



**Powys Local Development Plan
Topic Paper
Tourism**

DEPOSIT VERSION PAPER
(Updates the Pre-Deposit Stage version)

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EXECUTIVE SUMMARY

The purpose of this paper is to explore Tourism in Powys. It considers policy and local context, key issues and existing Unitary Development Plan Policies in the formulation of appropriate tourism objectives, policies and monitoring framework to be included in the LDP.

Tourism is a substantial sector of the region's economy spreading employment and income across Powys. The Wales Visitor Survey 2013 – Powys booster concluded that visitors to Powys tend to have a very high overall trip satisfaction and that the quality of the natural environment including Powys' natural landscapes are the county's key tourism draw. Also, the Montgomery Canal and its recent and ongoing restoration is a major tourism opportunity for the county.

The key findings of this paper in regard to Tourism are:

- Day visitors dominate the tourist market in Powys;
- There are no identified shortages of any particular types of tourist accommodation in the county. The quality of serviced accommodation could be improved and caravan/camping bedspaces make up 4.23% of all bedspaces in Wales suggesting camping and caravan holidays are popular;
- The natural and built environment and Powys' natural landscapes are significant tourism assets. The large majority of attractions in Powys are associated with the area's landscape, history, heritage and culture, few of which are of a scale to become attractors in their own right. This is coupled with their use being influenced by seasonality and the weather. Any new developments therefore should be sympathetic to their surroundings and not detrimentally impact on their environment;
- Proposals for changes of use (away from tourism) need careful consideration, especially if they would result in loss of important local facilities. Changes of use from tourist accommodation in the form of static caravans, chalets or cabins to permanent residential accommodation are not appropriate;
- The Montgomery Canal is a significant multifunctional resource and needs protection and enhancement; and
- Existing UDP policy could be simplified and improved.

This paper proposes a significant reduction in the number of Tourism Policies from the current 15 UDP policies to 3 comprehensive LDP Policies. This approach seeks to simplify the policy approach into 3 key policies that consider:

- New Tourism Development (including accommodation, facilities and attractions and extensions/alterations to existing development);
- Changes of use from Tourism to alternative uses (including permanent residential accommodation); and
- The protection and enhancement of the Montgomery Canal.

In addition to these Tourism policies, general development management policies (DM1 – Strategic Planning Matters and DM2 – Detailed and Site Specific Planning Matters include additional consideration against a range of issues relevant to all planning applications. These include for example, Protection of important tourism assets and visitor attractions and the natural environment (DM1), and compliance with design requirements and inclusion of energy conservation and efficiency measures (DM2).

Finally, the paper also supports the consideration of tourism development associated with the adaption or re-use of rural buildings (i.e. barn conversions and self-contained farm tourism developments) in accordance with the requirements of National Guidance (Technical Advice Note 6 – Planning for Sustainable Rural Communities (2010) rather than local

policies. This approach seeks to provide a more consistent approach to the re-use adaption of rural buildings for any given use (including but not limited to tourism).

1.0 Introduction

1.1 The planning system regulates the development and use of land in the public interest. It should reconcile the needs of development and conservation, securing economy, efficiency and amenity in the use of land, thereby contributing to sustainable development.

1.2 In 2004, the Planning and Compulsory Purchase Act introduced a new Local Plan process for Wales. The new system requires each authority in Wales to prepare a Local Development Plan (LDP) for their area which, once adopted, replaces any existing development plan, which for Powys is the Powys Unitary Development Plan (UDP).

1.3 Welsh Assembly Government guidance on the preparation of LDPs includes, within Paragraph 4.3 of Local Development Plans Wales: Policy on Preparation of LDPs (WAG, 2005), that local planning authorities are required to prepare, maintain or have access to an up-to-date information base on sufficient aspects of the economic, environmental and social characteristics of their area in order to ensure that its development plan policies and proposals are founded on a thorough understanding of the area's needs, opportunities and constraints

1.4 This paper is therefore one of a series of topic papers being prepared by Powys County Council as part of its preparation of the Powys Local Development Plan. The aims of these papers are therefore to:

- Provide a summary of the policies and strategies at national, regional and local level that will influence the development of Powys' Local Development Plan;
- Provide a summary of the current evidence base for the topic;
- Identify key messages arising from the policy review and evidence base;
- Identify emerging key issues; and
- Provide a review of existing Powys development plan (UDP) policies for the topic.

1.5 Whilst each topic paper produced focuses on a different theme, they are inter-related and together form the strategic overview of issues to be addressed in the Local Development Plan.

2.0 National and Regional Policy Context

2.1 Introduction

2.1.1 It is essential that any policies and proposals contained within Powys' Local Development Plan relating to Tourism are consistent and integrated with European, National and Regional legislation, regulations, plans and strategies. This section of the topic paper provides an overview of this national and regional policy context and highlights some of the most relevant messages for the preparation of Powys' Local Development Plan.

National Policy Context

2.2 Planning Policy Wales (PPW), Edition 7 (July 2014)

2.2.1 PPW sets out the national land use planning policies which local authorities need to take into account when compiling their LDP. It translates the Welsh Government's commitment to sustainable development in the planning system. Of most relevance to the consideration of Tourism in Plan making is Chapter 11 of PPW – Tourism, Sport and Recreation. This chapter identifies the Welsh Government's objective for Tourism and contains sections on how Tourism, sport and recreation should be treated in development plans and for development management purposes. In addition to Chapter 11, Chapter 6 – Conserving the Historic Environment and Chapter 7 – Economic Development consider Tourism in the context of preserving the historic environment and as a means to promote diversification of the rural economy respectively.

2.2.2 Chapter 11 of PPW states: Tourism is vital to economic prosperity and job creation in many parts of Wales. It is a significant and growing source of employment and investment, based on the country's cultural and environmental diversity. Tourism can be a catalyst for environmental protection, regeneration and improvement in both rural and urban areas.

2.2.3 The aim for Tourism in Wales is for Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales. In terms of Development plans, PPW requires the establishment of a strategic framework for the provision and enhancement of tourism facilities which:

- Considers local circumstances;
- Limits negative environmental impacts (including the consequences of climate change, and the protection of landscapes, biodiversity, the historic environment/areas of special interest and the interests of local communities);
- Takes into account the environmental, economic and social implications of likely future changes to the provision of these facilities; and
- Has regard to objectives for urban regeneration and rural diversification.

2.2.4 Further, it requires that development plans should:

- Contain clear policies for the provision, protection and enhancement of tourism facilities;
- Set standards of provision so that local deficiencies can be identified and met through the planning process;
- Set out policies to reduce conflicts through different pursuits;
- Indicate the ways in which previously developed or disused land and water bodies will be considered for Tourism, where appropriate;
- Locate facilities which may generate high levels of travel demand in or close to town centres and encourage a choice of modes of travel for access (i.e. on foot and by cycle and public transport); and
- Encourage the diversification of farm enterprises and other parts of the rural economy for appropriate tourism uses subject to adequate safeguards for the

character and appearance of the countryside, particularly its landscape, biodiversity and local amenity value.

2.3 Technical Advice Note (TAN) 6 – Planning for Sustainable Rural Communities (2010)

2.3.1 TAN 6 provides practical guidance on the role of the planning system in supporting the delivery of sustainable rural communities. It provides guidance on how the planning system can contribute to sustainable rural economies, rural housing and services and sustainable agriculture. Specifically relevant to Tourism Development, TAN 6 encourages farm diversification and considers the re-use and conversion of rural buildings.

2.3.2 Part 3.1.2 states that the development plan should facilitate diversification of the rural economy by accommodating the needs of both traditional rural industries and new enterprises whilst minimising impacts on the local community and the environment.

2.3.3 Part 3.2 considers the re-use and conversion of rural buildings. It states that conversion proposals should respect the landscape and local building styles and materials. The economic and social needs of the area and environmental considerations may be particularly relevant to such proposals.

2.3.4 TAN 6 further includes specifics in relation to different types of re-use and conversions including residential and holiday conversions, farm diversification, farm shops and farm workshops.

2.4 Technical Advice Note (TAN) 13 – Tourism (1997)

2.4.1 TAN 13 provides advice on hotel development, holiday and touring caravans and seasonal and holiday occupancy conditions. It identifies tourism as comprising a range of different, but independent activities and operations which overlap with sport, entertainment, the arts and other recreation and leisure activities. It goes on to say that while it cannot be regarded as a single or distinct category of land use, the issues it raises should be addressed in preparing or revising development plans and may feature in development control decisions. Development plans may provide guidance on opportunities for larger scale or innovative projects, appropriate facilities for the countryside or designated areas and the provision of facilities in historic towns and seaside resorts.

2.4.2 The TAN identifies some specific issues to be addressed in development plans relating to Hotels and Holiday and Touring Caravans as summarised below:

Hotels:

- Should be compatible with adjoining uses;
- Not perpetuate outdated accommodation;
- Consider historic character;
- Encourage adaptive reuse and moderate extensions; and
- Consider parking and access.

Holiday and Touring Caravans:

- Consider caravans and reconcile these needs with the protection of the environment;
- Consider new sites especially in environmentally significant areas;
- Screen new and extended sites effectively; and
- Encourage site improvement and appropriate relocation (i.e. extend opening periods).

2.5 The Wales Spatial Plan: People, Places, Futures (2004) & The Wales Spatial Plan 2008 Update

2.5.1 The Planning and Compulsory Purchase Act 2004 states that local planning authorities, in preparing a local development plan (LDP), must have regard to the Wales Spatial Plan (WSP). The 2008 Update to the Wales Spatial Plan updates the Plan from its originally adopted 2004 form. It reflects new drivers of change (including One Wales & its key policies) and the area work that has developed following the publication of the original plan. It's approach joins national, regional and local activities across organisations and administrative boundaries and splits Wales into 6 sub-regions. Powys lies in the 'Central Wales Spatial Plan Area' with the exception of the Ystradgynlais area in the south of the Country which lies in the 'Swansea Bay – Waterfront and Western Valleys Spatial Plan Area'.

2.5.2 The Central Wales Spatial Plan Area Strategy provides a model for sustainable development broadly identifying primary settlements and hubs and clusters as focal points for appropriate plan-led growth and investment. Powys' primary settlements, hubs and clusters include the the Llandrindod Wells cluster and the Severn Valley cluster with Newtown identified as a primary settlement. The priorities relative to Tourism in Powys include:

- Realising the full potential of the area's diverse environment and its unique cultural identity as a means of maintaining the region's rural and natural integrity, to build higher value sustainable tourism and to enhance its role in responding to the effects of climate change; and
- Maximising internal and external accessibility (including the improvement of broadband and telecommunication links), building effective cross-border collaboration within Wales and with neighbouring English and Irish regions, increasing access to a wide range and quality of services and enhancing the overall economic growth of the area whilst widening employment opportunities.

2.5.3 The Central Wales Area is identified as having huge potential for high quality tourism, with economic development built on regional strengths. The policy direction set in Farming for the Future provides an opportunity to create a sustainable and diversified land management system, with the emphasis on higher-value production, and closer synergy between farming, care for the environment and tourism. Tourism is identified as a key growth sector for the Area which due to the exceptional quality of the landscape and natural environment together with the strong sense of culture and heritage, attracts many visitors. The Brecon Beacons and Snowdonia National Parks are world class attractions and the Area's stunning coastline and areas of natural beauty also add to the quality of the visitor experience.

2.5.4 The Swansea Bay – Waterfront and Western Valleys Spatial Plan Area is made up of Neath Port Talbot and Swansea unitary authority areas, together with large parts of east Carmarthenshire and bordering parts of Bridgend and Powys. Key priorities for this region include developing a strong leisure and activity based tourism industry and that environmental protection and enhancement are fully integrated. It recognises Ystradgynlais as a supporting community, dependant on the area's hubs for some key amenities.

2.5.5 It further emphasises that Tourism has a particular role to play in providing jobs in the more remote valley communities, allied to outdoor activities and recreation. The Area also needs to draw on its links with the Brecon Beacons National Park and the Valleys Regional Park to help strengthen its image for tourism.

2.6 The Welsh Government Strategy for Tourism 2013 – 2020 – Partnership for Growth

2.6.1 The strategy emphasises that tourism touches many parts of Government policy including skills and employment, planning, regeneration, heritage and culture. It also benefits many other sectors of the economy including transport, retail and agriculture and therefore, it is important to consider the wider influences of tourism and to identify a coherent set of responses to the strategic challenges that are likely to face the tourism sector in Wales during the period 2013 – 2020.

2.6.2 The strategy, based on detailed research and analysis of the many factors that are likely to affect the future performance of tourism in Wales seeks to drive higher tourism earnings to deliver maximum value for the Welsh economy. It supports 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 produce in Wales; and
- Support investment in staff training and management to support a high quality tourism industry.

2.6.3 The Strategy places emphasis on key areas to achieve priorities including promoting the brand, product and people development, profitable performance and place building. It further identifies areas of competitive advantage including the natural environment, heritage and culture, activities and adventure, events and festivals and distinctive destinations.

2.7 Sustainable Tourism Framework 2007

2.7.1 The Welsh Government's sustainable tourism framework outlines what sustainable development means for the tourism sector in Wales. The document identifies the Welsh Government's vision for sustainable tourism as Wales is recognised internationally as a leading sustainable tourism destination that promotes local economic prosperity, supports community well being and engagement, enhances its natural environment and culture and delivers a high quality experience to visitors.

2.7.2 It further identifies four key objectives and associated actions supporting the vision. The actions relevant to tourism include:

- Promoting local prosperity;
- Target non-seasonal markets;
- Encourage tourism businesses to meet the needs of disabled people;
- Supporting community well being and involvement;
- Influence the scale, nature and location of development to ensure that tourism development is in keeping with the needs of the local community and its linguistic character;
- Encourage local communities to become engaged in tourism planning at the local level; and Ensure that communities and the voluntary sector are consulted on tourism proposals and plans;
- Minimising tourism's environmental impact;
- Ensure impact on water resources and sewerage systems is taken into account when developing new tourism facilities;
- Locating new tourism development near public transport;
- Protecting and giving value to natural heritage and culture; and

- Influence the scale, nature and location of development to ensure no adverse impact upon the environment.

2.8 Tourism Investment Support Scheme

2.8.1 The Tourism Investment Support Scheme is a discretionary Welsh Government investment scheme aimed at the Welsh private sector tourism businesses. It provides support of between £5,000 and £500,000 through grants and repayable business finance. Types of capital expenditure generally relates to upgrading tourist facilities. The objective of the Tourism Investment Support Scheme is to stimulate increased demand from new and existing markets by encouraging capital investment projects which create and safeguard jobs, improve the quality of facilities in existing tourism businesses, and create a distinctive sense of place, as well as encourage investments in new quality facilities and businesses with potential for high growth and profitability, and where the result is to add value to, not displace activity and custom.

Regional Policy Context

2.9 Mid Wales Regional Tourism Strategy (2011)

2.9.1 The Mid Wales Tourism Strategy's goal is: *to focus and coordinate the combined resources of stakeholders at a regional level, to support and help implement the aims of national and local tourism priorities, to increase the value of tourism and thereby contribute to the broader, sustainable regeneration of Mid Wales.*

2.9.2 Principles identified to achieve this goal include driving the national and local priorities, delivering economic development, pursuing sustainability and well-being, and encouraging collaborative working.

2.9.3 The strategy also provides statistics and an overview of tourism in Mid Wales. It identifies local factors influencing tourism in the region as the rural and dispersed nature of Mid Wales, the need for improved transport, communication and information infrastructure, and the quality of attractions, events and shopping. It identifies external factors (i.e. drivers for change) as the difficult economic situation, market changes, attitudes towards holiday taking, the environment, technology, increasing competition and tourism prospects.

2.10 Brecon Beacons and Powys Visitor Transport Plan

2.10.1 This study was commissioned through the Sustainable Tourism Powys project, funded by the Rural Development Plan and managed by Powys County Council, in association with Brecon Beacons National Park Authority. It included a review of tourism and transport policy documents and studies, an audit of public transport routes and infrastructure, and an audit of visitor attractions and countryside sites and their accessibility by alternative transport.

2.10.2 The overall aspiration of the plan is to position Mid Wales as a place where low carbon travel is integrated into the tourist experience, i.e. through making transport part of the fun and educative element of tourism rather than simply a means to an end. The plan seeks to develop a quality public transport network which integrates the needs of the tourist and resident. It will also bring economic benefits as visitor spending is focused more in their locality and on alternative locally provided forms of transport.

2.11 Montgomery Canal: Regeneration through Sustainable Restoration (A Conservation Management Strategy) 2005

2.11.1 This document provides a framework for delivering a sustainable restoration of the Montgomery Canal. It covers the policy context and the history of the canal and details the canal's unique values and associated guiding principles and management proposals relative to landscape and built heritage, nature conservation, navigation, water and environmental protection, community and visitor access, education and economic and rural regeneration.

2.12 Tourism Opportunities Action Plan Framework 2007

2.12.1 This report was commissioned by the Mid Wales Partnership to identify Central Wales Tourism Opportunities in the context of the Wales Spatial Plan and specifically to identify opportunities and requirements for enhanced tourism in Central Wales. It supports an approach that emphasises:

- Extending the tourism season;
- Identifying key growth sectors for sustainable development;
- Increasing leisure and cultural opportunities for both visitors and local people;
- Increasing the quality of the visitor experience;
- Increasing opportunities for healthy exercise;
- Strengthening the area's sense of identity and distinctiveness; and

- Increasing quality of life within the area to attract and retain businesses and people.

2.12.2 Central Wales is defined as an area:

- That has huge potential for high quality tourism;
- Which must be managed in a sustainable way to be sensitive to the environment;
- Where leisure development should emphasise the need to improve the visitor experience and length of stay;
- Where developments should be sensitive and low impact and build on the strengths of the region; and
- Where further innovative development (such as the Centre for Alternative Technology) should be promoted.

2.12.3 A key objective is to build on the unique strengths and characteristics that distinguish it from other tourism destinations including the high quality of the natural environment, distinctive history and cultural identity. The report goes on to identify key drivers affecting inland tourism being, responding to new and emerging tourism trends, characteristics of the Central Wales region, economic and social challenges associated with the changing nature of the rural economy and the interrelationship between inland Central Wales and the coast. These drivers are discussed in further detail with regard to continuing re-structuring of the Rural Economy, demographic changes, climate change and consumer preferences.

3.0 Local Policy Context

3.1 Introduction

3.1.1 As a spatial plan the Powys Local Development Plan will need to be consistent and integrated with other plans and strategies which have been prepared for the County, the most significant of which are detailed in this section.

3.2 Powys One Plan: A Single Delivery Plan for Powys (2014-2017)

3.2.1 The Local Government (Wales) Measure 2009 placed a duty on each Council in Wales to prepare a Community Strategy for promoting and improving the economic, social and environmental wellbeing of their areas, and contributing to the achievement of sustainable development in the UK. In 2014, for the first time Powys Council merged its own improvement plan (previously called the Powys Change Plan) into the One Powys Plan. This has been done so that strategic partners can better work together for the good of the county. By producing a coherent plan residents can find out what is planned and what results they can expect to see if the priorities are achieved.

3.2.2 The plan sets out priorities for improvement that will guide the work of strategic partners until at least 2017 for integrated health and adult social care, children and young people, transforming learning and skills, stronger, safer and economically viable communities and financially balanced and fit for purpose public services. The priority to build stronger, safer and economically viable communities is broadly relevant to Tourism.

3.3 Powys Regeneration Strategy 2011 and the Regeneration Strategy for Powys Action Plan (2014 - 2017)

3.3.1 The Powys Regeneration Strategy focuses on 9 key themes including Tourism which reflect the strategic needs of the County. Objective 8 Tourism states Powys will nurture, develop and promote the diversity and quality of its tourism industry in order to further support the realisation of other objectives. This will particularly apply to tourism related to: outdoor sport and recreation, events, wildlife, heritage, culture, language, 'slow tourism' and food. It goes on to address key priorities. Those relevant to Tourism being:

- Harnessing Community Strengths (Priority 1);
- Harnessing Powys' natural assets (Priority 5);
- Promoting Powys (Priority 6);
- Supporting Powys' Economy (including Tourism opportunities) (Priority 7); and
- Facilitating the resilience and renaissance of Powys' town and village centres (Priority 9).

3.3.2 The Action Plan was undertaken to relate to the financial years of 2014 – 2017. It outlines the agreed area of activity that will be taken forward by Powys County Council and partners, demonstrating links to the priorities of the Regeneration Strategy. Areas of Activity identified relevant to Tourism include:

- Encourage business networking and mentoring;
- Improve connectivity: Enable Powys' organisations to make the most of the roll-out of high speed fibre broadband;
- Up-skilling the existing workforce;
- Increase the provision of vocational training opportunities and apprenticeships in Powys;
- Assist businesses to utilise the opportunities and maximise the economic benefit generated by the local culture and heritage;
- Press and Social media marketing;
- Invest in the infrastructure of the town centre tourism offer;

- Include the regeneration and economic growth of Powys as an on-going agenda item in strategic discussions with WG and other relevant organisations;
- Actively promote Powys products within local and national markets; and
- The Powys Regeneration team to engage with partner organisation initiatives to deliver realised benefits to Powys Communities.

3.4 The Wales Visitor Survey 2013 – Powys Booster

3.4.1 The Wales Visitor Survey 2013 – Powys Booster looked at Tourism in Powys and concluded the following:

- Very high overall trip satisfaction;
- Quality of natural environment is significant drawcard;
- Commercial aspects (shopping and eating and drinking) are not so strong;
- 83% of UK staying visitors come from England;
- Scenic Explorer Couples and Pre-family Explorers are high among UK staying visitors; and
- Strong number of couples visit, but fewer children.

3.5 The Powys Unitary Development Plan (UDP) 2001 – 2016

3.5.1 The Powys UDP guides development in Powys. It provides a policy framework for positive forward planning, proposals and allocations for future developments and the basis on which consistent development control decisions can be made.

3.5.2 The plan recognises the need to support a variety of Tourism opportunities. It contains a suite of tourism policies that support tourism and address a range of tourism issues within Powys.

3.6 Powys Hotel Needs Survey (2010)

3.6.1 The Powys Hotel Needs Study (2010) considers all types of serviced accommodation including 3 and 4 star Hotels, B & B's, Farmhouse accommodation and Restaurants with Rooms. The study segments Powys in six 'location hubs' to assist understanding the distribution of supply across the County. It concludes that there is no shortage of serviced visitor accommodation in Powys but the quality of existing facilities could be improved.

4.0 LOCAL CONTEXT – TOURISM IN POWYS

4.1 Introduction

4.1.1 Powys is the largest county in Wales with sparse populations and a highly rural context. Tourism is a key sector in Powys and further tourism development has the potential to support local communities and rural holdings both in economic and social terms. The Wales Visitor Survey 2013 – Powys booster concluded that visitors to Powys tend to have a very high overall trip satisfaction and that the quality of the natural environment and Powys' natural landscapes are the county's key tourism draw. Powys' superb natural environment is coupled with a strong conservation ethos and therefore there is concern that any tourism that is encouraged should be as sustainable as possible. Also, the Montgomery Canal and its recent and ongoing restoration is considered a tourism opportunity for the County.

4.1.2 The landscape and environmental resources of the area are, in tourism terms, attractive and capable of competing with other destinations. The prominence of Powys in the tourism market place results from the fact that both the north and south boundaries of the county encompass a share of the resources and attractions of the Snowdonia and Brecon Beacons National Parks - assets of national and international profile. The varying landscape throughout the area is an attraction in its own right, and provides suitable settings for a variety of holiday experiences.

4.1.3 The three old counties in Powys – Montgomeryshire, Radnorshire and Brecknockshire all have important visitor economies and differing product strengths. In Brecknockshire, tourism is dominated by the National Park status of the Brecon Beacons. In Radnorshire and Montgomeryshire, there are a number of emerging sub-destinations, including the Cambrian Mountains, Dyfi Biosphere, Lake Vyrnwy and Offa's Country.

4.1.4 The following sections provide details on Tourism within Powys including the visitor profile, tourist accommodation, tourist attractions and assets, and canals.

4.2 The Visitor Profile

4.2.1 Visitors to Powys can be categorised into four key groups, Day visitors, domestic staying visitors, overseas staying visitors and residents. Each of these groups have particular characteristics which are explained in further detail below.

4.2.2 There were 6.14 million tourism day trips made to Powys in 2012¹. This figure represents 6% of all tourism day trips in Wales. Generally, the distribution of day trips reflects that of the population but the population of Powys is only around 4% of the Welsh population emphasising the scale of the market in the County.

4.2.3 Powys is ranked 5th out of 22 local authorities in Wales for the number of tourism day trips. Many of the day visitors to Powys will be residents from, and people on holidays in surrounding counties and metropolitan areas including Cardiff and Swansea. Based on the regional data available, around one third of tourism day trips are from the local area. The average spend per day trip in Powys is £36, above the average for Mid Wales (£28) but slightly less than the Welsh average of £38.²

4.2.4 The STEAM model, which is a tourism economic impact modelling process that uses local supply side data and tourism data, allocated day trips between the three old counties of Powys, Brecknockshire, Montgomeryshire and Radnorshire. It found that:

¹ GBVS Annual Report 2012. Tourism day trips are irregular trips of 3+ hours away from the normal place of residence or work.

² Powys Visitor Information Plan 2013-2015, Sustainable Tourism Powys (2013).

- Brecknockshire attracts 48% of day trips (given proximity to Brecon Beacons to Cardiff etc); while
- Montgomeryshire attracts 36%; and
- Radnorshire attracts 16%.

4.2.5 This allocation reflects the distribution of major attractions and honeypot areas in the County which is biased towards Brecknockshire. The following Figure includes visitor number details for larger attractions in Powys for 2011.

Figure 1 Day Visitors to Larger Attractions in Powys

Brecknockshire	Visitor Numbers (2011)
The towns of Brecon, Hay, Llanwrtyd, Builth	N/a
The National Park including Pen y Fan, Waterfall Country, Black Mts	4,000,000
Brecon Beacons National Park Visitor Centre	130,000
Brecon Cathedral and Heritage Centre	120,000
Brecon Mountain Railway	71,000
Dan yr Ogof Showcaves	69,000
Brecknock Museum and Art Gallery	16,823
Tretower Court and Castle	16,234
Montgomeryshire	
The towns of Montgomery, Welshpool and Machynlleth	N/a
Lake Vyrnwy	250,000 est
Powis Castle and Garden	115,464
Welshpool & Llanfair Railway	30,000 est
Museum of Modern Art	22,317
Radnorshire	
The towns of Llandrindod Wells, Knighton and Presteigne	N/a
Elan Valley Visitor Centre	134,614
Judge's Lodging	9,687

Source: Powys Visitor Information Plan 2013-2015, Sustainable Tourism Powys (2013).

4.2.6 Whilst there is no Powys specific data available about the nature of day trips, national data assumes the following:

- Day trips are taken all year round but the third quarter of the year is most popular and the first quarter is least popular;
- Those taking day visits are likely to be in more affluent socio economic groups (i.e. more educated and have access to a car);
- Tourism day visits in which the main activity was a day out for beauty/health, taking part in sport or going on a night out were more likely to be taken by those aged 35 to 54. The oldest age profile was for visits involving eating out and other leisure activities such as hobbies;
- In Mid Wales, around 20% of trips are to visit friends and relatives and around 10% are for a 'general day out', for outdoor activity, a night out, a meal or a special event;

- The average distance travelled to Mid Wales was 65 miles which is well above the UK average of 44 miles and 51 miles in Wales. 77% of trips in Mid Wales were taken by car, 4% by train and 2% by bus.
- There has been little or no growth in tourism day trips in Wales in recent years.

4.2.7 Powys attracts approximately 535,000 domestic staying visitors per annum including 137,000 visiting friends and relatives³. 46% are on short breaks and 28% are on main holidays. Powys attracts 6% of all domestic staying visitors to Wales, ranking it 7th out of 22 counties. Domestic staying visitors by Local Authority Area are detailed in the following figure.

Figure 2 Domestic Staying Visitors (% of total) by Local Authority Area

Local Authority	% of total
Gwynedd	16%
Pembrokeshire	12%
Cardiff	11%
Conwy	9%
Ceredigion	7%
Denbighshire	7%
Powys	6%
Swansea	6%
Anglesey	5%
Carmarthenshire	4%
Monmouthshire	3%
Others	2% or less

Source: GBTS figures for local authorities, 3 year rolling average 2009-2011

4.2.8 In terms of accommodation used by domestic staying visitors, 70% are staying in some form of commercial accommodation and 30% are staying with friends and relatives. Caravan and camping is the single most popular form of commercial accommodation (30%) with serviced accommodation used by 24%. The following figure details visitor accommodation types used by domestic staying visitors.

Figure 3 Accommodation used by type (% of total) by domestic staying visitors.

Accommodation used	%
Serviced	24%
Self-catering	8%
Caravan and camping	30%
Staying with friends and relatives	30%
Other	7%

Source: GBTS figures for local authorities, 3 year rolling average 2009-2011

4.2.9 Other features of the domestic staying market in Powys include:

- 47% Powys domestic staying visitors are from Wales with the remainder coming from other parts of the UK;
- 75% of domestic staying visitors are from higher socio economic groups;

³ Calculated using the new VW model that calculates visitor numbers using a three year rolling average taken from GBTS figures for local authorities. See <http://dservuk.tns-global.com/GBTSWalesLA/>

- 83% are aged 35 years or over;
- 5% are aged 16/24 years;
- 12% are aged 25-34 years;
- Average spend per trip is £147;
- Average length of stay is 3.6 nights;
- 88% travel to Powys by car compared to 4% by train and 2% by bus;
- Repeat visits account for 80% of all UK staying visits. Of these 40% are regular visitors having been on four or more visits in the last 3 years and 12% have been on 20 or more trips in the last 3 years.
- More staying visitors are first time visitors than day visitors but 80% were repeat visitors in 2012.

4.2.10 The STEAM model allocates trips between the three old counties based on the accommodation supply which suggests that:

- Brecknockshire attracts approximately 30% of staying trips;
- Montgomeryshire attracts nearly 60%; and
- Radnorshire attracts 17%

4.2.11 In addition to domestic staying visitors, the County attracts approximately 38,000 overseas visitors annually. Visiting friends and relatives (52%) is the biggest visit driver, then holidays (45%). Powys attracts 4% of all overseas visitors to Wales, ranking it 9th out of 22 counties. The following figure details overseas visitors to Wales by Local Authority Area.

Figure 4 Overseas visitors to Wales by Local Authority Area

Local Authority	Total	% of total
Cardiff	303,000	32%
Gwynedd	80,000	9%
Swansea	70,000	7%
Conwy	63,000	7%
Pembrokeshire	54,000	6%
Newport	42,000	4%
Monmouthshire	40,000	4%
Ceredigion	39,000	4%
Powys	38,000	4%
Anglesey	34,000	4%
Denbighshire	31,000	3%
Carmarthenshire	27,000	3%
Others	<23,000	2% or less

Source: IPS 2012, taken from Sub-regions trend by purpose. Accessed via the VisitBritain website.

http://www.visitbritain.org/bounce.aspx?PG=/Images/Subregion%20trends%20by%20purpose%2C%20country%202012%20corrected2_tcm29-14635.xls

4.2.12 The accommodation used by overseas visitors to Powys is reflective of visitor type, dominated by those staying with relatives and friends, followed by those staying in a hotel/guest house. The following figure details accommodation used by overseas visitors by accommodation type.

Figure 5 Accommodation used by Overseas Visitors by Accommodation Type

Accommodation used	%
Free guest with relatives or friends	37%
Hotel/guest house	29%
Rented house	13%
Bed and breakfast	11%
Camping / mobile home	4%
Own home	3%
Other	3%

Source: IPS 2012, Sub-regions Purposes versus accommodation used. Accessed via VisitBritain website

http://www.visitbritain.org/bounce.aspx?PG=/Images/Subregions%20vs%20Purpose%20and%20Accommodation2012_tcm29-14636.xls

4.2.13 Other characteristics of overseas visitors include:

- Average trip length is 6.2 nights;
- Average spend is £289 per trip;
- 50% of overseas visitors have visited Powys before;
- 90% of overseas visitors are over 35 years, 2% are 16 to 24 years, and 9% are 25 to 34 years old; and
- Most visitors arrive by car (88%) compared to using the train (10%) and bus (2%).⁴

4.2.14 In addition to day trippers, domestic and overseas staying visitors, local residents represent an important tourism audience as they underpin the market for local attractions, events, restaurants, pubs and retail outlets. Within Powys the population is dispersed between Montgomeryshire (48%), Radnorshire (20%) and Brecknockshire (32%). They are also a major influence on the 137,000 staying visitors who are visiting friends and relatives in the county each year. In addition to local residents, there is a significant number of people who commute into Powys for work and who look to the area around their place of work for social and leisure activities e.g. evening entertainment after work or a return visit at the weekend to visit an attraction.⁵

4.2.15 The above information on the visitor profile concludes that day visitors dominate visitors to Powys at 90% of all visitors to the county. Domestic staying visitors make up 8% and overseas staying visitors only 1%. It is noted that a higher number of day visitors visit the south (Brecon Beacons) but day visits are important across the whole County.⁶ In regard to domestic staying visitors, 70% are staying in some form of commercial accommodation and 30% are staying with friends and relatives. Caravan and camping is the single most popular form of commercial accommodation (30%) with serviced accommodation used by 24%. Finally, visiting friends and relatives (52%) is the biggest visit driver for overseas visitors, followed by those on holidays (45%).

4.3 Tourist Accommodation in Powys

4.3.1. The Powys Hotel Needs Study (2010) provides information on serviced accommodation across the County. The study considers all types of serviced accommodation including 3 and 4 star hotels, Bed and Breakfasts, farmhouse accommodation and Restaurants with Rooms. The following summarises the key findings of

⁴ Powys Visitor Information Plan 2013-2015, Sustainable Tourism Powys (2013)

⁵ Powys Visitor Information Plan 2013-2015, Sustainable Tourism Powys (2013)

⁶ Source: ONS, GBTS, Leisure Day Visits 2012

the study in terms of demand, supply and future demand within the serviced accommodation sector.

4.3.2 The Powys Hotel Needs Study (2010) considers all types of serviced accommodation including 3 and 4 star Hotels, B & B's, Farmhouse accommodation and Restaurants with Rooms. The study segments Powys in six 'location hubs' to assist understanding the distribution of supply across the County. The following figure provides details of location/property style – Number of Properties by Area.

Figure 6 Serviced Accommodation by Location and Type in Powys

Location	Hotel	Country House Hotel	Small Country House Hotel	Small Hotel	Bed and Breakfast	Farmhouse	Restaurant with rooms	Unclassified	Total
Brecon	19	1	5	12	142	18	3	3	203
Llandrindod Wells	16	3	1	16	91	20	5	5	157
South East	3	-	1	5	31	3	1	2	46
Severn Valley	7	-	5	24	82	22	3	5	148
North Llanymynech	2	-	-	5	26	4	-	1	38
Machynlleth	2	1	1	6	16	3	-	-	29
Powys Total	49	5	13	68	388	70	12	16	621

Source: Powys Hotel Needs Study (2010), Marketing Planning Associates.

4.3.3 This information suggests that:

- Brecon and Llandrindod Wells contain 71% of the hotel properties and 74% of the hotel property rooms within the County;
- The Severn Valley accounts for 14% of the hotel properties and 13% of the hotel property rooms within the County. Each town within this location having one or two hotels with an average of 20 rooms;
- In the County as a whole, hotels account for 32% of room supply and all other supply, mainly B & B style account for the remaining 68%;
- Only four hotels in the County are graded 4 Star. Overall, 55% of hotel rooms (601) are graded 3 or 4 star, and 45% (494 rooms) 2 star or less, which includes ungraded; and
- There are high levels of completely ungraded properties.

4.3.4 Over the past 10 years average annual occupancy in serviced accommodation in Mid-Wales has not exceeded 53%. In 2008 and 2009 average annual occupancy was 50% and 49% respectively. It should be noted however, that averages mean little in an area as large as Powys and large variances have been identified in the level of performance of hotels in the region. The study identified that top performing hotels were selling over 60% of their available rooms and their worst as few as 20%.

4.3.5 Some of the key characteristics of hotel performance, in terms of bedroom sales for Powys were identified by the Powys Hotel Needs Study (2010). These are summarised below.

- The best performing hotels depend on quality and range of facilities to drive bedroom sales;

- Whilst location is important, proximity to markets and accessibility are not the basis of best performance in Powys, with some of the best performers being amongst the most remote;
- The vast majority of hotels in the County do not turn business away on a regular basis. The exception is hotels with a strong leisure demand where Saturday is the peak trading day or, as a result of occasional demand peaks resulting from events such as the Hay festival and the Royal Welsh Show.
- With large numbers of hotels that trade at 50% occupancy, many must have low levels of profitability, which severely limits the ability of the businesses to invest in product development and improvement.

4.3.6 Growth in demand for serviced accommodation, particularly hotels, is closely linked to economic growth, and this is the basis normally used for forecasting future levels of demand. The study suggests that whilst economic growth forecasts are currently highly unreliable, assuming an annual growth rate of 2.5% over the next five years the annual demand for overnight accommodation in Powys would grow from a 2009 level (50% occupancy) to an annual average occupancy in 2014 of 56.5%. In this scenario, there would be no need for additional hotel rooms at any specific location within the County in the short or medium term.

4.3.7 The study recognises that whilst there is not a shortage of hotel accommodation in Powys at any level a more significant issue for the County is one of Quality. The study notes that:

- 50% of all rooms, identified on the County database, are 2 Star or below and, of these, the vast majority are ungraded;
- Only 17% of all serviced rooms are 4 Star or above;
- In the hotel sector there are currently only 91 rooms graded 4 star or above, though we understand that The Metropole, Llandrindod Wells has just achieved 4 Stars, which more than doubles the number.

4.3.8 The Powys Hotel Needs Study (2010) provides a useful insight into the serviced accommodation sector in Powys. It is clear from the occupancy data that, in terms of volume, visitor demand for accommodation is satisfied. Where hotels are unable to accommodate visitors, they consider that visitors find alternative accommodation in the locality on most occasions. This is what would be expected in a region when, on average across the year, half the available accommodation remains unsold. Therefore, whilst it does not identify any shortages for any type of serviced accommodation in any areas of Powys it suggest that the quality of accommodation could be improved.

4.3.9 There is limited information available on non-serviced accommodation sectors in Powys. However, the 2012 Wales Occupancy Survey (2012) provides a useful summary of capacity by accommodation type which is summarised in the following figure.

Figure 7 Powys: Capacity by Accommodation Type 2012

Accommodation Type	No. of establishments	% of Wales Total	No. of bed Spaces	Rank (/22)	% of Wales Total
Serviced	43	1.34	1,712	15	2.16
Self Catering	13	0.18	115	17	0.18
Caravan/Camping	17	1.29	16,893	9	4.23
Other (inc. Hostels)	0	0	0	19	0

Total	73	0.62	18,720	9	3.34
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Source: Local Authority Tourism Profiles 2010-12 Powys, Statistics for Wales

4.3.10 Of particular significance is that Powys was ranked 9th out of 22 local authority areas for caravan and camping bed spaces (16,893 spaces) accounting for 4.23% of all in Wales.

4.4 Tourist Attractions and Assets in Powys

4.4.1 Some of the larger tourist attractions and assets in the region that were identified in the Mid Wales Tourism Strategy (2011) include the following:

- The towns of Brecon, Hay, Llanwrtyd, Builth;
- The Brecon Beacons National Park including Pen y fan, Waterfall Country and Black Mountains;
- Brecon Beacons National Park Visitors Centre;
- Brecon Cathedral and Heritage Centre;
- Brecon Mountain Railway;
- Dan yr Ogor Showcaves;
- Brecknock Museum and Art Gallery
- Tretower Court and Castle;
- The towns of Montgomery, Welshpool and Machynlleth;
- Lake Vyrnwy;
- Powis Castle and Garden;
- Welshpool & Llanfair Railway;
- Museum of Modern Art;
- The towns of Llandrindod Wells, Knighton and Presteigne;
- Elan Valley Visitor Centre; and
- Judge's Lodging

4.4.2 The Strategy also provided more general details of tourist attractions and assets across Mid Wales. Of particular relevance to Powys are:

- The dramatic uplands and quiet valleys which provide a beautiful, unspoilt, uncongested natural environment;
- A large number of rights of way and open/managed access sites;
- National trails (such as Offa's Dyke Trail) that run through Powys offering opportunities for walking, cycling, riding, fishing, water sports and wildlife watching;
- Adjoining National Parks which have established reputations in the activity and adrenaline sector. The Brecon Beacons National Park to the south of the county and Snowdonia National Park to the north of the county receive 4.15 and 4.27 million visitors annually respectively which supports an annual tourist spend of £197 million and £396 million. These visitors often combine time in the national parks themselves with spending, staying and visiting parts of Powys;
- Walking and cycling in and around Rhayader and the Elan Valley;
- Attractive destinations and communities with interesting social histories and stories to tell, reinforced with a strong Welsh speaking culture;
- A range of arts facilities and venues which host programmes of exhibitions, events and festivals;
- A range of events that showcase local distinctiveness, this includes major events such as the Royal Welsh Agricultural Show but also smaller events which can be important as they offer interesting experiences for members of the local community and visitors predominantly drawn to the Region by other motivating factors. Some of these have the potential to grow into regional or national events, for example, bog snorkelling in Llanwrtyd Wells; and

- The quality of shopping and dining available including supporting local craft and food produce as well as a range of restaurants across the region and their prevailing use of local produce which adds distinctiveness and quality.

4.4.3 It is noted that Major iconic tourism attractions can have significant drawing power but Mid Wales has relatively few dedicated, large and/or iconic visitor attractions. The large majority of attractions in Powys are associated with the area's landscape, history, heritage and culture, few of which are of a scale to become attractors in their own right. This is coupled with their use being influenced by seasonality and the weather. The Mid Wales Tourism Strategy concludes that *overall there is a limited range of interesting, entertaining and informative visitor attractions which are open on a year round basis in Central Wales.*

4.5 Canals

4.5.1 The Canals of Wales are significant tourism assets, taking visitors on an unforgettable journey through the unique industrial, cultural and natural heritage of Wales. Canals in Mid Wales include the Monmouth and Brecon Canal, the Llangollen Canal and the Montgomery Canal.

4.5.2 The Monmouth and Brecon Canal is a small network of canals which runs through the Brecon Beacons National Park. The canal was originally two independent canals which were abandoned in 1962. The Brecknock and Abergavenny route and a small section of the Monmouthshire route have been reopened since 1970. Much of the rest of the original Monmouthshire Canal is subject of a restoration plan, which includes the construction of a new marina at the Newport end of the canal.

4.5.3 The Llangollen Canal is a navigable canal crossing the border between England and Wales. The Canal links Llangollen in Denbighshire, north Wales with Hurleston in south Cheshire, via the town of Ellesmere, Shropshire. In 2009 an eleven mile section of the canal from Gledrid Bridge near Rhoswiel through to the Horseshoe Falls which includes Chirk Aqueduct and Pontcysyllte Aqueduct was declared a World Heritage site by UNESCO.

4.5.4 Both the Monmouth and Brecon Canal and the Llangollen Canal are located wholly outside the Powys Local Authority Area and are therefore outside the consideration of the Powys Local Development Plan.

4.5.5 The Montgomery Canal (which is located in Powys) and its recent and ongoing restoration provides a tourism opportunity for the County. Originally, the canal was built primarily for agricultural use, to secure cheap and dependable transport of heavy goods for landowners on or near the canal and to avoid road tolls. Limestone was also transported along the canal from the quarries at Llanymynch to limekilns on the bank side. In 1840 there were 92 limekilns along the canal. Kilns can still be seen at several locations including Buttington. The canal also supported power for eight windmills using on and off feeder systems. Competition from railways, led to a decline in trade and when the Montgomery breached its banks near Perry in 1936 isolating it from the rest of the system, the costs of repairs vastly exceeded the annual revenue and it was abandoned.⁷

4.5.6 The Welsh section of the Montgomery Canal is some 36 kilometres (22 miles) long and extends from the Welsh border at Llanymynech to Newtown, passing through the beautiful countryside of the Severn Valley. The canal supports a nationally important aquatic ecology and, as a result, the whole of the Montgomery Canal in Wales is a SSSI. In respect of the internationally important populations of floating water plantain (a water plant), the Montgomery Canal in Wales is also a Special Area of Conservation (SAC). It also benefits

⁷ <http://www.visitmidwales.co.uk/Welshpool-Montgomery-Canal-/details/?dms=3&venue=1024694>

from many important and uniquely preserved structures and buildings, a number of which have listed building status. Currently, only certain sections are navigable by boat, but the canal offers many opportunities for walking and fishing. More than half of this rural waterway is now in water.

4.5.7 Since the 1960's the Canal has slowly been restored and in excess of half of the line has been reinstated in various sections with a view to complete restoration. Two sections of the canal are currently open to navigation. The canal has been restored from its northern end – the junction with the Llangollen Canal at Welsh Frankton – south through Frankton and Aston Locks. There are then extensive dry sections and some road blockages around Llanymynech and Pant. Continuing south, Carreghofa Locks have been restored but are currently a short isolated length. The canal is then navigable for an 11 mile section around the town of Welshpool. The southernmost few miles, into Newtown, have many obstacles to restoration but local enthusiasm has given new impetus to the proposals to restore this final section.

4.5.8 The restoration partnership group, The Montgomery Canal Partnership, have produced a management strategy entitled '*Montgomery Canal: Regeneration through Sustainable Restoration (A Conservation Management Strategy)*' (2005) to inform and guide the restoration and future management of the canal. This provides an understanding of the significance of the canal's natural and built heritage and seeks to ensure that canal restoration meets the aspirations and needs of the local communities for recreation and rural regeneration.

4.5.9 The Montgomery canal represents a multifunctional resource as a multi-user route and a community heritage asset that provides many opportunities for tourism, leisure and nature conservation. Whilst it is recognised that major restoration work is required in order to return the canal to a navigable condition over its entire length, the Council supports the restoration of the canal to form a navigable waterway throughout its length and should oppose any proposals that would obstruct its sensitive restoration. Restoration of the canal and associated canal-related development can help provide access to key tourism assets, support users of the canal, and bring wider economic benefits.

4.6 Conclusion

4.6.1 Powys visitor profile, its accommodation and attraction base (which is intrinsically linked to the natural environment and rural landscapes) and unique historical features such as the Montgomery Canal provide significant tourism opportunities for local communities which have the potential to bring a wide range of economic and social benefits.

4.6.2 Day visitors dominate visitors to Powys at 90% of all visitors to the county. It is noted that a higher number of day visitors visit the south (Brecon Beacons) but day visits are important across the whole County. Almost 70% of staying visitors (including domestic and overseas visitors) tend to stay in some form of commercial accommodation and 30% stay with friends and relatives. Caravan and camping is the single most popular form of commercial accommodation (30%) with serviced accommodation used by 24%.

4.6.3 With regard to serviced accommodation, visitor demand is satisfied in terms of volume, and existing accommodation meets current demand and expected demand into the future. However, whilst no shortages of accommodation have been identified the Powys Hotel Needs Study (2010) suggests that the quality of accommodation could be improved. With regard to non serviced accommodation, whilst there is limited information available it is noted that caravan/camping bedspaces are relatively high at 16,893 spaces, accounting for 4.23% of all in Wales.

4.6.4 The large majority of tourist attractions and assets in Powys are associated with the area's landscape, history, heritage and culture, few of which are of a scale to become attractions in their own right. This is coupled with their use being influenced by seasonality and the weather. One significant tourist asset is the Montgomery Canal. The Canal's ongoing restoration to return the canal to a navigable condition over its entire length presents a multifunctional resource as a multi-user route and a community heritage asset that provides many opportunities for tourism, leisure and nature conservation.

5.0 DATA/INFORMATION GAPS

5.1 Lack of Local Activity Sector and Self Catering Data

5.1.1 Tourism Activities Sector and Self Catering Sector Surveys were proposed in 2012 but were not undertaken. These surveys could have provided useful information on tourism activities and attractions within Powys and further details of the accommodation types and any particular issues that need to be addressed by the LDP.

5.1.2 The Hotel needs survey (2012) provides useful data on serviced accommodation in Powys and concludes that there is no shortage of serviced accommodation (including 3 and 4 star Hotels, B & B's, Farmhouse accommodation and Restaurants with Rooms) in the county.

5.1.3 Whilst there is no similar data available on non serviced accommodation, it is noted that caravan/camping bedspaces are relatively high at 16,893 spaces, accounting for 4.23% of all in Wales. In the absence of any specific data on non serviced accommodation occupancy no specific issues can be identified to address this sectors needs in the Local Development Plan. Notwithstanding, tourism in general provides economic and social benefits to rural communities and any new tourism development (including accommodation and/or attractions) should be encouraged in appropriate forms.

6.0 DRIVERS OF CHANGE

6.1 Introduction

6.1.1 Drivers of Change include the economic situation, demographic and market changes, attitudes towards holiday taking, the environment, technology, increasing competition and tourism prospects.

6.2 The Economic Situation

6.2.1 General economic decline in recent years as well as the continuing restructure of the rural economy and associated farm diversification has implications for tourism. Economic decline in recent years has provoked some uncertainty about the future of a range of industries in Mid Wales. Similarly, whilst the rural economy is benefiting from the growth of tourism, it will continue to be impacted by the decline of agriculture and agricultural employment through the closure of smaller farms, the greater use of machines and the diversification from food to other activities. There is likely to be a continued increase in the size of commercial farms and in the number of small holdings and organic farming operations.

6.2.2 Farm tourism offers a means of offering valuable supplementary income through the use of resources that may be currently underused. This can mean the difference between survival and closure for established farming businesses and can therefore help to booster community life in rural areas.

6.3 Demographic and Market Changes.

6.3.1 Population trends show an ageing demographic in the UK. Traditionally this group has been more likely to take holidays and breaks at home and has been important for Wales with its strong walking and outdoor product.

6.3.2 This is coupled with market changes including:

- More single person households/fewer traditional family households;
- Unemployment and reduced disposable income may constrain holiday choice for some;
- A more ethnically diverse population; and
- The probability that many people will have to work longer to fund their retirement⁸.

6.4 Attitudes towards holiday taking

6.4.1 Attitudes towards holiday taking have changed considerably over recent years.

Changes include:

- A shift towards consumers who are 'cash rich, time poor' – leading to shorter, more intensive holidays and added value;
- The search for authenticity and distinctiveness as everywhere begins to look the same. This has driven people further and further afield;
- The search for well-being and escape from a world where people are full-on, all the time. The spiritual quality of an experience is becoming more important;
- A fragmented market where people increasingly seek tailor-made experiences to satisfy their own particular needs and predilections;
- Discerning, sophisticated consumers who are widely travelled, know what they want and pride themselves in getting value; and
- Increasing importance of brands and third party recommendation in an era of seemingly limitless choice, fuelled by the internet⁹.

⁸ Mid Wales Regional Tourism Strategy Draft final Report 2011

⁹ Mid Wales Regional Tourism Strategy Draft final Report 2011

6.5 The Environment.

6.5.1 Scientific opinion is now agreed on a high level of probability that significant global warming will occur during this century. This will have a significant impact on inland Wales: including implications for biodiversity and farming practices and patterns. This will impact on the special characteristics of the Welsh countryside and landscape. The implications of this on Tourism are likely to be:

- Increasing transport costs and growing awareness of the impact of travel might encourage people to stay closer to home;
- Sustainable transport options to and from destinations will become more important, which will mean a stronger role for public transport;
- The growing interest in green and ethical choices will begin to have an impact amongst a section of consumers;
- Wales may see a warmer climate as a result of climate change, although more unpredictable weather is the likely scenario¹⁰.

6.6 Technology.

6.6.1 Technological advances continue. The internet is now the preferred route for booking and information collection for many people and has led to a desire for tailor-made experiences. New ways of accessing and sharing information through social networking sites are by-passing traditional routes and information can now be accessed more readily and the internet makes it easier for small enterprises to compete.

6.7 Increasing Competition and Tourism Prospects

6.7.1 Low cost airlines, the growth of the internet and a period of prosperity have meant that over the past decade the world has become more accessible to a larger number of people. The choice of places and experiences is becoming ever greater, both at home and abroad, and these are eating into traditional markets and setting new benchmarks. Meanwhile, in this country, there is a number of competing destinations also seeking to exploit the domestic tourism market. In this environment, simply keeping position and retaining market share becomes a challenge let alone breaking into new markets and developing new business.

6.7.2 The most likely outlook for the next five years or so is that the domestic and overseas demand for tourism in Wales and the UK is likely to remain at around the same level. This means that destinations can't rely on a rising tide to grow tourism but will need to capture market share from elsewhere.

¹⁰ Mid Wales Regional Tourism Strategy Draft final Report 2011

7.0 REVIEW OF EXISTING UDP POLICIES

7.1 Introduction

7.1.1 Para 5.3.2 of the Local Development Plan Manual states that “Existing planning policies should also be reviewed, for example the frequency of their use in development controls decisions and/ or their effectiveness at recent appeals”.

7.1.2 The UDP includes the following policies that address Tourism:

- TR1 – New Tourism Development
- TR2 – Tourist Attractions and Development Areas
- TR3 – Serviced Visitor Accommodation
- TR3A – Existing Hotels
- TR4 – Self Catering Visitor Accommodation
- TR5 – Farm Tourism
- TR6 – Holiday Static Caravan Sites
- TR7 – Touring Caravan and Camping Sites
- TR8 – Holiday Chalet and Cabin Developments
- TR9 – All Weather Facilities and Holiday Villages
- TR10 – Visitor Facilities
- TR11 – Canal Restoration and related development
- TR12 – Canal Moorings and associated development
- TR13 – Canal side Visitor Accommodation and Facilities
- TR14 – Other Canal Developments

For further information refer to the Powys Unitary Development Plan (UDP) 2001 – 2016.

7.2 Review of Existing UDP Policies

7.2.1 The UDP’s fifteen tourism policies currently address two broad issues being new tourism development (including new development, attractions, accommodation and facilities) and the Montgomery Canal. A number of policies are interlinked and could be combined and simplified to reduce the number of existing tourism policies in the LDP.

7.2.2 Following consultation with the Development Management Section of Council, two issues were identified in the use of existing UDP policy. These relate to the application of policies to rural tourism developments and changes of use from tourist accommodation (specifically static caravans, chalets and cabins) to permanent residential accommodation.

7.2.3 Issues surround the application of policies applicable to rural tourism developments such as barn conversions. The Unitary Development Plan includes Policy GP6 – Conversion of Buildings in the Countryside, Policy TR4 – Self Catering Visitor Accommodation and Policy TR5 – Farm Tourism which all have the potential to be applied to certain types of rural tourism developments.

7.2.4 Policy GP6 encourages the re-use of buildings in the countryside where the proposed use is considered appropriate. Policy TR4 and Policy TR5 support appropriate rural tourism activities. There is currently some conflict between the use of Policy GP6 and TR4 in considering planning applications for rural tourism developments including farm accommodation/barn conversions. Policy GP6 is generally applied to applications for holiday accommodation in the open countryside as it is more flexible than Policy TR4 in its application for the use of a rural building.

7.2.5 TAN6 – Planning for Sustainable Rural Communities considers the re-use and conversion of rural buildings. This covers all rural buildings (not just those used for agriculture or forestry). It states that conversion proposals should respect the landscape and local building styles and materials. The economic and social needs of the area and

environmental considerations may be particularly relevant to such proposals. It include specifics in relation to residential and holiday conversions, farm diversification, farm shops and farm workshops.

7.2.6 TAN 6 also covers sustainable rural housing, services and agriculture and procedural advice. Procedural advice relate to the determination procedure: Parts 6 & 7 of Schedule 2 to the GPDO, consultation arrangements. In regard to the reuse of agricultural buildings it state that when assessing planning applications for the re-use or adaption of a rural building, the primary consideration should be whether the nature and extent of the new use proposed for the building is acceptable in planning terms.

7.2.7 Conversion proposals should respect the landscape and local building styles and materials. Planning authorities should consider setting out in development plans their approach to proposals for the re-use of complexes of buildings with a large aggregate floor area, and of individual buildings which are especially large. The economic and social needs of the area and environmental considerations may be particularly relevant to such proposals.

7.2.8 Issues were also raised regarding changes of use from tourist accommodation (specifically static caravans, chalets and cabins) to permanent residential accommodation). This type of tourist accommodation is generally not appropriate for permanent residential use, particularly in the open countryside. Applications for change of use from caravans, chalets and cabins to permanent residential accommodation should not be supported. These types of accommodation do not meet the high standards associated with permanent residency, for example amenity space, access and parking. Should structures be no longer viable as tourism accommodation they should be removed from site as part of any new development.

8.0 KEY ISSUES

The following section details the issues that have been identified through this paper relating to Tourism.

8.1 New Tourist development should be encouraged and existing tourist development protected from inappropriate changes of use as a means to enhance and support social and economic regeneration of Powys's communities.

8.1.1 Evidence suggests that there are no particular shortages of any type of tourist accommodation in Powys. The serviced accommodation sector is extensive in terms of volume but opportunities to enhance quality of existing accommodation should be encouraged. In general, new tourism development (including sympathetic additions and alterations to existing facilities) that support social and economic regeneration must be supported by the LDP.

8.1.2 All types of new tourist developments should be encouraged because of the contribution they make to the local economy. Tourism developments within or adjoining settlements can support the role, function and character of the settlement. Tourists can use existing facilities and services within the settlement which supports the local economy through spending and employment. Development that utilise existing buildings and/or brown field sites should also be encouraged to support regeneration and adaptive reuse.

8.1.3 Tourism development in the open countryside that supports an existing tourist facility, attraction or asset but is also sympathetic to the natural environment and rural landscape should also be encouraged. Examples of appropriate developments include sympathetic additions or alterations to accommodation or facilities that seek to enhance quality, or developments on or adjoining tourist assets such as established walking routes and national trails. Sporadic tourist developments that do not relate to a tourist purpose should not be supported.

8.1.4 Proposals for minor or incidental tourism developments (such as small laybacks, picnic sites, viewpoints, interpretive facilities, nature trails) that would enhance access or usage of Tourism Accommodation, Facilities, Attractions or Assets should also be encouraged.

8.1.5 Existing tourism accommodation and tourist facilities and attractions in Powys make an important contribution to the local tourism and business economies. Proposals for the redevelopment or change of use from a tourist use to an alternative use need careful consideration to ensure there is no detrimental impacts to the tourism economy, local employment, provision of local services and the local natural and/or built environment. In this regard practical and reasonable attempts should be made to secure a developments future as a tourism development prior to its change of use. Applications for new development should clearly illustrate attempts to sustain the tourism business and how the proposed new use will support the existing community. Developments that, for example will result in the loss of important local facilities, and particularly all-weather facilities (such as indoor swimming pools or recreation facilities) should not generally be supported as a means to support a sustainable and year-round tourism sector.

8.2 Significant Tourism attractions and assets including Powys's rich natural and built environments and the Montgomery Canal should be protected.

8.2.1 The large majority of tourist attractions and assets in Powys are associated with the area's landscape, history, heritage and culture. Protecting these attractions and assets is important as visitors are drawn to the area for its outstanding scenery, heritage and recreational activities.

8.2.2 Powys also contains important historic and natural environments which are protected through designations made at European, National and local levels. These are valuable non-renewable resources which are also important for education, leisure, and the economy (including Tourism). The characteristics and special qualities of Powys' landscape and adjoining protected landscapes (National Parks and Areas of Outstanding Natural Beauty) are also significant tourism draw cards and need protection from incompatible development.

8.2.3 Any new tourism development in the open countryside or additional or alternations to existing development should not have a detrimental impact on the landscape or the natural environment. Developments involving permanent structures such as static caravan sites or cabin developments that consist of an informal layout, are low density and include substantial landscaping and/or high quality and sensitively coloured buildings can blend more satisfactorily into the landscape, providing the location is well chosen. Developments for touring caravan sites and camping which more seasonal in nature should generally be supported provided they are acceptably located and screened and provide adequate access and servicing.

8.2.4 Finally, The Montgomery Canal and its ongoing restoration to return the canal to a navigable condition over its entire length provides a tourism opportunity to the County. The canal represents a multifunctional resource as a multi-user route and a community heritage asset that provides many opportunities for tourism, leisure and nature conservation. Canal related development can help provide access to key tourism assets, support local users of the canal, and bring wider economic benefits. However, the location, scale and design of all such development will need careful consideration to ensure that there are no serious repercussions for the local environment or canal heritage. Council should support the canals restoration and oppose any proposals that would obstruct its sensitive restoration.

8.4 Key Issues for Inclusion in Deposit Plan

8.4.1 The above paragraphs identify issues relating to Tourism that the Deposit Draft Local Development Plan must address. In order to ensure that the Deposit Draft Plan is succinct, it is considered that the identified issues can be summarised in the following statements:

LDP Key Issue 8

Activities and Initiatives that support social and economic regeneration must be supported by the LDP.

LDP Key Issue 10

Tourism is important to the Powys economy, although employment in the sector can often be seasonal and part time. Visitors to Powys are drawn to the area for its outstanding scenery, heritage and recreational activities. Protecting these attractions and supporting a sustainable and year-round tourism is a must for the LDP.

LDP Key Issue 11

As a rural county, Powys natural resources and ecosystems are important for carbon storage, renewable energy generation, food, materials, water, flood alleviation, recreation and amenity. The LDP must manage development carefully to protect these resources and reconcile competing demands.

LDP Key Issue 13

The landscape of Powys is extremely diverse and includes upland landscapes and Valleys that are scenically and historically important. Development which impacts on the landscape must be carefully managed and appropriately designed particularly in terms of visual impact.

LDP Key Issue 14

Powys has an exceptional historical environment and contains 13% of Wales' listed buildings and 22% of Wales Scheduled Ancient Monuments. However, a fifth of its listed buildings are considered to be 'at risk' or vulnerable. Some archaeological sites and their settings, notably Offa's Dyke, are being eroded and compromised by development.

LDP Key Issue 15

Many of Powys' towns and villages have conservation areas protecting their distinctive character and architecture. It is important to protect and enhance local distinctiveness through good quality and sensitively designed development.

9.0 RECOMMENDATIONS – LDP OBJECTIVES, POLICIES AND MONITORING FRAMEWORK

9.1 Objectives

9.1.1 It is important that the objectives of the LDP address tourism needs in Powys. The following objectives relating to this topic have been proposed for the LDP. They have been written to address the key issues identified in this topic paper and those identified in some of the other topic papers.

LDP Objective 1 – Meeting Future Needs

To meet the needs arising in Powys over the plan period up to 2026, to provide adequate, appropriately located land for:

- i. 5,000 dwellings to meet all the housing needs of Powys' increasing and ageing population and its decreasing size of households, including open market and affordable housing, gypsy and traveller accommodation and other specialist housing needs.*
- ii. 49 hectares of employment and economic development uses.*
- iii. Retail, tourism, recreation, infrastructure, services and other needs.*

(Addresses Key Issue 10)

LDP Objective 3 – Efficient Use of Land

To support the re-use and remediation of suitably and sustainably located previously developed land and where this is not possible to make efficient use of green field sites. To apply a general presumption against unsustainable development in the open countryside and development on soils of high value and important mineral resources which are recognised as finite resources.

(Addresses Key Issue 8, 11 and 13)

LDP Objective 7 – Key Economic Sectors

To maintain and strengthen key economic sectors within Powys including manufacturing in the Severn Valley and Ystradgynlais, sustainable year-round tourism opportunities, agriculture and the rural economy.

(Addresses Key Issue 10)

LDP Objective 11 – Natural Heritage

To conserve and protect Powys' land, air and water resources important for environmental quality, geodiversity and biodiversity and where possible to ensure development enhances them and produces a net gain for biodiversity.

(Addresses Key Issue 11 and 13)

LDP Objective 13 – Built Heritage

To conserve, protect and where possible enhance the distinctive built heritage, landscape and cultural assets of Powys and adjoining areas, including its architectural and archaeological heritage and protected landscapes. In particular to facilitate the reduction of listed buildings at risk.

(Addresses Key Issue 14 and 15)

9.2 Deposit Draft Policies

9.2.1 The Policies below have been included in the Deposit Draft Plan to support and achieve the objectives above. These policies cover numerous issues and objectives, not just those identified in this topic paper. Note that some of these policies have not been repeated in their entirety. Full policy text and supporting justification for the policies (based on the content of this and other topic papers) is contained within the Deposit Draft Plan. Three tourism policies and two development management policies are proposed. Policy TD1 – Tourism Development supports new tourism development.

Policy TD1 – Tourism Development

Developments for tourist accommodation, facilities and attractions, including extensions to existing development, will be permitted as follows:

- 1. Within settlements, where commensurate in scale and size to the settlement.**
- 2. In the open countryside, where modest in scale and well integrated into the landscape so that it would not detract from the overall character and appearance of the area and where:**
 - a. It is part of a farm diversification scheme; or**
 - b. It re-uses a suitable rural building in accordance with TAN6; or**
 - c. It complements an existing tourist development or asset, without causing unacceptable adverse harm to the enjoyment of that development or asset.**
- 3. Accommodation shall not be used for permanent residential accommodation.**

Written Justification

Tourist accommodation includes serviced visitor accommodation, hotels, self-catering visitor accommodation, static caravans, chalets, cabins, touring caravans and camping. Tourist facilities and attractions include non-accommodation related tourism development.

New tourist development is encouraged because of its contribution to the economy in terms of visitor spending, supporting local business and employment generation. However, the Council seeks to ensure that developments are sustainable and respect the character of the Powys settlement hierarchy, landscape, natural environment, history and culture.

Developments that include year-round facilities (such as all-weather recreation facilities) that can be utilised by local people are encouraged. Tourism developments in a Town or Large Village can support the settlement's role, function and character. Tourists can use existing facilities and services within the settlement which supports the local economy through spending and employment. Development that utilise existing buildings and/or brown field sites should also be encouraged to support regeneration and adaptive reuse.

Tourism development in the open countryside that supports an existing tourist facility, attraction or asset but is also sympathetic to the natural environment and rural landscape will be supported.

Examples of appropriate developments include sympathetic additions or alterations to accommodation or facilities that seek to enhance quality, or developments on or adjoining tourist assets such as established walking routes and national trails provided the enjoyment of the asset is not harmed. Log cabin and chalet style developments that are sensitively designed and located to blend into the landscape and include substantial landscaping will be supported. Touring caravan sites and camping will generally be supported provided they are acceptably located and screened and provide adequate access and servicing. Sporadic tourist developments that do not relate to a tourist purpose should not be supported.

Proposals for minor or incidental tourism developments (such as small layby, picnic sites, viewpoints, interpretive facilities, nature trails) that would enhance access or usage of Tourism Facilities, Attractions or Assets will be supported.

Tourist accommodation shall not be used for permanent residential accommodation and this will be controlled by a conditional planning consent. Conditions will also be placed on some types of development to ensure that if the venture proves uneconomic in the future the land is restored to an agreed condition.

9.2.2 Policy TD2 – Alternative Uses of Existing Tourism Development requires careful consideration of changes of use away from tourism.

Policy TD2 - Alternative Uses of Existing Tourism Development
Development proposals for the change of use from an existing tourism use will only be permitted where it can be proven that the existing use is no longer viable. Proposals to change holiday chalets, cabins or caravans to permanent residential accommodation will be refused.

Written Justification

Existing tourism accommodation and tourist facilities and attractions in Powys make an important contribution to the local tourism and business economies. Proposals for the redevelopment or change of use from a tourist use to an alternative use need careful consideration to ensure there is no detrimental impacts to the tourism economy, local employment, provision of local services and the local natural and/or built environment.

In this regard practical and reasonable attempts should be made to secure a development's future as a tourism development prior to its change of use. The Council will need to be satisfied that all practical and reasonable attempts have been made to secure a development's future as a tourism business prior to its change of use. The applicant must provide a statement clearly illustrating the attempts to sustain the tourist business and how the proposed new use will support the existing community. Developments that, for example will result in the loss of important local facilities, and particularly all-weather facilities (such as indoor swimming pools or recreation facilities) should not generally be supported as a means to support a sustainable and year-round tourism sector.

Finally, tourist accommodation is generally not appropriate for permanent residential use, particularly where located in the open countryside. Applications for change of use from tourism accommodation (i.e. static caravans, chalets and cabins) to permanent residential accommodation will not be supported. These types of accommodation do not meet the high standards associated with permanent residency, for example amenity space, access and parking. Should these structures be no longer viable as tourism accommodation they should be removed from site.

9.2.3 Policy TD3 – Montgomery Canal and Associated Development seeks to protect, support and enhance the role of Montgomery Canal as a multifunctional resource.

Policy TD3 – Montgomery Canal and Associated Development
Proposals that support the restoration of the Montgomery Canal and preserve and enhance the role of the canal as a multifunctional resource, including off-line nature reserves and other appropriate canal-related development, will be supported.

Proposals for development that would adversely affect the role of the canal or prejudice its restoration will be opposed.

Written Justification

The Welsh section of the Montgomery Canal is some 36 kilometres (22 miles) long and extends from the Welsh border at Llanymynech to Newtown, passing through the beautiful countryside of the Severn Valley.

The canal supports a nationally important aquatic ecology and, as a result, the whole of the Montgomery Canal in Wales is a SSSI. In respect of the internationally important populations of floating water plantain (a water plant), the Montgomery Canal in Wales is also a Special Area of Conservation (SAC). It also benefits from many important and uniquely preserved structures and buildings, a number of which have listed building status.

The canal represents a multifunctional resource as a multi-user route and a community heritage asset that provides many opportunities for tourism, leisure and nature conservation. However, major restoration work is required in order to return the canal to a navigable condition over its entire length. The Council therefore wishes to see the restoration of the canal to form a navigable waterway throughout its length and would oppose any proposals that would obstruct its sensitive restoration. The LDP Proposals Map identifies the line of the canal.

The restoration partnership group, The Montgomery Canal Partnership, have produced a management strategy entitled 'Montgomery Canal: Regeneration through Sustainable Restoration (A Conservation Management Strategy)' to inform and guide the restoration and future management of the canal. This provides an understanding of the significance of the canal's natural and built heritage and seeks to ensure that the community aspirations of restoring the canal will be balanced with the necessary environmental and ecological mitigation and enhancement.

Restoration of the canal will only lead to significant local economic benefits once canal related developments have been established at points along the canal. Appropriate canal-related developments are uses that can demonstrate that they are associated with, and justify locations in close proximity to, the canal. Examples include:

- Moorings: essential in order to allow for overnight halts and daytime visits to
- shops, pubs and places of interest close to the canal.
- Boat services and facilities: boat users on the canal will require access to certain
- Basic essential services, such as fuel and water supplies, refuse and sewage disposal facilities and boat repair facilities at a few points along the canal.
- Canal-side pubs and restaurants: will provide a particularly popular attraction for canal users, general visitors and local residents. There will be scope for expansion of existing establishments, and conversion of suitable canal-side buildings to such uses.
- Visitor accommodation: may be proposed in association with canal side.
- Moorings.

Proposals of this kind will be supported in line with Policy TD1. Canal-related development can help provide access to key tourism assets, support users of the canal, and bring wider economic benefits. However, the location, nature, scale and design of all such developments will have to be determined with great care, in order to ensure that there are no serious repercussions for the local environment or canal heritage. Proposals must therefore accord with the objectives of the Montgomery Canal Partnership's management strategy and where canal-related development has the potential to generate car-based travel, must be in sustainable locations with appropriate access to the road network.

9.2.4 In addition to the above, general development management policies (DM1 – Strategic Planning Matters and DM2 – Detailed and Site Specific Planning Matters) include additional consideration against a range of issues relevant to all planning applications. Policy DM1 – Strategic Planning Matters part 7, 8, 9 and 11 seek to protect important material assets and their operation (i.e. The Montgomery Canal), the historic environment, the natural environment and Powys' landscapes from incompatible development.

Policy DM1 - Strategic Planning Matters

All proposals for development must not compromise, or unacceptably adversely affect, either on their own or in combination with existing or approved development, the following:

7. Important material assets and their operation including:

i. Strategic infrastructure including:

a. Transport and safeguarded routes.

b. Reservoirs and water supplies.

c. Sennybridge Training Area.

ii. Important tourism assets and visitor attractions

a. National Cycle Network routes.

b. National Trails.

c. Local Trails and public rights of way.

d. Montgomery canal.

e. Open access land and common land.

f. Royal Welsh Agricultural showground.

iii. Potential future routes along linear features such as former railway lines.

8. The historic environment, including essential settings or significant views, of:

i. Scheduled Ancient Monuments.

ii. Listed Buildings.

iii. Conservation Areas.

iv. Registered Historic Parks and Gardens.

v. Battlefields.

vi. Registered landscapes of Outstanding and Special Historic Interest.

9. The natural environment, integrity or conservation objectives of:

i. European Protected Sites / Habitats (Natura 2000 sites).

ii. Local Biodiversity Action Plan Habitats.

iii. Wildlife Trust Reserves.

iv. Local Wildlife Sites.

v. Sites Importance for Nature Conservation.

vi. Local Nature Reserves.

vii. Sites of Special Scientific Interest.

viii. Regionally Important Geological Sites.

ix. Important carbon stores

x. Best and most versatile Agricultural land (Grades 1, 2 and 3a).

11. The characteristics and special qualities of Powys landscape and adjacent protected landscapes (National Parks and Areas of Outstanding Natural Beauty).

Written Justification

Important Material Assets and their Operation. Powys contains many 'material' assets of national and regional importance which should be safeguarded. The LDP seeks to protect these assets and their operation. Various types of material asset are listed, but the list is not exhaustive. For instance, strategic infrastructure includes the east / west and north / south rail routes, trunk roads, proposed and committed bypass routes, reservoirs and the Ministry of Defence's (MOD) Sennybridge training area. Any proposals for development, including wind turbines, within the MOD's Safeguarding Zones will be referred to the MOD for consideration and comment. These Safeguarding Zones ensure operational facilities such as explosive stores, radar facilities and range areas are not compromised.

The Historic and Natural Environment. Powys contains important historic and natural environments which are protected through designations made at European, National and local levels. These are valuable non-renewable resources which are also important for education, leisure, and the economy. Guidance on the protection of these resources is contained in PPW, TANs and Circulars. Supplementary Planning Guidance will be prepared where necessary.

The characteristics and special qualities of Powys' landscape and adjoining protected landscapes (National Parks and Areas of Outstanding Natural Beauty). Powys' landscape is one of its most important assets and is a product of its natural history and geology and the influence of human activity. Maintaining the distinctiveness of Powys' landscape is an important factor in safeguarding the quality of its environment and ensuring the economic well-being of the area. It can help in attracting inward investment and employment opportunities, the tourism industry, and in providing an attractive setting in which local people can live and work. Proposals for development will also be considered against the impacts they might have on the special qualities or the reasons for designation of the adjoining National Parks, and Areas of Outstanding Natural Beauty.

9.2.5 Policy DM2 – Detailed and Site Specific Planning Matters part 3 and 4 seek to protect and enhance the natural and built environments and support sustainable development.

Policy DM2 – Detailed and Site Specific Planning Matters

In addition to the requirements set out in National Guidance, all proposals for development will be permitted where they comply with the following:

3. Proposals shall protect, positively manage and wherever possible enhance biodiversity and geodiversity interests to produce a net gain for the county including the enhanced connectivity of habitats.

4. Proposals shall protect, conserve and wherever possible enhance sites and features of historic and built heritage importance and contribute to preserving local distinctiveness, sense of place and setting.

Written Justification

Biodiversity and Geodiversity. Development proposals should plan positively for biodiversity and geodiversity. For further information refer to the Biodiversity Supplementary Planning Guideline.

Built heritage and local distinctiveness. All development, including proposals for demolition, must have regard to the context or place in which it is proposed. Important built heritage features and characteristics, whether listed or not, that make every place distinct will be protected.

9.3 Additional National Policy

9.3.1 Technical Advice Note (TAN) 6 – Planning for Sustainable Rural Communities provides practical guidance on how the planning system can contribute to sustainable rural communities. Specifically relevant to Tourism development, TAN 6 encourages farm diversification and considers the re-use and conversion of rural buildings.

9.3.2 It states that conversion proposals should respect the landscape and local building styles and materials emphasising the consideration of economic and social needs of the area and environmental considerations. It also includes specifics in relation to different types of re-use and conversions including residential and holiday conversions, farm diversification, farm shops and farm workshops.

9.3.3 Tourism development associated with the adaption and re-use of rural buildings (i.e. barn conversions and self-contained farm tourism developments) should be considered in accordance with the requirements of TAN 6 rather than local policies. This approach seeks to provide a more consistent approach to the re-use and adaption of rural buildings for any given use (including but not limited to tourism).

9.4 Monitoring

9.4.1 The proposed LDP monitoring framework identifies the topic area and reference number, the relevant plan objectives, the target, relevant policies, indicators of whether the target has been met, the source of monitoring information required. The monitoring will identify triggers for appropriate actions in terms of severity. This information will be reported in the LDP's Annual Monitoring report (AMR) based on the period 1st April to 31st March and any actions that will be undertaken should the LDP be found to be failing to meet its objectives. A full review of the LDP will be commenced four years from its adoption. The following table provides proposed monitoring information for Tourism:

Tourism Topic & Reference	Tourism Development – AMR 31
LDP Objective	7 – Key Economic Sectors.
Target	No specific target. Permitted developments should be in accordance with the requirements of Policies TD1, TD2 and TD3. Amount & Type of Tourism Development including: <input type="checkbox"/> Holiday accommodation development <input type="checkbox"/> Chalet/Caravan park development <input type="checkbox"/> Camping sites <input type="checkbox"/> Tourism Diversification
Policies	TD1, TD2 and TD3.
Local Indicator	The number and tourism development type of Planning Applications received for: TD1 - Tourist accommodation, facilities and attractions: (a) Within Settlements. (b) In the Open Countryside. TD2 - Changes of use from Tourism to an Alternative Use. TD3 – Montgomery Canal and Associated Development. And The number of Planning Applications received for TD1, TD2 and TD3 refused.

	Annually.
Source	Review of Planning Applications and Development Management Information.
Triggers and Actions	If there is a large amount of refusals consider a review of policies.

10.0 TABLE OF INVOLVEMENT

10.1 Introduction

10.1.1 Various stakeholders were consulted throughout the plan making process. The following table summarises the key consultation undertaken.

Person/Organisation	Comment	Date
Powys County Council (Development Management Officer - Louise Evans.	Various meetings and discussions to address various issues including: Existing UDP Policies and Planning Application issues; Tourism trends, issues and available data/data gaps; General policy issues and updates.	March 2014
Powys County Council Tourism/Marketing Staff	Various meetings and discussions to address various issues including: Existing UDP Policies and Planning Application issues; Tourism trends, issues and available data/data gaps; General policy issues and updates.	2011 – 2014
Tourism Partnership Mid Wales – Dee Reynolds	Meetings and discussions to understand and consider tourism in Mid Wales.	20/04/2011
The Montgomery Canal Partnership	Meetings and discussions to address the planning needs of the Montgomery Canal including relevant canal restoration strategies and information.	17/5/2011 (Alex Ball) and 18/06/2013 (Alex Ball/Andrew Stumpf/Alison Truman) 21/03/2013 (Partnership)
Powys Culture and Heritage Audit Focus Group	Meeting	
Cambrian Mountain Initiative	Meeting	8/4/2011 (Nick Venti)
Dyfi Biosphere Eco Dyfi	Meeting	20/04/2011 (Andy Rowlands)