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# Tourism Needs and Development Impact Assessment

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Three Cliffs Bay Holiday Park, Northhills Farm,  
Penmaen Gower SA3 2HA

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## 1. Introduction

- 1.1. This Tourism Needs and Development Impact Assessment intends to provide an overview of the contribution that tourism makes to the UK economy, specifically focusing on Wales.
- 1.2. Through this, it will identify the need for and impacts resulting from the proposals at Three Cliffs Bay Holiday Park for:
- a) Regularise an extension to the northern element of the site;
  - b) Relinquish a commensurate area of the southern element of the site in exchange;
  - c) 19 timber bases measuring 6m x 5m between 1<sup>st</sup> March and 31<sup>st</sup> October and removed from the site during the closed season
  - d) Relocating 36 tent pitches from the southern camping field to the northern camping field (including 19 yurt-style tents);
  - e) Relocating 19 tent pitches from the southern camping field to the adjoining touring element;
  - f) A uniform 1<sup>st</sup> March to 31<sup>st</sup> October season across the whole park;
  - g) Bicycle Storage;
  - h) Regularise ancillary development; and
  - i) Proposed landscaping

## 2. National and Local Tourism Strategy

- 2.1. Tourism is a significant contributor to the UK economy. According to Visit Britain, since 2010, tourism has been the fastest growing sector in the UK in employment terms, with inbound tourism bringing £24.5 billion into the UK economy through visitor spend in 2017. Britain is forecast to have a tourism industry worth over £257 billion by 2025, which will support 3.8 million jobs. The importance of tourism to the UK economy therefore cannot be underestimated.
- 2.2. In the UK holiday park sector, the UK Caravan and Camping Alliance (UKCCA) estimates there are over 438,000 caravan and camping pitches, almost 152,000 of which are touring caravan and motorhome pitches (UKCCA, 2018). This means that touring pitches comprise over a third of caravan pitches in the UK, demonstrating their popularity and importance to the tourism sector.
- 2.3. UKCCA commissioned an independent economic impact assessment and benefit assessment of the holiday park sector across the UK in 2018, with detailed reports produced for each country within the UK. The Wales report breaks down the economic contribution of all forms of holiday park and camping accommodation to the Welsh economy. It is estimated that visitors to Welsh holiday parks/campsites spent a total of £1.33 billion in the Welsh economy through direct and indirect means.

- 2.4. The tourism strategy for Wales specifically is set out in the 'Partnership for Growth: strategy for tourism 2013-2020' which is aimed at driving higher tourism earnings to deliver maximum value for the Welsh economy. The objectives of this strategy include promoting Wales as a destination through a higher quality tourism offer and extending the tourism season.
- 2.5. It is estimated that there are 898 holiday parks and campsites in Wales, across which a total of 15,943 touring caravan pitches are accommodated (UKCCA, 2018). The Wales report found that touring pitches are the second largest contributor to the Welsh economy through visitor spend, amounting to around £370.7 million and equating to approximately 6,866 full-time equivalent (FTE) jobs. This directly illustrates the strong demand for touring pitches in Wales and the enormous economic contribution touring visitors make.
- 2.6. At a local level, Swansea County Council hold a positive stance towards tourism and this is demonstrated through the Council's tourism strategy and the permissive local planning policies surrounding tourist development in the Local Development Plan.
- 2.7. At paragraph 1.4.31 of the LDP, the Council's culture and heritage strategy aims to "*support the improvement, expansion and diversification of appropriate sustainable tourism facilities and infrastructure in recognition of its importance to the economy and the need to balance development with environmental and cultural considerations.*" Accordingly, tourism policies TR1, TR3, TR6 take a positive stance on proposals for expansion or diversification of caravan and camping sites, subject to criteria.

## 3. The Proposal

- 3.1. Over recent years, Three Cliffs Bay Holiday Park has experienced significant demand for touring and tent pitches which has driven the subject application. The application refers to the following key areas:
- a) Regularise an extension to the northern element of the site;**
  - b) Relinquish a commensurate area of the southern element of the site in exchange;**
  - c) 19 timber bases measuring 6m x 5m between 1<sup>st</sup> March and 31<sup>st</sup> October and removed from the site during the closed season**
  - d) Relocating 36 tent pitches from the southern camping field to the northern camping field (including 19 yurt-style tents);**
  - e) Relocating 19 tent pitches from the southern camping field to the adjoining touring element;**
  - f) A uniform 1<sup>st</sup> March to 31<sup>st</sup> October season across the whole park;**
  - g) Bicycle Storage;**
  - h) Regularise ancillary development; and**
  - i) Proposed landscaping**

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- 3.2. Three Cliffs Bay Holiday Park has been graded 5 stars by Visit Wales principally in relation to the high quality facilities on site together with how well the park is maintained by the appellants; in itself a strong driver for visitor demand.
- 3.3. Tourism is a significant contributor to the UK economy. According to Visit Britain, since 2010, tourism has been the fastest growing sector in the UK in employment terms, with inbound tourism bringing £24.5 billion into the UK economy through visitor spend in 2017. Britain is forecast to have a tourism industry worth over £257 billion by 2025, which will support 3.8 million jobs. The importance of tourism to the UK economy therefore cannot be underestimated.
- 3.4. In the UK holiday park sector, the UK Caravan and Camping Alliance (UKCCA) estimates there are over 438,000 caravan and camping pitches, almost 152,000 of which are touring caravan and motorhome pitches (UKCCA, 2018). This means that touring pitches comprise over a third of caravan pitches in the UK, demonstrating their popularity and importance to the tourism sector.
- 3.5. UKCCA commissioned an independent economic impact assessment and benefit assessment of the holiday park sector across the UK in 2018, with detailed reports produced for each country within the UK. The Wales report breaks down the economic contribution of all forms of holiday park and camping accommodation to the Welsh economy. It is estimated that visitors to Welsh holiday parks/campsites spent a total of £1.33 billion in the Welsh economy through direct and indirect means.
- 3.6. The tourism strategy for Wales specifically is set out in the 'Partnership for Growth: strategy for tourism 2013-2020' which is aimed at driving higher tourism earnings to deliver maximum value for the Welsh economy. The objectives of this strategy include promoting Wales as a destination through a higher quality tourism offer and extending the tourism season.
- 3.7. Three Cliffs Bay Holiday Park has been graded 5 stars by Visit Wales principally in relation to the high quality facilities on site together with how well the park is maintained by the applicant; in itself a strong driver for visitor demand.
- 3.8. The aforementioned UKCCA 'Economic Impact Assessment and Benefit Assessment Wales 2018' report provides robust data on the contribution holiday and camping parks make to the economy and this is broken down into individual accommodation type.
- 3.9. According to this report, rented and touring accommodation creates a visitor spend of £95 per group per day through on-site and off-site expenditure in Wales (UKCCA, 2018).
- 3.10. Three Cliffs Bay Holiday Park operates on a permitted holiday season of 1 April (or Good Friday; whichever is the earlier) to 31 October to any one year. This is a period of at least 213 days per year in which the site is creating income into the local economy. 35% of 213 days is 74.55. £95 x 74.55 days x 133 (approved tents and touring caravans) equates to £941,939.25; say £940,000
- 3.11. Using the data provided in the report and basing this upon a conservative average occupancy level of 35% across the holiday season, Three Cliffs Bay Holiday Park creates approximately £940,000 in visitor expenditure into the local economy in any year from the permitted 23 touring caravans and 110 tents on site.

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- 3.12. Research by VisitBritain states that every £54,000 spent by tourists in a local economy sustains 1 FTE job. Accordingly, the £940,000 visitor expenditure from the park equates to 17.4 FTE jobs in the local area. There are clearly significant economic benefits to the proposed development in this respect.
- 3.13. It is estimated that there are 898 holiday parks and campsites in Wales, across which a total of 15,943 touring caravan pitches are accommodated (UKCCA, 2018). The Wales report found that touring pitches are the second largest contributor to the Welsh economy through visitor spend, amounting to around £370.7 million and equating to approximately 6,866 full-time equivalent (FTE) jobs. This directly illustrates the strong demand for touring pitches in Wales and the enormous economic contribution touring visitors make.
- 3.14. At a local level, Swansea County Council hold a positive stance towards tourism and this is demonstrated through the Council's tourism strategy and the permissive local planning policies surrounding tourist development in the Local Development Plan.
- 3.15. At paragraph 1.4.31 of the LDP, the Council's culture and heritage strategy aims to "*support the improvement, expansion and diversification of appropriate sustainable tourism facilities and infrastructure in recognition of its importance to the economy and the need to balance development with environmental and cultural considerations.*" Accordingly, tourism policies TR1, TR3, TR6 take a positive stance on proposals for expansion or diversification of caravan and camping sites, subject to criteria.
- 3.16. There are numerous local businesses which are reliant on holiday parks such as Three Cliffs Bay. Within 2 miles of the application site are the following businesses:
- Shepherds Shop and Cafe
  - Gower Heritage Centre
  - Parc le Breos Rooms and Restaurant
  - Perriswood archery Centre
  - Pennard Golf Club
  - Muddy Mail Room (coffee shop)
  - The Lookout Three Cliffs (cafe)
  - The Gower Inn
  - Nicholaston Farm Camping
  - Little Valley Bakery
  - Southgate Cub (pub)
  - Three Cliffs Bay Coffee shop

## 4. Conclusion

- 4.1. Tourism is a significant contributor to the UK economy and national and local-level tourism strategy and policy supports the expansion and diversification of rural tourism businesses.
- 4.2. The park presently generates over £940,000 into the local economy each year and it is estimated that it will generate 17.4 FTE jobs in the local area. The approval of this planning application will materially assist sustaining the economic spend and maintaining/creating jobs in the local area.
- 4.3. There is a wealth of data which demonstrates the need and demand for, and supports, the proposed development.

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