

Monmouthshire Tourism Performance 2016

Objective: We want to enable our County to Thrive	Council Priority: Supporting enterprise, entrepreneurship and job creation	Council & Single Integrated Plan Outcomes: Business and Enterprise & Protect and Enhance the Environment
Why we focus on this	<p>Tourism is vital to Monmouthshire's economy generating income to support a wide range of businesses that directly or indirectly benefit from visitor spending or that supply or service the county's tourism industry, including the retail and catering sectors and food and drink producers. According to STEAM 2016, tourism generated £190m for Monmouthshire in 2016, a 0.5% increase on 2015.</p> <p>2.28m visitors came to Monmouthshire in 2016, a 4.1% increase on 2015.</p> <p>Tourism also provides opportunities for enterprise and employment, and is a significant employer in the county. 2,895 FTEs were supported by tourism in 2016, (an increase of 5.5% from 2015) accounting for approximately 10% of the workforce.</p> <p>Each visitor day brings an average of £63.03 to the local economy, ranging from £31.59 for day visitors to £162.06 for visitors staying in serviced accommodation. Each staying visitor generates an average income for Monmouthshire of £277.63 per visit.</p>	
Performance context	<p>The previous Destination Development Plan came to an end in 2015. Monmouthshire's tourism performance over the life of this plan (2012-2015) was very encouraging with 10% real growth in terms of economic impact, 8.7% growth in visitor numbers and 1.5% growth in FTE jobs. There has been extensive consultation on this Plan as part of its review. A revised Destination Management Plan has been developed for the period 2017 -2020 informed by the results of the consultation.</p> <p>Tourism team reduced by 25% from 4 to 3 full time members of staff in May 2015. The reduced staff team comprises a Food & Tourism Strategic Manager, a Digital Tourism Marketing Officer, and a Business Development Coordinator / TIC Manager. In addition, a small number of TIC staff were employed on zero hour contracts to provide visitor information at Chepstow TIC.</p> <p>TIC budget reduced by 35% between 14/15 and 15/16 and by a further 57% in 2016/17. Abergavenny TIC operated reduced hours 10am-2pm 6 days a week. Chepstow TIC operated minimum opening hours during spring and summer, closed December 2015 to April 2016 and opened school holidays only until September 2016 then open 10am – 3pm over winter.</p> <p>Cleaning of the visitor accommodation bedstock database in 2016 revealed the following losses in bedspaces since 2015. Reduction in 151 serviced bedspaces worth £25,449.84 each = £3,842,925.84. Reduction in 762 non-serviced bedspaces worth £11,696.56 each = £8,912,778.72. This led to an estimated £12,755,705 reduction in tourism bedspace revenue for 2016.</p>	

2016
Destination
Performance

Key Figures: Economic Impact

Economic Impact £s 2016		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2016 (£ Millions)	£M	70.267	42.786	20.122	133.174	56.873	190.047
2015 (£ Millions)	£M	72.788	42.696	20.090	135.574	53.565	189.139
Change 15/16 (%)	%	-3.5	+0.2	+0.2	-1.8	+6.2	+0.5
Share of Total (%)	%	37.0	22.5	10.6	70.1	29.9	100.0

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2016 (Millions)	M	0.265	0.072	0.143	0.480	1.800	2.280
2015 (Millions)	M	0.277	0.075	0.143	0.494	1.696	2.190
Change 15/16 (%)	%	-4.1	-4.6	+0.2	-2.9	+6.2	+4.1
Share of Total (%)	%	11.6	3.1	6.3	21.0	79.0	100.00

Tourism visits were estimated to have generated £190.05 million for the local economy in 2016, an increase of 0.5% compared to 2015. (All 2015 figures are given in £s 2016 to remove inflation effects.)

This figure comprises *direct expenditure* of visitors on goods and services (£143.6 million) and the subsequent indirect / induced economic effects arising within the local economy (£46.5 million).

The 0.5% increase was slightly below the 2.8% growth for South East Wales. This was due to the 3.5 % fall in economic impact from visitors to serviced accommodation, which was larger than the regional 1% fall, and a direct consequence of losing 151 serviced bedspaces over this period.

Despite this, staying visitors still accounted for £133m (70%) of the total amount generated by tourism in 2016, staying an average of 2.5 nights.

In 2016, there were an estimated 2.28m tourism visits to the Monmouthshire County Council area, 4.1% higher than in 2015 and 8.7% higher than in 2014.

Day visitors continue to be critically important to Monmouthshire and the 1.8 million day visits accounted for 79% of all visits to the county. Day visits increased by 6.2% from 2015 levels. This continues a general upward trend since 2008, with an average annual increase in day visitor numbers from 2008 to 2016 of 2.5%. The increase in day visitors for South East Wales in 2016 was also 6.2%. However, this was largely driven by the new Friar's Walk development in Newport – the underlying increase was only around 1%, so in this context Monmouthshire's performance was particularly strong.

The falls of 4.1% and 4.6% in visitor numbers staying in serviced and non-serviced accommodation respectively were partly a result of a reduction in bed stock as revealed by the 2016 county bed stock survey. Occupancy levels across the county and the region as a whole were in fact fairly static between 2015 and 2016. However, 2015 was a very good year for staying visitors and the 2016 figures still show an increase on 2014 levels of 4.3% for serviced accommodation visitor numbers and 5.1% for non-serviced accommodation.

Key Figures: Employment Supported

Employment Supported		Direct Employment						Indirect and Induced	Total
		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	Total Direct		
2016 (FTEs)	FTE	916	715	197	1,828	555	2,383	512	2,895
2015 (FTEs)	FTE	893	639	196	1,727	519	2,246	498	2,744
Change 15/16 (%)	%	+2.7	+11.9	+0.8	+5.9	+6.9	+6.1	+2.9	+5.5
Share of Total (%)	%	31.7	24.7	6.8	63.2	19.2	82.3	17.7	100.0

2,895 FTEs were supported by tourism in 2016, an increase of 5.5% from 2015.

The largest portion of the direct employment supported is associated with the activity of visitors staying in serviced accommodation, accounting for 916 FTEs. Tourism spend supports the most employment in the Accommodation (1,012 FTEs) and Food & Drink (672 FTEs) sectors.

What did the Tourism team do in 2016?

CORE ACTIVITY DELIVERED BY TOURISM TEAM IN 2016

- Management of destination marketing campaigns / channels including management and development of visitmonmouthshire.com website, and securing Welsh Government RTEF funding to develop a new fully responsive website.
- Management of MCC's interests in TIC network at Abergavenny and Chepstow including direct management of Chepstow TIC and extensive stakeholder consultation aimed at identifying potential partners interested in developing a shared service operation to reduce net cost of service for MCC.
- Development / management of partnerships and collaborative projects.
- Data stewardship of Wales Tourism Product Database (which feeds visitmonmouthshire.com, visitwales.com, Monmouthshire digital visitor information kiosks as well as Visit Wales partnership channels e.g. TomTom & Nokia).
- Business support including advice /support on marketing, grants & planning application consultation responses for new and established tourism businesses
- Management of market research, Monmouthshire STEAM & bedstock data (including bi-annual bedstock database clean)
- Develop and submit applications for funding to deliver DMP priorities and management of externally funded projects
- Production of digital content including aerial videos (Monmouthshire from the sky <https://www.youtube.com/watch?v=x85eLzZk6Xg>) for promotion of Monmouthshire at and prior to 2016 Monmouthshire & District Eisteddfod
- Support marketing of MCC attractions and events, including hosting of the Caldicot Castle website and promoting Monmouthshire Countryside Walks

WEBSITE / SOCIAL MEDIA PERFORMANCE

Business entries 2016

By December 2016, Visit Monmouthshire had 177 accommodation businesses published on the website, (and on the Wales Tourism Product Database) and 327 non-accommodation businesses (not including events).

In 2016 there were 484,923 views of the accommodation pages and 13,693 referrals to Monmouthshire accommodation businesses own websites (from visitmonmouthshire.com). For non-accommodation businesses there were 1,325,679 visits and 51,016 referrals (not including events).

<p>Users 2016 The total number of unique users to Visit Monmouthshire over 2016 was 166,316, which was a 157% increase in users over the year. (The number of unique visitors continues to increase with 206,328 users recorded year to date September 2017).</p> <p>Social media increase 2016 Visit Monmouthshire Facebook – 74% increase on 2015 (1205 – 2096) Visit Monmouthshire Twitter – 39% increase on 2015 (5600 – 7775)</p> <p>Visitor Newsletters 2 newsletters sent to c10,000 visitors on database in 2016 – January (open rate 12%) & October (open rate 14%).</p> <p>Tourism Business Newsletters 1 Business newsletter sent to 296 tourism businesses on product database – December 2016 (open rate 30%)</p> <p>ADDITIONAL ACTIVITY DELIVERED WITH EXTERNAL FUNDING</p> <p>DESTINATION MONMOUTHSHIRE (RTEF funded activity LED BY MONMOUTHSHIRE TOURISM)</p> <p>Welsh Government RTEF Funding secured over 2 years (15/16 and 16/17) to:</p> <ul style="list-style-type: none"> • Review Monmouthshire’s approved Destination Development and Marketing Plan and develop revised Destination Management Plan 2017-2020 in consultation with stakeholders • Develop new fully responsive bi-lingual destination marketing website www.visitmonmouthshire.com to improve the experience for users of smartphones and tablets • Legendary Monmouthshire <ul style="list-style-type: none"> • Specialist Agincourt travel trade training / product development and identification & testing of a new St Tewdric’s cycle route to link the Wye Valley with the Wales Coast Path <ul style="list-style-type: none"> ○ New itinerary developed which is promoted via Southern Wales group travel / travel trade regional marketing campaign and in Monmouthshire’s Group Travel Guide distributed at Southern Wales Travel Trade Buyer Showcase at Newport Velodrome on 30 January 2017, at group travel exhibitions attended and online. ○ Industry information & networking event held 2 March 2017 (Aimed at group accommodation providers, Wales Tourist Guides and ambassadors) ○ Travel Trade Familiarisation Day 16 March 2017 (Aimed at travel trade, group travel and guides.)
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- VisitMonmouthshire Networking Event - 4-6pm Thursday 17 March 2016 Marriott St Pierre – 34 Monmouthshire businesses / ambassadors attended. Presentations by National Eisteddfod and Wye Valley AONB promoting opportunities to capitalize on the 2016 Monmouthshire & District Eisteddfod and the 2016 Wye Valley River Festival. Monmouthshire Ambassadors presented with their WorldHost certificates.
- Production & distribution of 10 Top Ten Videos to link with Wales' 2016 Year of Adventure - 10 Top Ten Monmouthshire Adventure videos produced. [First Top Ten Welsh Adventures video](https://www.facebook.com/visitmonmouthshire/) distributed via VisitMonmouthshire Facebook page <https://www.facebook.com/visitmonmouthshire/> on 15 June with a prize draw competition to win a family ticket to the 2016 Monmouthshire & District Eisteddfod. 10 x Top 10 videos distributed online during Wales' 2016 Year of Adventure <http://www.visitmonmouthshire.com/walesadventures.aspx>
- Development of Event Management Toolkit & ROI Model - Toolkit developed with Cardiff Met to support effective event management in Monmouthshire <http://www.visitmonmouthshire.com/eventmanagement-introduction.aspx>
- Production of Monmouthshire Eisteddfod Fringe Guide (to encourage eisteddfod visitors to see and do as much as possible while they're in Monmouthshire to spread the benefits of the event across the county). 36 Monmouthshire events / special offers promoted including three short break offers. 15,000 copies printed for distribution via key visitor sites. Distribution of electronic copy via online channels and by email to visitors staying in eisteddfod caravan and camping sites. Fringe guide event widget developed to feed event data direct to businesses own websites.

VALE OF USK COUNTRY KITCHEN (£25k Rural Development Programme funding secured)

Installation of a Vale of Usk demonstration kitchen within the Monmouthshire marquee and development and delivery of a packed programme of bilingual chef demonstrations, masterclasses and cookery courses at the 2016 Monmouthshire & District Eisteddfod to raise the profile of the area as a high quality food tourism destination and encourage Eisteddfod visitors to purchase local food & drink products.

CARDIFF CAPITAL REGION FOOD TOURISM (Welsh Government P4G Project Led by Monmouthshire Tourism) (£15k WG P4G funding secured)

- 9 participating LAs across SE Wales (all LAs except Blaenau Gwent)
- 9 LA food & drink business databases cleaned
- Regional Food Tourism Marketing Plan developed
- 11 food tourism videos produced and promoted – one for each LA plus 2 regional (one food & one drink)

<http://www.visitmonmouthshire.com/cardiffcapitalregionfood.aspx>

CARDIFF CAPITAL REGION TRAVEL TRADE / GROUP TRAVEL CAMPAIGN (RTEF PROJECT LED BY BRIDGEND CBC)

- Ongoing management of dedicated travel trade / group travel website www.southernwales.com
- Group Buyer Showcases - Hensol Castle 2 February 2016 & Wales National Velothon 30 January 2017
- Group Buyer Fam trips 1 Feb 2016
- Attendance at Discover Wales, World Travel Market, Britain & Ireland Marketplace, British Travel Trade Show, Explore GB
- Updated [Monmouthshire Group Buyer Guide](#)
- Monmouthshire Familiarisation trip for SE Wales businesses and ambassadors 9 February 2016 with 27 attendees led by Wales Official Tour Guide with the following itinerary:
 - Caldicot Castle & Country Park
 - Wyndcliffe Sculpture Gardens
 - Guided tour by Clerk of the Course followed by lunch at Chepstow Racecourse
 - White Castle Vineyard – guided tour followed by tutored tasting

MEET CARDIFF CAPITAL REGION BUSINESS EVENTS TOURISM CAMPAIGN (RTEF PROJECT LED BY CARDIFF CC)

- Events attended, 23rd /24th Sept 2015 Square Meal - Old Billingsgate, London, 22nd /23rd Jan 2016 C&IT Corporate Forum – Brighton, 17th Feb 2016 BNC Show – London, 1st March 2016 Cardiff Capital Region in London - London venue, 12th March 2016 Experience Cardiff Capital Region familiarisation visit –Capital region, C& IT Association Forum – London
- Range of branded event support collateral produced #meetcardiffcapitalregion
- Digital activity comprising e-blasts, social media campaign driving traffic to www.meetcardiffcapitalregion.com

DARK SKIES ADVENTURES (RTEF PROJECT LED BY RCT CBC)

- Monmouthshire Dark Skies Training for 25 businesses / ambassadors on 13 November 2015, at Goytre Wharf
- Registration and promotion of 5 Monmouthshire Dark Sky Discovery sites by Dark Sky Wales - Abergavenny Castle, Black Rock, Caldicot Castle & Country Park, Goytre Wharf & Skenfrith Castle.

- 3 Dark Sky events held at Abergavenny Castle (29 January, 2016) Caldicot Castle (2 April, 2016) & Goytre Wharf (13 November, 2015)

CARDIFF CAPITAL REGION LINKING UP (P4G PROJECT LED BY NEWPORT CC)

- Cycling tourism audit
- Cycling tourism toolkit developed
- Infrastructure Gap Analysis report
- Cycling tourism networking event
- Cycling tourism Interactive map <http://www.visitmonmouthshire.com/cardiffcapitalregioncycling.aspx#>
- Series of leaflets aimed at Visit Wales target market segments
<http://www.visitmonmouthshire.com/cardiffcapitalregioncycling.aspx#>

Funding secured for 2017

£49,000 Vale of Usk Rural Development Programme funding to:

- Undertake a review of visitor information services across the Vale of Usk RDP area (Monmouthshire and the rural wards of Newport)
- Develop recommendations in consultation with stakeholders for development of more sustainable visitor information services
- Fund a part-time temporary post to develop a local visitor information point scheme and help local businesses capitalize on the benefits of coach tourism
- Identify added value visitor information services that will deliver increased benefits to local communities

Prospects for
2017

Headline results from Wales Tourism Business Barometer: Wave 3, Summer 2017

Tourism businesses in Wales enjoyed a successful summer in 2017 according to the survey. Two in five (40%) received more visitors than last summer, and a similar proportion (39%) received the same level. A wide variety of reasons were given for the busy summer. The most frequent reasons were 'own marketing' (23% of businesses with increased visitors) and 'more British people staying in the UK' (16%).

All four regions of Wales (North, Mid, SW, SE) have seen increased visitor levels on balance. The South East in particular has performed strongly, with nearly half (46%) of businesses receiving more visitors, and a third (32%) receiving the same level. High confidence for the remainder of the year

Following a busy summer, operators are feeling confident for the remainder of the year. Over a quarter (28%) say they are feeling 'very confident' and over half (54%) are 'fairly confident'.

Industry leaders say that the weaker pound is affecting tourism. On the positive side, it makes the UK relatively cheaper for holidays, but on the negative side, some businesses are experiencing increased costs.

Full report is available here <http://gov.wales/docs/caecd/research/2017/170926-wales-tourism-business-barometer-wave-3-2017-en.pdf>

New Serviced Accommodation Opened in 2017

Premier Inn, Abergavenny **61** bedrooms
Raglan Lodge, **43** rooms

Serviced Accommodation Occupancy 2017

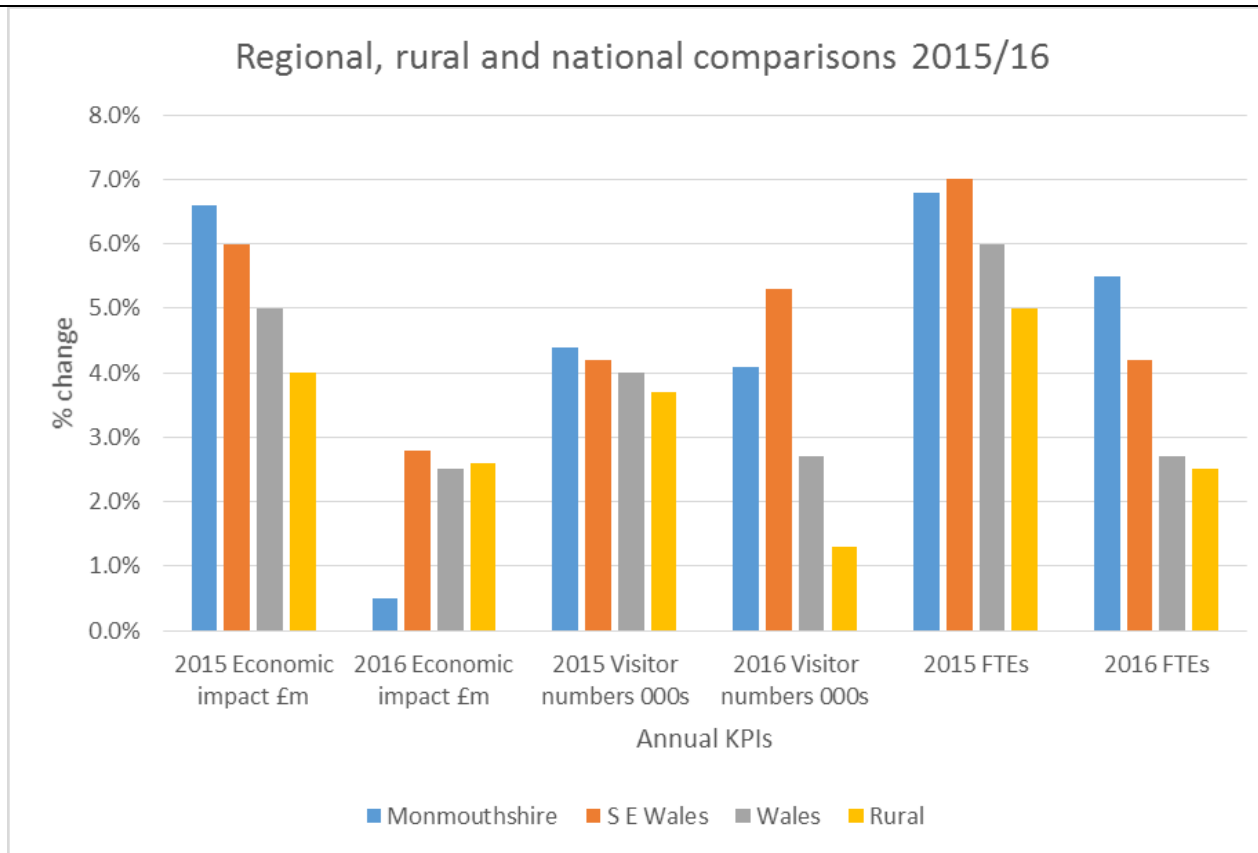
Serviced accommodation performance has continued to improve during 2017, running at an average 74% occupancy year to date for the larger branded hotels in 2017 compared with 71% for the same set of bedstock over the same period in 2016.

Improved Online Presence

New fully responsive VisitMonmouthshire.com website launched April 2017. New events form developed to enable partners / event organisers to upload their own events information. Visit Monmouthshire events widget installed on corporate MCC website to promote events to in-destination resident, community audience.

Collaboration/ Partners we are working with	Abergavenny TC, Abergavenny & District Tourism Association, St Mary's Priory Trust, Brecon Beacons NPA, Wye Valley AONB, Brecon Beacons Tourism, Wye Valley & Forest of Dean Tourism Association, Southern Wales Marketing Consortium, South East Wales Destination Implementation Group, South East Wales Destination Management Group, Meet Gateway South Wales, South East Wales Tourism Forum, Wales Tourism Research Partnership, Visit Wales marketing, research and development teams, Tourism Information Network Group, Welsh Government Business Support and Investment teams, Monmouthshire Ambassadors, Monmouth Chamber, Chepstow Chamber, Chepstow TC, Portskewett Community Council.																																																			
What we have spent on this objective	The core Tourism budget for 2016/17 was £134,678. An additional £45k of external funding was secured to deliver approved activity, £20k under RTEF & £25k under the Vale of Usk RDP. The TIC budget for 2016/17 was £18,344 a 57% reduction on the budget for 15/16.																																																			
How are we performing?	<table border="1"> <thead> <tr> <th data-bbox="398 592 1509 647">How much did we do?</th> <th data-bbox="1509 592 1720 647">2015</th> <th data-bbox="1720 592 1930 647">2016</th> <th data-bbox="1930 592 2132 647">2016 Target</th> </tr> </thead> <tbody> <tr> <td data-bbox="398 647 1509 703">Total Number of tourists per yearⁱ</td> <td data-bbox="1509 647 1720 703">2.19m</td> <td data-bbox="1720 647 1930 703">2.28m</td> <td data-bbox="1930 647 2132 703">>2.190m</td> </tr> <tr> <td data-bbox="398 703 1509 759">Total number of day visitors</td> <td data-bbox="1509 703 1720 759">1.696m</td> <td data-bbox="1720 703 1930 759">1.80m</td> <td data-bbox="1930 703 2132 759">>1.696m</td> </tr> <tr> <td data-bbox="398 759 1509 815">Total number of visitors staying overnight</td> <td data-bbox="1509 759 1720 815">0.494m</td> <td data-bbox="1720 759 1930 815">0.480m</td> <td data-bbox="1930 759 2132 815">>0.494m</td> </tr> <tr> <td data-bbox="398 815 1509 871">Number of visitors to Abergavenny TIC</td> <td data-bbox="1509 815 1720 871">19,327*</td> <td data-bbox="1720 815 1930 871">23,069*</td> <td data-bbox="1930 815 2132 871">>19,327</td> </tr> <tr> <td data-bbox="398 871 1509 927">Number of visitors to Chepstow TIC</td> <td data-bbox="1509 871 1720 927">30,931*</td> <td data-bbox="1720 871 1930 927">26,167*</td> <td data-bbox="1930 871 2132 927">>30,931</td> </tr> <tr> <th data-bbox="398 927 1509 999">How well did we do?</th> <td></td> <td></td> <td></td> </tr> <tr> <td data-bbox="398 999 1509 1054">Total employment supported by tourism (Full Time Equivalent, FTE)</td> <td data-bbox="1509 999 1720 1054">2744</td> <td data-bbox="1720 999 1930 1054">2895</td> <td data-bbox="1930 999 2132 1054">>2744</td> </tr> <tr> <th data-bbox="398 1054 1509 1126">Is anyone better off?</th> <td></td> <td></td> <td></td> </tr> <tr> <td data-bbox="398 1126 1509 1182">Income generated from tourism per year ⁱⁱ(£ millions)</td> <td data-bbox="1509 1126 1720 1182">£186.14m</td> <td data-bbox="1720 1126 1930 1182">£190.05m</td> <td data-bbox="1930 1126 2132 1182">>£186.14</td> </tr> <tr> <td data-bbox="398 1182 1509 1238">Total value of overnight visitors (£ millions)</td> <td data-bbox="1509 1182 1720 1238">£135.57m</td> <td data-bbox="1720 1182 1930 1238">£133.17m</td> <td data-bbox="1930 1182 2132 1238">>£135.57m</td> </tr> <tr> <td data-bbox="398 1238 1509 1294">Total value of day visitors (£ millions)</td> <td data-bbox="1509 1238 1720 1294">£53.57m</td> <td data-bbox="1720 1238 1930 1294">£56.87m</td> <td data-bbox="1930 1238 2132 1294">>£53.57m</td> </tr> </tbody> </table>				How much did we do?	2015	2016	2016 Target	Total Number of tourists per year ⁱ	2.19m	2.28m	>2.190m	Total number of day visitors	1.696m	1.80m	>1.696m	Total number of visitors staying overnight	0.494m	0.480m	>0.494m	Number of visitors to Abergavenny TIC	19,327*	23,069*	>19,327	Number of visitors to Chepstow TIC	30,931*	26,167*	>30,931	How well did we do?				Total employment supported by tourism (Full Time Equivalent, FTE)	2744	2895	>2744	Is anyone better off?				Income generated from tourism per year ⁱⁱ (£ millions)	£186.14m	£190.05m	>£186.14	Total value of overnight visitors (£ millions)	£135.57m	£133.17m	>£135.57m	Total value of day visitors (£ millions)	£53.57m	£56.87m	>£53.57m
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How do we compare with other areas



In terms of economic impact, Monmouthshire's growth (0.5%) was below the regional (2.8%), national (2.5%) and rural (2.6%) average between 2015 and 2016. This was due to the 3.5 % fall in economic impact from visitors to serviced accommodation, which was larger than the regional 1% fall, and a direct consequence of a loss of 151 serviced bedspaces. These bedspaces were worth an estimated £25,449.84 each which meant £3,842,925.84 lost tourism revenue due to reduced serviced accommodation capacity in 2016.

Monmouthshire's 4.1% increase in visitor numbers was below the regional average (5.3%) but above the Wales (2.7%) and rural (1.3%) averages. NB high regional average driven by new Friar's Walk development in Newport).

	For FTEs, Monmouthshire's 5.5% increase between 2016 and 2015 was above the regional (4.2%), the Wales (2.7%) and rural (2.5%) averages.
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ⁱ Based on annual calendar year data produced by STEAM

ⁱⁱ All 2015 figures are given in £s 2016 to remove inflation effects.

* Reduced opening hours / periods of TICs during 2016.