

**Neath Port Talbot County Borough Council
Cyngor Bwrdeistref Sirol Castell-nedd**

**Democratic Services
Gwasanaethau Democrataidd**

Chief Executive: K.Jones

Date: 12 January 2022

Dear Member,

**REGENERATION AND SUSTAINABLE DEVELOPMENT CABINET
BOARD - FRIDAY, 14TH JANUARY, 2022**

Please find attached the following Updated Report for consideration at the next meeting of the **Regeneration and Sustainable Development Cabinet Board - Friday, 14th January, 2022.**

Item

- a) **Updated Tourism Update Report** (Pages 3 - 16)

Yours sincerely

Tammie Davies

p.p Chief Executive

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Cyngor Castell-nedd Port Talbot
Neath Port Talbot Council

NEATH PORT TALBOT COUNTY BOROUGH COUNCIL

Regeneration and Sustainable Development Scrutiny Committee

14 January 2022

Report of the Head of Property & Regeneration – S.Brennan

Matter for Information

Wards Affected: All

Tourism Update

Purpose of the Report

1. To update members on progress against agreed outputs within the Dramatic Heart of Wales marketing campaign.
2. To update members on projects and initiatives which have been delivered during 2021 or continue to be delivered by the Tourism Team.
3. To update members on available data in relation to the tourism economy within Neath Port Talbot and the ongoing challenges posed by the Covid-19 pandemic.

Executive Summary

4. The Dramatic Heart of Wales destination marketing campaign, which was launched on 14th September 2021, has shown good progress against agreed outputs during the first three months of the campaign.
5. The Tourism Team has continued to deliver key projects and initiatives during 2021 including; working across departments to deliver a visitor management plan for the summer of 2021, a pilot Waterfall Country Park and Ride service, secured funding for a fully accessible changing place at Aberavon Seafront and continued delivery of the Afan Forest Park Valleys Regional Park Gateway project.

6. As a result of the completion of the Neath Port Talbot Bed Stock survey a review of available data has been summarised and some initial observations have been noted. The full year data on the volume and value of tourism in the county during 2020 has been provided as we await the 2021 data becoming available in mid-2022.
7. The impact of Covid-19 upon the tourism sector is ongoing. Although the sector has seen a busy summer there are significant challenges posed as a result of difficulties in recruiting staff and the potential threat of restrictions as a result of new variants.

Destination Marketing Update

8. The Tourism Team launched the new 'Dramatic Heart of Wales' destination marketing campaign and website on 14th September 2021.
9. The campaign has been delivered via funding secured through the Visit Wales Regional Tourism Engagement Fund.
10. To recap, the campaign is delivering;
 - 7 experiences/ itineraries which have been compiled in response to an 'open call' exercise which asked tourism businesses to cluster together to deliver experiences which reflect NPT's strengths as a visitor destination.
 - A public relations campaign which includes attracting journalists and travel bloggers to the area.
 - A digital/ online campaign which includes utilising the power of social media and digital media (such as video) to appeal to key target markets.
 - A group travel campaign to engage with group travel organisers such as coach operators and tour operators in the UK.
 - Videography for each product cluster.
 - Photography for use within the campaign.
11. Since its launch the campaign has been well received and although there will be some time before we can measure impact on bookings with tourism operators involved in the campaign, the following progress has been made against the campaign outputs agreed with Visit Wales.

Table 2: Dramatic Heart of Wales Campaign Progress Against Agreed Outputs.

Agreed Campaign Output	Target (to be met within 12 months of launch)	Progress between 14/09/2021 to 16/12/21
Blogger/Press Visits	5	5 (4 have taken place, 1 in planning phase to take place in Feb 22)
PR Value	£50k	£18,600
Cluster videos	6	7
Destination photography	60	1,241
Social media reach	250,000	205,814
Social media engagement	2,500	8,698
Unique visits to websites	25,000	15,968
Group travel familiarisation visit	1	0
Engage with Group Travel Operators	20	5
Stakeholders engaged	30	37
Training sessions held	2	2
Tourism operators upskilled	15	17
Tourism products established (Clusters)	6	7
Bookings among cluster members	25 And average 5% increase across cluster operators	Benchmarking complete. To be measured at end of 2022.

Increase in visitors to NPT attractions	15,000	To be measured at end of 2022.
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12. We are seeing significant increases in engagements with our content across our social media channels which indicates that people are sharing, liking, watching and reading our content.
13. Between 14th September 2021 and 16th December 2021 the number of followers across our social media platforms has increased by 9% (an increase of 392 followers).
14. During the same period there has been 8,698 engagements (likes, shares, clicks etc.) with our social media content and our social media reach (the total number of people who have seen our content) stands at 205,814 to date within the campaign.
15. Between 14th September 2021 and 16th December 2021 the new destination website (www.dramaticheart.wales) has received 15,968 unique visitors, this shows good progress against the target of 25,000.
16. Although it is difficult to make a direct comparison between data from the old destination websites with the new Dramatic Heart of Wales website, usage data indicates an increase of 13% in new website visitors when compared to the same period of 2020.
17. The increase in new visitors is particularly positive as, due to the pandemic, the Dramatic Heart of Wales campaign is being delivered during the winter months when levels of engagement with destination marketing activities by target markets is generally much lower. Traditionally, visitors from within the UK will actively seek out holiday options during the early spring and summer months rather than the winter.
18. The data summarised above is a good indication that potential visitors are getting to know our area a little better and may therefore consider Neath Port Talbot as a base for a stay during 2022.
19. The team has already released a series of high quality videos across social media channels and will continue to do so during 2022.

20. The team has worked with a range of media outlets to run competitions and content articles which target key geographical areas and key visitor markets.
21. During 2022 we will continue to take advantage of opportunities to work with appropriate travel bloggers and journalists to generate content and news stories relating to the Dramatic Heart of Wales.
22. In January/ February 2022 we will be approaching group travel organisers to publicise opportunities to add our area to travel itineraries for coach or special interest group tours in addition to distributing our electronic Group Travel brochure.
23. Our ongoing marketing activities will be mindful of any potential Covid-19 restrictions and guidance in place at any given time. We will adapt, and if needed pause, the campaign to reflect this as needed.

Tourism Team Projects and Initiatives

24. **Visitor Management Measures 2021**
During 2021, as a result of increased demand from visitors seeking to holiday within Wales and the wider UK, officers anticipated that the county would see significant visitor pressures at key sites. In order to manage visitor flows a visitor management plan was put in place across the Council.
25. A range of measures were delivered across various departments of the Council including;
 - Increasing parking enforcement patrols in problem areas such as Brombil Reservoir, Aberavon Seafront and Pontneddfechan
 - Putting in place car parking marshals in Afan Forest Park to manage traffic flows simultaneously across Council and Natural Resources Wales car parks
 - Running a pilot Park and Ride service for visitors to Waterfall Country (please further details under paragraph 31 below)
 - Enhancing cleaning rotas in public toilets at key sites
 - Implementation of car parking booking systems where appropriate
 - Enhancing communication across social media channels urging visitors to plan ahead and act responsibly during their visit.
26. Overall the visitor management plan helped to prevent significant issues on the ground, however the ongoing impacts of visitor flows

on local communities will be a key consideration for the new Destination Management Plan.

27. The Council has been able to access approximately £120,000 of funding via the Welsh Government's Hardship Fund to deliver the above measures. However, the funding position to cover the cost of such measures in future years is currently uncertain.
28. **Afan Forest Park Valleys Regional Park Gateway**
Work is nearing completion on the Afan Forest Park Gateway project which has received funding through Welsh Government's Valleys Regional Park initiative.
29. The project is due to deliver; the refurbishment of the existing public toilet and shower facilities, additional car parking, 3 electric hook up points for campervans, new interpretation within the visitor centre, low-key lighting of pathways and a children's adventure playground. The adventure playground element of the project opened during the summer and has been well received by visitors.
30. **Aberavon Seafront Changing Place Project**
The Tourism Team has been successful in securing £160,000 from the Visit Wales Brilliant Basics Scheme in order to install a new fully accessible changing place at the Aqua Splash public toilet building on the seafront. The project, which will see the public toilet facilities opened all year at this location, will also refurbish existing public toilet provision and improve access paths to the site.
31. **Waterfall Country Park and Ride Pilot Project**
During the school summer holiday period the Tourism Team worked with partners to deliver a pilot park and ride service for visitors to Waterfall Country. The service ran half hourly between Glynneath and Pontneddfechan on Saturdays, Sundays and Bank Holiday Monday between 17th July and 5th September 2021.
32. The purpose of the pilot was to understand the impact of the intervention on the significant parking pressures within the village of Pontneddfechan and wider Waterfall Country.
33. The service received 456 individual uses across the 17 days of operation and feedback was positive from users of the service.
34. An evaluation report will be brought to board in the first quarter of 2022 in order to aid further discussion on this pilot scheme.

35. Gnoll Country Park Masterplan

As part of the Gnoll Country Park Working Group, the Tourism Team; alongside departments such as Biodiversity and Regeneration, has been working in close collaboration with the staff at Gnoll Country Park to deliver the prioritised actions which were agreed with Members in November 2020.

36. The prioritised actions are taken from the visitor experience action plan (which forms part of the overall Gnoll Country Park Masterplan) and which received over 800 responses from the local community and visitors to the park during the consultation phase for the plan.

37. A range of developments have been, or are in the process of being delivered, including;

- New signage within the car park to raise awareness of how car parking income is reinvested to support the park
- New and improved children's play areas
- Access improvements to the café entrance
- New picnic area with accessible picnic benches
- Mobile catering unit to extend catering offer within the park
- Improvements to the café menu and investment in kitchen equipment to facilitate this.
- Improvements to pathways leading to Moss House Reservoir
- Renovation of second viewing platform at Fish Pond.

38. The team is actively seeking out funding opportunities to enable the accommodation proposals on site which would see the installation of self-contained pods/ units on the site of the former service yard, in addition to the potential refurbishment of the Ranger's cottage to offer self-catering accommodation.

39. The Gnoll Country Park Working Group are also exploring funding opportunities to enhance the overall heritage offer within the park in order to restore and promote key heritage features.

40. The team at The Gnoll continue to work closely with The Woodland Trust to support their proposals on the land neighbouring the park.

41. New Destination Management Plan

The Tourism Team is in the process of procuring the new Neath Port Talbot Destination Management Plan which will identify and prioritise the development of our area as a visitor destination over the next 5 to 10 years.

42. Key themes which will be explored as part of the process to compile the new plan include (for example);
- Covid 19 Recovery
 - Increasing economic impact from tourism (increasing overnight stays, employment, visitor spend, business support etc.)
 - Visitor infrastructure improvements (toilets, car parks and accessible/ inclusive facilities)
 - Product development (heritage, environment, activities which appeal to visitors)
 - Destination marketing
 - Sustainability and managing community impact
 - Building on partnership working
 - Accessibility
 - Quality
 - Data collection
43. Members and stakeholders will be invited to take part in workshops as part of the process to devise the new plan. Subject to procurement, the new Destination Management Plan should be in place by summer 2022.

Review of Visitor Economy Data

44. **Bed Stock Survey Summary**
A 'bed stock' survey has now been undertaken to develop an accurate database of the nature and amount of visitor accommodation in the Neath Port Talbot area.
45. All local authorities in Wales are required to undertake bed stock survey's periodically in order to understand accommodation demand, assess trends in the accommodation market and provide a baseline for the calculation of economic data on the value of the tourism economy to the area.
46. A summary of the results of the bed stock survey can be found in Table 1 below.

Table 1: Neath Port Talbot Bed Stock Survey Summary

	Number of Individual Operators	Number of available bedrooms/ units/ pitches	Number of available bed spaces
TOTAL	132	962	2887
Serviced (Hotel/B&B)	31	615	1435
Self-catering (Cottage, Cabin/ House)	94	250	1028
Camping and Caravanning	7	97	424
Breakdown by Area			
Afan Valley	29	153	800
Port Talbot	27	304	782
Neath	24	300	685
Swansea Valley	30	119	328
Vale of Neath	12	55	201
Upper Amman Valley	6	17	65
Dulais Valley	4	14	26

47. In total, across the whole of Neath Port Talbot, there are currently 2,887 bed spaces available within 962 individual bedrooms/units or pitches. There are a total of 132 individual accommodation operators/ businesses offering accommodation across the county.
48. There appears to be a fairly even spread of bed spaces between urban and valleys areas. In total there are 1,420 bed spaces in valleys areas in comparison to 1,467 in urban areas.
49. In valleys areas, although there is some serviced provision, there is a dominance of accommodation within the self-catering sector. In urban areas (i.e. the towns and residential areas of Port Talbot and Neath) there is a dominance of serviced accommodation.
50. The serviced (hotel/ B&B) accommodation offer within Neath Port Talbot accounts for the highest proportion of bed spaces (1,435) which consist of a number of large hotels and some smaller B&B or guest house style accommodation.
51. The self-catering sector (cottages/ cabins/ houses) account for the highest number of individual operators, with 94 operators (offering 1,028 bed spaces) in this sector. This accommodation sector ranges

from individual operators offering multiple units to those who offer only single accommodation units.

52. There is a significant number of self-catering properties across Neath Port Talbot which are advertised via AirBnB (there are 300+ units listed on AirBnB website). However, as many established accommodation operators use AirBnB as a promotional or booking platform in the same way that they may also use multiple other platforms such as booking.com, hotel.com or a self-catering accommodation agency, it is not possible to identify those properties that operate exclusively as AirBnB's within the county.
53. Given the rise in demand which has been widely reported within the camping and caravanning sectors within Wales, there does not appear to be sufficient provision for touring caravan/ camper van provision within the county at the present time. This could therefore limit our ability to take advantage of the potential to increase stays within this market.
54. The area with the highest concentration of bed spaces is the Afan Valley where the majority of the accommodation offer is in the self-catering sector.
55. Due to the pandemic and historically low levels of industry participation in occupancy surveys (which identify the number of actual stays/ bookings) within Neath Port Talbot, we do not have accurate occupancy data available which would allow us to evaluate any potential over or under supply of accommodation within the county.
56. We will be working with Visit Wales over the next 12 months as changes are due to be made in the way that occupancy data is collected which should provide us with a more detailed picture in future.
57. **The Impact Of Tourism On The Local Economy**
Each year the Tourism Team collects data relating to visitor numbers and stays in the area to feed into the STEAM (Scarborough Tourism Activity Monitor) model. The STEAM model measures the volume and value of the tourism sector to the local economy.
58. Within the January 2021 Tourism Update report which was presented to the Regeneration and Sustainable Development Scrutiny Committee on 5th February 2021, a summary of the STEAM results for the period January to October 2020 was provided.

59. We were able to provide this update earlier than usual as a special analysis had been undertaken by the contractor in order to provide initial feedback on the impact of the pandemic upon the sector.
60. The 2021 STEAM data is now subject to normal timescales and will therefore be due in April/May 2022. However, we are now in possession of the full year figures for 2020, as summarised below.
61. The STEAM results for the period **January 2020 to December 2020**, when compared to 2019, show that;
- The number of visitors overall to Neath Port Talbot **decreased by 53%** to **710,000** visitors. This represents a decrease of **796,000** visitors in total.
 - The economic impact of tourism within the Neath Port Talbot economy **decreased by 59%** to £54.05 million (this represents a decrease of £78.73 million)
 - The number of jobs supported by the tourism sector within Neath Port Talbot decreased by 34% to 1,073 jobs (this represents a decrease of 553 jobs). Without furlough arrangements the decrease in employment may have been significantly higher.
62. During 2021 it is highly likely that the indicators measured above will show signs of recovery, however as we go into 2022 there will be continued uncertainties for the tourism/ hospitality as a result of the ongoing pandemic and the emergence of the Omicron variant.

Ongoing Impact of Covid-19 on the Tourism Sector

63. Whilst businesses within the tourism/ hospitality sectors have generally reported high levels of bookings during 2021 there continues to be significant challenges for the sector.
64. Particular challenges include being unable to recruit sufficient numbers of staff to enable businesses to operate at full capacity and the impact of ongoing uncertainties as businesses attempt to recoup losses from previous national and local lock down periods.
65. Due to the emergence of the Omicron Covid 19 variant, at the time of writing it is not clear what conditions the tourism/ hospitality sector

will be operating in during 2022. Any limits on the number of people who can meet indoors will impact significantly upon the sector and its ongoing recovery.

66. The Tourism Team will continue to assist the tourism sector in navigating Covid-19 guidance and any wider support streams which become available.

Financial Impacts

67. None. The financial impacts of the projects and initiatives listed within this report have been addressed in separate reports to Members.

Integrated Impact Assessment

68. An IIA is not required to accompany this report as the purpose of the report is for the information of Members rather than for decision. The projects/ initiatives listed within this report have been the subject of individual board reports whereby IIAs have been completed.

Valleys Communities Impacts

69. There will be a positive impact on valleys communities as the ongoing recovery and future growth of the tourism sector in the area will support the local economy.

Workforce Impacts

70. None.

Legal Impacts

71. None

Risk Management Impacts

72. None.

Consultation

73. There is no requirement for external consultation on this matter.

Recommendations

74. That Members note the progress against agreed outputs in the destination marketing campaign, the updates on the activities of the NPT Tourism Team and the available data summarised within this report.

Appendices

75. None.

List of Background Papers

76. Aberavon Seafront Changing Place and Access Enhancements Project. Urgency Action, 20/08/2021
77. Proposed Waterfall Country Park and Ride Pilot, Regeneration and Sustainable Development Cabinet Board 14/05/21
78. Tourism Update Report 2021, Regeneration and Sustainable Development Scrutiny Committee, 05/02/2021
79. Afan Forest Park Visitor Centre Valleys Regional Park Gateway Project, Cabinet Board, 11/11/20
80. Neath Port Talbot Discovery Clusters Marketing Campaign, Regeneration and Sustainable Development Cabinet Board, 07/06/19.
81. Gnoll Estate Country Park Masterplan, Cabinet Board, 25/11/20

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