-style-type: none"> • ID of activities which may impact on sensitive conservation sites • Linkage of seasonality of activities with seasonality of wildlife sensitivity • Awareness raising / education of relevant users on ways to minimise / avoid impact on wildlife • ID areas needing better management in order to reduce conflicts and protect wildlife 	<p style="text-align: center;">BENEFITS TO ALL</p> <ul style="list-style-type: none"> • Accurate information being fed into the spatial planning process which will allow more informed planning decisions • Partnership working • Sharing of information • Avoiding duplication of effort • Effective allocation of resources • Proactive rather than reactive management

Table III potential benefits and uses

1.9.1 Actual uses and project update

There has been information exchange with officers from CCW Bangor regarding the Audit and proposals for a similar project in North Wales. Further, information on methods and best practice have been provided to project officers from the Solent forum who are about to embark on a water based audit on the South coast of England.

The database, GIS layers and further information have been provided to external consultants carrying out a survey for CCW in relation to recreation and Highly Protected Marine Reserves in Wales. Information has also been provided to Plymouth Marine Lab and a PhD study into coastal recreation.

Continued discussions with Tidal Energy Limited have taken place regarding their data needs to complete an Environmental Impact assessment within Ramsey Sound. The database and GIS layers have been provided to the [Finding Sanctuary](#) project and the [Irish Sea Conservation Zones](#) project, both involved with creating a network of Marine Conservation Zones. Work has also been carried out for the Carmarthen Bay and Estuaries European Marine Site (CBEEMS) Officer and involved creating JPEG snap shots of coastal recreation areas for the upcoming CBEEMS management plan (Figure I).

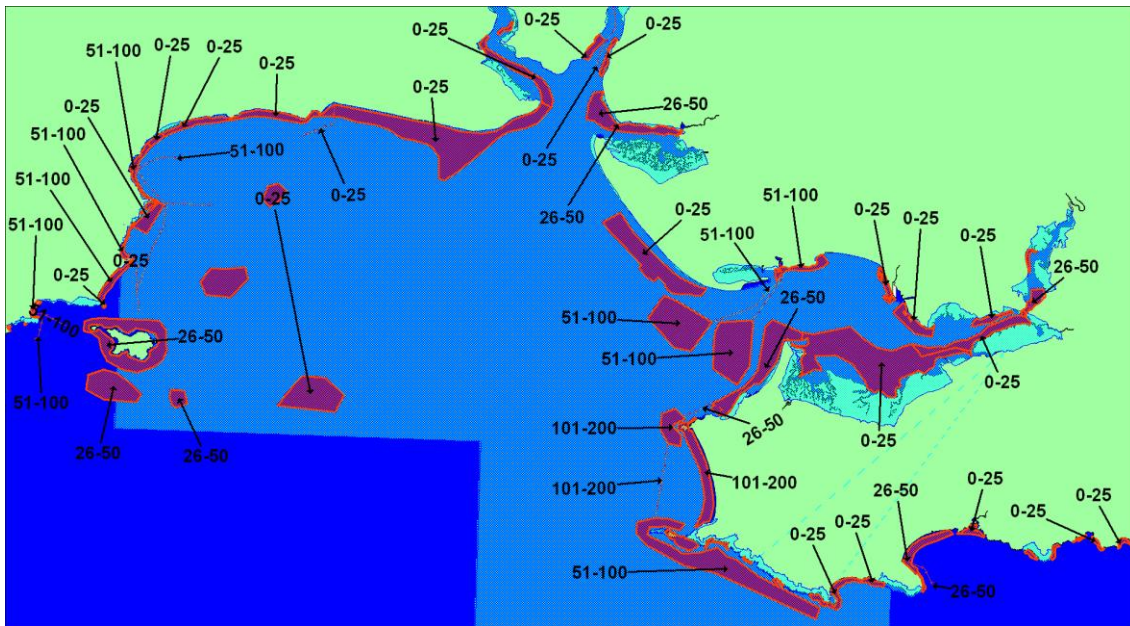


Figure I Sea Angling in the CBEEMS

Details of the RA project have been supplied to DECC for their Marine Action Plan and to the [Countryside Recreation Network](#) (CRN) who were given a demonstration of the GIS website. The project officer also published an article in the CRN [Journal](#) giving the project National coverage. Contact has been made with the Environment Agency investigating the potential to display water quality data. Data has been provided to the South and West Wales Marine Federation about the number and location of moorings and slipways and a new GIS layer funded by The Crown Estate has been added.

Information from the RA project is being used to assist with the mapping of potential areas of coastline that could be developed as new commercial coastering locations. A new coastering management GIS layer funded by The National Trust will be added in 2011 (Figure II).

RPS consultants on behalf of WAG requested the data and layers for their upcoming Marine Renewable Energy Strategic Framework which is mapping potential suitable areas for Marine Energy in Wales. WAG has also confirmed that the RA Project and [GIS website](#) will be part of a National Destination Management /Recreation Management Toolkit aimed at sustainable destination management.

The data has been used as the evidence base for the upcoming Recreation Plan for the Pembrokeshire Coast National Park Authority (PCNPA). Information from the project has assisted in providing data for the new [PCNPA Recreational Website](#) where management issues and knowledge of capacity have proved a useful tool in drawing up messages for best practice. It has also assisted in highlighting locations that may not need marketing for a particular activity due to site infrastructure. The RA Project combined with the Recreation Plan and Enjoy website are components of the Destination/Recreation Management Toolkit.

New layers and funding has been confirmed from the PCNPA to display PROW e.g. Bridleways/footpaths open and closed. This work will begin in early 2011.

Demonstrations of the GIS website have been given at both Regional and National levels. Local Authorities from the study area including CCW, PCNPA, National Access Forum for Wales, WAG Coastal Tourism Team, Welsh Activity Tourism Organisation, CRN, Pembrokeshire MC/OC working groups and the Marine Conservation Zone Stakeholder Engagement Group. Feedback from all demonstrations has been positive.

Updates to recreational data have been added to the database and GIS layers, and as part of additional work funded by the PCNPA the study has been moved inland within the National Park as part of the Recreation Plan.

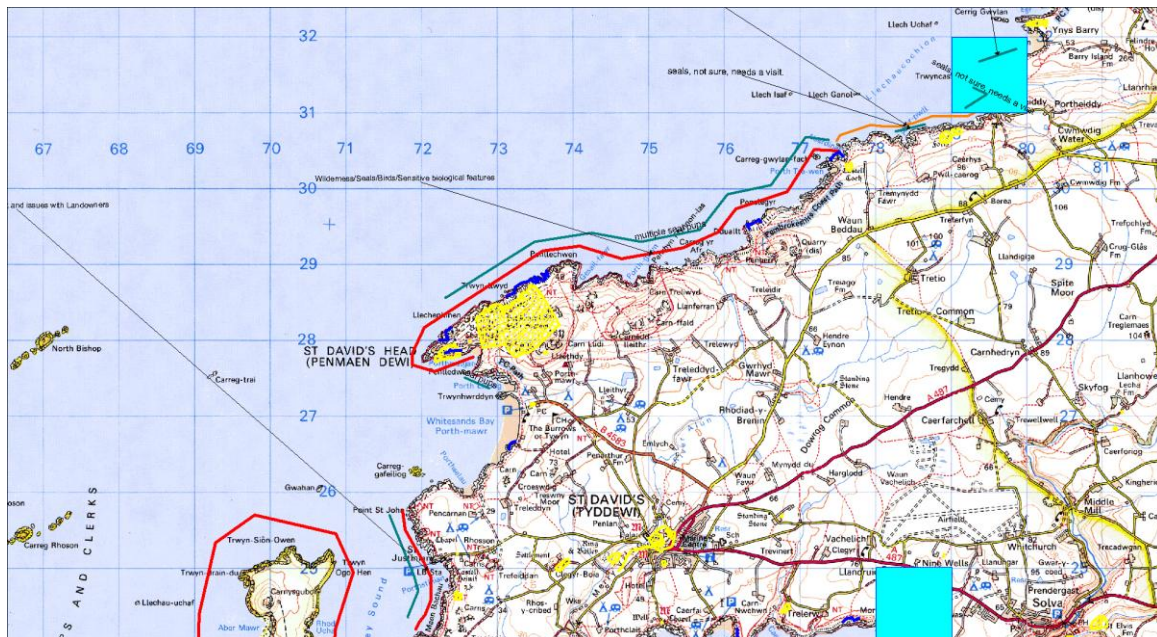


Figure II Coasteering Project working with the National Trust and Outdoor Charter

After feedback from the working group further work has included adding information to conservation layers throughout the study area providing users with simple information on why specific locations have been designated and any key potential threats on the site.

Work has begun with Landsker Business Consultants looking at the potential for the project to become sustainable beyond grant funding. This 3 phase project has involved working group members and the project officer and is looking at a number of alternative means to commercially generate income for the project including user license fees, bespoke reports and diversification into other areas of mapping and/or regions of study.

After consultation with the Crown Estate additional funding has been provided to develop a new RA project website. This will allow users, including the public to view not only the GIS mapping but also information on the background, potential, and actual uses of the project. This will allow SEO and possible rebranding after the work by Landsker Business Consultants.

Meetings have been carried out with Sue Burton, Pembrokeshire Marine SAC Officer, CCW and Exegesis to ascertain the potential for new GIS layers to be added to the project website concerning Plans and Projects within the Marine SAC and the relevant consents, CCW advice and implications for the SAC Designation. This project has now been confirmed and will begin in 2011.

2.0 Methods and Methodology

2.1 Research method selection

A number of proposed research methods were chosen for the survey and included desk top research, telephone interviews, county based workshops, personal interviews, e mail and postal based data collection.

Proformas were drawn up after all feedback from the Bowles Green survey was examined. The proformas were then passed to the working group for comment and were adjusted as necessary to reflect the type of information required by the group before the survey commenced.

Proformas were posted and e mailed to a range of individuals along with maps and prepaid envelopes to gauge the return rate which turned out to be low. County workshops were not carried out due to negative feedback from the Bowles Green survey where after high initial interest in the proposed workshops actual attendance was poor.

2.2 Chosen research methods

Interviews with wardens, rangers, outdoor centre instructors, recreation managers, beach managers and harbour masters have taken place throughout the region. These face to face interviews have provided the opportunity to complete the proforma and capture spatial information concerning recreational activities by asking data providers to draw on OS maps and Admiralty Sea Charts. The proformas were designed to capture data on coastal recreation including details on infrastructure and management.

Face to face interviews have provided the opportunity to establish future contacts for data provision, explain the benefits of the project, awareness raising, and familiarization with the location under study. Overcoming initial suspicion into the survey has also proved easier using personal interviews. Pembrokeshire Coastal Forum coastal surgeries have also provided opportunities for "snap shot" data collection where the amount and type of recreation carried out at coastal locations has been recorded. Further desk top research and telephone interviews have built upon data collected in person. These data collection methods were utilized by consultants in drawing up the Scottish Marine Spatial Planning pilots and were found to be the most effective method of mapping recreational activities.

2.3 Number of participants

Due to the potential for a lack of absolute numbers regarding coastal recreational activities a scale of usage was drawn up ranging from 0-25 to 2000 + which can be found on the proforma. This was based on numbers of participants on a moderately busy day over the entire day and not a spot count. Where absolute numbers could be obtained they have been recorded e.g. details on recreational Ministry Of Defence permits, Coast Path people counters, manned slipways, wildlife boat movements in Ramsey Sound, RNLI Lifeguard data, activity data in Skomer Marine Nature Reserve and in circumstances where management schemes are in place to allow capture of accurate numbers e.g. PWC launching at Pendine.

2.3.1 Seasonality and frequency

To provide details of seasonality and frequency the calendar year was broken into 5 seasons; Easter holidays, Spring early summer, Summer holidays, Autumn and Winter. Data providers were asked to supply information on when the activity under study took place and mark for each season the frequency it occurs with daily = 28 plus days per month, frequent = 9-27 days per month and infrequent = 8 days or less per month.

2.3.2 Repeat visits

Used to determine if possible the percentage of repeat visitors for the site specific activity.

2.3.3 Participant profile

Used to determine if the activity was carried out by individuals or in organised groups.

2.3.4 Activity trend

A 5 point scale was used to gauge usage over the last 5 years for each site specific activity where 1=falling rapidly 2=falling steadily 3=steady 4=rising steadily 5=rising rapidly.

2.4 Data confidence tags

A confidence scale was devised to allow database users to make a judgment on the potentially subjective information collected. The confidence tag was based on a five point scale ranging from 1= no confidence to 5 = absolute confidence. During all interviews the use of confidence tags were explained to the data providers where they were asked to score themselves for each activity under investigation. The final score considered a number of variables including occupation and time in employment - familiarity of the activity/location and time spent at location – other data providers giving information on the same location and activity – absolute numbers available.

2.5 Data coverage tag

A data coverage tag utilizing a 5 point scale where 1 = no/poor recreational data for the location to 5 = excellent recreational data for the location has also been added to the database providing users to make better judgements on the potentially subjective data.

2.6 Data storage and display

Data from the previous Bowles and Green study was deemed as being impractical as a management tool due to the activities being mapped as point data and the information stored in a excel spread sheet which was not easily accessible. An Access Database was designed around the fields contained within the proforma and utilizes tabbed headings to display data (Figures III and IV). This data is displayed in separate reports on the RA Project GIS Website which can be found [here](#).

Recreation Data tab

Contains information on the type, amount, distribution, seasonality, participant profile and activity trends for each activity. Confidence tags and details are also provided.

Location Management tab

Contains information on site management, management issues, nature designations and byelaws and codes of conduct in place relevant to coastal recreation.

Location Details tab

Contains information on site infrastructure such as parking, toilets, slipways, moorings, public transport, easy access, beach awards and activity providers using the location.

Data Management tab



Contains information on contact details of data providers, the date and research methods used which could allow further investigation by interested parties.

South West Wales Coastal Recreation Audit

Recreation Data | Location Management | Location Details | Data Management

Main menu [Home] [Back] [Forward] [Print] [Close]

Double click to open

Location search	<input type="text" value="Porth Clais to Caerfai"/>	Organisation	<input type="text" value="independent/activity centre"/>	All Activities Map Info	
Location	<input type="text" value="Porth Clais to Caerfai"/>	Activity trend / national level	<input type="text" value="4"/>	Activities Map Info	
Activity description	<input type="text" value="canoeing/kayaking"/>	Activity trend at site	<input type="text" value="4"/>	Misc	
Absolute numbers known:	<input type="text" value="no"/>	Activity trend details	<input type="text" value="increase in sit on tops for individuals"/>	rec data GIS x:	<input type="text"/>
Details	<input type="text" value="Dr Lou luddington report"/>	Data confidence tag	<input type="text" value="4"/>	rec data GIS y:	<input type="text"/>
Scale	<input type="text" value="51-100"/>	Confidence tag details	<input type="text" value="details from ranger/activity providers and report by Dr Lou Luddington"/>	rec data GIS lat:	<input type="text"/>
Distribution details	<input type="text" value="mainly launch from porthclais to use surrounding area. See GIS"/>	Map area confidence tag	<input type="text" value="4"/>	rec data GIS long:	<input type="text"/>
Participant profile	<input type="text" value="individuals/groups"/>	Map confidence details	<input type="text" value="see above"/>		

Frequency Repeat visitors % repeat visitors

Record: 511 of 763 Unfiltered Search

Figure III Recreation data

South West Wales Coastal Recreation Audit

Recreation Data | Location Management | Location Details | Data Management

Main menu [Home] [Back] [Forward] [Print] [Close]

Location	<input type="text" value="Castlemartin Range"/>	Management issues identified	<input type="text" value="Yes"/>	Hotspot	<input type="text" value="No"/>
Managing Organisation	<input type="text" value="MOD/PCNPA"/>	Management issues details	<input type="text" value="Climbers and birds - though management agreements are in place with only occasional"/>		
Management Contact	<input type="text" value="Lynne Ferrand PCNPA"/>	Potential management issues	<input type="text" value="yes"/>		
Management Plan	<input type="text" value="Yes"/>	Potential details	<input type="text" value="potential increase in range use could mean less access"/>		
Management plan details	<input type="text" value="Castlemartin Range Integrated Land Management Plan"/>	Environment management unit	<input type="text" value="Erocips"/>		
Legislation	<input type="text"/>				
byelaws/COC	<input type="text" value="MOD Byelaws for range/PCNPA
COC Marine Code/Outdoor charter"/>				

Record: 106 of 620 No Filter Search

Figure IV Location management

2.7 Spatial data

The database is linked to Map Info GIS layers which were digitised from areas drawn by data providers. All of the activities under study are being mapped along with site infrastructure such as slipways, and mooring areas. These are then uploaded to the RA Project GIS website (Figure V). Confidence tags have also been added to assist in the use of data provided (see 2.4).

2.8 GIS Web mapping design

A major part of the work this year has been continued focus on developing the RA Project GIS website to display data to RAWG members and other relevant users (Figure VI). GIS layers have been re-created to adhere to the web based system. The link to the RA Project GIS website can be found [here](#). The website allows users to view activity, conservation, infrastructure and alert GIS layers over an OS back drop.



Figure V Multiple activities on the St Davids Peninsula

The database runs behind the system giving users more information (Figure VII) whilst a filtering system has been built in along with the ability for users to comment and add data. Spatially mapped relevant reports are also displayed. There is great potential to add future data and GIS layers and/or to expand the mapping to other areas.



Figure VI - RAWG web mapping site displaying beach activities throughout the region

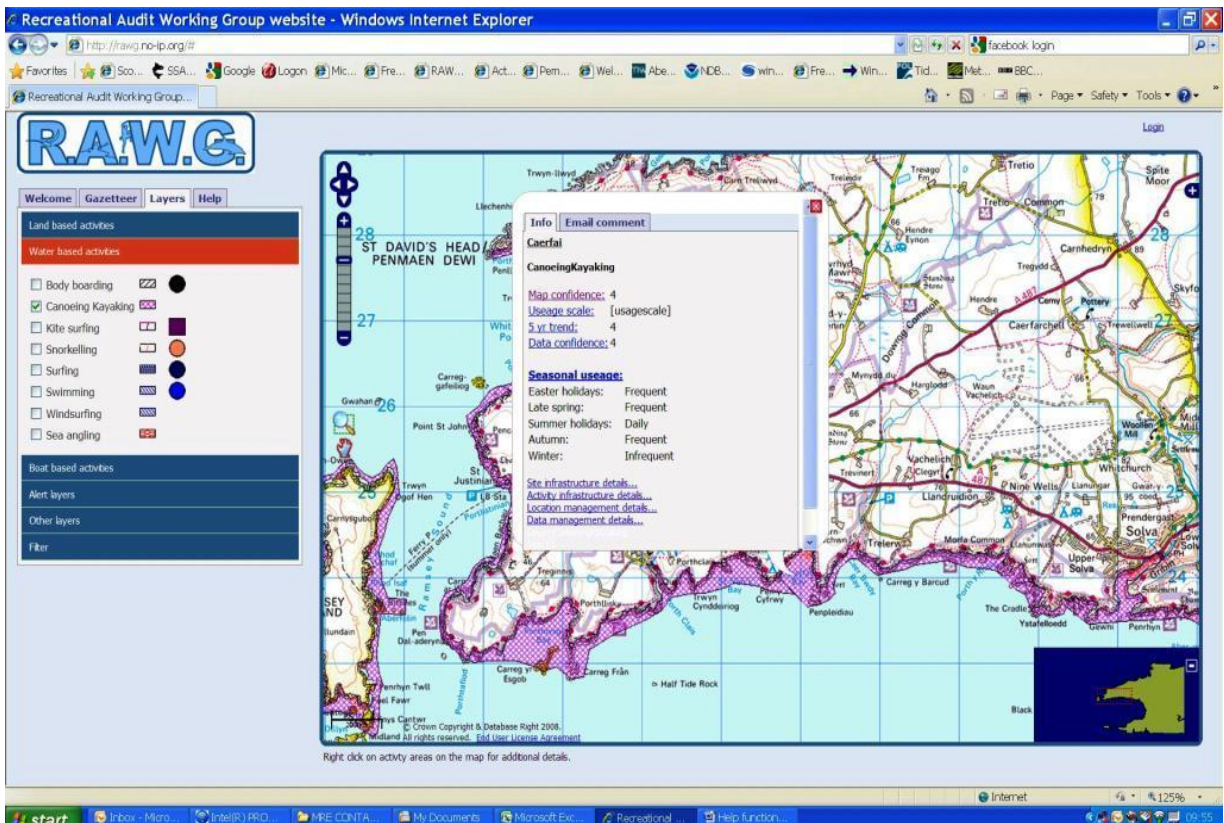


Figure VII - Displaying a kayaking layer and information pop-up on RAWG web mapping site

3.0 Results

3.1 Overview

This interim report has been compiled to provide a summary of results thus far. Detailed information for the activities under study along with location infrastructure, management issues and spatial data can be found in the database and [RA Project GIS website](#) which deems it unnecessary to repeat the information within this report. This section will highlight a selection of sites as examples only.

3.2 Location examples

The information provided in the following tables is to provide an overview of data type contained with the project database. This dataset is being added to and amended as more information becomes available.

3.2.1 Coastal section = Porthclais to Caerfai (Tables IV– IV)

(not including Porthclais or Caerfai which are considered as separate locations in the survey). An example of spatial data for this location can be seen in Figure III.

Site description This section includes sea cliffs and rocky small bays backed by campsites and the Pembrokeshire Coast Path.

activity type	distribution details	absolute numbers known	scale
canoeing/kayaking	mainly launch from Porthclais to use surrounding area/See GIS	no	51-100
Climbing	see GIS	no	26-50
Coasteering	from Porthclais - Porth Y Ffynnon to St nons bay/see GIS	yes	51-100
cruiser sailing	off shore	no	0-25
Diving	Caerfai headland shore diving and boat diving at Porth y Ffynnon Bay	no	0-25
dog walking	coast path concentrated at Porthclais and Caerfai	no	26-50
sea angling	at all points where access from the coast path allows. GIS	no	0-25
Walking	coast path	no	101-200

Table IV activity, scale and distribution

activity type	Easter holidays	Late spring / early summer	Summer holidays	Autumn	Winter
canoeing/kayaking	frequent	Frequent	daily	frequent	infrequent
Climbing	frequent	Frequent	daily	frequent	infrequent
Coasteering	frequent	Frequent	daily	frequent	infrequent
cruiser sailing	infrequent	infrequent	infrequent	infrequent	infrequent
Diving	infrequent	Infrequent	infrequent	infrequent	infrequent
dog walking	daily	Daily	daily	daily	frequent
sea angling	frequent	Frequent	daily	frequent	infrequent
Walking	daily	Daily	daily	daily	frequent

Table V activity and frequency

activity type	participant profile	Organisation	Activity trend at site	activity trend details
canoeing/kayaking	individuals/groups	independent/activity centre	4	increase in sit on tops for individuals
Climbing	individuals/groups	independent/activity centre/club	2	decrease throughout county
Coasteering	individuals/groups	independent/activity centre	4	more demand for activity
cruiser sailing	individuals	Independent	3	
Diving	individuals	Independent	0	not known
dog walking	individuals	Independent	3	
sea angling	individuals	Independent	3	
Walking	individuals	Independent	3	

Table VI activity, profile and activity trend

activity type	data confidence tag	confidence tag details	map confidence tag
canoeing/kayaking	4	details from ranger/activity providers and report by Dr Lou Luddington	4
Climbing	4	details from ranger and report by Dr Lou Luddington	4
Coasteering	4	details from ranger/activity centres and report by Dr Lou Luddington	4
cruiser sailing	3	anecdotal info from TYF guides	2
Diving	3	details from ranger and report by Dr Lou Luddington	3
dog walking	4	Details from ranger	4
sea angling	4	details from ranger and report by Dr Lou Luddington	3
Walking	4	details from national trail officer	4

Table VII activity and data confidence

activity type	Source of data	Source of data 2	Source of data 3
canoeing/kayaking	Ian Meopham PCNPA Ranger	Lou Luddington Report	Jethro Moore Adventure Beyond
Climbing	Ian Meopham PCNPA Ranger	Lou Luddington Report	Jethro Moore Adventure Beyond
Coasteering	Ian Meopham PCNPA Ranger	Lou Luddington Report	Phil Saddler PAC Manager
cruiser sailing	TYF Guides	Lou Luddington Report	
Diving	TYF Guides	Lou Luddington Report	
dog walking	Ian Meopham PCNPA Ranger		
sea angling	Ian Meopham PCNPA Ranger	Lou Luddington Report	
Walking	Dave Maclachlan National Trail Officer		

Table VIII activity and data source

Source of data 4	Source of data 5	Date sourced	Research methods
Dean Jones Activity centre manager	Denise Marriot head of activities	30-Jul-08	interview and site report
Phil Saddler PAC Manager	Denise Marriot head of activities	30-Jul-08	interview and site report
Jethro Moore Adventure Beyond	Dean Jones Activity centre manager	30-Jul-08	interview and site report
		30-Jul-08	site report
		30-Jul-08	interview and site report
		30-Jul-08	interview
		30-Jul-08	interview and site report
		14-Jul-08	interview and user surveys

Table IX data source and research methods

authority area	PCC/PCNPA
managing organisation	National Trust/ PCNPA
management plan	NT and PCNPA plans
byelaws/Codes Of Conduct	marine code/outdoor charter COC
management issues id	No
potential management issues	potential for increase in PWC
site designation details	Special Area of Conservation / Site of Special Scientific Interest / Heritage Coast/ Special Protection Area

Table X management details

activity centre using location	activities carried out
TYF	climbing/coasteering/kayaking
PAC	coasteering/climbing
Adventure Beyond	climbing/coasteering
Adventures	coasteering
Newgale YMCA	kayaking/coasteering/climbing

Table VI activity centres using location

public transport to site	no
parking at site	no
Toilets	no
easy access	no
beach awards	n/a
Lifeguards	n/a
dog restrictions	no
slipway/launching	no

mooring facilities	no
marina within 20 miles	no
Eateries	no

Table XII location infrastructure

3.2.2 Coastal section = Pendine (Tables VII – VIII)

Site description

A 7km long sandy beach backed by dunes with Pendine village at western end. MOD owned land to the east with restrictions in place.

activity type	distribution details	absolute numbers known	scale
beach activities	between HW and LW and MOD restriction	no	2000+
body boarding	see GIS	no	26-50
canoeing/kayaking	launch for surf and coastal explore	no	26-50
Caving	Blood cave	no	0-25
Cycling	beach road and on firm sand	no	26-50
dog walking	on beach outside zoning	no	201-300
horse riding	on beach outside MOD range when in force	no	0-25
kite boarding	beach zoned with club access	no	0-25
kite surfing	Mainly stay in bay	no	0-25
land yachting	beach zoned with club access	yes	0-25
power kites	beach in zoned area	no	0-25
PWC	launch site out into bay usually west due to MOD restrictions see GIS	Yes per year	30
sea angling	beach fishing	no	0-25
swimming	concentrated in lifeguard areas	no	301-400
Walking	on beach and coast path	no	301-400
wildlife watching	on beach/coast path/ cliffs/ dunes	no	0-25

Table XIII activity, scale and distribution

Activity type	Easter holidays	Late spring / early summer	Summer holidays	Autumn	Winter
beach activities	daily	daily	daily	daily	daily
body boarding	frequent	frequent	daily	frequent	infrequent
canoeing/kayaking	frequent	frequent	frequent	frequent	infrequent
Caving	infrequent	infrequent	infrequent	infrequent	infrequent
Cycling	frequent	frequent	daily	frequent	frequent

dog walking	daily	daily	daily	daily	daily
horse riding	frequent	frequent	frequent	frequent	frequent
kite boarding	frequent	frequent	frequent	frequent	frequent
kite surfing	infrequent	infrequent	infrequent	infrequent	infrequent
land yachting	frequent	frequent	frequent	frequent	frequent
power kites	frequent	frequent	frequent	frequent	frequent
PWC	infrequent	infrequent	infrequent	infrequent	not recorded
sea angling	frequent	frequent	frequent	frequent	frequent
swimming	infrequent	frequent	daily	frequent	infrequent
Walking	daily	daily	daily	daily	daily
wildlife watching	infrequent	infrequent	infrequent	infrequent	infrequent

Table XIV activity and frequency

Activity type	Participant profile	organisation	Activity trend at site	Activity trend details
beach activities	Individuals	independent	3	
body boarding	individuals/groups	independent/activity centre	3	
canoeing/kayaking	individuals/groups	independent/activity centre	4	sit on tops
Caving	individuals/groups	independent/activity centre	3	
Cycling	Individuals	independent/other recreation provider pedal go kart hire	4	beach hire
dog walking	Individuals	independent	3	
horse riding	individuals/groups	independent/activity centre	3	
kite boarding	individuals/groups	independent/club	3	
kite surfing	Individuals	independent	5	increase in activity
land yachting	individuals/groups	independent/club	3	
power kites	individuals/groups	independent	3	
PWC	individuals/groups	independent/club	3	
sea angling	individuals/groups	independent/club	4	more clubs using beach
swimming	Individuals	independent	3	
Walking	individuals/groups	independent/activity centre	3	
wildlife watching	individuals/groups	independent	3	

Table IXV activity, profile and activity trend

Activity type	Data confidence tag	Confidence tag details	map area confidence tag
beach activities	3	From 2 on site rangers plus report	4
body boarding	3	From 2 on site rangers plus report	4
canoeing/kayaking	3	From 2 on site rangers plus report	4
Caving	4	From 2 on site rangers plus report	4
Cycling	3	From 2 on site rangers plus report	4
dog walking	3	From 2 on site rangers plus report	4
horse riding	4	From 2 on site rangers plus report	4
kite boarding	3	From 2 on site rangers plus report	4
kite surfing	4	From 2 on site rangers plus report	4
land yachting	3	From 2 on site rangers plus report	4
power kites	3	From 2 on site rangers plus report	4
PWC	5	From 2 on site rangers plus report	4
sea angling	3	From 2 on site rangers plus report	4
swimming	3	From 2 on site rangers plus report	4
Walking	3	From 2 on site rangers plus report	4
wildlife watching	3	From 2 on site rangers plus report	4

Table X activity and data confidence

Activity type	Source of data	Source of data 2	Date sourced	Research methods
beach activities	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
body boarding	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
canoeing/kayaking	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
Caving	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
Cycling	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
dog walking	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
horse riding	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
kite boarding	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
kite surfing	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
land yachting	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview and report
power kites	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
PWC	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview and report
sea angling	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
Swimming	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview

Walking	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview
wildlife watching	Mike Smith CCC Ranger	Jackie Kempton CCC Ranger	11-Jul-08	interview

Table XVII activity, data source and research methods

authority area	CCC
managing organisation	Pendine CC/CCC/MOD
management plan	No
byelaws/Codes Of Conduct	kiting/ PWC/ Boat clubs have COC
management issues id	litter/unauthorized activity (report)/recreational access (clubs have slipway access only)/ commercial fishery activity/major events
potential management issues	future of MOD in the area
site designation details	Special Area of Conservation / Site of Special Scientific Interest / Special Protection Area

Table XI management details

activity centre using location	activities carried out
Morfa Bay	surfing/body boarding/kayaking
Marros riding school	horse riding

Table XIX activity centres using location

public transport to site	yes
parking at site	Yes
Toilets	yes
disabled facilities	yes
easy access	yes
Details	slipway
beach awards	yes
Details	blue flag
lifeguards	yes
slipway	yes
Details	club access/permit required
dog restrictions	yes
mooring facilities	no
marina within 20 miles	no
Eateries	yes

Table XX location infrastructure

3.3 Activities under study

A complete list of the activities under study can be found in table II with further in-depth details found in the database. This section will provide a brief overview only whilst the study is not yet complete.

Beach Activities

including bucket and spade, rockpooling and general beach games. There are 74 sites throughout the study area where beach activities are recorded as occurring. Of these only 1 location has been scored with an activity trend of 2 suggesting a reduction in users over the last 5 years. 55% of the sites score 3 while 34% score 4 or above showing increased usage. User figures range from 0-25 for places such as Ciebwr Bay to 1000+ regularly seen at Pendine, Whitesands, Tenby, Newgale and Langland Bay based on a moderately busy day.

Body boarding

There are 27 sites throughout the study area where body boarding occurs. 50% of these score 4 whilst the remainder score 3 showing a general increase of this activity. User figures range from 0-25 peaking at 201-300 at Llangenith.

Canoeing/kayaking

There are 71 sites that have recorded usage ranging from 0-25 to 51-100. 89% of the sites show an increase across the region which is mainly due to the recent popularity of sit on top kayaks.

Climbing

There are 22 main sites recorded with usage at 0-25 to 101-200. Activity scores of 2 throughout pembrokeshire are common suggesting a decline in numbers which is supported by actual MOD access numbers for Castlemartin Range. Usage in Bridgend and Swansea is recorded as rising.

Coasteering

Was recorded at 18 sites throughout the region mainly focussed in Pembrokeshire which sees visits from groups travelling from Cardiff and Bridgend. Usage ranges from 0-25 to 51-100 and scores 3 to 4 in the activity trend scale. 50% of sites surveyed showed an increase in usage. Most users carry out the activity with an activity centre.

Crusier sailing

Was recorded at 25 sites with usage at 0-25 to 101-200. Activity trend scores generally show crusier sailing to be steady or rising with 32% of the survey sites showing an increase.

Cycling

Was recorded at 12 sites with usage from 0-25 peaking at 301-400 along the millennium coastal park cycle path. 58 % of the sites show an increase in cycling numbers

Dinghy sailing

Was recorded at 24 sites with usage ranging from 0-25 to 26-50. There was a recorded increase at 20 % of sites with the remainder scoring 3 on the activity trend.

Diving

Was recorded at 31 sites which included launching locations. 21 sites had area usage recorded at 0-25 with one launching site namely dale having 101-200 divers on a moderately busy day. This was also the only site with an activity trend of 4 with the remainder scoring 3.

Horse riding

Was recorded at 25 sites and included beach riding. All sites had usage at 0-25 with the exception of Merthyr Mawr 26-50 and Druidston Haven 51-100. Activity trends of 3 were common with 16 % of sites scoring 4.

Personal Water Craft

Was recorded at 35 sites throughout the region although the activity is potentially carried out along much of the coastline. 4 sites namely Burry Port, Lydstep Haven, Newton and Sandy Bay/Treco Bay had usage at 26-50. PWC was recorded as increasing at 40 % of survey sites with only 1 site seeing numbers falling.

Kite surfing

Of 20 sites where this activity was recorded only Rest Bay had user figures in the 26-50 range with the remainder seeing usage in the 0-25 range. 80 % of survey sites showed an increase in users.

Sea Angling

Was recorded at 102 sites spanning a large part of the coastline. Recreational boat fishing, launching and shore fishing were covered. Usage ranged from 0-25 to 101-200 with 25 % of sites having daily average numbers above 25. Burry Port, Lydstep, Daugleddau, Kidwelly and Oxwich Bay were the only sites where usage has reportedly increased.

Surfing

Was recorded at 37 locations with usage ranging from 0-25 to 751-1000 at Llangennith / Rhossili. 50 % of the sites had 26-50 + carrying out the activity with 21 sites scoring 4 on the activity trend scale showing the increasing popularity of this sport.

Swimming

Was recorded at 50 sites with usage ranging from 0-25 to 751-1000. Generally the activity was recorded as steady however 18 % of sites showed an increase with the only site showing a reduction in users being Pwll Gwaelod in Pembrokeshire.

Walking

Was recorded at over 90 sites but is carried out along much of the coastline where access to the coast is possible. User figures range from 26-50 to 301-400. Only 3 sites Llangennith/Rhossili, Oxwich Bay and Three Cliffs Bay scored 4 on the activity trend with all others recording the activity as steady. This data is supported by people counters in a number of locations.

Wildlife boat tours

Were recorded at 18 sites inclusive of launching where usage ranged from 0-25 peaking at 401- 500 at Ramsey Island. The Activity trend for all sites was recorded as steady with Ramsey, Caldey, Skomer and Worms Head popular.

Windsurfing

Was recorded at 23 sites with only Amroth showing usage above 25. Ferryside, Merthyr Mawr and Oxwich Bay scored 3 on the activity trend whilst the sport seems to be falling at all other sites under study.

Wildlife watching

Land based wildlife watching was recorded at 33 sites throughout the survey area with user figures ranging from 0-25 to 51-100 for Strumble Head and 101-200 at Skomer. Whilst the majority of sites have seen steady user levels over the last 5 years numbers have increased around Burry Port, Kidwelly and Strumble.

3.4 Infrastructure at sites

As stated in section 3.1 detailed information of infrastructure relevant to recreation can be found in the database. This brief section will only highlight a small example of the data collected.

3.4.1 Slipways

45 slipways were recorded throughout the region with an array of management controls at the site which included restricted use with paid membership, slipway wardens and free public slipways only suitable for certain size craft.

3.4.2 Moorings

Including marina berths there are 4348 official moorings throughout the study area. However there are a number of ad hoc moorings not under any management scheme dotted along the coastline. Management is varied from Boat Owners Associations to Harbour Authorities and Yacht Clubs. The number of moorings available for visiting craft varies considerably throughout the region.

4.0 Conclusion

There is a lack of absolute numbers regarding coastal recreation where activities are often carried out on an individual independent basis. It could be argued that much of the data collected in the survey is subjective and based on observations and personal experience of individuals. However a great deal of time and effort has been taken in personally interviewing a wide range of the most relevant data providers possible as highlighted in section 2.2. Where absolute numbers and reports have been available they have utilized to build up a comprehensive picture of coastal recreation. The use of confidence tags for the data and spatial information along with data coverage tags, data provider details and research methods should allow database users to make judgements on the potentially subjective data provided.

Whilst this survey into the type, amount and distribution of coastal activity is ongoing there are a number of conclusions that can be drawn thus far. Almost all activities under study have been recorded as steady or rising with a number of management issues and concerns stated. This is in contrast to the Watersports and Leisure Participation Survey 2008 which is deemed the most valid and comprehensive study of coastal recreation in the UK. The National participation figures in that study have only 3 of 21 relevant activities showing a positive trend in the last seven years, namely angling from the shore/boat and motor boat cruising.⁴

It is beyond the scope of this report at present to determine whether locations are at or near capacity in terms of infrastructure, nature and habitat, and activity users. However the survey has recorded and mapped a wide range of recreational activities that could benefit from proactive management to ensure the sustainable development and marketing of coastal recreation throughout the region.

5.0 Finances

EXPENDITURE

ITEM	2010/11 £	2011/12 £	2012/13 £	TOTAL £
OVERSPEND	2,984	0	0	2,984
STAFF @ 3 days pw (INC. PM, NI & Benefits)	19,763	22,162	22,938	64,863
TRAVEL & SUBSISTANCE	1,000	1,035	1,071	3,106
OVERHEADS	4,000	4,000	4,000	12,000
PUBLICITY & MARKETING	500	750	750	2,000
EVENTS	500	1,500	1,500	3,500
CONSULTANCY	9,350	2,000	2,000	13,350
TOTAL CASH	38,097	29,740	30,492	98,328

INCOME

FUNDERS	2010/11 £	2011/12 £	2012/13 £	TOTAL £
RA Carry Over	0	0	0	0
South West Wales Tourism Partnership (SWWTP)	11,400	6,000	6,000	23,400
MHPA	3,000	3,000	3,000	9,000
Pembrokeshire Coast National Park (PCNPA)	2,000	2,800	2,000	6,800
Countryside Council for Wales	5,000	5,000	5,000	15,000
Pembrokeshire County Council	2,000	2,000	2,000	6,000
Carmarthen County Council	2,000	1,000	2,000	5,000
Neath Port Talbot County Council	500	500	500	1,500
Swansea City Council	2,000	1,000	2,000	5,000
Bridgend County Borough Council	2,000	1,000	2,000	5,000
The Crown Estate	1,300	1,300	1,300	3,900
Environment Agency Wales / SPLASH	12,000	0	0	12,000
The National Trust (NT)	0	500	500	1,000
Pembrokeshire Marine SAC	0	4,000		4,000
Total Confirmed	36,700	16,600	0	53,300
TOTAL CASH	43,200	28,100	26,300	97,600

Note: the figures above are forecasts and whilst the expenditure can be reasonably accurate the income has to be applied for on an annual basis and only those highlighted are confirmed at this stage. ***Bold and Italic are confirmed funding.***

The Overspend of £2984 coming into 2010/11 was due to the building of the GIS system. There is a projected overspend of £940 for the end of 2010/11 due to unforeseen staff costs e.g. pension increase. The increased funding from the SWWTP to 11400 includes ongoing work looking at making the project more sustainable. For 2011/12 additional contributions from the PCNPA, NT, The Crown Estate and Pems Marine SAC are for work explained in section 1.9.1.

References

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4. British Marine Federation et al. (2008). *Watersports and Leisure Participation Report 2008*. IPC Marine Media, London.