

**Neath Port Talbot
Destination Management Plan
2015 to 2020**

DRAFT

Contents

- 1.0 Introduction
- 2.0 Strategic Context
- 3.0 The Visitor Economy in Neath Port Talbot
- 4.0 Neath Port Talbot SWOT Analysis
- 5.0 Aim and Objectives
- 6.0 Partnership and Delivery Structure
- 7.0 Action Plan

DRAFT

1.0 Introduction

Destination Management is the process which co-ordinates all aspects of a designated area that contribute to a visitor's experience and takes into account the needs of visitors, local businesses, residents and the environment.

A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of different stakeholders and identifying the clear actions that they will take.

In 2013, the Welsh tourism sector was estimated to have contributed around £3.1bn to Wales' GDP¹. If efficiently planned and managed, the visitor economy has the potential to be one of the largest contributors to economic growth in the Swansea Bay City Region, as it has a substantial impact on the local economy through the direct industry (visitor spending) and through the visitor economy (multiplier effects through the supply chain).

Why does Neath Port Talbot need a Destination Management Plan?

- To demonstrate that Neath Port Talbot County Borough Council is committed to supporting the visitor economy in the County Borough through:
 - The development of strategic projects for economic growth, and
 - Business development, support and engagement
- To establish a partnership between the Council and key stakeholders which will ensure visitor economy activities are delivered in a coordinated and collaborative manner
- To steer resources to ensure a high quality visitor experience is maintained
- To maximise the opportunities for economic growth within the County Borough

2.0 Strategic Context

At the national level, Tourism has been recognised by the Welsh Government as one of the nine key sectors of the economy. Its strategy for tourism 2013-2020 'Partnership for Growth' identifies Destination Management as fundamental in helping to improve the visitor appeal of tourism destinations throughout Wales. The principles set out in Visit Wales' Developing the Visitor Economy: A Charter for Wales 2009, provide clear terms of reference for Destination Management arrangements in Wales and identifies a key role for local authorities in leading the preparation of local destination plans and the establishment of local destination partnerships.

At the regional level, the South West Wales Tourism Partnership (SWWTP) was responsible for delivering the national tourism strategy at the regional level and worked with key stakeholders, including local authorities and the tourism industry, to drive sustainable growth in tourism. As part of its remit, SWWTP commissioned a regional tourism strategy that was closely aligned with the priorities of the national tourism strategy. Since October 2014, Visit Wales has set up regional engagement teams, which continue to deliver support at a local level.

¹ Deloitte – Tourism: jobs and growth. The economic contribution of the tourism economy in the UK. November 2013

The Swansea Bay City Region Economic Regeneration Strategy 2013 - 2030 recognises the importance of tourism to the regional economy and identifies it as one of the key sectors with significant potential for growth.

3.0 The Visitor Economy in Neath Port Talbot

Table 1: The Growth of the Visitor Economy in Neath Port Talbot

	2007	2008	2009	2010	2011	2012	2013
Visitor Expenditure - contribution to local economy (£'s Millions)	91.1	91.1	96.3	94.7	95.6	99.6	97.93
Visitors (Millions)	1,350	1,341	1,443	1,355	1,374	1,458	1,375
Employment supported (Full Time Equivalents)	1,554	1,561	1,628	1,602	1,585	1,637	1,574
Source: Scarborough Tourism Economic Activity Monitor Final Trend Report 2002 - 2013 20th June 2014							

Over the past ten years NEATH PORT TALBOTCBC has secured investment in visitor economy infrastructure which has benefited both residents and visitors. As a result of this investment the visitor economy is now a growing sector of the local economy.

The figures in Table 1 demonstrate the growth of the visitor economy in Neath Port Talbot since 2007.

Specific investment has been made in mountain biking trails and facilities in Afan Forest Park and this is now one of the best established areas for mountain biking within the UK. In particular investment through the Cognation mtb Trails South Wales project has further strengthened the mountain biking product across the region, creating one of the most exciting mountain biking destinations in the world.

Through the delivery of tourism projects funded via the Rural Development Plan (RDP), the Welsh Government's Western Valleys Strategic Regeneration Area (SRA) and through European Convergence funding we have built upon the capacity of the wider Neath Port Talbot area to cater for visitors. The main objective of this investment is to spread the economic benefit of tourism throughout the County Borough.

Visitors to NEATH PORT TALBOT can be summarised as follows:

- NEATH PORT TALBOT attracts a greater proportion of day visitors than seen in Wales overall. This is due to the proximity of the County Borough to Swansea, Gower and the Brecon Beacons National Park and highlights that the day visitor market cannot be underestimated as a key target for the area.

- Short breaks constitute a high proportion of the staying visitors in NEATH PORT TALBOT.
- NEATH PORT TALBOT attracts a younger profile of visitors than the Wales average. This is largely due to the mountain biking facilities and trails in Afan Forest Park.

NEATH PORT TALBOT's proximity to well known destinations in Gower and Brecon Beacons National Park is a significant factor contributing to the strong day visitor market in the County Borough. A key opportunity for NEATH PORT TALBOT is to convert these day visitors to staying visitors so that they use accommodation within the County Borough and so spend more money in the local economy.

There are opportunities to increase the amount of money that day visitors and staying visitors spend while they are in Neath Port Talbot. In order to maximise visitor spending, further work is required in matching both the private sector and third sector to specific retail and accommodation development opportunities to create more places for visitors to buy souvenirs, have a meal/ snack, buy supplies etc.

As a result of mountain biking growth in Afan Forest Park, the area attracts fairly affluent but 'niche' mountain biking visitors. These are mainly individuals or groups rather than families however this demographic may change due to the investment of family friendly trails that have been introduced through Cognation mtb trails South Wales.

Families have the potential to make a wider economic impact across the whole of the County Borough as they look for a wider range of activities and attractions at a destination and have the potential to spend more money. Enhanced promotion of the range of things to see and do in the area, specifically aimed at families will be required to actively target this visitor market.

4.0 Neath Port Talbot SWOT Analysis

This SWOT analysis was developed in conjunction with stakeholders utilising key sources of information, including STEAM and the Think Links, Think Rural, Think Sustainability Final Report.

Strengths

- Capacity to host large national sporting events (Afan Forest Park and Margam Country Park).
- Wide range of historic attractions (from Bronze Age burial mounds through to WW2 watch points).
- Strategically located as the gateway to Swansea Bay from the East.
- Excellent transport road links via M4 and A465 to nationally important tourism areas at Swansea, Cardiff, Carmarthen and Brecon.
- Excellent rail links to UK Cities including Cardiff and London.
- 3 town centres provide key facilities to whole NEATH PORT TALBOT areas – close proximity to town centres
- Excellent 'sense of place' from local and friendly tourism businesses.

- World known as a mountain bike visitor destination.
- Part of the wider Swansea Bay tourism offering

Weaknesses

- Poor quality of visitor experience at NEATH PORT TALBOTCBC attractions, particularly Margam Park and Cefn Coed Colliery Museum
- Limited disabled access at many visitor attractions e.g. Cefn Coed Colliery Museum
- Lack of a clear unique selling point.
- Lack of strategic focus, many tourism focused businesses work independently from each other.
- Limited maintenance of tourism facilities and signage gives a poor impression (walking paths not maintained, rights of way signage missing etc).
- Current minimum maintenance of cycleways and related structures.
- Low use of digital media from businesses and attractions
- Limited weekend public transport provision to key tourism attractions
- Lack of a lead organisation to strategically coordinate tourism in the area
- Lack of tourism innovation in the area to embrace new technologies and new tourism product offering.
- Limited range of accommodation categories
- No clear sense of arrival in NEATH PORT TALBOT from all directions – no welcoming gateways
- Limited car parking facilities at key tourism locations e.g. waterfall country, Richard Burton trails, NEATH PORT TALBOT Coast Path etc.
- High volume of red tape and lack of support from landowners for sports provision e.g. rock climbing, river developments and mountain walks.
- Tree disease 'Phytophthora Ramorum' depleting the local forests and continuing with new cases confirmed at Margam Park.
- Lack of investment and strategic thinking from key local landowners including Woodland Trust, Natural Resources Wales and NEATH PORT TALBOTCBC.
- Heavy reliance on EU and Lottery funding to develop new attractions and facilities
- Reliance on seasonal business
- No destination marketing support or investment by NEATH PORT TALBOTCBC
- Lack of NEATH PORT TALBOT tourism product on www.visitswanseabay.com

Opportunities

- Accommodation development to improve quality assurance star gradings
- Improve the visitor experience at key attractions eg Margam Park
- Develop key sites as potential venues for large events
- Package visitor experiences - walking breaks, mountain biking breaks, activity breaks, which will help address issues of seasonality
- Provision of tourist information
- Involvement in the Swansea Bay City Region

- New Swansea University campus on Fabian Way – opportunities for promotion of tourism products to staff and students, as well as the “visiting friends & family” market
- The continuing decrease in consumer spending is extending the ‘staycation’ culture, which provides an opportunity to attract new markets.
- Increasing investment in broadband will create opportunities for local tourism businesses to be more connected to customers and can increase promotional opportunities.
- Increasing local investments from wind farms can increase tourism investments and projects.
- Investment in the physical regeneration key tourism sites.
- Electrification of the Swansea to London rail line could decrease visitor travelling times along M4 corridor and Valleys to NEATH PORT TALBOT.
- Swansea Bay Tidal Lagoon can increase visitors to Briton Ferry area and provide a new and unique visitor attraction
- Opportunity to work closely with City & County of Swansea and align DMP objectives to the Swansea DMP
- Access to Visit Wales’ Regional Tourism Engagement Fund
- Engagement with NEATH PORT TALBOT College to promote tourism/hospitality careers

Threats

- Pressure on NEATH PORT TALBOT CBC budgets to reduce services which will have a negative impact on the visitor economy.
- Increasing use of wind farms locally impacting on scenic views across NEATH PORT TALBOT.
- Changing Ministers in WG can change tourism priorities
- More positive promotion of Swansea than NEATH PORT TALBOT in local media
- Poor air quality due to industrial landscape
- High levels of local deprivation resulting in low spending at attractions from NEATH PORT TALBOT day visitor market.
- Increasing health and safety legislation seen as a barrier to extreme sports provision.

5.0 Aim and Objectives

Aim

To maximise the potential for growth in the Neath Port Talbot visitor economy, through the adoption of a strategic approach to the management and maintenance of a high quality visitor experience.

In order to achieve this aim, it is important to appreciate the elements that contribute to the visitor experience, including:

- accommodation
- places and attractions visited
- activities and entertainments
- food and drink
- people encountered

- transport used
- ways information was obtained
- tourism businesses

The above list should be considered along with other elements that add to the overall experience, such as transport infrastructure, ICT/broadband provision, place management, customer care, supply chain management, arts and culture, land use planning and retailing.

When visitors spend their time and money in a destination they do not purchase a tangible product that can be taken home with them – they buy an experience, which ultimately is a collection of memories of the time spent in that destination. A poor or mediocre experience in any element of the visit could have implications for other businesses. So, there is an inter-dependence between businesses and all those involved in the delivery of the above elements to ensure the visitor experience is of the highest possible quality.

Objectives

- Increase the contribution that visitor spending and the visitor economy makes to the local economy of Neath Port Talbot
- Establish Neath Port Talbot as a destination which consistently delivers a high quality visitor experience
- Develop a partnership of key tourism stakeholders to steer the management of the destination

Priority areas of activity

In order to achieve the aim and objectives, the following areas of activity have been prioritised:

- Place Building
 - Maintain a high quality infrastructure and public realm to meet the needs of visitors and local residents
 - Improve the quality of the visitor experience through the development of a distinctive sense of place, which will encourage people to visit and recommend to others
 - Explore investment opportunities for the regeneration of key strategic sites
- Product Development
 - Stimulate investment in high quality accommodation, attractions and activities
 - Encourage participation in quality assurance schemes
 - Work with partners to grow existing products and to develop new ones
 - Support operators to tackle issues of seasonality
 - Establish Margam Park as a prime venue for major events
- Promotion
 - Adopt a product led approach to marketing, building on the strength of our existing products
 - Focus on the high quality of the offering in the County Borough

- Target markets with most growth potential
- Align marketing activity with Visit Wales yearly themes
- Work with partners to develop a brand identity that can be adopted for use by all stakeholders
- People
 - Work with partners to develop a network of key visitor economy stakeholders to facilitate engagement and participation in the destination management of Neath Port Talbot
 - Encourage operators to participate in relevant training and staff development opportunities

6.0 Partnership and Delivery Structure

Partners

The success of this DMP will be determined by the effectiveness of the partnership developed to deliver it. The key partners are:

Internal	External
NEATH PORT TALBOT CBC's departments: Business support Property and regeneration Highways Transport Planning Countryside and biodiversity Streetcare services Communications European and external funding	Tourism Swansea Bay Visit Wales / Welsh Government The National Trust Natural Resources Wales Rural Development Plan Partnership NEATH PORT TALBOT Trade Engagement Group Swansea Bay City Region

Delivery Structure

A Steering Group has been established to lead on supporting the visitor economy in Neath Port Talbot. This Steering Group will meet quarterly and includes:

- NEATH PORT TALBOTCBC Director of Environment
- NEATH PORT TALBOTCBC Head of Service for Streetcare
- NEATH PORT TALBOTCBC Head of Service for Planning
- NEATH PORT TALBOTCBC Head of Service for Property & Regeneration
- Chair of Tourism Swansea Bay
- Visit Wales Regional Tourism Engagement Manager
- The National Trust
- Natural Resource Wales

Working groups will be established to deliver the activities identified within the DMP's action plan. The working groups comprise NEATH PORT TALBOTCBC Officers, Tourism Swansea Bay, and representatives from the private and third sector, as appropriate.

Tourism Swansea Bay has developed the local tourism stakeholder groups, originally established by the NEATH PORT TALBOT Tourism Team, into one county wide trade engagement group, where all interested businesses and organisations can engage and play a role in the delivery of the DMP's action plan. This engagement helps ensure that the local community and local visitor economy continue to work together to develop the visitor economy in a strategic manner. This NEATH PORT TALBOT Trade Engagement Group meets on a quarterly basis, and will feed in to the steering group.

7.0 Action Plan

A "bottom up" approach has been adopted for the development of this action plan to ensure the needs of the visitor economy and the NEATH PORT TALBOT trade are at its core. The plan has been developed in partnership with Tourism Swansea Bay and the NEATH PORT TALBOT Trade Engagement Group, along with the internal NEATH PORT TALBOTCBC partners identified in Section 6.0 of the DMP.

The aim of the plan is to identify actions that will contribute to the achievement of the aim and objectives identified in Section 5.0 of this DMP. It will also ascertain who will be responsible for delivering each action.

This action plan will be reviewed on a six monthly basis and feedback from key stakeholders will be used to update and report on progress. There will be a clearly defined structure to the communication between the Steering Group, Delivery Groups and NEATH PORT TALBOT Trade Engagement Group to ensure a robust process.

Detailed action plan to follow.