
REVIEW OF TOURISM SUPPORT IN NEATH PORT TALBOT



JANUARY 2017

Neath Port Talbot County Borough Council

CONTENTS

CHAIR'S FOREWORD

BACKGROUND & CONTEXT

APPROACH

KEY EVIDENCE

CONCLUSIONS

RECOMMENDATIONS

CHAIR'S FOREWORD

The County of Neath Port Talbot is uniquely placed as a visitor destination. A wealth of natural resources and attractions provide something for everybody, from young families to the more adventurous activity-tourists. Its location makes it easily accessible for visitors from across the UK as well as from overseas and well-placed as a base from which to explore other parts of south and mid Wales.

The Scrutiny Committee recognises the importance of the contribution that the visitor economy makes to the development and sustainability of the local economy. The Committee has regularly monitored activities in the tourism sector, and in 2016, decided that it was timely to review the impact of the Council's decision to disband the tourism team.

This report represents the work of the Task and Finish group undertaken over a period of several months, and considered a wide range of views and opinions from numerous individuals, organisations and stakeholders, who either made their representations in person, or provided their submissions in writing.

I would like to take the opportunity to thank those who gave their time and effort to provide their evidence to the review, which assisted the Group Members in understanding their experiences

and expertise. I would also like to thank my Scrutiny colleagues who have shown a real commitment in addressing the objectives set out at the start of the review.

I hope our conclusions will play an important role in shaping how tourism in Neath Port Talbot is supported in the future, so that we can continue to develop and build on the facilities and attractions the County has to offer, and promote it as an attractive destination to an ever wider audience of visitors.

Councillor A Llewelyn
Chair

Background and Context

The tourism sector is an extremely important part of the economy for Neath Port Talbot and in 2015 it contributed £110m to the local economy, attracted 1,530,000 visitors and supported 1,583 jobs in the local area.

The Council like all Councils across Wales faces significant budget pressures due to reducing budget settlements from the Welsh Government, and the decision to disband the tourism team came as part of the Forward Financial Plan for 2013/2014.

The Economic and Community Regeneration Scrutiny Committee has responsibility for tourism and regularly receives reports from the Economic Development department in relation to the sector. The Committee also receives regular reports in relation to Margam Country Park that is often referred to as the jewel in the crown for tourism in the County Borough. However, the Committee has long held the opinion that Margam Park is one of many other areas within the County Borough that attract tourists. Some examples are Afan Forest Park, Aberavon Seafront and Waterfall Country in the Vale of Neath. The Committee was keen to understand what has been the impact of the loss of the tourism team.

The Committee were aware that the County is often referred to as an industrial County given the location of TATA Steel and with the recent news of the threat to the steel works they were keen to understand how tourism contributes to the County. In addition, they recognised the need to diversify the employment profile of the Borough, and reduce the local economy's reliance on the Steel industry, by promoting growing sectors such as Tourism.

At its meeting in March 2015 the Committee resolved to undertake an in-depth review of the tourism support provided by the Council during the 2016/2017 Civic Year.

At a meeting held in June 2015 the Committee considered a Cabinet Board report that endorsed the Neath Port Talbot Destination Management Plan, which was a 'shared statement of intent to manage a destination over a stated period of time' – taking into account the needs of visitors, local businesses, residents and the environment.

It was noted that a Visit Wales approved Destination Management Plan is also an essential criteria when applying for funding such as Coastal Communities Fund, Visit Wales funding (including European Structural Funds ERDF), Regional Tourism Engagement Fund (RTEF) and Rural Development Plan (RDP). It should be noted that all local authorities are required to develop and publish a DMP.

The former tourism team had previously been responsible for developing Neath Port Talbot's Destination Management Plan; however it was not completed before the team was disbanded. The European and External Funding team therefore completed the Destination Management Plan, consulting with stakeholders and ensuring that it was aligned to the Visit Wales' Partnership for Growth strategy. It was approved by Visit Wales and signed off by Council in June 2015.

In April 2016, responsibility for the delivery of the Destination Management Plan passed to the Regeneration & Economic Development Team who had demonstrated a successful track record in sourcing external funding and helping to develop the tourism economy, through their work on Aberavon Seafront in particular.

APPROACH

At the initial meeting the scope of the review was discussed and agreed. The elected members who volunteered to sit on the review were

- Cllr. A Llewelyn (Chair)
- Cllr. A Taylor
- Cllr. S Paddison
- Cllr. A Jenkins
- Cllr. C Morgans

The review was completed over 5 meetings and considered a wide range of information from a number of sources including a specific

online survey and key information from key stakeholders who were invited to meetings.

The survey considered a number of key questions and was circulated to a number of key external stakeholders. A total of 34 responses were received and a summary of the responses can be found at Appendix One.

The remaining information considered at meetings of the review group was gathered from the following stakeholders:

Internal Stakeholders

Mr Andrew Collins (NPTCBC Officer)
Mrs Karleigh Davies (NPTCBC Officer)
Miss Sarah Fowler (NPTCBC Officer)
Mrs Julie Davies (NPTCBC Officer)

External Stakeholders

Mr G Evans (Visit Wales – Welsh Government)
Mr P Abraham (Visit Wales – Welsh Government)
Mr A Shufflebotham (Neath Inspired)
Mr R Bowen (Swansea Valley Holiday Cottages)
Mr M Lyddon (Neath and Tennant Canal Trust)
Mrs C Lewis (Tourism Swansea Bay Trade Association)

A number of other stakeholders were invited but were unable to attend a meeting they were given the option to provide a written submission but this was not forthcoming.

KEY EVIDENCE

To ensure consistency across the review all stakeholders were asked similar questions to ensure that the evidence was balanced and to allow the group to make tangible recommendations if possible.

It was clear that the disbanding of the tourism team had had a significant negative effect on the sector. Particularly, the level of funding that could be sourced to assist tourism destinations to attract visitors. This was the same for tourism attractions owned by the Council. It was agreed that officer support was available to provide limited assistance, but this was of a general nature and not to the level of knowledge previously provided or needed.

External Stakeholders

Visit Wales were quite clear that there had been a certain level of disappointment when they heard the decision of Neath Port Talbot

CBC to disband the tourism team and whilst they are there to support Councils they will concentrate on those where there is a dedicated resource to take forward initiatives particularly as Visit Wales are providing the funding to support these projects. Consequently, Councils need to demonstrate a clear commitment to support the development of tourism before Visit Wales consider providing funding.

In addition, Visit Wales stressed the importance of delivering on the Destination Management Plan as this was a key requirement of attracting visitors to a particular area. Members of the review were provided with information in relation to the funding that had been secured, prior to the Tourism team being disbanded. The funding can be found at Appendix Two.

The review was informed that whilst there were specific attractions that were a magnet for tourists there were other types of tourist that could be attracted to the area. One example was provided by the Neath Inspired representative who stated that within the County Borough there was a distinct lack of what are termed Coach Tourists where they visit the area on a day trip and spend money in shops in the town. This was the case particularly in Neath because there was no specified parking for coach operators.

Members heard from a private business owner whose family had diversified from farming in 1996 to offer self-catering accommodation and the business has steadily grown over the years and they are planning two more cottages in the near future. Members were advised that the business had attracted visitors from all over the world including Australia and New Zealand. Members were advised that the tourism team had been essential in establishing the business as they had helped them complete applications for funding and assisted in marketing the business.

The representative from Neath Canal Trust was quite clear that the removal of the tourism team had had a detrimental effect on the Neath Canal that is a privately owned canal but has a right of navigation.

Members heard that the canal was now in a state of disrepair in some areas including the two lock gates that had originally been refurbished to assist navigation. The lack of maintenance was also affecting the pleasure cruises that were operated during the summer months and recently the boat had been damaged.

Members had asked whose responsibility it was to undertake the maintenance of the canal and it was stated that it was the Neath Canal Navigation Ltd that had been established by St Modwens as part of the deal for the land at Llandarcy however, it was apparent

that they no longer had funding to continue with the maintenance. It was suggested that this was dereliction of their responsibilities and it was felt that a recommendation should be made in relation to St Modwens and future maintenance.

Tourism Swansea Bay provided information on how they assist tourism in both Swansea and Neath Port Talbot. It was noted that the organisation was now 10 years old and supports and represents businesses of tourism, leisure and hospitality within the area.

They have provided specific training for businesses including customer service and have collaborated with the City and County of Swansea and Neath Port Talbot County Borough Councils as part of the development of their Destination Management Plans.

Tourism Swansea Bay suggested that since the tourism team had disappeared the visitor numbers to key sites such as Aberdulais Falls had plateaued and potentially if the team was still in place the numbers could well have increased.

It was generally agreed that Neath Port Talbot was an ideal location to visit other areas due to its central location. It is ideal for visiting the Gower, Brecon Beacons, Carmarthenshire and even Cardiff given the rail links. In addition it was accepted that Neath Port Talbot is also a destination in its own right and something should be done to reinvigorate the drive to attract tourists.

Survey Feedback

There was a wide range for responses via the online survey ranging from businesses to elected politicians. The initial feedback from the survey was that there was a feeling that tourism had been neglected since the removal of the tourism team. The main issue was that there was a lack of marketing and promotion of the County Borough as a tourist destination.

Respondents also stated that there are untapped areas within the County Borough that could be marketed such as Historical visits and the need to highlight this to the public that the County Borough was not just an industrial area but a heritage site also. The greatest thing on offer was the access that the County Borough allows which can see the public base themselves within the County Borough and visit other parts of South and Mid Wales.

It was noted that there was perceived to be a lack of joined up thinking between different organisations and if this was improved then possibly tourism support would improve. It was also suggested that there was a lack of tourist facilities near specific

sites such as Neath Abbey.

It was generally suggested again that the public perception of the County Borough is that it is an industrial county and an aim going forward must be to overcome this notion and highlight the wide and varying attractions that are within the County Borough.

All respondents recognised the economic benefits of tourism to Neath Port Talbot and whilst the current level is good there is an opportunity to potentially increase job opportunities if tourism is developed further. This not only allows those in employment to spend in the local economy but the increased number of visitors will also spend.

It was apparent that when asked what the respondents were doing to increase visitor numbers they were not solely reliant on the Council or other external assistance but they do their own bit as well. However, it was agreed that with specific targeted tourism support visitor numbers could be increased further. It was also suggested that it was not a business' responsibility to attract visitors to the County Borough but it is their responsibility to keep them in the area.

It was suggested that the County Borough was generally accessible but there could be issues with public transport links to access some areas of the County Borough.

Local Authority Research

As part of the review Members asked for contact to be made with other Councils in Wales to identify the level of support they provide for tourism. There was a wide range of different delivery options across the 10 Councils that responded.

A full list of responses are included at Appendix Four but all those who responded, did have some sort of dedicated support for tourism.

Funding

The review considered the funding that had been secured over a number of years to support tourism in the County Borough and advertise the County Borough as a visitor destination.

Visit Wales provided the review with a list of the levels of funding that had been provided to Neath Port Talbot from 2011 to present day under the different funding streams. The findings highlighted a significant disparity between the amount of tourism funding

secured for the benefit of Neath Port Talbot since the tourism team was disbanded, and the much larger amount of funding secured within other areas of South West Wales during the same period (2014-2016).

A breakdown of the regional funding secured is included at Appendix Three.

Fund	Amount
Tourism Investment Support Scheme	£105,000 (£60,000 of this figure was secured by the previous tourism team in 2011, the remainder was secured by individual businesses)
Regional Tourism Engagement Fund (only available between 2014-2017)	£15k specifically for NPT via Tourism Swansea Bay for trade engagement and business mapping. There were some funding made indirectly available in relation to regional collaborations.
Tourism Product Innovation fund available since 2015 ERDF	£25k for Burn Series, Neath Golf club also received £5k. Of a total of £16.5m for tourism specific projects NPT directly benefited from £2.33m of funding. (all of this funding was secured by the previous tourism team)
Coastal Communities Fund	Out of a total of £2,433,086 of funding NPT directly benefited from £486,725.

The information contained at appendix three of this report highlights the tourism investment secured between 2002 and 2013 and includes external funds secured and Members noted that this funding had been secured whilst the Council had a dedicated tourist resource.

CONCLUSIONS

Following the consideration of all the evidence presented to them the group was able to make some conclusions that in turn have informed the recommendations.

The tourism sector impacts on a number of improvement

objectives contained within the Council's Corporate Improvement Plan for 2016-2019. In the main it addresses the objective Prosperity for All which aims to support and invest in our infrastructure and communities to promote economic growth, regeneration and sustainability, maximise job opportunities and improve access to employment particularly within our valley communities.

Importantly, tourism also embraces many of the cross cutting measures within the Council's Single Integrated Plan including the Anti-Poverty and Health and Wellbeing agenda.

Tourism is one of the Welsh Governments (WG) key priorities because the sector plays a key role in creating a national identity for Wales in the UK and internationally as a place to visit, invest in and as a place to do business. It is essential therefore, that the Council works in partnership with WG as we are an important partner in attracting investment to provide the right infrastructure and amenities to promote the sector.

The decision to disband the Tourism Team was based upon a perception that alternative structures were in place to service the needs of the tourism industry. However, the evidence collected through this review clearly shows that the proposed alternative structures were not able to provide support in the way that it had been envisaged.

As a result of this;

- There has been a significant reduction in the level of funding secured to deliver tourism development within Neath Port Talbot
- We have fallen significantly behind our neighbouring Local Authorities in delivering, and gaining exposure in, destination marketing campaigns; as a result we are now almost 'hidden from view' for potential visitors.
- We are not maximising the potential number of visitors that we could attract to the area, or the money that they would spend in our local economy
- There is reduced revenue for existing businesses, who have the capacity to cater for much larger number of visitors
- There is a lack of incentive for strategic investment and new business start-ups within the tourism sector in Neath Port Talbot
- We are not maximising the potential of the tourism industry to diversify the local economy and create employment.

In addition, there is now a requirement for the Authority to deliver a Destination Management Plan (DMP) for Neath Port Talbot which brings together all stakeholders working within the tourism sector in Neath Port Talbot to steer tourism priorities. Visit Wales has

made it clear in the evidence that they have submitted to this review that they will not support tourism projects in a Local Authority where there is not an effective DMP in place and there is a clear commitment to deliver on its priorities.

Whilst the Neath Port Talbot DMP has been overseen within the Economic Development Team (EDT) since April 2016, there are fundamentally no resources available to deliver and develop the actions within the plan.

The EDT has managed to secure funding via the Rural Development Plan (RDP) to employ a Business Development Officer for the tourism sector, in recognition that there was a gap in the support available to the tourism industry. However, since securing the funding it has become evident that the funding cannot be used to deliver the activities required to fully support and promote the sector as had originally been intended.

In the longer term, external funding, such as RDP, is not sustainable in securing the future growth of the tourism sector due to the short term nature of the funding. A long term, dedicated resource would ensure that we maximise the potential of the tourism sector in diversifying the economy of Neath Port Talbot.

RECOMMENDATIONS

Recommendation One – A dedicated resource is identified to drive forward tourism support

Reasons: the evidence presented to the review was quite clear that the County was lacking support for tourism and this was having a negative knock on effect in securing much needed funding.

It was agreed that the tourism sector requires specialist support and it is suggested that two posts would be required along with a budget to deliver tourism growth. One post would need to be responsible for destination marketing which would promote and raise awareness of the area to potential visitors (i.e. website upkeep, social media, publications etc.). The second post would be responsible for the development of the destination which would involve delivering strategic tourism projects, tourism product development, attracting funding and managing our Destination Management structure. These activities will be vital as the County aims to diversify from its perceived industrial nature to a potential premier tourist destination.

Both roles would sit within the Regeneration and Economic Development department within the Environment Directorate.

Recommendation Two – The Destination Management Plan is considered by the Economic and Community Regeneration Scrutiny Committee on a regular basis to ensure the actions are implemented.

Reasons: We need to ensure that there is sufficient progress in the implementation of the DMP in order to secure the same levels of investment as our neighbouring Local Authorities. Given the evidence received during this review, on the importance of the sector to our economy, it is now even more important that the action plan is monitored regularly. In line with this, Recommendation one (a dedicated resource) would ensure that the DMP is fully implemented and reported.

Recommendation Three – An All Member Seminar is organised to highlight the findings of the review that demonstrates how important the tourism sector is to the County Borough.

Reasons: the initial thoughts on the review of tourism was that it would be a specific item on a formal scrutiny agenda however, during the scoping it became apparent that a wider review would be required and due to the amount and level of evidence that was considered it was agreed that this information needs to be shared with all Members.

Recommendation Four – A letter is written and sent to St Modwens to establish what they understand their responsibilities are in relation to Neath Canal and stress the importance of the maintenance that is required.

Reasons: it was clear from the submission from a representative of Neath Canal Navigation Ltd that there is a clear lack of maintenance of the canal and this is jeopardising the future attraction of this site.