Cyngor Castell-nedd Port Talbot
Neath Port Talbot Council

Neath Port Talbot Destination Management Plan

2023 – 2028

NEATH
PORT TALBOT
The Dramatic Heart of Wales

Contents

Summary – DMP on a Page

NEATH PORT TALBOT

Long term growth: Visitor economy has grown by more than 14% between 2010 and 2019.

Jobs: More than 1,600 FTE (2019).

Visits: More than 1.5 m visits representing more than 2m visitor days and nights (2019).

Visitors: Day visitors account for 68% of visits. Staying visitors account for 16% of visits.

Visitor Spend: Staying visitors spend £395.97 per trip whereas day visitors spend £25.81 per trip on average.

Product: The combination of the coast, countryside provide basis for strong activity offer.

WHAT WE HAVE HEARD

Strengths:
- Varied natural landscape.
- Afan Forest Park and Waterfall Country as key visitor hubs.
- New 'Dramatic Heart of Wales' brand identity.
- Recent funding successes.

Weaknesses:
- Lack of high quality accommodation.
- Nearby competition (Gower and Brecon Beacons).
- Limited resourcing of tourism function.
- External perceptions of the area.

Opportunities:
- Pipeline investment into catalyst projects.
- Potential to develop heritage and culture offer.
- Create a vibrant events programme.
- Integrate communities into visitor management plans.
- Develop coastal offer.

Threats:
- External economic factors.
- Regulatory changes for sector.
- Growth in overseas holiday taking.
- Staffing and recruitment issues in tourism sector.

MARKET TRENDS

Sector survival, recovery and growth

Demand for outdoor-based experiences

Localism and authentic experiences

Adaptable adventure

Sustainable and responsible tourism

Increasing use of technology

VISION

Neath Port Talbot is a vibrant, year-round, destination of choice where visitors can stay and enjoy high quality, authentic experiences and also acts as a gateway to the wider south Wales region.

Following post-pandemic recovery, tourism is now making an increasingly important contribution to the economic, social, cultural and environmental sustainability of the County Borough.

The Dramatic Heart of Wales brand is established in the UK marketplace and the destination's visitor economy is growing each year at 1% above the average of its neighbours.

STRATEGIC PRIORITIES – NEATH PORT TALBOT: AN ALTERNATIVE DESTINATION

1. Developing a distinctive and responsible destination

2. Transforming awareness and perceptions of the area

3. Supporting thriving businesses and workforce

4. Vibrant communities

5. Promoting sustainable and active travel

6. Working in partnership more effectively

Introduction

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1.0 Introduction

The Neath Port Talbot Destination Management Plan (DMP) sets out the blueprint for how the county intends to sustain, grow and manage its visitor economy between 2023 and 2028. The DMP is a shared statement of intent to develop tourism in Neath Port Talbot to deliver exceptional experiences and transform people's perception of our diverse and distinctively different area. The DMP recognises the economic and social value of tourism, articulating the role of different stakeholders and identifying priority actions that reflect resources.

Despite the real challenges brought on by the Covid-19 pandemic and cost-of-living crisis, this is an exciting period for the visitor economy in Neath Port Talbot. As detailed in this plan, substantial public and private sector investment will underpin the sector's recovery from the pandemic and will provide impetus and direction for future growth, helping to build resilience and raise awareness of Neath Port Talbot as a quality, 'alternative' tourism destination. The visitor economy in Neath Port Talbot is on the cusp of transformation driven by visionary ambition and major public and private sector investment. The new £300m Wildfox Adventure Resort driven by the private sector together with the 'Levelling Up' fund success and funding commitments from the Council's Shared Prosperity Fund will be a game-changer in boosting the visitor offer. A focus of the DMP is to support effective delivery of these catalyst projects in a way that benefits all communities in Neath Port Talbot.

As a county borough, Neath Port Talbot faces long-standing challenges. However, building on our unique asset base and under the leadership of the County Borough, a new partnership is emerging to drive inclusive, responsible growth for the visitor economy. As such, the DMP articulates visitor economy priorities and reflects the needs and opportunities of the sector.

The DMP is intended to be a living document that will be periodically reviewed to take into account new opportunities, the operating environment and market considerations.

Vision

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2.0 Vision

Our vision for the future of tourism in the borough for the next 5 years is set out below:

Neath Port Talbot is a vibrant, year-round, destination of choice where visitors can stay and enjoy high quality, authentic experiences and also acts as a gateway to the wider south Wales region. Following post-pandemic recovery, tourism is now making an increasingly important contribution to the economic, social, cultural and environmental sustainability of the County Borough. The Dramatic Heart of Wales brand is established in the UK marketplace and the destination's visitor economy is growing each year at 1% above the average of its neighbours.

Alongside the vision, the Destination Management Plan will be framed by three cross-cutting principles:

- **Responsible tourism**: Contributing to a net-zero emissions county for the benefit of our environment, our people and our prosperity.

- **Inclusive growth**: Ensuring that tourism benefits every person that lives and works in Neath Port Talbot.

- **Collaboration and partnerships**: Creating a shared action plan between private and public partners (including Visit Wales) and our communities.

We will be a destination that:

- Is seen as distinctively different from others in Wales while providing a range of good quality accommodation, places to visit and things to do.

- Makes the most of our location on Wales' primary transport routes where visitors can stay and easily explore the wider South Wales region.

- Is proud of our unique story and cultural connections within and beyond Wales which resonate with residents and visitors alike.

- Offers exceptional experiences based on our rich heritage, culture and stunning coast and countryside, which fully deliver on the '**Dramatic Heart of Wales**' promise.

- Warmly welcomes visitors and respects their individual needs.

Neath Port Talbot Today

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3.0 Neath Port Talbot Today

Facts and Figures

The area's natural environment, coupled with strong elements of cultural and industrial heritage, are the County Borough's main strengths as a tourist destination. Neath Port Talbot has seen significant investment in tourism infrastructure over the last ten years and it has developed as a destination and continues to grow its market presence and product offering.

In terms of the visitor economy, the underlying long term trend data is positive for Neath Port Talbot County Borough. Looking at the ten-year period from 2010 to 2019, visitor days and visitor numbers (combining day trips and overnight stays) have both increased by more than 11% and direct expenditure and economic impact have both increased by more than 14%. The graphic opposite highlights the key performance indicators for the sector in the County Borough for 2019. This is used as it is the most recent year prior to Covid-19.

Neath Port Talbot's VISITOR ECONOMY 2019*

A total of **1.51 million Tourism Visits,** equating to 10.3% of all tourism visits to South West Wales

A total of **£129.3 million** was generated within the local economy through visitor and tourism business expenditure

1.15 million tourism visits made by **Day Visitors** to the County Borough

In total, **staying visitors** generate a total economic **Impact** of **£85.59 million** for the businesses and communities of Neath Port Talbot

Visitors to the County Borough supported **1,626 active full time equivalent jobs**

Between 2010 and 2019, **Visitor Numbers increased by 11.1%**

Total bedstock in Neath Port Talbot is 2,887 beds Comprising 1,435 serviced beds, 1,028 non-serviced and 424 camping and caravanning spaces

Day Visits generated **£43.72 million** for the local economy of Neath Port Talbot in 2019

Economic Impact grew by +14.8% between 2010 and 2019

2.07 million Visitor Days and Nights generated by visitors in 2019

0.36 million visits were made by visitors staying in **Neath Port Talbot** as part of a holiday or short break, generating **0.92 million nights** in accommodation across the County Borough

* The last full year Pre-Covid-19

Source: STEAM and CBSCNPT

Impact of Covid-19 on volume and value

The pandemic has had a sharp downward impact on Neath Port Talbot with major reductions in volume and value. The staying visitor market in particular has experienced a substantial fall. The pattern is less pronounced for day visitors which experienced a lower reduction in 2020 and a faster recovery in 2021 and economic impact where the substantial drop in 2020 has only partially been recovered in 2021. Employment levels dropped sharply in 2020 (down by more than a third at -34%) and only showed a small recovery in 2021 of just over 1%. Despite the staycation 'bounce', there is no doubt that the past 2-3 years have proved to be difficult trading conditions for most parties in the tourism sector. The focus for the tourism sector in the immediate term is to support business resilience and to foster future growth once the recovery returns to pre-pandemic levels.

Visitor profile

The Neath Port Talbot Visitor Survey in 2022[1] identified that 60% of respondents felt they had wanted to enjoy the landscape, countryside and beaches on offer within the county, which had increased considerably from 47% when the research carried out in 2017. The main reason for visiting Neath Port Talbot for two thirds of visitors (65%) was to take part in outdoor or sporting activities (increasing slightly since 2017).

Overall, Neath Port Talbot attracted slightly older visitors in 2022 compared to 2017, as the proportion of children and younger visitors had decreased slightly in 2022. The proportion of older visitors aged 55 and over had increased in 2022 compared with 2017. Visitors tended more towards the ABC1 socio-economic groups (67%) than C2DE (33%), which was also the case in 2017; however, the proportion of AB visitors had doubled since 2017. Almost a quarter of visitors also came to Neath Port Talbot with a dog.

Two thirds (65%) of visitors to Neath Port Talbot in 2022 came from Wales, while almost a third (31%) came from England. Only 1% came from other countries in the UK and a further 3% came from overseas. Since 2017, there had been an increase in the proportion of visitors coming from Wales and a decrease in the proportion of visitors from England. However, the proportion of overseas visitors was consistent with pre-pandemic levels (3%). As in 2017, the highest proportion of Welsh visitors came from neighbouring Bridgend (25% cf. 20% in 2017). This was closely followed by Swansea (22% cf. 19% in 2017) and Rhondda Cynon Taf (17% cf. 16% in 2017). Almost three quarters of visitors were familiar with Neath Port Talbot; 73% were repeat visitors, with just over a quarter visiting for the first time.

1. Research Report, Neath Port Talbot, Visitor Survey 2022. Beaufort Research.

Market trends

The Neath Port Talbot Destination Management Plan will need to respond to market trends and changes in consumer behaviours, particularly as the sector continues to recover following the pandemic. Some of the key trends include:

- Localism and a desire to experience authentic experiences.

- Growing environmental awareness and interest in sustainable eco travel.

- Pet friendly travel.

- The rise of 'work-and-play-cations'.

- Rise in active holidays, which can create hotspots and overcrowding.

- Value for money plays an important role in choosing a destination.

- Fast reliable internet connectivity is expected and online booking for attractions, restaurants etc has now been normalised. This is leading to a shift from printed marketing to digital marketing.

Strategic and policy context

At a national level, Welsh Government has committed to support the four 'foundation' sectors of the Wales economy – tourism, food, retail and care – acknowledging that for some parts of Wales the foundation sectors are the local economy. The strategic emphasis is focused on five interconnected themes, all of which are important to Neath Port Talbot:

- Recovery and resilience.

- Net Zero and decarbonisation.

- Technology change.

- Changing environment for public investment.

- Recruitment and retention.

The Welsh Government is consulting on a number of key policy areas which could impact on the tourism sector, for example, the potential visitor levy and the statutory licensing scheme for visitor accommodation, changes to the Non-Domestic Business Rate (e.g., for self-catering properties) and revisions to the structure of the school year. The changes to the policy landscape are at an early stage but it will be important that the DMP builds in flexibility to adapt to a new policy landscape.

In addition, the DMP will needs to play a positive role in meeting the strategic objective set out in the **Well-being of Future Generations (Wales) Act** of improving social, economic, environmental and cultural well-being in the its seven wellbeing goals. A critical element is focussed on **sustainable development**. The design and delivery of the Destination Management Plan will need to reflect a sustainable and responsible approach toward tourism related development and marketing.

The ambition in the national **Tourism Action Plan, Welcome to Wales (WTW)** is 'to grow tourism for the good of Wales', balancing economic growth, environmental sustainability, social and cultural enrichment, health benefits for the benefit of visitors and locals.

At a regional level, the DMP reflects the regional context, which continues to develop, including the preparation of a Regional Economic Delivery Plan for South West Wales which builds on the success of the Swansea Bay City Deal. The Valleys Regional Park continues to champion the landscape and people of South West Wales, including its investment focus on twelve Gateway Sites.

At a County Borough level, there is a strong policy fit at local level to support the development of the visitor economy in Neath Port Talbot. **The Recover, Reset, Renew – Corporate Plan 2022-2027** sets out a clear vision and direction of travel to assist recovery, specifically move towards the 'reset and renew' phase with an emphasis on young people's wellbeing, thriving communities, ensuring that the local environment, culture and heritage can be enjoyed by future generations and that local people are skilled and have access high quality, green jobs.

The Neath Port Talbot **Local Development Plan (LDP) 2011-2026** acts as the overarching planning policy document for the county and sets out the planning policies and land use allocations that will shape the future of the County Borough area. The LDP vision states that, *'The County Borough's rural areas and valley communities will be supported and revitalised through encouragement of new and expanded economic activity through provision for sustainable small-scale employment, including tourism initiatives capitalising on existing successes such as the strategic tourism destinations at Margam Park and the Afan Valley'.*

The process of compiling the Replacement Local Development Plan (RLDP) 2023-2036 has commenced and a call was issued for candidate sites in the summer of 2022. It is important that the continuing aspirations for the sustainable growth of the visitor economy within Neath Port Talbot are reflected within the RLDP and the sector should be encouraged to engage with the Council on shaping the future plan. The continued development of Neath Port Talbot as an authentic, sustainable visitor experience provides an opportunity to generate economic and social benefits and stimulate the step change that is required to truly transform the local and broader regional economy. Training, development and retention of staff in tourism and hospitality sectors in Wales continues to be a challenge, which is also recognised in Neath Port Talbot.

The Rights of Way Improvement Plan (ROWIP) sets out the Council's vision and commitments to protecting, maintaining and improving the Public Rights of Way (PROW) Network, and wider countryside access, in Neath Port Talbot. It also seeks to ensure that countryside access provision meets the needs of its users, providing benefits for

health and well-being, tourism and recreation. Partnership working and collaboration in delivery of the ROWIP will play an important part in supporting leisure and tourism in Neath Port Talbot; ensuring that access to key destinations is maintained and promoted, and recreational activities that rely on the PROW network can continue and flourish.

The **Neath Port Talbot Culture Strategy** aims to capture the unique cultural strengths and spirit of Neath Port Talbot. It will be important that the DMP builds on the outputs and plans of the Culture Strategy specifically its varied offer of arts, heritage and culture for visitors and residents. The Culture Strategy, Heritage Strategy and DMP are integrally linked and support each other.

The **Neath Port Talbot Heritage Strategy 'Restore, Regenerate, Repurpose'** will set out actions to ensure the sustainable conservation, maintenance and management of our heritage assets and the measures that can add value to the economic, social and environmental wellbeing of the area. The strategy will focus on raising awareness of our local heritage and the need to sustain the heritage community groups who play a crucial role work in conserving our historic environment.

The Council has a legal duty under the **Welsh Language Standards Regulations** (No.1) 2015 to comply with a set of standards of conduct on the Welsh language. The Standards require the Council to draw up and publish an action plan, as detailed within the Welsh Language Promotional Strategy 2023-2028, to promote the Welsh language with the aim of increasing language use and the number of Welsh speakers in the county borough. As a visitor destination the Welsh language provides us with a sense of place which distinguishes Wales from other countries. Encouraging the use of Welsh and integrating the Welsh language into the way that we tell the heritage and cultural story of our county is an important tool in developing the area further as a visitor destination.

As one of the main strengths of the County Borough's tourism offer, looking after the natural environment is a key aim underlying this strategy. In 2021, the Welsh Government declared a nature emergency, which acknowledged the significant loss of biodiversity caused by humans. On a local level, NPT Local Nature Partnership (LNP) has undertaken an assessment of the State of Nature of NPT. The habitats of NPT were grouped into 11 broad categories (e.g. woodland, coastal etc.), and sadly, of these 11 habitat categories, only two were assessed to be achieving 'good' ecosystem resilience. This means that habitats across NPT are not resilient enough to deal with pressures and demands such as climate change. Action needs to be taken now to improve the ecosystem resilience of our habitats across NPT and ensure that our natural environment remains an asset for tourism into the future. The **NPT Nature Recovery Action Plan** provides a roadmap to helping the natural environment in NPT and the **Biodiversity Duty Plan** outlines how NPT CBC intends to maintain and enhance biodiversity in exercising its functions, including promoting sustainable tourism.
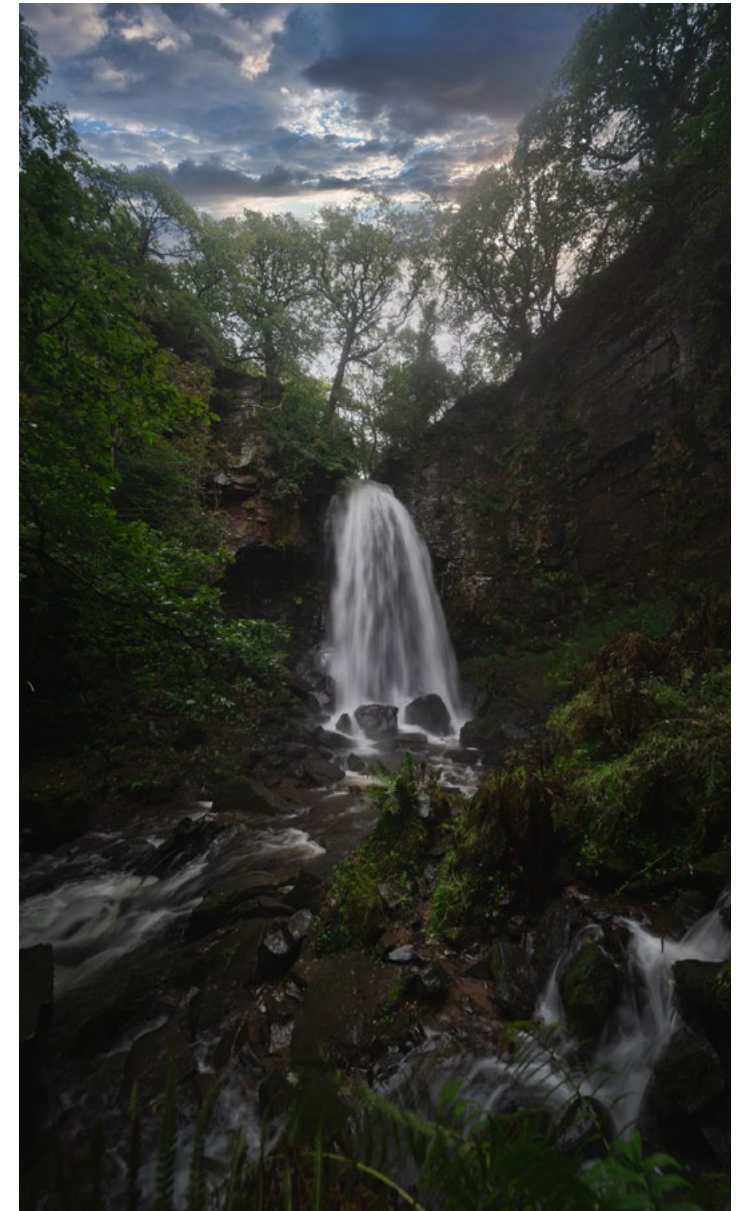
SWOT Analysis

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4.0 SWOT Analysis

Below we set out a SWOT analysis which details the key Strengths, Weaknesses, Opportunities and Threats associated with Neath Port Talbot as a destination.

Strengths	Weaknesses
• Nature, coast and industry – distinct contrasts.	• Relatively low length of stay.
• Varied landscape: natural landscape, coast and countryside.	• Low spend/local markets.
• Established adventure/activity product (including Afan Forest Park).	• Current lack of high-quality accommodation.
• Network of walking and cycling routes, including Wales Coast Path and Sustrans Routes.	• Limited poor weather options.
	• Heritage product has limited profile.
• Non-motorised watersports usage at Aberavon.	• Nearby competition – e.g. Gower, Bannau Brycheiniog (although this is also an opportunity).
• Range of heritage assets (albeit currently under-utilised).	• Not a homogenous product/destination.
• Strong political commitment and ambition.	• Relatively unknown proposition – 'flies under the radar' as a destination.
• Access to markets: position within M4 corridor.	• Varied resourcing of tourism.
• New destination website and brand identity.	• Limited private sector engagement.
• Destination Marketing and Pride of Place campaign 2023-2025.	• Some socio-economic challenges in terms of residential market.
• Secured Government funding (UKSPF and Levelling Up Funds).	

Opportunities	Threats
• Undiscovered/'alternative' destination.	• Unknown timescale linked to recovery of tourism within county borough.
• Transformational impact of private sector investment: Wildfox Resort (significantly expanding accommodation base with strong year round occupancy).	• Regulatory changes within the tourism sector.
• Deliver investment in innovative and interactive built heritage products at Gnoll Estate Country Park and other sites for example Neath Abbey, Neath Abbey Ironworks, Margam Country Park etc.	• Resurgence in outbound international holidays. • Tendency to "talk down" Neath Port Talbot. • Further development of adventure tourism products in adjacent local authority areas e.g. Swansea – Kilvey Hill adventure park and Zip World at the former Tower colliery site (although could also be an opportunity).
• Deliver investment in visitor infrastructure at Waterfall Country Pontneddfechan.	• Ongoing cost of living crisis and risk of potential recession.
• Seek funding to create a strategic events programme across the County which aligns with the NPT place brand.	
• Regeneration of Margam Castle (early stage of a National Lottery Heritage Fund project) and links to wider heritage offer in the immediate area and the wider sub region.	
• Implementation of nature recovery actions which enhance the local environment and biodiversity.	

Opportunities	Threats
• Partnership working with adjacent authorities. • Development of coastal asset/product to complement activity offer (including new management structure). • Investment in cultural and arts based activities/programmes throughout the county borough. • Subject to funding, long-term opportunities linked to Swansea, Tennant and Neath canals.	

Moving forward –
Our priorities

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5.0 Moving Forward – Our Priorities

The Destination Management Plan provides an opportunity to reset priorities in order to implement innovative solutions to support local tourism and address our three cross-cutting themes:

- Responsible tourism

- Inclusive growth

- Collaboration and partnerships

Feedback from our businesses and stakeholders still demonstrate uncertainty about the future and the overwhelming need to build resilience and stability.

Following the pandemic, the growth in domestic tourism has helped to soften the blow and the immediate actions taken at a national and local level to restore and re-activate the sector has mitigated the impact on jobs and businesses.

However, the visitor economy continues to face a number of significant challenges. We recognise that developing Neath Port Talbot as a visitor destination and brand is a long-term process that will require on-going investment and commitment.

Our focus for the next 5 years is on development and stability: delivering our catalyst projects and enhancing our unique assets and themes that Neath Port Talbot already has strengths in – our rich heritage, culture and stunning coast and countryside – to sustain and grow the visitor economy.

We also need to protect the core appeal of the area – its landscape and historic environment – and meet the needs of our residents.

The Destination Management Plan will deliver the vision by focussing on six main objectives:

1. **Developing a distinctive and responsible destination**
   Creating, enhancing and supporting more sustainable visitor facing products in the drive towards Net Zero – facilities, outdoor adventure, heritage, culture, events and the public realm – increasing our appeal to staying visitors across the destination and reducing seasonal fluctuations. The evolving tourism product and service will warmly welcome all visitors and respect their individual needs.

2. **Transforming awareness and perceptions of the area**
   Extending the reach and traction of the 'Dramatic Heart of Wales' brand, and marketing Neath Port Talbot by working together with a consistent, joined-up approach and clear messaging understood and amplified by all stakeholders.

3. **Supporting thriving businesses and workforce**
   Learning the lessons of external economic shocks and building the resilience of businesses within the visitor economy to better cope and recover through periods of adverse trading conditions. Welcoming new investors and encouraging local businesses to re-invest in their offer and the recruitment, training and retention of their workforce.

4. **Vibrant communities**
   Supporting host communities' vital role in delivering the wider tourism experience, by investing in facilities and public realm as a key element of successful and thriving places. Embracing and celebrating local and wider Welsh culture as an integrated part of the tourism offer, delivering an authentic sense of place.

5. **Promoting sustainable and active travel**
   Working with partners across the public and private sector to enhance connections into our valleys and rural communities through promoting active travel choices that encourage sustainable, planet-friendly, travel for the visitor economy.

6. **Working in partnership more effectively**
   Creating a strong and representative advocate voice for the tourism sector as partners in managing the destination, making the most of our existing strengths and plugging the current gaps. Developing an effective and accountable delivery mechanism for this plan through further partnership working within and beyond Neath Port Talbot.

Delivering the Destination Management Plan

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6.0 Delivering the Destination Management Plan

Destination Management Leadership Group (DMLG)

The Neath Port Talbot DMP is a roadmap for the sustained recovery and medium-term growth of the visitor economy in Neath Port Talbot. A visitor economy can only be successful if the public, private and third sectors work both together and with local communities. Delivery of the new DMP will require leadership, consensus and partnership, as well as financial and other resource commitments.

The key leadership role will continue to rest with the Visitor Economy Team at Neath Port Talbot County Brough Council, but the DMP is relevant to all public, private and voluntary sector organisations involved in the visitor economy and the Council cannot hope to deliver on its own.

The former Neath Port Talbot Destination Management Plan was supported by a Destination Management Strategic Steering Group, made up of representatives from public and private organisations with an interest in developing the visitor economy in Neath Port Talbot.

In addition, a range of partnership groups have been set up on an area destination basis to engage partners and stakeholders including:

- Aberavon Seafront Steering Group.

- Afan Forest Park Destination Management Stakeholder Group.

- Margam Park Destination Management Stakeholder Group.

- Waterfall Country/Vale of Neath, which is managed by Bannau Brycheiniog National Park.

While there are a number of existing platforms for engaging with tourism businesses in the Borough to support the Council's role and achieve wider buy-in to the plan and its priorities, themes and actions, we recommend that the Destination Management Steering Group is refreshed as a Destination Management Leadership Group (DMLG), which will be the primary conduit to reach out and engage with tourism businesses and partners across the County Borough.

The Council will retain its role for destination management and marketing and crucially identifying resourcing and financing of the DMP. The DMLG will be the acknowledged point of contact for business engagement and local partnership engagement to support the design and delivery of priority actions.

Its terms of reference will need to be determined by partners but are likely to include:

- Overall strategic responsibility for monitoring DMP delivery.

- Providing support and guidance on product development and marketing.

- Presenting a coherent voice for the visitor economy.

- Articulating and stewarding the visitor 'narrative' and ensuring synergy with the place-making activities.

The Leadership Group will be between 10-12 member drawn from the sector, will have an independent Chair with representation across the visitor economy sector, including the various local partnership groups which are in existence. Thought will need to be given as to where the DMLG sits within the family of private public sector partnerships within Neath Port Talbot, specifically its relationship with investment and place-making in the borough.

The role of Neath Port Talbot County Borough Council

Limited resources at the destination level make partnership working increasingly important. However, as indicated, Neath Port Talbot CBC will continue to play an operational role to develop the visitor product as well as marketing and promoting the borough. The Visitor Economy Team is lean (two permanent FTEs). In collaboration with other Council departments, the team will play a central role in ensuring that external funding, including the Shared Prosperity Funding programme and Vale of Neath Levelling Up Fund, are delivered in an effective and efficient way. Indeed, sometimes securing capital funding can be easier than funding the 'nuts and bolts' of destination promotion and management.

Thought will need to be given as to the Visitor Economy Team's capacity to continue to play a lead role facilitating the various stakeholder groups identified. It is recognised that engagement with stakeholders across the sector is an important activity in identifying priorities and delivering stakeholder aspirations in partnership with the sector, however there are currently insufficient resources within the Visitor Economy Team to deliver support in this way.

The primary focus is to ensure that resources are in place to drive forward the Destination Management agenda for the area. A revised resource and staffing plan will need to be developed taking into account the additional responsibilities set out in DMP around product development, events, marketing and coordination.

Action Plan
2023 to 2028
07

7.0 Action Plan 2023 to 2028

Introduction

The Action Plan for Neath Port Talbot sets out a package of co-ordinated actions to deliver the vision and strategic objectives identified above. They will support the recovery and thereafter sustainable growth of the visitor economy – benefitting tourism businesses, host communities and the environment.

Neath Port Talbot County Borough Council cannot deliver the Action Plan on its own. There is a requirement to work in partnership with the private and third sectors and local Communities.

Catalyst projects

A number of catalyst tourism projects, at different stages of development, are being delivered in Neath Port Talbot, which will drive the recovery and growth of the visitor economy.

Once delivered these projects will radically change the tourism base and profile in the County Borough as well as delivering economic multiplier, employment and supply chain benefits.

The main transformational projects are:

Private sector led

i. Wildfox Resort

In the Afan Valley, planning permission has been secured to develop a major £400m adventure resort which will incorporate over 550 lodges, a hotel, apartment hotel, food and beverage offers alongside supporting leisure facilities.

Action (Catalyst Project One): Close collaboration between NPTCBC and the operator for project implementation through the construction and operational phases. Ensure that mechanisms are in place so the local communities benefit from this investment programme.

Partnership led

ii. Future development of Afan Forest Park

A development plan is being finalised to improve the visitor product at Afan Forest Park and help it to regain its position as a leading mountain biking destination. There is an ongoing requirement to work with NRW to secure future investment to develop Afan Forest Park as a key destination for mountain biking and outdoor recreation.

iii. Vale of Neath Heritage Corridor Framework

The framework sets out range of interventions to support the development of the tourism offer in the Vale of Neath. There is a focus on partnership working to deliver new products, enhance existing visitor sites and supporting marketing activities.

To date NPTCBC have secured Levelling Up Funding to deliver two of the key projects – the Waterfall Country Gateway Visitor Infrastructure scheme and enhancing the visitor experience Gnoll Estate Country Park Heritage and Visitor Infrastructure scheme.

Action (Catalyst Projects Two and Three): Secure funding and develop partnership to allow these projects to be delivered effectively.

Neath Port Talbot led

iv. Waterfall Country Visitor Infrastructure Scheme

To address issues related to increasing visitor numbers to Waterfall Country and provide rural employment opportunities, a gateway visitor and community hub is being developed in Pontneddfechan. The project incorporates high-quality tourist accommodation, a community/farm shop and car parking alongside supporting visitor infrastructure. Funding has been secured from the Levelling Up Fund.

v. Gnoll Estate Country Park

Over £12m has been secured to transform the Gnoll Estate Country Park visitor experience. Investment is focussed on enhancing the existing visitor centre, making the rich heritage of the country park more accessible, introducing self-catering accommodation within the grounds and upgrading the supporting visitor infrastructure such as car parking. Funding has been secured from the Levelling Up Fund.

vi. Regeneration of Margam Castle and Country Park

Currently, a National Lottery Heritage Fund (NLHF) supported project is exploring options to regenerate the characteristic Grade I listed Margam Castle, (located in Margam Country Park) as a heritage based visitor experience, with an education offer and potential for visitor accommodation. There is a need to continue to build the business case in readiness for an application to the NLHF and other funders.

Further opportunities will be explored to develop the wider country park to improve the visitor experience and attract more visitors.

vii. Aberavon Seafront Strategy

The forthcoming Aberavon Seafront Strategy will steer for future investment and development at the seafront. The plan will examine existing and potential future provision for the development of Aberavon Seafront as a leisure destination.

The outcome of this strategy will inform future actions within the DMP in relation to Aberavon Seafront.

Action (Catalyst Projects Four to Seven): Ensuring there is adequate support and project management resources available within NTPCBC to take forward and deliver the transformational schemes in the immediate term (and funding is secured to regenerate Margam Castle).

Individually each project has the potential to make a real positive difference to the tourism sector in the County Borough, however, when combined a 'package of interventions' has the potential to transform the market profile of Neath Port Talbot as a tourism destination and the tourism experience itself.

Action Plan 2023 to 2028

The development of the 2023 to 2028 action plan has been shaped by:

- Extensive engagement including four workshops, online surveys to engage with Members and tourism businesses and one-on-one consultation with individual stakeholders.

- Market assessment and wider research.

- Site visits.

- Best practice.

Action Plan Framework

- **Goals/objectives:**

  01. Developing a distinctive and responsible destination.

  02. Transforming awareness and perceptions of the area.

  03. Supporting thriving businesses and workforce.

  04. Vibrant communities.

  05. Promoting sustainable and active travel.

  06. Working in partnership more effectively.

- **Indicative timescale:**

  · **Short-term** within 12 months.

  · **Medium-term** years 2 to 3.

  · **Long-term** years 4 to 5.

Developing a distinctive and responsible destination

Supporting and attracting investment to develop sustainable, high-quality and consistent tourism products and experiences to create compelling reasons to visit Neath Port Talbot to encourage a greater share of overnight stays. Ensuring that new interventions align with the Dramatic Heart of Wales place brand.

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Develop the events offer to address issues of seasonality and attract new market segments.	• Develop an Events Action Plan to support the successful delivery of UKSPF events funding over the next two years.	NPTCBC (with input from NRW)	O1, O2, O3, O4, O5.	Short-term/ medium-term
	• Successfully stage the Tour of Britain 2023 and Urdd Eisteddfod in 2025 at Margam Country Park in order to raise the profile of Neath Port Talbot as a location for major events.	NPTCBC	O1, O2, O3, O4, O5.	Short-term/ medium-term

Developing a distinctive and responsible destination		Lead	Goals	Timescale
Actions		**Lead**	**Goals**	**Timescale**

Develop the events offer to address issues of seasonality and attract new market segments.	• Attract, develop and deliver a programme of signature events at Gnoll Estate Country Park, Margam Country Park and other 'sites' (e.g. those managed by others including the private sector and NRW), which could be themed on, for example:
	
	  · Heritage and culture.
	
	  · Adventure and activities (land and water-based) e.g. downhill mountain biking event, of national importance, on NRW owned land in the Vale of Neath.
	
	  · Food and drink.
	
	• Ensure that key outdoor venues have adequate supporting infrastructure in place (to enable hosting of large-scale and other events).
		NPTCBC (with input from NRW)	O1, O2, O3, O4, O5.	Short-term/medium-term

	• Create Events team within the Council to co-ordinate the delivery of the Events Action Plan and events across the county borough.	NPTCBC	O3, O6.	Short-term

Developing a distinctive and responsible destination

Actions		Lead	Goals	Timescale
Increase the quality and quantity of visitor accommodation.	• Create a positive environment for investment in visitor accommodation.	NPTCBC/ Private sector	O1, O3, O6.	Medium-term
	• Encourage the development of new creative accommodation experiences, for example, build on the introduction of camper van charging points and the trialling of 'aires' at strategic locations within the county.	NPTCBC	O1, O2, O6.	Short-term
	• Work with existing accommodation providers to improve the quality of their bedstock through grading and accreditation schemes.	NPTCBC	O1, O6.	Medium-term
	• Deliver accommodation proposals as part of the UK Levelling Up funded projects at Gnoll Estate Country Park and Waterfall Country Pontneddfechan.	NPTCBC	O1, O2, O6.	Short-term

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Attract private sector investment in the tourism sector.	• Review sites owned by the council and others, which could accommodate tourism uses, such as a caravan park, prepare an investment prospectus and to take to market.	NPTCBC	O1, O2, O3, O6.	Short-term
	• Continue to provide advice and assistance to support major investment proposals at Wildfox Resort in the Afan Valley (subject to Planning input).	NPTCBC in partnership with private sector	O1, O2, O6.	Long-term
	• Continue to provide advice and assistance to support major tourism investment proposals at East Pit in Tairgwaith (subject to Planning input).	NPTCBC in partnership with private sector	O1, O2, O6.	Long-term
	• Continue to provide advice and assistance to support major tourism investment proposals at Rheola Estate in the Vale of Neath (subject to Planning input).	NPTCBC in partnership with private sector	O1, O2, O3.	Long-term

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Develop and champion sustainable outdoor recreation and adventure products.	• Support the development of on-water products/ experiences (building on water use of the Neath Canal at Ty Banc Cottage, near Resolven, Margam Adventure at Margam Country Park and Surf School Wales at Aberavon beach).	NPTCBC	O1, O2, O6.	Medium-term
	• Explore options for nature and wildlife tourism (particularly given growing consumer interest in the environment, the climate and biodiversity emergencies and the Lost Peatlands Projects).	NPTCBC	O1, O2, O6.	Long-term
	• Continue to explore the feasibility of developing/ re-instating the Neath and Tenant Canals for tourism, leisure and recreation use.	NPTCBC	O1, O4, O5, O6.	Medium-term
	• Scope out potential expansion of Fforest Fawr Geopark into the county – work closely with Bannau Brycheiniog in respect of the overall Geo-park.	NPTCBC/ Geopark/ Bannau Brycheiniog National Park Authority	O4, O6.	Medium-term

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Create a vibrant seafront at Aberavon.	Develop a vision and masterplan for Aberavon Seafront – creating a cohesive offer through a range of interventions/projects e.g.: • Investment in seafront public realm alongside updating information provision and signage (both along the seafront and from the M4). • Piloting/trialling introduction of seasonal, high-quality mobile food units on the seafront. • Supporting non-motorised watersports activities at Aberavon, as a complementary offer to Afan Forest Park and Waterfall Country. • Identify opportunities for new car parking provision and explore options for consolidating car parking provision along the seafront to better manage peaks and troughs in usage. • Use IoT and geospatial (mapping) technology to generate real time 'busy-ness' data, which could report on the capacity key car parks at Aberavon Seafront which along with variable roadside messaging to promote alternative park and ride scheme.	NPTCBC	O1, O2, O3, O4, O6.	Short-term/medium-term

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Develop the heritage and cultural market place.	• Develop and implement an Action Plan to deliver the Vale of Neath Heritage Corridor Strategy. Also, identify priority projects e.g. (a) work in partnership with Cadw to deliver investment at Neath Abbey and also Neath Abbey Ironworks, (b) at Melincourt explore potential to enhance visitor facilities and car parking (c) at Aberdulais Falls work with the National Trust to get the site fully operational once more.	NPTCBC and Partners	O1, O2, O4, O6.	Medium-term
	• Ensure that the Culture Strategy dovetails with DMP to support key themes and initiatives.	NPTCBC	O6.	Short-term
	• Promote new arts and culture product which emerge through the Culture Strategy in order to add to the appeal of Neath Port Talbot to wider market segments.	NPTCBC	O1, 02.	Medium-term
	• Support the emerging proposals to regenerate Margam Castle, which could have a stronger tourism focus (including the potential to introduce visitor accommodation within the castle itself).	NPTCBC	O1, O2, O6.	Medium-term/ long-term

Developing a distinctive and responsible destination				
Actions		**Lead**	**Goals**	**Timescale**
Develop the food offer – an emerging opportunity.	• Building on the success of Neath Food and Drink Festival, nurture the development of the local 'food scene' (which will help to draw in staying visitors and attract new visitors).	NPTCBC	O1, O2, O3, O4, O6.	Medium-term
Deliver excellent customer service.	• Provide customer service training for people working across the tourism sector to deliver consistent and high-quality services for all visitors to Neath Port Talbot. This will run alongside the investment in the tourism product.	NPTCBC/ private sector	O3, O4, O6.	Short-term
Create an accessible destination.	• Secure public and private sector investment to develop accessible tourism infrastructure. For example, accommodating groups of multi-generational visitors, sensory experiences, accessible pathways, Changing Places facilities, accessible play etc.	NPTCBC	O1, O2, O4, O5, O6.	Medium-term

Developing a distinctive and responsible destination

Actions		Lead	Goals	Timescale
Ensure that a sense of place is integrated into all project proposals in order to change perceptions of Neath Port Talbot and instil pride in the area.	• Ensure that the Welsh language and Welsh culture is integrated into all communications and projects being developed by the Council and within partner projects. • Advise stakeholders and businesses within the tourism sector on how to integrate the Welsh language and a sense of place into their own activities. • Deliver the Shared Prosperity Fund funded Destination Marketing and Pride of Place Campaign between April 2023 and March 2025. • Continue to integrate the Neath Port Talbot place brand with place-based marketing activities and development across the Council.	NPTCBC	O1, O2, O3, O4.	Short-term, medium-term.

Transforming awareness and perceptions of Neath Port Talbot as an alternative destination

Work with partners to promote Neath Port Talbot as a quality, alternative destination.

Transforming awareness and perceptions of Neath Port Talbot as an alternative destination			
Actions	**Lead**	**Goals**	**Timescale**
Raise the profile of Neath Port Talbot as an alternative year round visitor destination.	• Deliver the destination marketing campaign utilising the 'Dramatic Heart of Wales' destination brand. NPTCBC	O1, O2, O3, O6.	Short-term
	• Strengthen co-operation with neighbouring areas to create sub-regional experiences, which showcase the place brand and link to the areas strongest activity and heritage/culture led products. NPTCBC	O6.	Medium-term
	• Secure the on-going collection of data to evaluate the effectiveness of the campaigns. NPTCBC	O2, O6.	Short-term
Change perceptions of Neath Port Talbot as a place to live and work.	• Deliver the Pride of Place marketing campaign. NPTCBC	O2, O6.	Short-term

Supporting thriving businesses

Build back better a more innovative and resilient industry to recover market position and accelerate growth over the medium – long term.

Supporting thriving businesses				
Actions		**Lead**	**Goals**	**Timescale**
Secure greater engagement and buy-in from the tourism industry.	• Ensure regular communication and engagement with industry partners (e.g. latest market data, delivery of projects etc). • Introduce an annual Neath Port Talbot Tourism Summit.	NPTCBC	O3, O6.	Medium-term
Encourage up take of advice/ support offered by NTPCBC.	• Ensure that tourism businesses are aware of and are able to access business support and advice delivered by NPTCBC.	NPTCBC	O6.	Short-term

Supporting thriving businesses				
Actions		**Lead**	**Goals**	**Timescale**
Develop a suite of supporting industry toolkits.	• Prepare a Tourism Entrepreneurs Toolkit to support the start-up of new tourism businesses – adding positively to the tourism offer. • Refresh the 'Green Toolkit' to support tourism businesses to become sustainable and their journey to reach Net Zero. • Develop an accessibility toolkit to encourage businesses to place 'accessibility' at the heart of their 'product offer' and customer experience.	NPTCBC	O6.	Short-term
Provide up to date data[2].	• Continue to collect bedstock data, site specific footfall data and commission annual STEAM reports alongside ad-hoc data on motivations to visit, spend levels, impact of events etc. • Set up a programme to collect annual occupancy data to inform Council and business decision making.	NPTCBC	O3, O6.	Medium-term
	• Disseminate the data to businesses in the tourism sectors and others with an interest in economic development (could form a core part of the annual tourism summit).	NPTCBC	O3, O6.	Medium-term

2. This empirical evidence base will also help to demonstrate the importance of the tourism sector to all stakeholders and interested parties, enable tourism businesses to respond to latest market trends and make informed decisions based on evidence and also can be used to support future funding bids.

Vibrant communities

Vibrant host communities and local businesses are at the heart of the tourism experience across the county borough. However, host communities do not necessarily benefit from increasing visitor numbers and they can suffer from the negative impacts associated with increased visitor numbers. There is a need to balance the requirements of visitors and communities.

Vibrant communities				
Actions		**Lead**	**Goals**	**Timescale**
Minimise impacts on host communities.	• Identify tourism hotspots and produce plans to minimise negative impacts and maximise the positive impacts of tourism on host communities.	NPTCBC	O4.	Short-term
	• Ensure that appropriate community engagement is carried out in respect of future development projects.	NPTCBC	O4, O6.	Ongoing
Improve the public realm.	• Under the Valleys and Villages Prosperity Fund and other funding sources support investment in the public realm to help create a sense of vibrancy and welcome e.g. refresh of key public spaces, use of small-scale events, reuse of empty shop fronts.	NPTCBC	O2, O4, O6.	Long-term
Get the basics right.	• Carry out an audit of the provision of WC facilities, signage, wayfinding, interpretation and car parking – these facilities are often the first touch-point for visitors on arrival. Upgrade where required and introduced new supporting facilities where there is demonstrated demand[3].	NPTCBC	O2, O3, O4, O6.	Short-term

3. Some projects may be fundable via the Valleys and Villages Prosperity Fund (UKSPF).

Enhancing connectivity and active travel

The car is the main mode of transport utilised by visitors to travel to and around the county borough. Actions are required to promote and encourage visitors to use more sustainable means of transport to move around the county borough.

Enhancing connectivity and active travel				
Actions		**Lead**	**Goals**	**Timescale**
Develop travel itineraries linked to public transport.	• Work closely with public transport providers to develop integrated visitor offers in the form of linked travel itineraries.	NPTCBC	O5, O6.	Medium-term
Encourage the uptake of walking and cycling.	• Under the Valleys and Villages Prosperity Fund and other funding support investment in active travel projects.	NPTCBC	O5, O6.	Medium-term
	• Ensure funding mechanism is in place to support ongoing maintenance of trails/routes e.g. Afan Forest Park and wider trails within Waterfall Country (a key element of the tourism offer within the county borough).	NPTCBC	O2, O5, O6.	Medium-term
	• Formalise a 'branded' route from Aberavon Seafront through to Glyncorrwg (supporting 'Valleys to Coast' product).	NPTCBC	O1, O4, O5, O6.	Short-term

Enhancing connectivity and active travel				
Actions		**Lead**	**Goals**	**Timescale**
	• Explore options to facilitate supporting infrastructure and activity related to the growth in the use of ebikes.	NPTCBC	O1, O5, O6.	Medium-term
	• Scope out option to link Wildfox Resort and Afan Forest Park Visitor Centre via an off-road route.	NPTCBC	O1, O4, O5, O6.	Medium-term
	• Explore option to improve linkages for walking and cycling route between the mainline railway station at Port Talbot and the seafront at Aberavon.	NPTCBC	O1, O4, O5, O6.	Medium-term