



Chapter 25.0 Tourism and Recreation

25.0 Tourism and Recreation

25.1 Overview of existing situation

- 25.1.0.1 Tourism is an important contributor to the Welsh economy, representing some 6% of the total GDP and 13% of employment in Wales (Wales Tourism Alliance). In 2013, there were 2.28 million trips and 5.1 million nights spent in South East Wales (GBTS 2013). The Project includes coast, countryside and urban areas as part of the hinterland. Unlike the Swansea Tidal Lagoon scheme, there are likely to be limited informal recreational opportunities created as a result of the lagoon; only the sections of breakwater closest to the landfall sites are likely to be suitable for recreational use, for example as a pier-like structure.
- 25.1.0.2 The eastern landfall for the Project is in close proximity to Cardiff Bay, one of Europe's largest waterfront developments with a wealth of entertainment and leisure activities and a significant tourist destination for the area, including attractions such as Techniquest and the Wales Millennium Centre. The Cardiff Bay Barrage provides a valuable walking and cycling link in this area and is a tourist destination in its own right.
- 25.1.0.3 Objectives contained within the Cardiff Destination Action Plan (2012-2014) include to further develop the cruise and maritime market (Cardiff Port already has three berths suitable for docking of cruise liners) as well as to develop Cardiff as a sustainable and distinctive destination. For Newport, strategic priorities as identified in the City Council's Economic Development Strategy (Newport City Council, 2011-2015) have focused more on issues such as improving the image and identity of the city, thereby creating a distinct sense of place.
- 25.1.0.4 Recreational activities of relevance are shown on Figure 25.1 and include, on the landward side of the Project, the Wales Coast Path which forms part of an 870 mile long trail around the entire coast of Wales. The Severn Way long distance trail follows the English side of the coast in this area and there may be vantage points from which the Project may be visible. Other land-based recreational activities in the area include the fishing lake and golf club at Peterstone and wildfowl shooting activities within marsh and wetland areas (organised formally through the Wentloog Wildfowling and Conservation Association).



Figure 25.1 Tourism and Recreational Activities and Facilities (Contains Ordnance Survey data © Crown copyright and database right 2010)

- 25.1.0.5 A number of locations within the Estuary have been important historically as seaside resorts – for example the development of Weston-Super-Mare and Clevedon – and which still attract large numbers of visitors today. There are clear views from this coast across the Estuary towards Wales. Although the stretch of coastline immediately around Cardiff is not suited to recreational beach use, there are a number of award winning beaches within the wider Estuary area, for example Sand Bay area near Weston-Super-Mare and from Penarth westwards towards Swansea.
- 25.1.0.6 The Severn Estuary is a busy shipping area, with marine leisure activities a popular pastime. There are yacht clubs and marinas at locations on both sides of the Estuary. Sailing clubs include Sully Sailing Club, Barry Yacht Club, Penarth Yacht Club, the Rhymney River Club, Cardiff Bay Yacht Club, Cardiff Yacht Club, the Newport Uskmouth Sailing Club, Chepstow and District Yacht Club, Chepstow Boat Club and Lydney Yacht Club on the north side of the Severn Estuary as well as Shirehampton Sailing Club, Bristol Avon Sailing Club, Bristol Cruising Club, Clevedon Sailing Club, Burnham on Sea Motor Boat and Sailing Club, Comwich Cruising Club, Cabot Cruising Club, Thornbury, Portishead and Weston Bay Yacht Clubs to the South. The Bristol Channel Yachting Association represents the interests of the sailing community in this area. Marinas include those at Watchet Harbour, Portishead and Cardiff Bay (Penarth). Local events such as the Bristol Harbour

Festival bring tall ships and Royal Navy vessels to the area and can attract some quarter of a million visitors.

25.1.0.7 Leisure based activities along the coastline include fishing. Angling from boats is a very popular and rapidly growing activity in the Estuary, with both privately owned and charter boats operating from local ports and harbours such as Barry, Penarth, Portishead and Weston-super-Mare. Sea angling takes place along the coast on both the Welsh and English sides of the Estuary and plays an important part of the social and economic fabric of communities throughout the Severn. Upstream on the Rivers Usk and Wye game fishing is also important. Lave net fishing is still practiced at Black Rock, near Portskewett.

25.1.0.8 The Severn Bore is a large surge wave that can be seen in the estuary of the River Severn. It is a popular event with visitors, including spectators and also surfers that come to ride the wave into the upper reaches of the Severn.

25.2 Scope of potential impact to be assessed

25.2.0.1 An assessment of both the positive and negative impacts of the Project relating to tourism and recreation will be assessed.

25.2.0.2 Preliminary research into the impacts on tourism of other significant infrastructure projects both in the UK and further afield (for example gas storage projects, offshore wind) has revealed that the most likely effects may relate to:

- i. Perceptions surrounding the visual impact of the Project (visitors placing value on an 'unspoilt' local environment, together with the importance of views across the Estuary from visitor accommodation businesses, attractions and users of recreational routes);
- ii. Impacts during construction – both positive impacts as a result of workers providing welcome off-season business to accommodation providers, pubs and shops and potential negative impacts as a result of take-up of accommodation space by construction workers during the main holiday season, possibly leading to reductions in visits to local attractions. There are clearly links with the socio-economic assessment, discussed further in paragraph 25.4.0.10;
- iii. Impacts on tourism deriving from increased traffic on the local road network due to construction of the Project;
- iv. Impacts during construction and operation phases on marine recreation (sailing, watersports, angling and the Severn Bore); and
- v. Positive impacts during operation as a visitor attraction in its own right (for example the La Rance Estuary barrage in France illustrates how an energy scheme can also act as a tourism generator, with visitor numbers in the region of 70,000 per annum¹).

¹ <http://www.british-hydro.org/downloads/La%20Rance-BHA-Oct%202009.pdf>

25.2.0.3 As tidal lagoons are a relatively new form of energy generating technology in the UK, it is worth considering as part of the assessment what information might be available surrounding the impact of other types of infrastructure scheme (for example windfarms, gas storage or waste repositories) on tourism volume and value, to see what conclusions can be drawn. A literature review prepared by The Tourism Company for the Isle of Anglesey County Council in 2012 (The Tourism Company, 2012) considered the impact of wind turbines on tourism in both the UK and further afield. The literature review drew on a wide variety of sources of information and included the observation that there is little data about the actual impacts on tourism volume and value in areas where windfarms have been established. The review also concluded that only a minority of tourists appear to be negative about wind turbines and believe they spoil the landscape, however, this is a significant minority (around 20% of visitors interviewed in certain locations). Research into other types of infrastructure schemes appear to reinforce these findings; for example research into the impact of a nuclear waste repository facility on perceptions of West Cumbria was undertaken by GVA in 2011 (GVA, 2011) and was informed by a series of interviews and focus groups with local residents, tourism groups and stakeholders. Respondents acknowledged the fact that Cumbria is considered a world-class destination, with a high level of visitor loyalty and corresponding repeat visits. Less than half of respondents felt that the proposed facility would affect the number of visitors to the area, and very few (5%) felt that there would be a significant impact on tourism services, including the provision of hotels, restaurant and retail.

25.3 Existing baseline data, consultation and need for survey

25.3.0.1 Baseline information relating to the volume and value of tourism to the local economy is available and would be drawn together by means of internet and desk-top research. Relevant sources of information would include STEAM data (Scarborough Tourism Economic Activity Model) which is available for the City of Cardiff Council area (City of Cardiff Council, 2012) as well as national and regional statistics available from the Great Britain Tourism Survey (2013)² and Visit Wales.

25.3.0.2 Usage data is available on the Wales Coast Path, which passes along the landward stretch of the Project. The WCP Visitor Survey 2011-13 (Natural Resources Wales, 2013) estimated that there were some 2.82 million visits to the WCP between October 2012 and September 2013, with gross expenditure by adult visitors on these trips estimated at £32.3million. The Survey identified that the vast majority of users of the Cardiff to Monmouthshire stretch of the WCP were day visitors (91%) as opposed to trips involving overnight stays.

25.3.0.3 Tourist businesses would be identified along the stretch of coastline on the landward side of the Project – businesses would include visitor attractions, accommodation providers and related businesses. Cardiff Bay, for example, is one of Europe's largest waterfront developments with a number of tourist attractions

² The GB Tourist Statistics 2013 <http://wales.gov.uk/docs/statistics/2014/140902-gb-tourist-statistics-2013-en.pdf>

and a wealth of leisure activities available both on and off the water (Severn Estuary Partnership, 2011). The most popular tourist attractions/recreational activities in this area (shown on Figure 25.2) include:

- i. Boat tours from Mermaid Quay
- ii. Techniquest Science Discovery Centre
- iii. The Norwegian Church Arts Centre
- iv. Wales Millennium Centre
- v. Cardiff Bay Visitor Centre
- vi. Cardiff International White Water
- vii. Doctor Who Exhibition

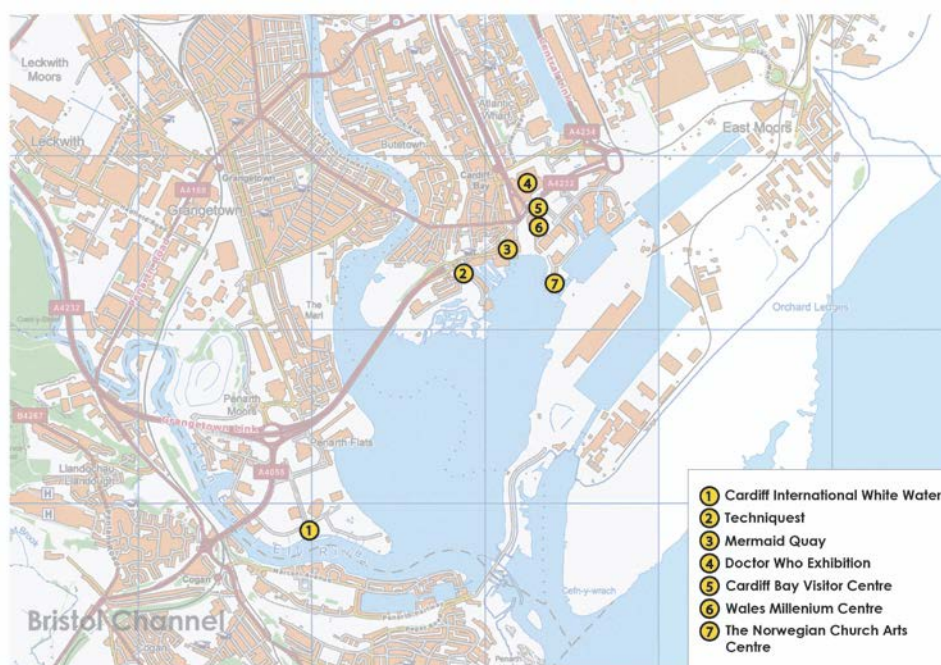


Figure 25.2 Cardiff Bay Visitor Attractions (Contains Ordnance Survey data © Crown copyright and database right 2010)

25.3.0.4 Accommodation providers would include caravan and camping sites of which one, Ty Coch, is located off the B4239 near Peterstone (located on Figure 25.1).

25.3.0.5 Tourist attractions would also be identified along the coastline both in adjoining authority areas (for example Penarth Pier and the Newport Wetlands Centre, both shown on Figure 25.1) and those along the English coastline of the Severn Estuary, from which the Project may be visible. The proposed study area for undertaking the Seascape and Landscape assessment extends 15km from the Project, with potential viewpoints for the assessment work including those of relevance to the tourism and recreation assessment, for example Clevedon Pier and viewpoints along both the Wales Coast Path and the Severn Way.

- 25.3.0.6 Whilst there are no beaches of recreational importance in close proximity to the Project on the Welsh side of the Severn Estuary, on the English side there are several award winning beach destinations, for example Sand Bay area near Weston-super-Mare.
- 25.3.0.7 Site visits will be undertaken as necessary in order to confirm relevant findings of desktop data gathering and assessment work. No visitor surveys are proposed to be undertaken.

25.4 Proposed assessment methodology

- 25.4.0.1 There are no specific guidelines or requirements for assessing impacts on tourism and recreation as part of an Environmental Impact Assessment. The assessment will seek to identify and assess changes in tourism and recreation which may arise from the Project, with resultant impacts on material assets. Unlike other environmental topics such as noise, the sensitivity of receptors to the Project is not determined by reference to designations or an objective standard. Instead, it is the nature of the activity that the human receptor is undertaking that is most influential in determining sensitivity. A combination of quantitative and qualitative assessment, together with professional judgement, will therefore be undertaken.
- 25.4.0.2 Receptors would include tourism infrastructure (for example visitor attractions, accommodation providers (either individual businesses or clusters, for example Weston-super-Mare), tourism related businesses and those relating to recreational areas and activities (for example users of long distance trails, sailing/watersports clubs).
- 25.4.0.3 The following tables set out how the impact of the Project will be assessed, in terms of determining sensitivity of receptor, magnitude criteria and significance of impact. Table 25.1 sets out the sensitivity assigned to receptors.

Table 25.1 Sensitivity of Receptors

Sensitivity	Definition
High	Where the individual receptor is defined as being one of the following: <ul style="list-style-type: none"> • For which annual visitor numbers exceed 100,000. • A business for which loss of employment or closure would be deemed a nationally important issue (for example a strategic business or major employer). • A recreational activity of international/national importance.
Medium	Where the individual receptor is defined as being one of the following: <ul style="list-style-type: none"> • For which annual visitor numbers are between 10,000 and 100,000. • A business for which loss of employment or closure would be deemed a regionally important issue. This level of sensitivity could also be applied where the loss of employment or closure of multiple small businesses within an area could be deemed a regionally important issue. <ul style="list-style-type: none"> • A recreational activity of regional importance
Low	Where the individual receptor is defined as being one of the following: <ul style="list-style-type: none"> • For which annual visitor numbers are less than 10,000. • A business for which loss of employment or closure would be deemed a locally important issue. • A recreational activity of local importance.

25.4.0.4 Table 25.2 sets out proposed evaluation criteria for the magnitude of change as a result of the Project. The magnitude of the change may be influenced by proximity as well as perceived or real linkages between the Project and the receptor (for example a visitor attraction).

Table 25.2 Magnitude Criteria

Magnitude of Effect	Definition
High	Where the extent of effects on receptors is large in scale (for example leads directly to closure or significant job losses within a business (whether it is a visitor attraction, tourism accommodation or tourism supporting business)) or leads to a significant reduction in a particular recreational activity/group of visitors.
Medium	Where the extent of effects on receptors may be moderate (for example where businesses might lose income as a result of fewer visitors per annum/reduced recreational activity or where the reduction in visitor numbers is outside of what can be considered to be normal annual variability).
Low	Where the extent of effects on receptors is considered to be small (for example there may be a very minor reduction in annual visitor numbers/recreational activity, but this is considered to be within the parameters of normal annual variability and does not have an impact on jobs or overall income levels).
Very Low	Where there is no credible scenario whereby the proposal could affect the level of a visitor numbers/recreational activity, tourism opportunities or benefits beyond a handful of individuals.

25.4.0.5 Taking the sensitivity and magnitude criteria into account, Table 25.3 sets out proposals for determining the likely significance of impact. With regard to receptors deemed to be of high sensitivity and where the magnitude of effect is likely to be low or very low, the significance of impact would be considered on a case by case basis, hence the table showing either a minor or negligible level of significance for these categories.

Table 25.3 Significance of Impact

Magnitude	Sensitivity		
	High	Medium	Low
High	Major Adverse or Beneficial Significant	Major Adverse or Beneficial Significant	Minor Adverse or Beneficial Not Significant
Medium	Major Adverse or Beneficial Significant	Moderate Adverse or Beneficial Significant	Minor Adverse or Beneficial Not Significant
Low	Minor Adverse or Beneficial /Negligible Not Significant	Negligible Not Significant	Negligible Not Significant
Very Low	Minor Adverse or Beneficial/Negligible Not Significant	Negligible Not Significant	Negligible Not Significant

- 25.4.0.6 The location of the Project is such that the geographic extent of the study area will need to take both sides of the Severn Estuary into account. Collection and assessment of baseline data will be undertaken at various levels namely:
- i. At a local level, enabling the identification of visitor attractions along the coast that could experience an impact. The assessment would also take into account centres where there is a particular cluster of tourist-focused businesses and facilities (as shown on Figure 25.3);
 - ii. At local authority level, to determine for example the volume and value of tourism to the local economy; and
 - iii. At a regional level (South East Wales and the West of England), which would identify broader tourism issues.

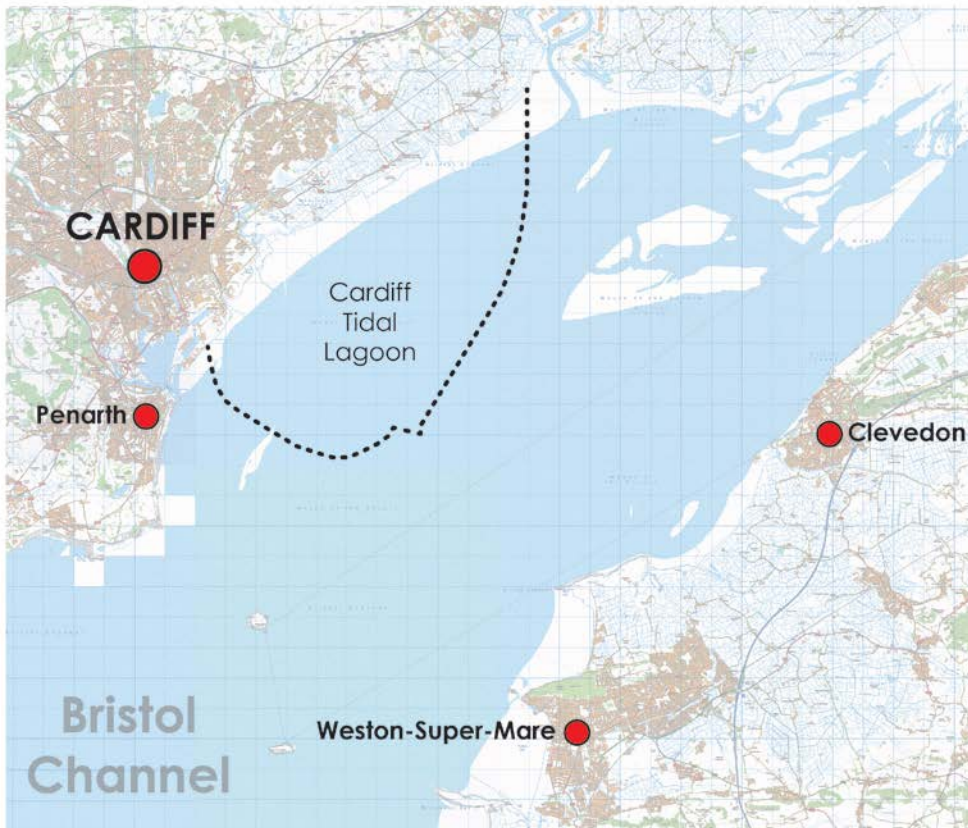


Figure 25.3 Proposed Tourism and Recreation Study Area (Contains Ordnance Survey data © Crown copyright and database right 2010)

25.4.0.7 National, regional and local guidance, policies and strategies relating to tourism and recreation on both Welsh and English sides of the Estuary would be reviewed. This would include the following documents:

Wales

- i. Planning Policy Wales (7th Edition, July 2014)
- ii. Technical Advice Note 13 Tourism (1997)
- iii. Partnership for Growth: Strategy for Tourism 2013-2020 (Welsh Government)
- iv. The South East Wales Strategic Tourism Framework
- v. Policies contained within the Cardiff, Newport and Vale of Glamorgan Local Development Plans
- vi. Relevant tourism and economic development documents of local authorities including for example the Cardiff Destination Action Plan 2012-2014, Newport Economic Development Strategy 2011-2015 and Vale of Glamorgan Tourism Strategy 2011-2015

England

- I. Visit England – A Strategic Action Plan for Tourism 2010-2020
- II. South West Tourism Strategy Towards 2015;
- III. Policies contained within the Bristol Local Plan, Sedgemoor Local Development Framework and the North and West Somerset Local Plans
- IV. Relevant tourism and economic development documents of local authorities and destination management organisations (such as Destination Bristol).

25.4.0.8 Non-statutory consultation has already been undertaken by Tidal Lagoon Cardiff Ltd with a wide variety of organisations in order to understand concerns, identify issues for assessment and provide input to the design process at an early stage. Key stakeholders approached as part of the preparation of this Scoping Report include Cardiff, Newport and Monmouthshire Councils.

25.4.0.9 Following on from the scoping stage, further consultation will be necessary with a variety of organisations, both in order to provide an overview of existing tourism activities within this part of the Severn Estuary and to assist with the identification and quantification of the effects of the proposal on the local and regional visitor economy. Ongoing consultation is anticipated with the following organisations/groups:

- i. Welsh Government (Visit Wales)
- ii. City of Cardiff Council
- iii. Newport City Council

- iv. Bristol City Council
- v. Other relevant local authorities adjoining the Severn Estuary, including the Vale of Glamorgan Council, Monmouthshire County Council, and North Somerset, West Somerset and Sedgemoor District Councils
- vi. Marine leisure groups (relating for example to sailing, watersports and angling). Groups would include Cardiff and Cardiff Bay Yacht Clubs, Sully Sailing Club, Uskmouth Sailing Club, Penarth Yacht Club, Portishead Yacht and Sailing Club, Clevedon Sailing Club and Weston Bay Yacht Club. In terms of watersports, consultation would be undertaken with the Wales Outdoor Activity Organisation.
- vii. Onshore recreation groups including for example the Ramblers Association, Sustrans Cymru, Welsh Cycling and the Cardiff Outdoor Group.

25.4.0.10 There are important linkages between the tourism and recreation topic and other topics covered elsewhere in this Scoping Report. Accordingly, reference will be made to relevant findings from other chapters within the assessment, particularly those relating to:

- I. Commercial and recreational fisheries – consideration of any impact on angling as a recreational activity;
- II. Navigation and marine transportation – identification of impacts on marine leisure activities;
- III. Seascape and landscape – consideration of how visual impacts may relate to visitors and those using recreational routes;
- IV. Onshore transport – implications of findings for tourist traffic; and
- V. Socio-economics – links with findings as they relate to the economy, for example the possible impact on visitor accommodation of construction workers.

25.5 References

- Cardiff Council, 2012. STEAM Report
- Cardiff Destination Action Plan (DAP), 2012-2014
- GVA, 2011. Managing Radioactive Waste Safely (MRWS) Partnership Report
- Natural Resources Wales, Oct 2013. The Wales Coast Path Visitor Survey 2013 'The Economic Impact of WCP Visitor Spending in Wales 2013'
- Newport City Council, 2011-2015. Economic Development Strategy
- Severn Estuary Partnership, 2011. State of the Severn Estuary
- The Tourism Company, Feb 2012. The Impact of Wind turbines on Tourism – A Literature Review