

SUBJECT:	MONMOUTHSHIRE DESTINATION MANAGEMENT PLAN 2017-2020
MEETING:	CABINET
DATE:	10 JANUARY 2018
DIVISION/WARDS AFFECTED:	ALL

1. PURPOSE:

- 1.1 This report seeks approval of [Monmouthshire's revised Destination Management Plan \(DMP\)](#) to guide destination management, marketing and development for the period 2017-2020. The purpose of the DMP is to establish a clear framework for public, private and voluntary sector partnership working to address the identified priorities and deliver year round sustainable tourism growth to maximise the economic, social and environmental benefits of tourism across all parts of the county. In so doing it focuses diminishing resources on activities likely to deliver the greatest return on investment. The revised DMP was endorsed by MCC Economy & Development Select Committee at their meeting on 19 October 2019.
- 1.2 The Plan contributes to the Council's third priority to 'promote enterprise and job creation' and enables access to external funding for tourism-related activity over the same period. The Plan replaces the previous DMP which came to an end 31 December 2015.

2. RECOMMENDATIONS:

- 2.1 To approve the revised DMP to guide tourism development, management and marketing over the period 2017-2020 and the proposed partnership arrangements to deliver the Plan and monitor progress.

3. KEY ISSUES:

- 3.1 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. 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. 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.

- 3.2 Tourism is cited as one of four foundation sectors identified in Welsh Government's new Economic Development Action Plan (alongside food, retail and care) launched on 12 December 2017.
- 3.3 The review of the previous DMP included:
- A review of Monmouthshire's tourism performance over the last plan period
 - Identification of the best opportunities for growth for next plan (marketing and development)
 - Extensive consultation with destination stakeholders / partners on proposed revisions and existing partnership arrangements
- 3.4 The impact and potential of Cardiff Capital Region's City Deal has been acknowledged in the review to ensure that the area contributes fully to regional growth. It is also essential that Monmouthshire's activity is complementary to that of Visit Wales, assisting in achieving Wales' overall growth target (value of tourism) of 10% or more by 2020.
- 3.5 Tourism performance over the life of the previous DMP 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.
- 3.6 The revised DMP has been developed in consultation with stakeholders and is based on a review of development and marketing priorities to ensure they are fit for purpose and reflect the needs of Monmouthshire's businesses and communities, identifying the optimal areas on which to focus activity over the next three years. The revised draft DMP has undergone further consultation, and has been updated to reflect stakeholder feedback. Stakeholder feedback has informed not only the suggested way forward but also the way that existing partnership arrangements could be refreshed in order to best serve tourism implementation activity up to 2020. The stakeholder consultation included face to face and telephone interviews with key partners and stakeholders and an online survey which was completed by 108 businesses / organisations involved in Monmouthshire's visitor economy. An infographic summary of stakeholder feedback can be downloaded [here](#).
- 3.7 The revised DMP aims to grow tourism revenue in the county by 10% in real terms value (from 2015 base) across the year, across all parts of the County, based on high quality visitor experiences. This is supported by the following objectives:
- Consolidating Food Capital of Wales status for Monmouthshire
 - Consolidating and making further progress on the Walking Product Development Plan
 - Maximising the tourism benefits of the cultural offer as well as countryside and heritage
 - Establishing the County's cycling credentials on a sustainable base of events, routes, amenities and cycle friendly communities and accommodation
 - Encouraging investment in the serviced accommodation sector (especially following development of the International Convention Centre)

- Developing seasonal programmes of events which support the County's key product offers – Food, Heritage, Arts + Culture, Walking and Cycling
- Continuing to support vibrant, attractive, welcoming and distinctive towns and villages
- Establishing Monmouthshire's position as Wales' 'first' county through an iconic intervention at the entrance to Wales
- 'Resetting' partnership arrangements with 'neighbours' and between stakeholders within the county
- Ensuring that Monmouthshire's on and off-line content is distributed through all relevant channels and campaigns
- Through all activities to build the reputation of the County - 'Monmouthshire' = high quality

Key challenges to Tourism Growth

- 3.8 Although showing healthy growth overall year on year, the vast majority of the area's 2.28m visitors visit Monmouthshire for the day, whereas the most significant benefits of tourism are generated by staying visitors. According to [Monmouthshire's 2016 STEAM Report](#), the 21% of the county's visitors who stayed overnight in 2016 generated 70% (£133m) of the total tourism spend (£190m). The most valuable bedspaces are within the serviced sector, with each bedspace estimated to be worth £25,449.84 pa (according to the same report).
- 3.9 Monmouthshire's accommodation profile is skewed in favour of non-serviced accommodation which is performing less well than serviced accommodation in terms of occupancy and is less resilient (especially caravan and camping) in times of inclement weather.
- 3.10 The partnership arrangements proposed in the previous plan have not worked as intended and there is a need to refresh these as future support for tourism from Visit Wales is predicated on robust Destination Partnership arrangements involving public, private and community interests.
- 3.11 Uncertainty over Brexit.

4. OPTIONS APPRAISAL

- 4.1 The revised DMP is based on extensive consultation with stakeholders, including consultation on a revised draft DMP with feedback incorporated in the final version. The alternative to the revised DMP is no DMP. This would leave the county without a strategic plan in place to guide tourism development, management and marketing, and without a destination partnership established to oversee delivery of the plan. This would in turn leave the county without access to external funding to deliver tourism-related activity.

5. EVALUATION CRITERIA

- 5.1 An evaluation assessment has been included at Appendix A for future evaluation of whether the decision has been successfully implemented. The decision will come back to this committee in 2 years for review.

6. REASONS:

- 6.1 A revised DMP is needed to guide tourism development, management and marketing of Monmouthshire for the period 2017-2020. The revised DMP has been consulted on extensively to ensure it meets the existing and future needs of Monmouthshire businesses and communities and focuses diminishing resources on optimal areas of activity.
- 6.2 A new Destination Partnership needs to be established to deliver the plan and monitor progress in order to access external funding for tourism-related activity.

7. RESOURCE IMPLICATIONS:

- 7.1 The revised DMP is based on existing resources and access to external funding to deliver identified priorities.
- 7.2 The proposed partnership will deliver efficiencies in terms of:
- Shared risk and reward
 - Economies of scale and better value for resources expended
 - The whole is often more than the sum of the parts
 - Elimination of duplication
 - A wider range of resources, talents and energies to call on

8. WELLBEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING AND CORPORATE PARENTING):

- 8.1 If the Destination Management Plan is approved it will have positive effects on all well-being goals, particularly in terms of delivery of the well-being goal for resilience, and will meet all of the sustainable development principles. Monitoring will be via the proposed Monmouthshire Tourism Action Group.
- 8.2 A Future Generations Evaluation is attached. This includes Equalities and Sustainability Impact Assessments (attached as Appendix 2).

The significant equality impacts identified in the assessment (Appendix 1) are summarised below for members' consideration:

Complete

The actual impacts from this report's recommendations will be reviewed in 2 years and the criteria for monitoring and review will include:

Complete

9. CONSULTEES:

Cabinet
SLT

The DMP was presented to Economy & Development Select Committee on 19 October 2017 and the committee's conclusions are as below.

Committee's Conclusion

- Tourism within Monmouthshire is on the right path. However, there are some areas that require further work. Some uncertainties beyond the County exist, such as Brexit and a potential tourism tax.
- A better connection is required between some of the Authority's objectives, aspirations and delivery.
- There needs to be a strong professional basis in terms of delivery.
- Tourist Information Centres and the Alternative Delivery Model were discussed.
- Internal synergies were discussed in terms of departments working collaboratively and setting priorities.

We resolved to endorse Monmouthshire's Destination Management Plan 2017-2020 prior to its consideration by Cabinet.

10. BACKGROUND PAPERS:

[Monmouthshire Destination Management Plan 2017-2020](#)

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Appendix A Evaluation Criteria – Cabinet, Individual Cabinet Member Decisions & Council

Title of Report:	Revised Destination Management Plan 2017-2020
Date decision was made:	10 January 2018
Report Author:	Nicola Edwards

What will happen as a result of this decision being approved by Cabinet or Council?

What is the desired outcome of the decision?
What effect will the decision have on the public/officers?

Continued tourism growth in terms of economic impact, visitor numbers and FTEs
Effective destination partnership established with regular meetings of engaged partners / stakeholders
Effective destination management of county with continued high levels of visitor satisfaction recorded
Continual improvement in performance of destination marketing channels / activities
External funding secured to deliver identified priorities

2 year appraisal (STEAM results are not available until 6 months into the following year)

What benchmarks and/or criteria will you use to determine whether the decision has been successfully implemented?

Think about what you will use to assess whether the decision has had a positive or negative effect:
Has there been an increase/decrease in the number of users
Has the level of service to the customer changed and how will you know
If decision is to restructure departments, has there been any effect on the team (e.g increase in sick leave)

Ongoing monitoring of KPIs as above

2 year appraisal

What is the estimate cost of implementing this decision or, if the decision is designed to save money, what is the proposed saving that the decision will achieve?

Give an overview of the planned costs associated with the project, which should already be included in the report, so that once the evaluation is completed there is a quick overview of whether it was delivered on budget or if the desired level of savings was achieved.

There are no additional costs associated with the project. It will be delivered within existing core tourism budget and resources and will enable access to external funding to deliver identified tourism priorities.

2 year appraisal

Any other comments