Monmouthshire

Destination Management Plan

2017-2020

visitmonmouthshire
ymwelwch a sir fynwy

Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government

Contents

Foreword

Welcome to Monmouthshire

Wales' first county – at least for most visitors to our country - and a chance to make a great first impression

Defined by water – the Usk, Monnow, Wye, Severn and 'Mon and Brec' Canal shape our county and connect us with our neighbours

Our inspirational landscapes, border-country heritage, intriguing creativity and above all tasty local produce give the county its very special character

Our name might not always be familiar but our shared destination brands certainly are: Brecon Beacons and Wye Valley

This plan is about defining what we want from tourism, renewing the way we work together, converting our assets into memorable visitor experiences, and making sure visitors know about them

Above all we want 'Monmouthshire' to be a mark of genuine and trusted tourism quality

Welcome to Monmouthshire……

Executive Summary

This plan builds on the previous destination plan for the county which ran from 2013-2016.

Strategic Context

The Wales Tourism Strategy 'Partnership for Growth' sets a target of 10% real terms increase in revenue from 2013 to 2020. In its own Tourism Framework the region increased that target to 15%. To help focus the development of visitor experiences the 'Year of Adventure' in 2016 has been followed by 'Legends' in 2017 with 'The Sea' and 'Discovery' to follow. The new Wales Brand 'This is Wales' sets 5 tests for tourism projects:

- ✓ Surprise and Inspire
- ✓ Change Perceptions
- ✓ Elevate Our Status
- ✓ Do Good Things
- ✓ Be Unmistakably Wales

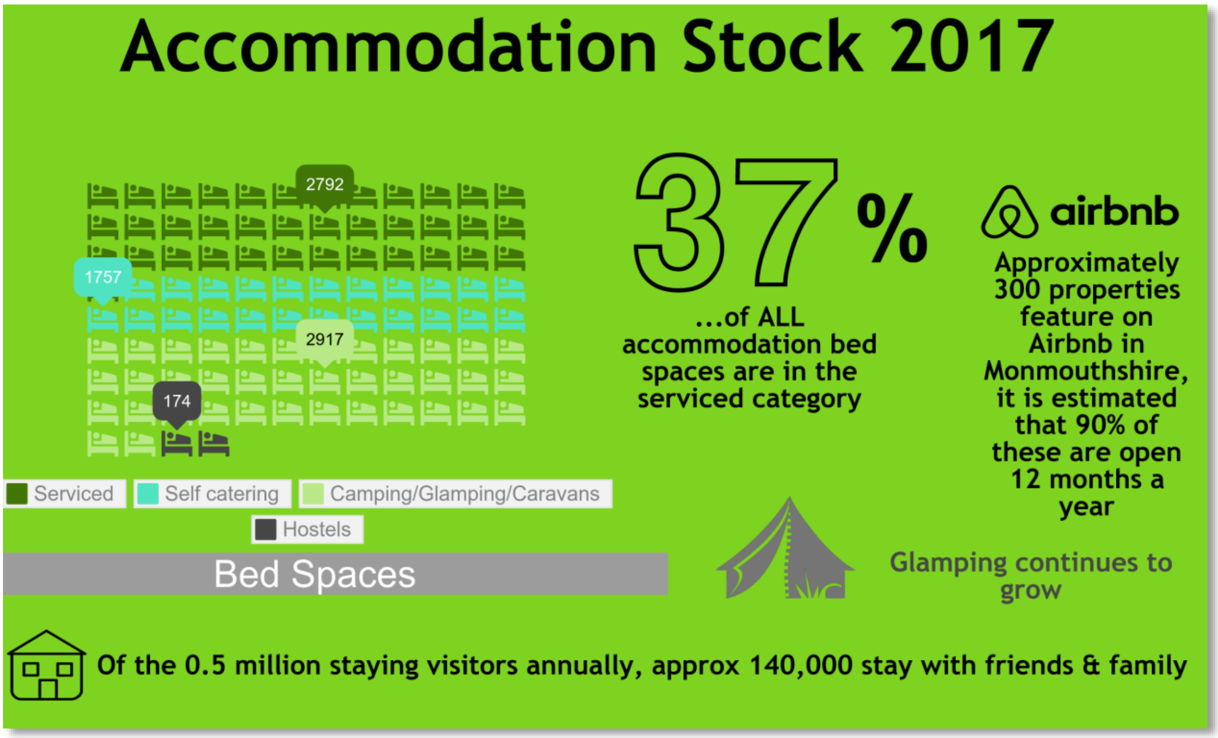
Achievements

Ambitious targets were set in the previous plan but based on historic prices; progress against those specific targets is as follows

STEAM [1]	Target 2015	Actual 2015	Growth since 2012
Visitors	2.5m	2.2m	7.1%
Economic Impact	£200m	£187m	18.0%
Employment FTE	4000	2744	1.5%

Where we are now

[1] Scarborough Tourism Economic Activity Monitor (STEAM) is a model used by all Local Authorities in Wales to track the volume and value of tourism.


Accommodation Stock 2017
2792
1757
2917
174
Serviced
Self catering
Camping/Glamping/Caravans
Hostels
Bed Spaces
37%
...of ALL accommodation bed spaces are in the serviced category
airbnb
Approximately 300 properties feature on Airbnb in Monmouthshire, it is estimated that 90% of these are open 12 months a year
Glamping continues to grow
Of the 0.5 million staying visitors annually, approx 140,000 stay with friends & family


Some of the things that visitors enjoy most
Food and drink
Walking
Countryside
Heritage
Events are VERY important and cycling is growing in popularity
In the 2016 visitor survey, 95% of those interviewed said that they would recommend Monmouthshire to friends and relatives

Our Vision - Where we want to be by 2020

Monmouthshire has enhanced its status as the Food Capital of Wales, but now as much for great value everyday eating across the county as Michelin-starred fine dining. Festivals and food trails guide visitors to the best local produce to enjoy here or take home. And that legendary food and drink tastes so much better with a background story...

As a legacy of hosting the Eisteddfod in 2016, the County's reputation for arts, culture and creativity is now growing to match that for stunning landscapes and heritage attractions – after all this historic border country was the birthplace of British tourism **and** the picturesque movement.

Driven by reputation-building participation and spectator events, Monmouthshire is fast becoming Wales' most welcoming county for road and lane cycling, with the offer developed in the same sustainable and successful way as walking, itself given fresh impetus by connection to the England Coast Path. As the home of the Welsh Grand National, the County is making more of its wider sporting heritage too. A '4 seasons' programme of events is encouraging year round, longer and overnight visits.

Our visitors are also discovering new and surprising corners of the County –like the 'big skies' and intricate landscape of the Living Levels – given confidence to explore by targeted communications, well-informed hosts, timely and relevant information and enthusiastic Ambassadors.

The opening of the Wales International Convention Centre 'next door' at Celtic Manor in 2019 has been the trigger to bring forward long-needed investment in the serviced accommodation base, supported by tourism-friendly planning guidance. Big name 'brands' on major routes are joined by rural boutique hotels delivering a unique 'sense of place'. At last, Wales 'first' County is exploiting its superb communications network with our M4 and M5 corridor markets and proximity to the business centres of Bristol, Cardiff and Newport.

Active in the wider City Region and with a major stake in both the Brecon Beacons and Wye Valley - destinations with international recognition - it is good to see significant improvement in collaboration with 'neighbours' and between public and private sector partners based on a clear understanding of delivery roles, as public funding continues to diminish.

We are not competing with established destination brands but delivering great experiences for them – the 'Monmouthshire' name has now become a stamp of genuine and trusted tourism quality.

Strategic Aims and Objectives

To grow tourism revenue to 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**

Supported by the following objectives

- To consolidate **Food Capital of Wales** status for Monmouthshire
- To consolidate and make further progress on the **Walking** Product Development Plan
- To maximise the tourism benefits of the **cultural offer** as well as **countryside** and **heritage**
- To establish the County's **cycling** credentials on a sustainable base of events, routes, amenities and **cycle friendly communities** and accommodation
- To encourage investment in the serviced **accommodation** sector (especially following development of the International Convention Centre)
- To develop a seasonal programmes of **events** which support the County's key product offers – **Food, Heritage, Arts + Culture, Walking and Cycling**

- To continue support for vibrant, attractive, welcoming and **distinctive towns and villages**
- To establish Monmouthshire's position as our **'first' county** through an iconic intervention at the entrance to Wales
- To 'reset' **partnership** arrangements with 'neighbours' and between stakeholders within the county
- To ensure that **Monmouthshire** 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**

Action Programmes

Programmes	**Action Areas**
Headline Programmes	
The Accommodation Offer	Encourage upgraded and increased capacity in line with 2013 Opportunities report and take advantage of WICC development (including wider business tourism)
The Activities Offer	Develop the Monmouthshire Cycling offer using the same successful and logical methodology as for Walking concentrating on a manageable number of viable routes e.g. canal, Living Levels. Consolidate and continue development of the Walking Offer
Wales Food Capital	Broaden impact of Food Capital status by concentrating on the 'everyday' offer to complement the high end product. Encourage VW to consider a Year of Food...
Cultural Product Offer	Building on its rich 'border country' heritage, develop a contemporary creative offer to sit comfortably alongside food and activities e.g. open studios to complement open gardens. Support development of cultural infrastructure

	and venues. Develop a landmark feature at the border to reflect excellence, creativity and innovation
The Monmouthshire Season	Encourage events that create year-round added value, support emerging products and celebrate the County's strengths: Walking, Cycling, Food and Drink, Culture and Heritage especially those of national status. Use events creatively to respond to Wales 'Years of...' initiative e.g. extended River Wye Festival for Year of the Sea
Support Programmes	
A new Partnership	Develop a new delivery model for destination development and marketing in Monmouthshire
Welcoming Places (Towns, villages and countryside)	Encourage each town to play to its distinctive historic and contemporary strengths and therefore enrich the overall visitor experience e.g. • Chepstow - Walking and Sporting Hub • Monmouth – Local 'Legends' • Abergavenny – Food and Drink • Caldicot – Capital of the Levels • Usk – Town of Flowers
Welcoming People	Signpost business skills provision and maintain the Ambassador cohort
Visitor Information	Identify and implement more cost effective and dispersed methods for delivering timely and relevant visitor information building on the expertise and resources of the key TIC hubs
Content creation and distribution	Develop consistent content on Monmouthshire products and make it available through a variety of channels and partner campaigns
Customer Relationships	Customer communications and visitor research

1. Current Climate

1.1. Scene Setter

This plan covers the period 2017 to 2020 and replaces the plan put in place in 2012, while acknowledging that not all actions outlined in that plan have yet been fully delivered.

Activity has involved:

- Reviewing development and marketing priorities to ensure that they are fit for purpose
- Identifying the optimal areas on which to focus activity in the next three years
- Reflecting on the needs of Monmouthshire's businesses and communities

There has been acknowledgement of the impact and potential of Cardiff Capital Region's City Deal in order 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.

An invaluable aspect of the work (in terms of the plan's ultimate success and longevity) has been consultation with the destination stakeholders and partners. This 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.

1.2. Strategic Context

The context for tourism development and marketing in Wales is set by the national tourism strategy Partnership for Growth 2013-2020. After a mid-term review in 2016 it sets the following priorities (items particularly relevant to Monmouthshire are in bold):

Promoting the Brand

- **Building Wales' profile**; rolling out the series of Themed Marketing Years with Year of Adventure in 2016**, Year of Legends in 2017 and Year of Sea in 2018**, underpinned by **new product experiences and events**.
- Evolving the **product led approach**; promoting relevant holiday types, **iconic products and distinctive** destination brands and **experiences** to meet market needs.
- **Attracting high-growth markets**; continuing to prioritise the domestic holiday market, taking a tightly targeted approach in our priority international markets of Ireland, Germany and US and focussing on partner-led and tactical opportunities in wider international markets.
- Refocussing marketing activity; delivering an appropriate balance of marketing activities between and within each target market based around market growth potential, resource availability and **opportunities to collaborate with partners**.
- Targeting new high yield markets; securing additional resources to target the **Business Events market**, supporting Cruise Wales and supporting golf marketing, with a view to greater private sector engagement after the Seniors Open in 2017.
- **Becoming digital-first**; developing an integrated digital gateway for Wales, improving www.visitwales.com and Visit Wales international web sites, developing the content ecosystem for Wales and growing social media communities.
- Driving spend and profitability; Visit Wales will continue to focus on increasing overall demand and interest in visiting by using digital and trade channels to filter interest into leads for the industry.

Product Development and Major Events

- Flagship attractions; particularly those providing distinctive and unique **experiences that can attract new demand and all weather, year round visits**.
- Quality accommodation; particularly high quality branded hotels and upgrades to **quality accommodation that meet changing market demands**.

- Business and Events; products to cater for **Business and Events** markets capitalising on proposed **Wales International Convention Centre**.
- Cruise; Develop modern cruise infrastructure at key ports.
- Development of **Heritage and Cultural experiences**; investment in the visitor experience and **accommodation provision at landmark heritage sites**.
- Food and Drink; strengthen Wales' growing reputation as a **food destination** including progressing priorities set out in the Food Tourism Action Plan.
- Utilisation of emerging technology; industry to harness **new technology to create exciting, transformative visitor experiences**.
- Attracting new **high profile events** and developing existing events; drawing high spending visits from outside Wales.
- **Supporting the Thematic Years with anchor events**.
- Maximising branding opportunities at events.

People Development

- Continue to **influence training and apprenticeships** schemes to remain in step with changing industry and customer needs.
- Drive business use of the Welsh Government Skills Gateway Business Online Support Service.
- Support destinations to achieve **World Host Destination status**.
- Introduce a National Tourism Award for excellence in customer service in 2017/18.
- Investigate development of a customer service element in the Welsh Baccalaureate.
- Progress the Learning Journeys project to develop best practise across the industry.
- Support initiatives aimed at changing perceptions of careers in tourism.
- Increase **provision of guides and local ambassadors with suitable language skills**.
- Work with the industry to consider opportunities for a **new hospitality school** in Wales.

Place Building and Partnerships

- **Refocus support for the Destination Partnerships** to drive forward key actions in line with their plans and wider strategic priorities.
- Identify **destinations with market strength to be promoted as lead sub-national destination place brands**.
- Review the role and **support for Tourism Associations**.
- Deliver the EU funded strategic tourism infrastructure investments at the eleven specified destinations across Wales.
- **Strengthen the links between the Regional Fora, Destination Management Partnerships, local tourist associations and Sector Representative Industry Bodies.**
- Ensure that **tourism is prioritised in the plans of the Regional Economic bodies**.
- Promote the new online support for the industry and **develop a sustainable approach and distinctive sense of place**.
- **Provide better evidence to key decision makers** at a local level to ensure budgets are protected to reflect the impacts of the visitor economy.
- Ensure that **tourism needs are considered in relevant transport infrastructure** developments including better connectivity via the main air and sea ports of entry, improvements to the M4, rail electrification and franchise agreements.
- **Work with transport operators** and carriers on route promotion to visitors.

1.3. Achievements

The previous highly ambitious Destination Plan formally ran from 2012 to 2015 with the following developmental objectives:

1. To achieve a more strategically driven and co-ordinated approach to developing the visitor product of Monmouthshire
2. To focus firmly on priorities in order to make the best use of available resources
3. To engage tourism businesses and stakeholder organisations in productive partnership working that is relevant to their interests and makes the best use of available budgets and manpower resources
4. To develop year-round visitor demand
5. To increase visitor satisfaction with the Monmouthshire visitor experience
6. To drive up tourism business performance in the county
7. To responsibly grow the economic, environmental and social contribution of the visitor economy of Monmouthshire
8. To contribute significantly to the development of the regional and national visitor economy in Wales[2]

Actions were based on 7 programmes:

1. Tourist Accommodation Development
2. Town & Village Visitor Experience Development Plans
3. Walking Product Development
4. Food Tourism Product Development

[2] Partnership for Growth, the national tourism strategy, sets a target of 10% real terms growth for the period 2013 - 2020

5. Festivals Development
6. Visitor Information
7. Tourism Skills & Business Support

Monmouthshire's tourism performance over the previous plan's life (between 2012 and 2015) has been very encouraging - (10% real terms growth in terms of economic impact, 8.7% growth in visitor numbers and 1.5% growth in FTE jobs) with exceptional growth (6.6%) seen between 2014 and 2015 which was above the national (5%) and regional average (6%). A summary of STEAM results based on both historic and index-linked prices can be found at Appendix 1.

Ambitious targets were set in the previous plan but based on historic prices; progress against those specific targets is as follows

STEAM [3]	Target 2015	Actual 2015	Growth since 2012
Visitors	2.5m	2.2m	7.1%
Economic Impact	£200m	£187m	18.0%
Employment FTE	4000	2744	1.5%

To drive these numbers, there was significant progress on delivery of the Plan's developmental priorities, whether in terms of the experience visitors find on the ground in villages, towns and attractions, the focus on walking, the consolidation of the County as Wales' Food Capital, the programme of events or the quality of the product database which drives marketing and communications. Impacts on the overall tourism asset base are explored later in this report (Section 3).

Monmouthshire still faces challenges however, not least in seeking to reverse the previous decline in serviced accommodation stock (although showing an encouraging

[3] Scarborough Tourism Economic Activity Monitor (STEAM) is a model used by all Local Authorities in Wales to track the volume and value of tourism.

direction at this time) the provision of visitor information and services and the way it can most successfully market the County in closer partnership with the industry and its neighbours.

The previous Plan relied heavily on the public sector providing a lead role in each of the programme areas but progress was inevitably compromised by a rapidly changing operating and political environment and the impact of falling public sector funds and resources.

Consumer Marketing

The previous Destination Plan specifically excluded consumer-marketing actions. These were outlined in a separate plan and were predicated on agreements that Monmouthshire products and content developed through the Destination Plan would be carried by the consumer-facing brand campaigns for Wye Valley & Forest of Dean and Brecon Beacons, via protocols between Monmouthshire County Council (MCC) and Wye Valley and Forest of Dean Tourism Association (WVFDTA), and the Brecon Beacons Sustainable Destination Partnership (via Brecon Beacons National Park Authority).

In the event, it proved impractical to implement these proposals fully, as originally devised, to guarantee full marketing distribution of Monmouthshire product, and MCC felt obliged to invest resources in developing the www.visitmonmouthshire.com website with experiential thematic content, and building and communicating with a consumer database as well as acting as data champion for tourism supply-side product information within the Visit Wales Guestlink protocol.
This latter kind of work is unglamorous, largely unnoticed and **absolutely necessary**.

N.B. This revised plan does contain recommended marketing actions

1.4. Working Arrangements

Destination Partnerships

Currently there is no Destination Partnership for Monmouthshire, at least as envisaged in the previous Destination Plan. As identified above the intention was that the County would ideally also work through and actively participate in the 'neighbouring' partnerships serving Brecon Beacons and Wye Valley and Forest of Dean, with industry representation led by Brecon Beacons Tourism in the north/ west and WVFDTA in the south/east respectively. In hindsight the unintended consequence of this recommendation, which was primarily linked to pragmatic marketing actions only, has been to fragment working relationships.

Political and organisational complexity is built in to both destinations as they cross Local Authority (LA) and national borders, making partnership working challenging.
The Brecon Beacons Destination Partnership, facilitated and supported by Brecon Beacons National Park Authority (BBNPA), is currently reviewing its Tourism Strategy and Destination Action Plan. A revised Wye Valley and Forest of Dean Destination Plan is also in development.

Wye Valley and Forest of Dean Tourism Association (WVFDTA) www.wyedeantourism.co.uk

WVFDTA has around 80 (out of its 300) members in Monmouthshire and is a company limited by guarantee. (A generalisation perhaps but Monmouthshire provides the established accommodation base while the Forest of Dean specialises in attractions and activities). It has a paid staff resource providing strategic leadership, marketing and administration capacity and a voluntary board of directors. It is a key partner in the WVFD Destination and is recognised as a Destination Management Organisation (DMO) by Visit Britain/ Visit England. It currently concentrates on marketing activities but with aspirations to get more involved in destination development activities.

Brecon Beacons Tourism (BBT) www.breconbeaconstourism.org

Brecon Beacons Tourism (BBT) is the key industry partner in the Brecon Beacons Sustainable Destination Partnership. BBT has around 250 members, is joint 'owner' of the Brecon Beacons destination website, has a paid executive, and delivers a range of networking, business-to-business and business-to-consumer benefits and activities against an annual business plan.

Abergavenny and District Tourism Association (ADTA) www.visitabergavenny.co.uk

ADTA has around 100 members but with a higher proportion of retail, food and drink and other ancillary categories. It is affiliated to BBT and many ADTA members have also joined BBT in their own right[4]. As with many other purely voluntary TAs in Wales, ADTA is constrained by capacity issues in terms of time and resources.

Regional Working

MCC represents the County on the 10-authority regional Destination Management Group (DMG) and Destination Implementation Group (LA Tourism Officers), where discussion is currently focused on the strategic tourism opportunities within the Cardiff Capital Region City Deal mechanism. The DMG is currently commissioning a

[4] Wherever they are located in the county, Monmouthshire businesses often choose to join more than one destination association. As in other parts of Wales there are many however who choose to join none.

Destination Investment Plan to inform City Deal spending plans. Ahead of this plan Monmouthshire's capital investment priorities have been identified as:

- Wales Gateway Feature (on the Living Levels area close to border)
- Walking Product infrastructure and support (completion)
- (Road and Lane) Cycling Product Development
- Serviced Accommodation Development
- Business Tourism Product Development

Monmouthshire participates in the regional Southern Wales Campaign, which covers travel trade and attractions marketing www.southernwales.com .

Visit Wales (www.visitwales.com)

MCC and the industry associations are invited to meetings of the South East Wales Tourism Forum, which is Visit Wales' preferred second-tier mechanism for industry engagement.

Visit Wales is the most significant external public funder of tourism development and marketing for Monmouthshire through:

- Regional Tourism Engagement Fund (revenue: for Destination Partnership activity)
- Tourism Product Innovation Fund (revenue: private sector)
- Tourism Investment Support Scheme (capital: public realm[5] and private sector strands)

In addition VW has allocated EU capital funds to 11 transformative 'Attractor' projects across Wales, one of which borders Monmouthshire – work on the "Mon and Brec" Canal.

Blaenavon World Heritage Site (www.visitblaenavon.co.uk)

[5] This strand is derived from Rural Development Programme funding. The rural wards of the county also have access to Leader funds through the Vale of Usk Local Action Group shared with Newport.

MCC has a place on the Blaenavon World Heritage Site Management Committee. As lead body Torfaen CBC has commissioned a review of the Blaenavon World Heritage Site Management Plan. In terms of access to and enjoyment of the World Heritage Site the Draft Plan identifies that the primary 'way in' for visitors should be the walking, cycling and other activity opportunities offered by the landscape with the heritage 'story' and sites providing additional visitor value. MCC is specifically identified as having a supporting role in terms of rationalising the network of walking and cycling routes and developing loops and links and promoting the National Cycle Route multi-user trail between Pontypool, Abergavenny and Brynmawr.

Wye Valley AONB (www.wyevalleyaonb.org.uk)

The Wye Valley Area of Outstanding Beauty (AONB) covers parts of Monmouthshire, Herefordshire and the Forest of Dean.

The Wye Valley AONB Joint Advisory Committee has a place allocated for a tourism industry representative and WVFDTA have been invited to fill that position. MCC leads the officer technical group. The AONB Management Plan is supportive of sustainable tourism and has led significant Destination Development activities in the past (e.g. Wye River Festival, Overlooking the Wye Landscape Partnership Scheme). Usefully the AONB straddles 3 county and 2 national borders, lying at the heart of the wider Wye Valley/ Forest of Dean destination, but capacity issues have prevented it getting more involved in tourism Destination Management more directly.

Living Levels

MCC is a leading partner in the Living Levels project, which covers the coastal lowlands south of the M4 from the River Wye to the River Rhymney, currently the subject of a substantial Landscape Partnership Scheme bid. This will deliver landscape, interpretation and access improvements to a less visited part of the County, including the M4/ M48 corridor 'gateway' to Wales.

Vale of Usk Local Action Group

Facilitated by MCC, the LAG is delivering the LEADER programme in rural wards of Monmouthshire and Newport, based on a Local Development Strategy. There is tourism industry representation on the LAG. Tourism initiatives can be supported through Theme 1 of the LDS ‘Adding Value to Cultural and Natural Heritage’ but only feasibility work and pilot projects are eligible. A useful by-product of the LAG is closer cross-border cooperation with Newport.

Monmouthshire County Council

MCC itself has lost DM-focused resources over the period of the last Destination Plan. Aside from operational TIC staff only 2 staff members cover the function currently, and even then not exclusively.

Unlike many LAs in Wales MCC still directly operates a Tourism Information Centre in Chepstow and supports (along with BBNPA, Abergavenny Town Council, St Mary’s Priory Development Trust and local volunteers) the Abergavenny TIC and other Tourist Information Points across the County e.g. Shire Hall, Monmouth.

MCC is currently undertaking an extensive and lengthy management review of how leisure, cultural and tourism services will be delivered from 1st April 2018. 2 clear options have emerged:

- An external delivery model eg ‘arms-length’ Trust
- Internal service transformation

A final decision is not expected until after the County Council elections in May 2017, but may have a significant impact on how this plan is prioritised and delivered, not least the need for a commercial approach to providing Information Centres.

MCC has member representation on both the Brecon Beacons National Park Authority and Wye Valley AONB. MCC also leads the Technical Officers Working Party of the Wye Valley AONB.

2. Where we are

2.1. Demand Factors and Competitive Position

Although showing healthy growth overall year on year, the vast majority of the area's 2 million annual visitors are visiting for the day. STEAM[6] figures are shown below.

Visitor Type	2012 - Number	2015 - Number	% Change
Staying	0.443 million	0.494 million	**+ 11.7**
Day	1.573 million	1.696 million	**+ 7.8**

This is potentially a reflection of ease of access from nearby urban areas in Wales and England and as well as looking for ways to convince visitors to stay overnight, priority should be given to finding ways to maximise secondary spend revenue whilst those day visitors are in the area; highlighting retail and food opportunities as well as consolidating event programming. The 2016 Visitor Survey ([7]Beaufort) corroborates the above STEAM figures recording that
"Visitors to Monmouthshire are more likely to be on a day trip than visitors to Wales as a whole (at 94% compared to 88% across Wales). The proportion of staying visitors to the area is half that of Wales overall (6% compared to 12% overall)"

However, although in the minority in terms of volume of visitors, it is those who do stay that add significantly to spend levels. Of the £187 million income attributable to tourism in 2015, £134 million of that came from staying visitors compared to £53 million derived from day visitors.

NB: It should also be noted that overnight stays are increasing; growth of approximately 12% was recorded in the period 2012-2015

[6] STEAM Reports 2012 and 2015

[7] Visitor Survey 2016 Beaufort

In the 2016 survey, the proportion of visitors to Monmouthshire coming from England, Scotland and Northern Ireland was similar to the proportion of visitors who came from parts of Wales (48% and 45% respectively). Monmouthshire's proximity to England explains a slightly higher number of English visitors than the Wales average and although only 7% were of overseas origin this is higher than the average across the whole of Wales (where only 4% of visitors are international). Also higher than the average of across Wales is the proportion of couples visiting the area.

Something that is clear from consultation and survey results (and aligned to the depth of product across the database that Monmouthshire maintains) is the positive way in which many different businesses view themselves as very much part of the local tourism/visitor economy. E.g. retailers gave their views alongside more "direct" tourism operators who ran accommodation and attractions locally.
Additionally, survey results suggest a turnover of operators given the numbers who have been in business for 5 years or less. 16 respondents indicated that they had been involved in the tourism sector for 12 months or less and 28 recorded involvement of between 1 and 5 years.

This is not always the case in other destinations and represents a clear opportunity to further develop a consistent, quality visitor product across the board.
Several principal factors may impact on demand for Monmouthshire as a destination of choice for both day and staying visitors. Some of the following are further discussed in section 4.4. They are shared considerations for all UK destinations and include

Brexit - while there is still uncertainty around the longer term impact of Brexit the vote had an "immediate, positive impact" [8](Forwardkeys Research) on tourism to the UK in the latter part of 2016 when a drop in the value of sterling saw an increase in bookings from Europe and further afield as well as from value hungry domestic tourists who chose to holiday at home.

Short Breaks - UK holidays are also maintaining a holding pattern of sustained

[8] Forwardkeys Research 2016

growth in the short break sector. In 2016, for the second consecutive year, the proportion of Britons taking a short-break (i.e. up to three nights) at home increased[9].

"Safety first" would appear to be a major consideration for many. People have chosen to holiday in more traditional destinations and also to seek out UK locations that offer a borderless, hassle free trip[10].

Experience based breaks - recent research[11] shows that people want more out of their life and their time away than ever before. They look to make authentic connections on a physical, emotional, spiritual, social and intellectual level. Experiential tourism is able to assist with this and has grown in recent years.

Social media peer-to-peer sharing has helped to fuel the above and acted as a platform for peer recommendations. Holiday choices influenced by trusted friends and family will continue and point to the encouragement of word of mouth through positive reviews and social sharing. As recorded by Nielsen "*92% of consumers trust online content from friends & family above all other forms of brand messaging*". Perhaps even more significantly, that same research shows that online reviews play such a strong part in the decision making process that "(consumers)…*trust strangers second most - far more than they trust content from brands."*[12]

Improved connectivity and a rise in mobile phone growth and usage tipped the balance of internet search in November 2016 with more users around the world accessing the internet from mobile devices than from desktop computers for the first time.

Digital media - this plays a central role in the travel planning and booking process.

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[9] BRCD Holiday Trends 2017

[10] BRCD Holiday Trends 2017

[11] BRCD Holiday Trends 2017

[12] Nielsen Research 2016

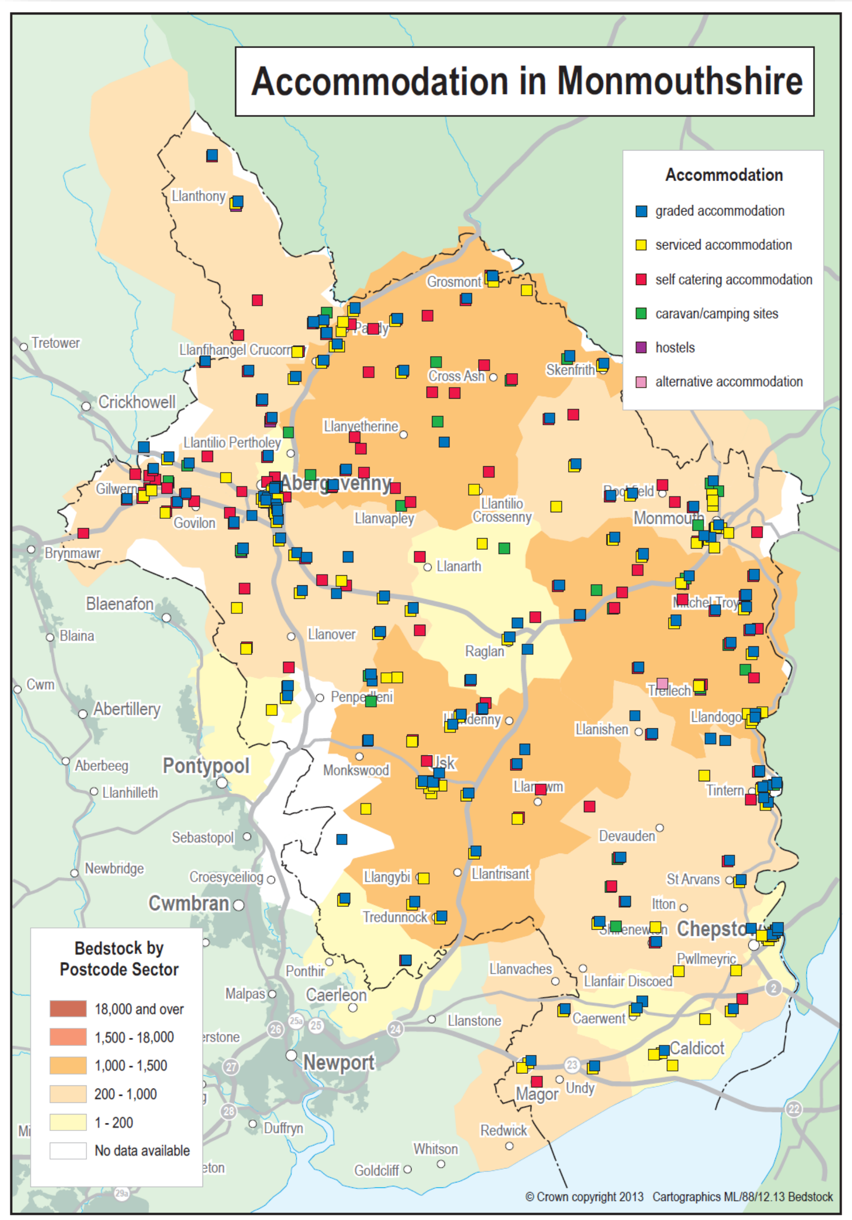
On average, Britons took around 5 1⁄2 hours to dream, plan and book their main holiday in 2015 using a combination of online resources, 4 in 5 were peer-led (word of mouth, friends' social media or review sites) or expert-led (travel agents) while search engines also played a major role.

"Years of…" theme - in the Wales context there is an opportunity to be grasped for the area maximising opportunities created by Visit Wales' Year of Legends (2017), Year of the Sea" (2018) and Year of Discovery (2019).

2.2. Supply Factors

Accommodation

The map below (based on 2013 statistics) shows that accommodation is well spread across the whole county but with the greatest concentrations centred on Abergavenny/ Black Mountains and the Wye Valley



According to official figures[13] the accommodation stock within Monmouthshire has seen change in the last five years (2012-2017), predominantly in the non-serviced touring and caravan and camping category, although this is largely a reflection of reclassification rather than overall reduced stock.

Although there have been fluctuations from 2012, in real terms, over the last year (2015-2016) the headline change is 1 additional 50+ room property.

[13] STEAM and Bed Stock Reports 2016

It should be noted that a reclassification from 4 bedspace family rooms to 2 bedspace twin/double rooms by one 50+ room hotel has reduced the number of serviced bedspaces despite the opening of one additional 50+ room early in 2017.
'Glamping' (which includes Yurts, Teepees, Eco Pods, Shepherd's Huts) did not feature as a category in 2012 but is now a growing category in the area. Previously this fell under 'Self-Catering' or 'Caravan and Camping' depending on the business type. Narrow boats fall under the non-serviced categorisation.

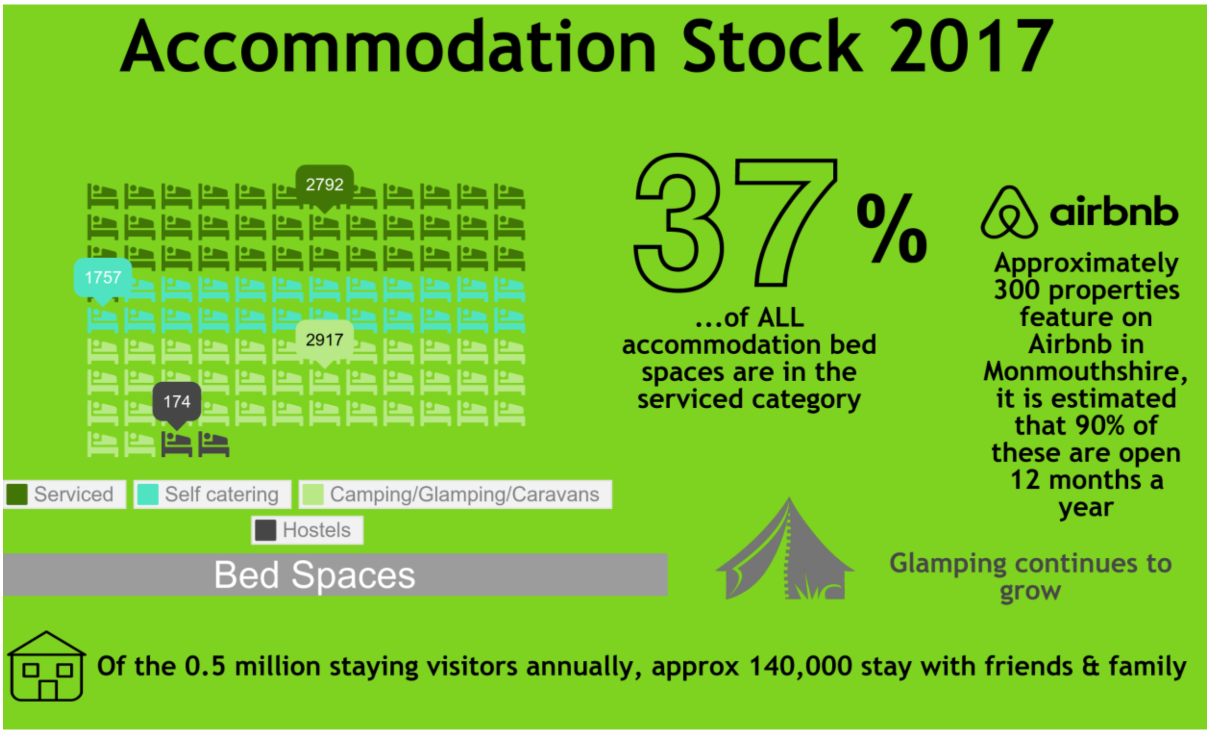
It should be borne in mind that the figures for bed stock presenting on Airbnb would suggest higher numbers operating 'under the radar'. Barely featuring at the time of the last strategy (as although founded in 2008 the site was still niche) Airbnb had become a major force in the Online travel Agency (OTA) and social media community and now offers experience booking as well as accommodation reservations.

As at March 2017, the site offers approximately 80 accommodation options in the wider Abergavenny area, 43 in the Wye Valley/Ross on Wye area, 29 around Caldicot, 54 in and around Chepstow, 39 around Usk and 114 in Monmouth.[14]
NB: Where identifiable Airbnb properties are included on the county's product database and are factored into overall bed stock figures. Only those open all year are recorded, I.e. approximately 90% of all existing Airbnb establishments.
Although there is overlap with some known bed stock, many of these properties are "off the grid" in terms of knowledge and influence of Monmouthshire's activities (including skill development opportunities).

This is a position shared with virtually every recognised destination in the UK (as well as further afield) and is important to note as the rise in homestay will undoubtedly impact on the overnight stay capacity and pattern with the area, albeit that it will be extremely difficult if not impossible to effectively monitor that impact.

[14] Even if Monmouthshire specific search terms are used Airbnb will, of course, offer results which are based outside the county

Accommodation Category	Businesses 2012	Bed Spaces 2012	Businesses 2017	Bed Spaces 2017	Change
Serviced accommodation					
+50 room hotels	2	790	3	767	+1 Property -23 spaces
11-50 room hotels	24	1171	26	1140	+2 properties - -31 spaces
<11 room hotels/others	106	911	113	885	+7 properties - -26 spaces
Serviced total	**132**	**2872**	**142**	**2792**	**+10 properties -80 bedspaces**
Non-serviced accommodation					
Self catering	166	1217	219	1583	+53 properties +366 spaces
Static caravans/ chalets	1	44	3	44	+2 properties +0 spaces
Touring caravans/camping	35	3159	27	2767	-8 properties - -392 spaces
Not-for-hire statics	0	0	0	0	
Glamping			14	106	New stock category
Hostels			4	174	+4 properties +174 spaces
Non-serviced total	**202**	**4420**	**267**	**4674**	**+61 properties +80 bedspaces**
Total	**334**	**7292**	**409**	**7466**	



Other Tourism Assets

Destination partners accomplished much during the life of the previous plan in terms of the wider product offer and destination infrastructure. The headline products such as the **food and drink offer** continued to gain momentum and further advanced the county's reputation (and this is borne out by satisfaction levels and recognition of the sector by both operators and visitors).

In the **heritage** context, Caldicot Castle- a key attraction-laid the foundations for its development into a major events venue in the county and also opened a new catering outlet (tea room) to serve customers while Monnow Bridge and Gate (part of Monmouth's town walls) undertook refurbishment and physical access improvements as well as implementing a volunteer training programme in order to deliver guided walks.

Dark Sky Discovery Site status was awarded to five of Monmouthshire's heritage sites; Abergavenny Castle & Castle Meadows, Black Rock, Caldicot Castle, Goytre Wharf and Skenfrith Castle and this adds significantly to not simply product appeal but also awareness raising of the county in the UK context.

Walking remains a popular (and growing) facet of the county's product offer and with the advent of the Wales Coast Path (WCP) in 2012 loops were developed to Caldicot and Caerwent via the Severn Tunnel Junction and Caldicot train stations with 21 "kissing" (pedestrian) gates installed plus a range of complementary way marker posts to maximise opportunities to exploit the national route.

Notably, enhancement of the Usk Valley Walk enabled better access and links to Abergavenny town centre and transport points via Castle Meadows and three new, interpreted loops – the **Time travelling trails-** were developed from the Wales Coast Path and Offa's Dyke, namely Sudbrook, Shirenewton and Wentwood. The Tunnel Centre (Sudbrook) has provided enhanced interpretation and walking facilities along the WCP while sculptures have added to both the Offa's Dyke National Trail (marking the start and finish) and the WCP (at Chepstow). The former well known Trail has also benefitted from loop development. The Nedern Trail (a short linear way marked walk starting from Caldicot Castle and based on the Nedern brook) has also been enhanced with interpretation panels and benches.
In addition to physical developments two new walking festivals have been established; Chepstow (April) and also MonDean (formerly the Monmouthshire Walking Festival) that takes place in October.

Delivery of a "Walkers are Welcome" capital grant scheme helped ensure that an additional 9 accommodation businesses are now particularly "walker friendly" with facility upgrades such as drying areas. Significantly, Abergavenny, Chepstow, Monmouth and Tintern have all achieved "Walkers are Welcome" *town* accreditation in recognition of their walker friendly welcome /product.

Improved interpretation, signage and access to the county's rivers and waterways has meant that visitors can derive more enjoyment from some of the county's natural assets and these projects include:

- A new visitor centre at Llandegfedd Reservoir and a 10km way marked trail around the reservoir that links to that centre

- River interpretation and fishing information panels on the rivers Monnow and Wye near Monmouth

- "Mon and Brec" Canal interpretation which has seen provision of panels based on Michael Blackmore watercolour paintings and interpretive/canal orientation map benches on the Monmouthshire stretch of canal (supplemented by a new Canal history leaflet)

- The St Teilo's Church Gavenny riverside project that focused on riverbank protection, footpath extension and interpretation panels

- Tintern Wye riverside resurfacing of a track forming part of the Wye Valley Walk alongside provision of new Wye Valley Walk panels at Tintern and Piercefield

- Provision of train related bespoke cycle racks at The Old Station

The **cycling product** in the county has witnessed a huge boost in popularity via the number of high profile cycling events held in recent years; particularly the British Cycling National Road Championships (2014) and Stage 3 of the Tour of Britain as well as Velothon Wales.

Visitor signage, an essential element of county destination management and an essential aspect of an enjoyable trip, has been consolidated with comprehensive signage schemes in both Monmouth and Usk. (A similar scheme was developed for Abergavenny but unfortunately this could not be implemented due to trunk road complications and costs). These larger initiatives are complemented by area specific enhancements such as:

- **Abergavenny**'s refurbished fingerpost signs, new town maps, visitor information panels at the train station, directional signing to St Mary's Priory/Tithe Barn/TIC and a welcome sign for St Mary's Priory, street light banners conveying key tourism messages and The Tumble iconic cycling hill climb signs.

- **Chepstow**'s refurbished fingerpost signs, pedestrian signs linking the town centre and the train station

- **Monmouth's** refurbished fingerpost signs, 'Wikipedia town' sign plates, street light banners conveying key destination messages, 'Market Town' interpretation panels and Nelson Garden directional signs

- **Caldicot**'s additional brown tourism signs and welcome signs for the Castle, and new town centre noticeboard.

- **Magor's** brown and white signage for 'Historic Magor Square' and Magor Marsh

- **Tintern's** enhancements to two sites within the village including timber fingerpost signs and improved highway signage

- **Caerwent's** new village entry signs

2.3. Consultation and Survey Results

Extensive consultation was undertaken to inform this plan:

- A detailed on-line industry survey with well over 100 responses
- A workshop with senior MCC planning, culture, economic development, place-shaping, countryside and tourism staff
- A presentation and discussion with MCC's Economy Scrutiny Committee
- One-to-one discussions with key industry and public sector stakeholders

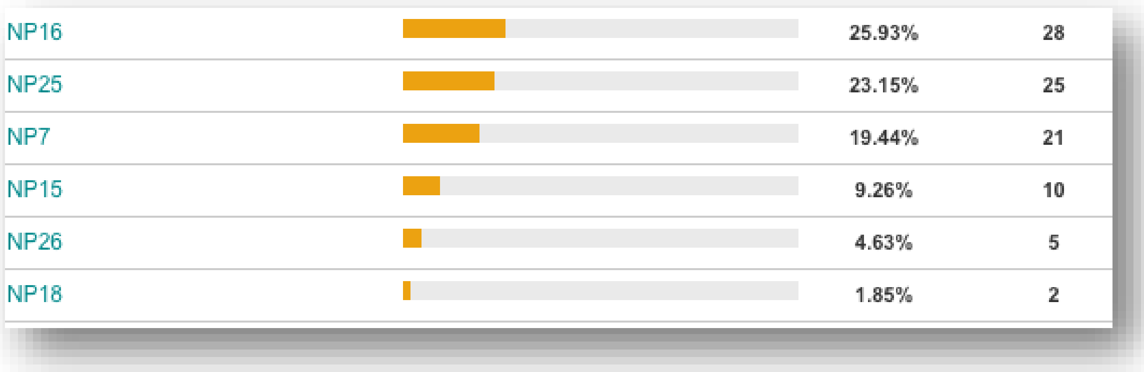
The online survey took place over 3 weeks in November/December 2016. Disseminated via partner database and social media channels, a total of 108 respondents took part. We communicated with a wide cross section of established accommodation providers, attraction operators, activity operators and representative bodies (stakeholders with an interest in the visitor economy).

A copy of the survey form can be found at Appendix 2. A summary of results follows as does a visual (infographic) of key elements (to follow after comments)

Who took part?

The 108 respondents were fairly spread in geographic terms (see figure 1)

Figure 1



43 accommodation establishments took part with eating out, retail, attractions, voluntary and public sector organisations making up the remainder.

The above is indicative of the level to which many different businesses view themselves as very much part of the local tourism/visitor economy and encouraging that they were keen to give their views.

Just over half the respondents had been involved with the tourism sector in Monmouthshire from 5 to over 10 years but it was interesting to see that 16 businesses had been involved for less than 12 months.

(See figure 2 overleaf)

A healthy 59% of stated that they felt “very well” or “quite well” informed about Monmouthshire County council’s current activity to support tourism.

(See figure 3 overleaf).

Figure 2

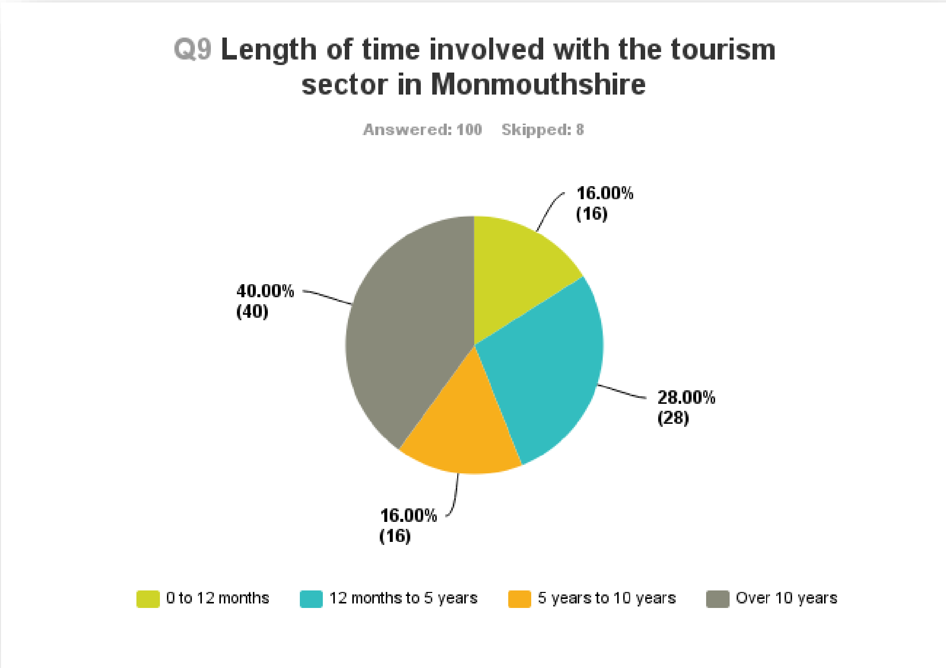
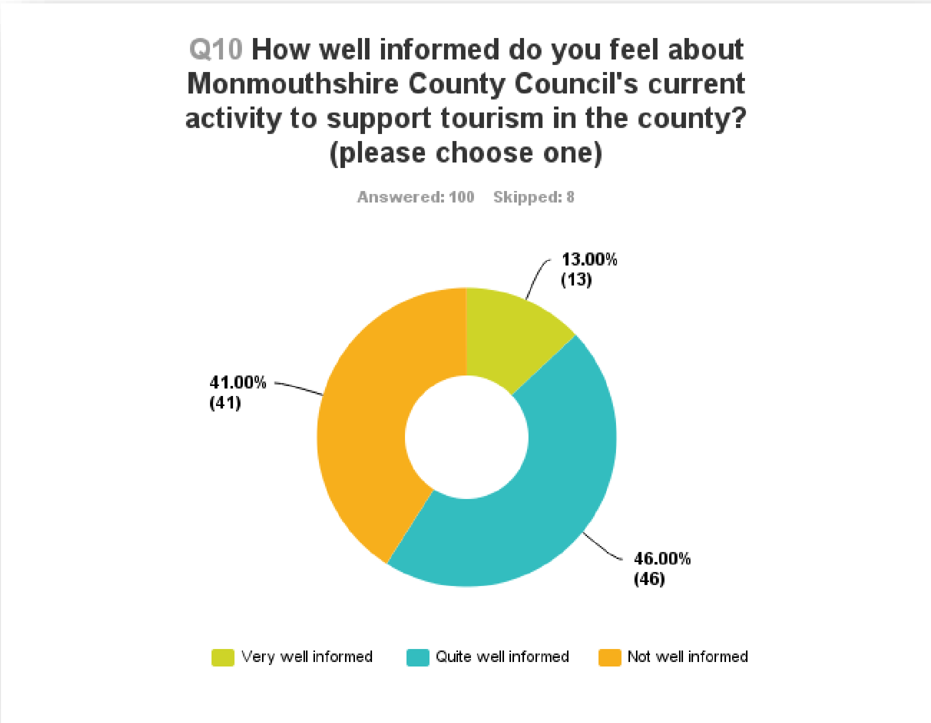


Figure 3



Online Promotion

All operators, accommodation and others, indicated that they relied predominantly on their own website to promote their business, with many also stating that Visit Monmouthshire and Visit Wales were the next most important vehicles (second and third choices ticked respectively).

From the feedback of the 85 stakeholders who responded to this question (i.e. those to whom online promotion is relevant) it was clear that Visit Monmouthshire is an important element of their marketing mix.

(It should also be noted that, when considering avenues other than their own business site, around 25% of all respondents stated "don't know/can't evaluate" indicating that there may be latent benefit from several of the channels that is not currently being evaluated via lead tracking).

Across the board, "Own website", "Word of Mouth", "Reviews" "Social Media" and "Repeat Business" were cited as important.

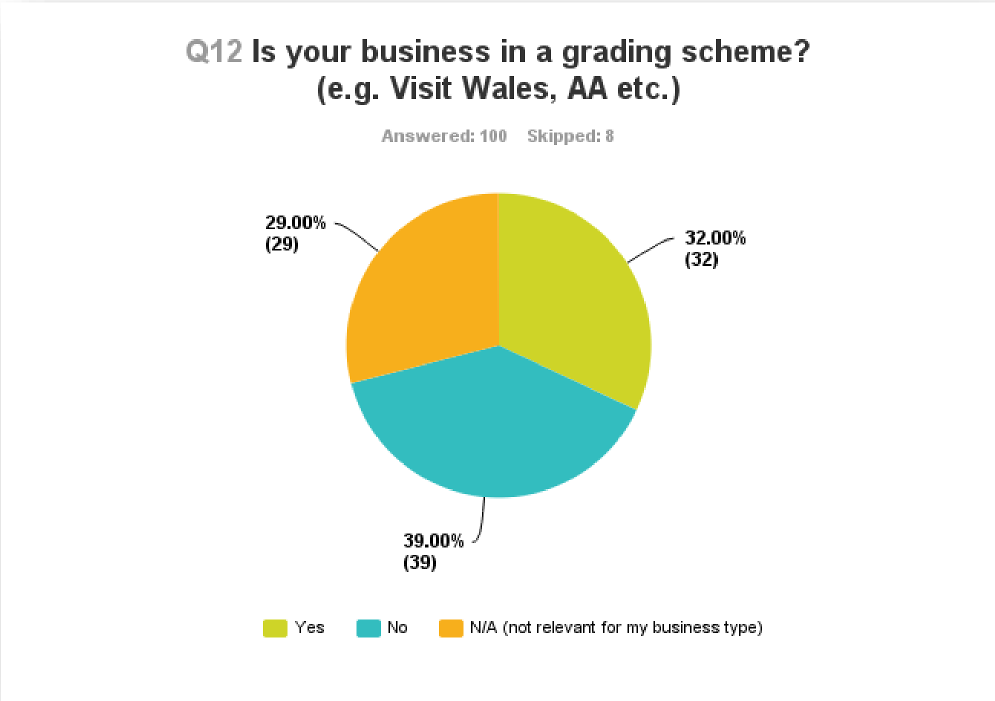
Training, Awards and Grading Schemes

13 businesses have undertaken World Host in the last 2 years (others mentioned that they had undertaken training but over 2 years ago). In all 51 respondents had not undertaken training in the last 2 years and a further 36 stated that they were not aware of the training or its relevance to them.

Approximately 24% of businesses had received awards (of some description) in recent years; from AA Rosettes, Visit Wales and local business awards to Trip Advisor Certificates of Excellence. Only 12 businesses were part of a Green Tourism scheme. Of the 71 businesses eligible for official grading just under half were in a scheme (either VW or AA)

(See figure 4 overleaf)

Figure 4



Satisfaction with levels of business (over the last 2 years)

Interesting results here with the majority “very” (19 businesses) or “quite” (50 businesses) satisfied (see figure 5 overleaf). The level of new entrants to the sector was reflected in some of the comments e.g.

“…available for letting only since April 2016”

“…we are new and need more information”

“…we are still so new and learning to build the business”

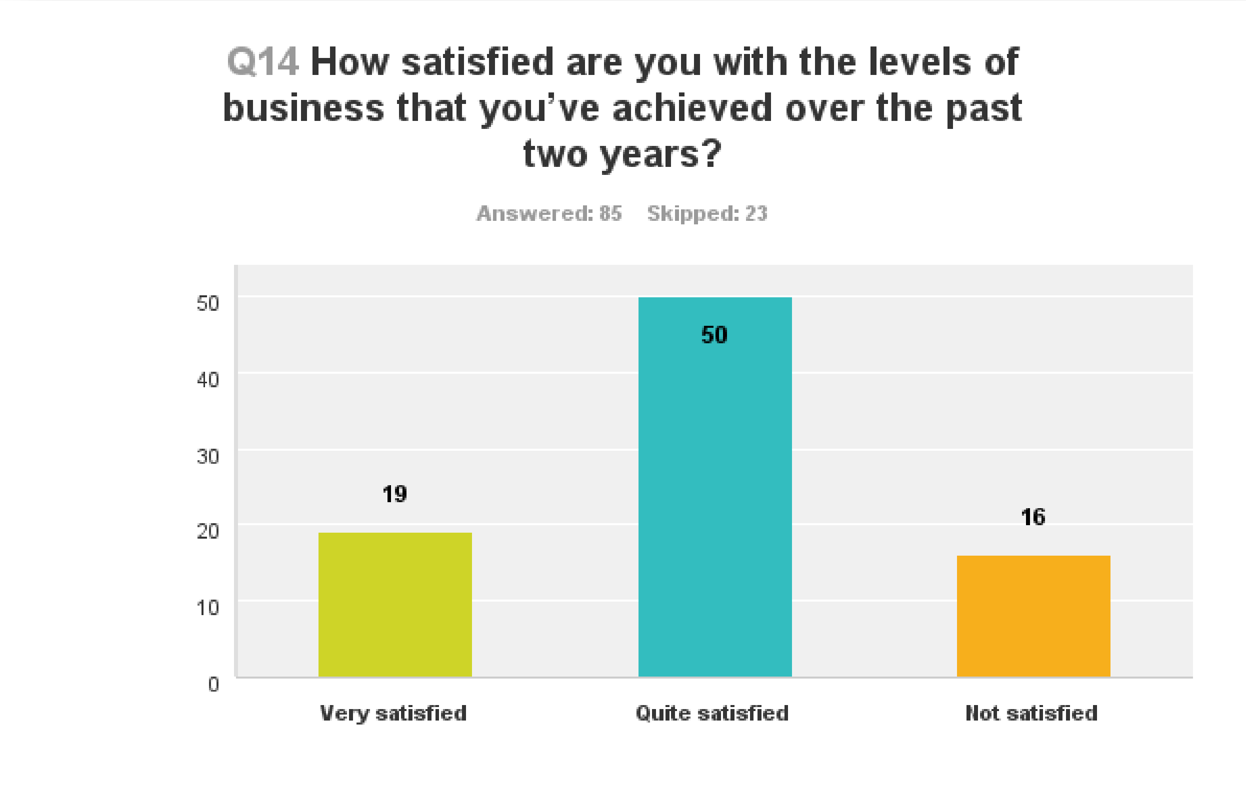
“…took over the business 15 months ago”

Though some mentioned Brexit and harder economic conditions e.g.

“…had excellent 2015 but since Brexit business is 60% of last year”

“…we have kept going throughout recession by keeping overheads down”

Figure 5



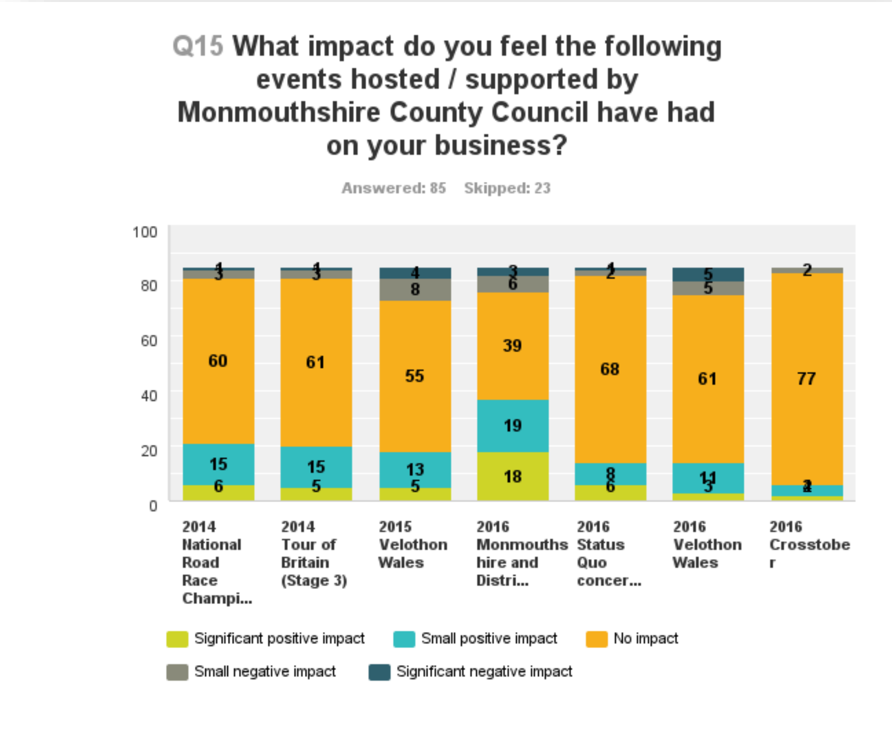
NB: Over half of all those who responded stated that weekdays (in general) and the November to March period were the periods when additional business was most required.

Impact of Major Events (Monmouthshire based)

Unsurprisingly responses on the perceived positive and negative impacts of major events in Monmouthshire varied significantly, with more businesses reporting positive impacts for events taking place over several days (e.g. Eisteddfod).

On balance, more "positive" than "negative" ratings were received for all events other than Velothon Wales (for which the figures for positive and negative impacts were balanced). NB: Care should be taken in interpreting these top line results as individual circumstances obviously apply e.g. accommodation bed spaces may have already been booked by other business/leisure guests, issues regarding road closures for retailers may be expressed as negative impact. In addition, the question did not refer to the impact of major events in adjacent areas that may have helped business in the county (e.g. Principality Stadium events) nor did it attempt to measure the potential benefit of such major events in terms of the equity they may bring to the profile of the destination.

Figure 6



Promotion (via Visit Monmouthshire's marketing activity) of key products (particularly activities such as cycling, walking and food and drink) was viewed by the majority as very or quite effective.

Most satisfaction was attached to (in order of scoring) Events, Activities (cycling) walking and food/drink promotion. Cultural Heritage and Arts promotion was also rated reasonably well but there were comments that designated landscapes (e.g. Wye Valley AONB) could be promoted more effectively.

It should be noted that receipt of a published plan of activity and product content (where and when including its reach) was mentioned by several respondents as something that would be beneficial. To raise awareness of the activity undertaken and also in order that businesses could take advantage of it.

NB: 65 respondents took the time to leave additional feedback regarding the above question/section and these are available as a separate document of verbatim comments on request. They include detailed views on subjects such as online promotion versus print, the role of retail, TICs and impact of events.

Feelings with regard to Infrastructure and Services locally

(An additional comments list is available on request)

Several statements attracted high levels of agreement, including

(* % Of respondents agreeing/strongly agreeing)

- *"The destination's food offer is of a good quality and offers options at all levels "* **(90%)**
- *"Tourist Information Centres are an important part of the destination offer and should be prioritised for support"* **(89%)**
- *"The range and quality of visitor attractions is good"* **(84%)**
- *"Monmouthshire has a good range of events throughout the year"* **(81%)**
- *"The destination provides good basic visitor services (e.g. car parking/toilets)"* **(80%)**
- *"Conservation of the area's built heritage is undertaken well"* **(79%)**

Statements regarding the retail offer, signage (both roads and footpaths) and upkeep of towns and villages received between 60 to 68% positive agreement.

Understanding of roles and responsibilities was evenly split (pretty much 50:50) between those who agreed it was clear who did what and those who did not. This scoring was echoed when it came to broadband provision (i.e. an even split of those who found it adequate for their business needs and those who did not)

The statement *"Public transport options are adequate and well promoted"* attracted the greatest dissension (with 66% disagreeing/strongly disagreeing)

General Aspects of being part of the tourism sector in Monmouthshire

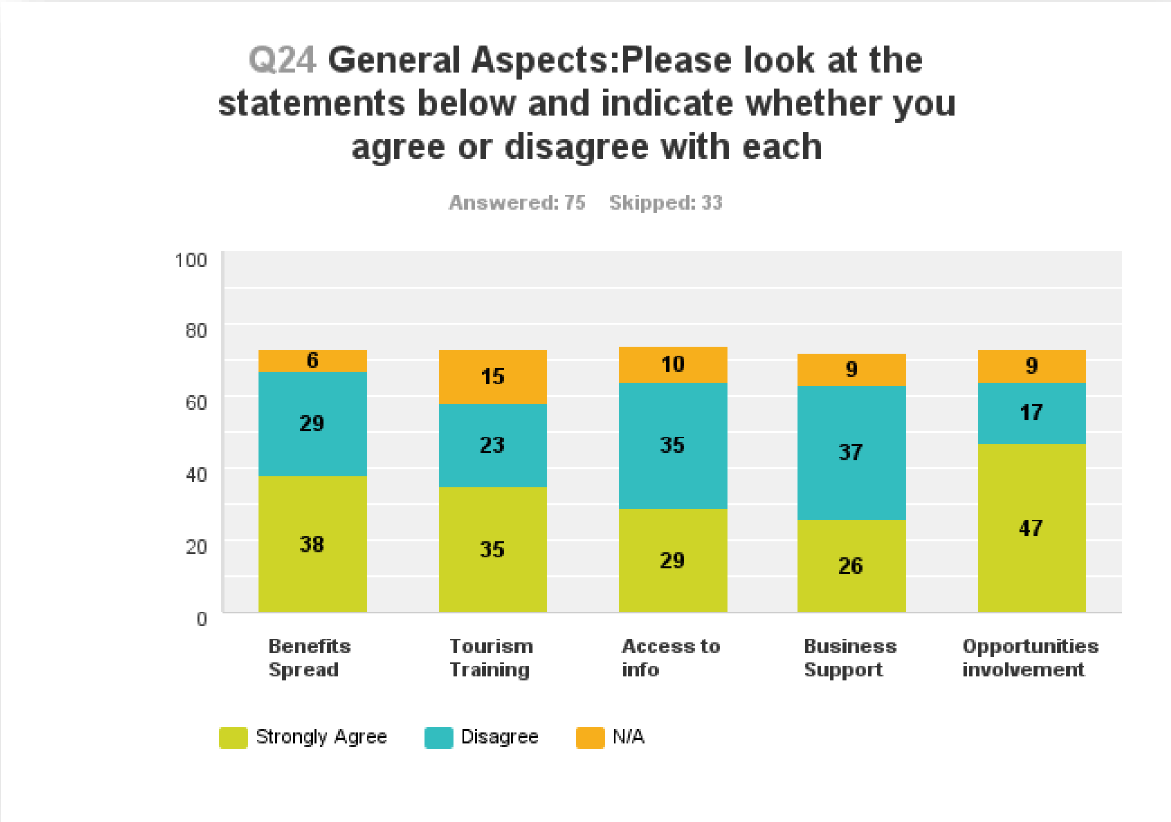
In this section we asked for views on statements including

- *The benefits of tourism (e.g. visits and spend) are spread throughout the county*
- *There is good local provision of tourism business skills training*

- *I have access to the destination intelligence and visitor research needed to develop my business*
- *There is adequate support for businesses in the area*
- *There are opportunities for my business to get involved with tourism activity at a destination level (e.g. tourist associations, business networking and events)*

Results as follows

Figure 7



Open Questions

At the end of the survey several (optional) open questions were posed and respondents were asked to choose "Top 3" Weakest (Figure 8) and Strongest (Figure 9) aspects of tourism in Monmouthshire – summary results follow. NB: Word clouds represent most frequently occurring comments appearing to answers 1, 2 and 3 and are grouped in that order.

Top 3 Weakest Aspects

Figure 8

Comment examples:

"Wet weather attractions lacking"

"Not particularly well known as a destination - sandwiched by Wye Valley and beacons"

"Lack of a strong brand / identity"

"Budget cuts"

(Lack of) " Appeal to wide cross section of diverse population"

"Public Transport within destination"

Top 3 Strongest Aspects

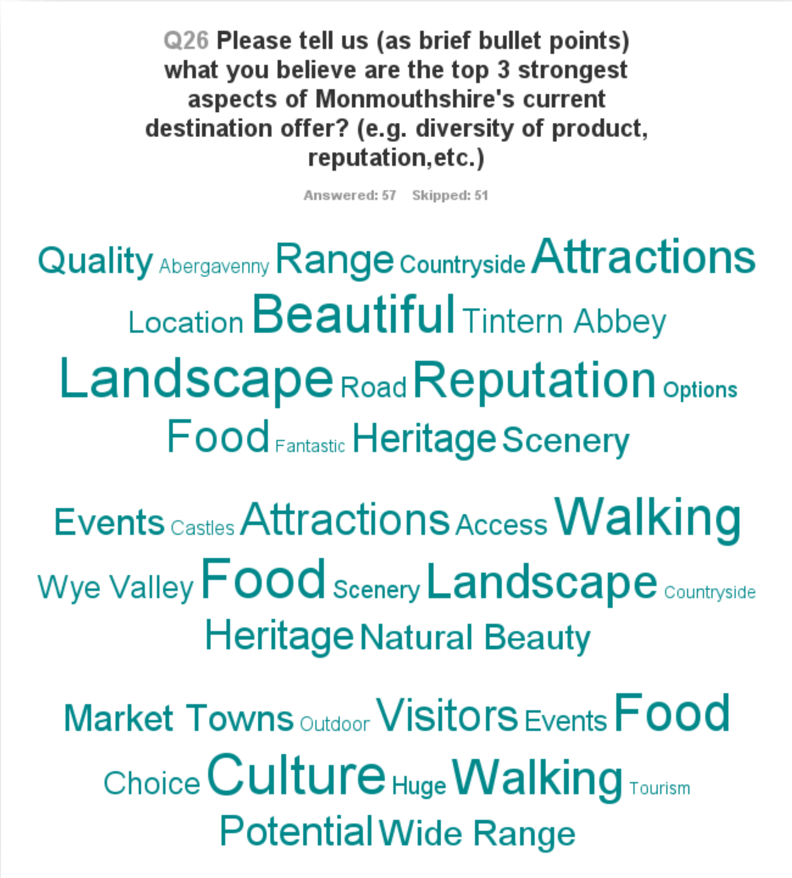


Figure 9

Comment examples:

"Beauty of landscape"

"Access to road network"

"Reputation as an outstanding landscape with exceptional heritage sites. Tintern Abbey in particular has a global reach - all my visitors (USA, NZ, Germany etc.) know of Tintern Abbey"

"Heritage"

"Food offer"

Biggest obstacles? Views of respondents

The survey closed with the opportunity for respondents to record their views on what they saw as the biggest obstacles to tourism progression in the country. Approximately 60 took the time to leave comments and these are all recorded in a separate document for individual attention.

Comments regarding fiscal squeeze on the private sector (such as business rate increases) and diminishing public sector budgets (and the impact of that on investment and project implementation) were very evident.
Many also referred to marketing limitations brought about by budget considerations and visitor awareness of what the county has to offer – often combined with a perceived lack of identity particularly in context of strong brands nearby.

There were also concerns with regard to the uncertain economic climate and mentions of how OTAs are forcing accommodation to compete on price.
Although, as one respondent stated
However people are more likely to holiday at home so we could benefit long term. Seeing the opportunities that change offers - one door closes and another opens."

Key Challenges and Opportunities arising from consultations can be summarised as follows

Challenges	Opportunities
Terms of Engagement for industry	Active and professional base to engage with
Events type and timing	Improving existing venues eg Abergavenny and Caldicot Castles and broadening the base of venues and providers e.g. Chepstow Racecourse
Aspirations and boundaries of DMOs	Share the load of tourism delivery
Product development need - Cycling to follow on from Walking	Proven approach to emulate i.e. Walking – link to England Coast Path
Brand and branding delivery	Find value in each available brand and apply at different levels ie Brecon Beacons, Wye Valley, Cadw, NT, Marriott, Hilton etc. Businesses will help define overall brand

2.4. Dimensional Analysis for Monmouthshire

Available research and extensive consultations with stakeholders lead to the following summary analysis of the current status:

Dimension	Analysis
Political	• Welsh Government policy recognises Tourism as one of Wales' key economic sectors • MCC is well integrated into the Cardiff City Deal process • Growing understanding of the value of tourism to a rural county • There has been stakeholder buy-in to the existing tourism plan and its 'direction of travel' especially around the Walking Offer and Food + Drink • Positive and supportive view of tourism by Monmouthshire County Council, Brecon Beacons National Park Authority and Wye Valley AONB as well as neighbouring authorities **but…** • Tourism is seen as less of a priority for Cardiff Capital Region than other parts of Wales • Stakeholder relationships at a local level have not been entirely smooth • Impacts of Brexit are unclear in terms of perceptions of UK for welcome and employment
Economic	• Monmouthshire is strategically located on 2 of the most important transport corridors into Wales providing ready access to UK markets • Positive performance of the destination over the last plan period • Vibrant tourism sector with some evidence of new entrants • Major events of national appeal e.g. Welsh Grand National, Abergavenny Food Festival, Cycle Road Racing • Monmouthshire's reputation for Food and Drink allows producers to offer premium products rather than commodities

		• Wye Valley and Brecon Beacons are 2 of the UK's iconic destination brands **but...** • Long-term dependence on public funding to support tourism marketing and product development • Public funding at destination level continuing to reduce • Reducing access to remaining EU Funds (RDP) with prospect of no availability after 2020 • Increased dependence on Welsh Government central funds to support day-to-day delivery • Significant 'lag' for private and voluntary sectors in filling funding gaps • Effects of Brexit unclear although fall in value of the pound has had short term positive impact on Overseas and UK visits to Wales • 60/40 split in favour of non-serviced accommodation • Rise in available accommodation (in addition to current known stock) via Airbnb – this has increased capacity although there is uncertainty over total base and levels of quality. While some known accommodation providers use it to supplement marketing reach other properties (previously unknown) have appeared
Social		• An aging but still adventurous UK and Northern European population • When asked local residents have positive view of tourism and its benefits • Tourism demonstrably supports higher level of retail, eating out and cultural provision for local population • High levels of expertise through volunteering e.g. Ambassador programme and Abergavenny TIC • Tourism is significant provider of locally based employment **but...** • Buy-in to tourism by MCC is directly related to the County's interests and identity being promoted

		• Still some concerns over value/ prospects of tourism jobs due to perceptions over seasonality, structure of employment and wage rates • Potential difficulties in recruiting to key posts after Brexit • Retirements and lifestyle changes are leading to the largely 'invisible' loss of capacity, expertise and 'sense of place' • Volunteers still need considerable guidance and management
Technological		• Increasing use of digital to research, plan, purchase and review visits, as well as accessing real-time information in destination • Monmouthshire has been a pioneer in facilitating digital access • Rapidly improving technologies for less-polluting forms of personal transport **but...** • Access to fast mobile/ Wi-Fi/ broadband now seen as a basic service not optional • A large proportion of visitors still prefer and value hard copy information on territory • Platforms such as Airbnb are disrupting traditional mechanisms for product development, distribution and collaborative working • Limited locations within the County for charging electric vehicles
Environmental		• National Park, World Heritage Site, Area of Outstanding Natural Beauty and other relevant designations (National Nature Reserve, Marine Protection Area etc.) means that high environmental sustainability standards are a 'given' for any public-supported economic activity • Protected Landscape status is a huge advantage in visitor appeal

		• Electrification and City Region Metro proposals may offer improved sustainable transport opportunities for the county • Tourism provides locally based employment opportunities thus limiting out-commuting **but...** • Business-level green accreditation has had very limited take-up due to perceived cost v benefit • Current Public Transport is limited and geared towards social rather than economic goals – attempts to supplement provision have been expensive and time-limited • Perceived value still beats environmental credentials for most UK consumers • Longer term impacts of Brexit on environmental protection, quality and food production unknown[15]
Organisational/ Legal		• In Wye Valley and Forest of Dean TA and Brecon Beacons Tourism the county has professionalising industry associations admired for their scale, scope, track record and ambition by many other areas of Wales • MCC planning policies are now generally supportive of tourism development • MCC has adopted a clear Destination Management approach through the last plan period with a clear lead responsibility **but...** • As in other Local Authorities, all departments of the County Council have a significant role to play in helping the destination 'work' to the benefit of visitors and residents – not just those with tourism in their title • Other statutory agency processes can inhibit development eg the requirement for Flood Risk Assessments by NRW

[15] Any real 'regime' changes will happen after the end of this plan but shorter term speculation may be disruptive

		• The proposed Destination Partnership arrangements have not been fully implemented

3. Where we want to go

3.1. Ambition

Monmouthshire Vision – In 2020…..

…Monmouthshire has enhanced its status as the Food Capital of Wales, but now as much for great value everyday eating across the county as Michelin-starred fine dining. Festivals and food trails guide visitors to the best local produce to enjoy here or take home. And that legendary food and drink tastes so much better with a background story...

As a legacy of hosting the Eisteddfod in 2016, the County's reputation for arts, culture and creativity is now growing to match that for stunning landscapes and heritage attractions – after all this historic border country was the birthplace of British tourism **and** the picturesque movement.

Driven by reputation-building participation and spectator events, Monmouthshire is fast becoming Wales' most welcoming county for road and lane cycling, with the offer developed in the same sustainable and successful way as walking, itself given fresh impetus by connection to the England Coast Path. As the home of the Welsh Grand National, the County is making more of its wider sporting heritage too. A '4 seasons' programme of events is encouraging year round, longer and overnight visits.

Our visitors are also discovering new and surprising corners of the County –like the 'big skies' and intricate landscape of the Living Levels – given confidence to explore by targeted communications, well-informed hosts, timely and relevant information and enthusiastic Ambassadors.

The opening of the Wales International Convention Centre 'next door' at Celtic Manor in 2019 has been the trigger to bring forward long-needed investment in the serviced accommodation base, supported by tourism-friendly planning guidance. Big name 'brands' on major routes are joined by rural boutique hotels delivering a unique 'sense of place'. At last, Wales 'first' County is exploiting its superb communications network with our M4 and M5 corridor markets and proximity to the business centres of Bristol, Cardiff and Newport.

Active in the wider City Region and with a major stake in both the Brecon Beacons and Wye Valley - destinations with international recognition - it is good to see significant improvement in collaboration with 'neighbours' and between public and private sector partners based on a clear understanding of delivery roles, as public funding continues to diminish.

We are not competing with established destination brands but delivering great experiences for them – the 'Monmouthshire' name has now become a stamp of genuine and trusted tourism quality

3.2. Strategic Aims and Objectives

From this Vision we can identify the following Strategic Aim for the Destination Plan 2017-2020:

To grow tourism revenue to 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**

Supported by the following objectives

- To consolidate Food Capital of Wales status for Monmouthshire
- To consolidate and make further progress on the Walking Product Development Plan
- To maximise the tourism benefits of the cultural offer as well as countryside and heritage
- To establish the County's cycling credentials on a sustainable base of events, routes, amenities and cycle friendly communities and accommodation
- To encourage investment in the serviced accommodation sector (especially following development of the International Convention Centre)

- To develop a seasonal programmes of events which support the County's key product offers – Food, Heritage, Arts + Culture, Walking and Cycling
- To continue support for vibrant, attractive, welcoming and distinctive towns and villages
- To establish Monmouthshire's position as our 'first' county through an iconic intervention at the entrance to Wales
- To 'reset' partnership arrangements with 'neighbours' and between stakeholders within the county
- To ensure that Monmouthshire 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

3.3. Priority programmes for growth

Like other destinations across Wales, it would be easy for Monmouthshire to be blown off course by Visit Wales 'Years Of...' approach, not least because strategy and public funding streams have been so aligned to it, but this would be to misunderstand the intention, which is to build up in the visitor's mind, layer by layer, a clear and credible understanding of what Wales overall can genuinely deliver (and importantly how it can make one feel). And of course not all parts of Wales can deliver all facets of the offer all the time. Wales has not stopped delivering 'Adventures' but 'Legends' now adds an appreciable depth, complexity and Sense of Place to those adventures. Also it is clear that there is enough 'wriggle room' within these themes to accommodate most destinations if they respond creatively to the presentational challenge (even 'the Sea' for inland areas). The inter-linked destination development priorities both 'hard' and 'soft' for Monmouthshire should and do transcend the exigencies of annual campaigns and revolve around playing to current strengths but addressing perceived weaknesses:

The Proposal is to build on the programmes delivered in the last Plan but integrate Marketing with Development and Management Actions.

Programmes	Action Areas
Headline Programmes	
The Accommodation Offer	Encourage upgraded and increased capacity in line with 2013 Opportunities report and take advantage of WICC development (including wider business tourism)
The Activities Offer	Develop the Monmouthshire Cycling offer using the same successful and logical methodology as for Walking concentrating on a manageable number of viable routes e.g. canal, Living Levels. Consolidate and continue development of the Walking Offer
Wales Food Capital	Broaden impact of Food Capital status by concentrating on the 'everyday' offer to complement the high end product. Encourage VW to consider a Year of Food...
Cultural Product Offer	Building on its rich 'border country' heritage, develop a contemporary creative offer to sit comfortably alongside food and activities e.g. open studios to complement open gardens. Support development of cultural infrastructure and venues. Develop a landmark feature at the border to reflect excellence, creativity and innovation
The Monmouthshire Season	Encourage events that create year-round added value, support emerging products and celebrate the County's strengths: Walking, Cycling, Food and Drink, Culture and Heritage especially those of national status. Use events creatively to respond to Wales 'Years of...' initiative e.g. extended River Wye Festival for Year of the Sea
Support Programmes	
A new Partnership	Develop a new delivery model for destination development and marketing in Monmouthshire
Welcoming Places (Towns, villages and countryside)	Encourage each town to play to its distinctive historic and contemporary strengths and therefore enrich the overall visitor experience e.g.

	• Chepstow - Walking and Sporting Hub • Monmouth – Local 'Legends' • Abergavenny – Food and Drink • Caldicot – Capital of the Levels • Usk – Town of Flowers
Welcoming People	Signpost business skills provision and maintain the Ambassador cohort
Visitor Information	Identify and implement more cost effective and dispersed methods for delivering timely and relevant visitor information building on the expertise and resources of the key TIC hubs
Content creation and distribution	Develop consistent content on Monmouthshire products and make it available through a variety of channels and partner campaigns
Customer Relationships	Customer communications and visitor research

3.4. Market and Image development for the destination

It is clear that Monmouthshire's 'solution' to marketing activity and support in recent years (e.g. particularly development and maintenance of a comprehensive product database) has paid dividends with healthy growth of the website and social media channels and the result that businesses cite **VisitMonmouthshire.com as the most important source of business after their own online presence**[16].

NB: In addition to driving the Visit Monmouthshire website and feeding into Visitwales.com, the product database is used to provide visitor information (via **information kiosks** at key sites around the county).

The "unglamorous" but essential work of consistent content addition and updating will provide strong foundations for the area to expand its marketing reach, ensuring that Monmouthshire's product is spread across as wide a base as possible; from national activity (e.g. Visit Britain and Visit Wales) to inclusion in local destination partnership, trade association and operator activity. This ***content first approach*** puts Monmouthshire in a strong position to expand its reach and raise awareness of its offer complementing, as it does, two of Visit Wales' key national objectives[17]

- Evolving the **product led approach**; promoting relevant holiday types, **iconic products and distinctive** destination brands and **experiences** to meet market needs
- **Becoming digital-first**; developing an integrated digital gateway for Wales, improving www.visitwales.com and Visit Wales international web sites, developing the content ecosystem for Wales and growing social media communities

By developing existing relationships and seeking new opportunities to collaborate on marketing with partners (national and local) using its content a rich resource, Monmouthshire is well placed to capitalise on high growth consumer markets (both domestic and international) and business tourism. An increase in **overseas visitors** (particularly from Germany) points towards a market in which Monmouthshire could make further gains, maximising use of the product data and building relationships

[16] Stakeholder Survey 2016

[17] Partnership for Growth Visit Wales

with Visit Wales (and Visit Britain). Germany is a key overseas market for Wales and thus opportunities for collaborative activity with Visit Wales do exist; from provision of salient content to the potential of journalist/blogger visits and profile for Monmouthshire product attached to activity at annual events such as ITB Berlin.

Monmouthshire's "brand" is aligned to its quality of offer rather than geography. Though not, in comparative terms, currently as widely known a destination as Brecon Beacons or The Wye Valley, it is clear, from both visitor and stakeholder research, that it benefits from experience-led tourism products (e.g. food) which are synonymous with "quality". This positioning may be the most beneficial to the county in the longer term both in any promotional activity originated at destination level as well as capitalising on the exposure Monmouthshire receives through collaborative partnerships in the wider arena (e.g. from Visit Wales, Wye Valley, the Brecon Beacons, or town-based events).

The following table includes salient trends that constitute areas of particular opportunity for positive market and image development for Monmouthshire.

The rise in appeal of experience based holidays and local distinctiveness	Recent omnibus research (BRCD 2017) records that 87% of UK holidaymakers feel that it is important they have a 'local experience' on their next holiday. This figure rises among higher income groups and Monmouthshire records a high prevalence of ABC1 visitors, in the 2016 survey "these make up nearly three quarters of the visitors to Monmouthshire (74%)" higher than the Wales average and possibly due to the likelihood of Monmouthshire's visitor profile to be older and are more likely to come from outside Wales. Experiential tourism marketing and product development embraces sense of place and focuses on capturing the hearts and minds of potential visitors encouraging businesses and products to enhance their offer to drive visits and spend

	The more 'superficial' local experiences Britons are likely to expect on their next holiday include 'trying local food and drink" – something that Monmouthshire, with its respected food offering, can capitalise upon. Development of 'soft-packaging' (aka "bundling") through consistent communications and information linking accommodation and transport options to attractions, activities, events, food and drink and retail will assist in forming and presenting a deeper experience (and will assist Monmouthshire in taking full advantage of national brand-building activity).
Continued growth in the UK short break market and the "staycation"	Further fuelled by exchange rate uncertainty and safety considerations, research on holiday intentions (BDRC, January 2017) shows that Britons are more likely to take a short-break of 1-3 nights (88%) than a longer holiday of 4+ nights (77%). It is a clear indication that the area can and should shape communications and activities around short-breaks. Research cites that "*the proportion of Britons anticipating a domestic holiday of 4+ nights has increased from 24% in 2016 to 27% in 2017. After 4 years of declining intentions, this is the first increase since 2012, which is matched by a rise in the proportion regarding the UK as 'more appealing' for a holiday than it used to be.*" As with some other destinations in Wales, and due in part to its proximity to England and ease of access, Monmouthshire experiences a high proportion of day visitors (i.e. approximately 75% of its 2 million visitors annually). In 2016's survey, the vast majority of visitors to were on a day trip when interviewed (94%); this was higher than the All Wales average of 88%. The following 12-24 months represent one of the best

	chances (in recent years) for the area to convince and convert some of those day visitors to stay overnight.
Dominance of the digital medium in the holiday search and booking process	Today's holiday planning process is predominantly built around the digital medium. Google's recognised 5 stages of travel planning are equally applicable to all market segments and based around travel search patterns online. From Dreaming to Planning, Booking to Experiencing and finally Sharing. The area needs to ensure that digital resources and activity planning offer a 'seamless' approach to managing the 'visitor journey' before, during and after a visit.[18] Monmouthshire's product database has benefitted from investment in both time and financial resources and as a result, probably has few if any equals in Wales, if not further afield. The refreshed website will benefit from a content rich resource, i.e. the product database, which will offer a means for engagement with both existing and prospective visitors that plays to experience based breaks and will encourage sharing of Monmouthshire's content - all aiding awareness raising of the area and its product offer.
The weighting given (by the prospective visitor) to positive peer to peer recommendations and reviews when choosing a destination	With its high levels of repeat business and visitor satisfaction e.g. in Beaufort's 2016 Visitor Survey "Virtually all visitors to Monmouthshire said they were likely to return in future (95%); 84% said they would definitely visit again, while 11% would probably visit again". Furthermore, with 92% of those visitors stating that they would recommend a visit to Monmouthshire to friends and family, this perfectly places the destination to

[18] Google – 5 Stages of Travel Planning

	capitalise on the trend demonstrated in recent research (BDRC, 2017) which confirms that over 2 in 5 Britons use peer reviews to plan their holidays (rising to two-thirds of 18-34 year olds and 3 in 5 families). Tripadvisor reviews are included on product database entries to enable (more) informed choice e.g. http://www.visitmonmouthshire.com/thedms.aspx?dms=3&pid=0899613

In order to optimise opportunities presented by aspects including the current trends around experiential tourism and continued growth of the digital medium, Monmouthshire's focus should continue to be the **prioritisation of content marketing**. Underpinned by attention to organic search (via optimisation) and also email this activity will continue to deliver leads and conversions for businesses in the UK consumer marketplace as well as opening up opportunities to chase further overseas traffic, particularly in western Europe.

Travel trade and group travel is currently undertaken via participation in the regional Southern Wales marketing consortia and this path remains effective and should be maintained. It offers a solution for accessing those markets that is efficient in terms of both resources and reach. A similar arrangement is being sought with regard to **Business tourism** as Monmouthshire, although being a relatively minor player in the context of the whole south east Wales offer can nevertheless benefit significantly from exposure.

3.5. Destination Partnerships and connectivity

Future support for tourism in Monmouthshire from Visit Wales is predicated on robust Destination Partnership arrangements being in place involving public, private and community interests. The value of successful partnerships is obvious:

- 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

However partnership working is neither easy nor straight–forward and requires perseverance, mutual confidence, shared clarity of purpose, willingness to compromise and effective communication in equal measure to succeed. Destination partnerships really come into their own when no single stakeholder has, or seeks, exclusive access to all the lines of support, resources, and information needed to succeed.

Thus, any arrangements for Monmouthshire have to acknowledge the growing professionalization, capacity and aspiration of industry partners in the Wye Valley and Brecon Beacons destinations and the communities of interest around those established destination brands. Equally, industry stakeholders have to appreciate the significant reductions in resources available in the public sector to support tourism development and marketing, as its role moves much more towards facilitation rather than direct provision. The sector will have to be much more self-reliant in future.

It is important that stakeholders appreciate that the 'Tourism Monmouthshire' approach is complementary rather than competitive to the aspirations of Tourist Associations and Destination Partnerships. We recommend that in its tourism industry communications MCC carries links through to TA membership websites to reinforce this position. The *quid pro quo* would be links back from TA membership websites to the resources at http://www.visitmonmouthshire.com/destination-intelligence. Similarly we would like to see a confidence-building commitment between 'Tourism Monmouthshire' and the Brecon Beacons and Wye Valley destinations to develop specific marketing and development projects of mutual benefit.

To 'reboot' the Destination Partnership approach for Monmouthshire, retain local political 'buy-in' and rebuild mutual confidence, we therefore recommend the following arrangements:

Tourism Liaison Group or Tourism Reference Group

- Membership: BB Sustainable Destination Partnership nominee, WVFD Destination Partnership nominee, MCC Tourism nominee
- Facilitated by: MCC
- Chaired by: MCC
- Tasks:
  - To maintain communication between key players between formal meetings of MTAG
  - To galvanise tourism in Monmouthshire to respond quickly to unexpected challenges and opportunities
  - To identify strategic tourism opportunities of benefit to the County
  - To nip any partnership difficulties in the bud
  - To develop agenda for the MTAG and Tourism Day
- Meetings: Monthly (on line or physical) + ad hoc as required

Monmouthshire Tourism Action Group (in effect the County Destination Partnership)

- Membership: As above plus Visit Wales, (Visit England), BBT, WVFDTA, ADTA and other constituted active tourism groupings in the County, Chambers/ Town Councils with a tourism delivery remit, MCC delivery departments, WVAONB, Cadw, Natural Resources Wales, Canal and River Trust, NT, Living Levels, Ambassadors

- Facilitated by: MCC
- Chaired by: Independent Chair (appointed by open process) or members of the Tourism Liaison Group by annual rotation
- Tasks:
    - To oversee progress against the Monmouthshire Destination Plan
    - To share and compare forward plans with impact in the County especially BB and WVFD destinations
    - To identify action areas of common interest e.g. Walking, Food, Heritage and Culture, Filming
    - To develop and agree joint activities against those action areas and allocate roles and responsibilities for delivery
    - To identify external funding opportunities and develop targeted applications
    - To appoint task and finish groups for working up and delivering projects as required
- Meetings: 2 per year (in sync with the main funding and reporting cycles)

Monmouthshire Tourism Industry Day

Attendance: Open to all with a positive interest in tourism in Monmouthshire

Facilitated by: MCC

Chaired by: MTAG Chair

Tasks:

- To raise and share awareness of key issues affecting tourism in Monmouthshire
- To engage stakeholders in product development and marketing opportunities
- To offer generic and specific business support
- To formally report on progress against the Monmouthshire Destination Plan
- To provide networking opportunities

4. How we will deliver

Recommended Actions have been refined and prioritised against strategic principles and objective criteria:

Principles	Criteria
• Effective Partnership • Year Round Growth in Value • Sustainability • Geographical Spread • Balanced Market Approach • Community Engagement • Authenticity and 'Sense of Place'	• Strategic Fit • Identified Champion/ Lead • Fundability • Clarity of Outcomes • Ease of Delivery • Delivery Timescale • Contribution to Targets • Mutual Consistency

4.1. Outline Action Plan 2017-2020

	Programme and Objectives		Action	Yr. 1,2,3	Lead	Partners	Cost H, M, L	KPIs
	Headline Experience Programmes							
1	The Accommodation Offer	**1.1**	Upgrade and increase capacity in line with 2013 Opportunities report to take advantage of WICC development (including wider business tourism)	**1-3**[19]	**Industry**	**VW** **MCC**	**H**	New and upgraded accommodation
		1.2	Develop and promote a complementary business tourism offer to optimise WICC opportunity	**3**	**Southern Wales**[20]	**MCC** **WVFDTA** **BBT**	**M**	Increase in business related tourism
2	The Activities Offer (Cycling)	**2.1**	Develop the Monmouthshire Cycling offer using the same successful and logical methodology as for Walking i.e.: • Develop a stakeholder partnership • Assess market needs	**1-2**	**MCC**	**Sustrans** **WVFDTA** **BBT** **ADTA**	**M**	Plan developed and implemented

[19] Subject to WICC going ahead on schedule

[20] Southern Wales consortium does not currently embrace Business Tourism; lead may fall to Newport and/or Cardiff

			• Audit current provision • Formulate Action Plan					
		2.2	Develop a number of new promoted and well-presented routes to attract family and beginner markets as well as enthusiasts e.g. Canal, Living Levels	**2,3**	**Sustrans**	**MCC** **CRT** **LL**	**H**	At least 2 new family ride routes
	The Activities Offer (Walking)	**2.3**	Continue implementation of the Walking Product Development Plan in line with customer demand: • Exploiting links with England Coast Path • Opportunities through 'Living Levels' • Priorities from ROWIP Review (2018)	**1-3**	**MCC**	**WHS** **AONB** **BB** **WVFD** **WaW**	**M**	2 new routes from Living Level Hubs
3	Wales Food Capital	**3.1**	Broaden impact of Food Capital status by: • Supporting extension of the Abergavenny Food Festival brand and other food events across the year and the County • Improving information on and access to Farm Shops and Producers • Encouraging Food Trails development • Further encouraging local food culture across the wider 'everyday' hospitality sector	**1-3**	**MCC**	**AFF** **BBT** **ADTA** **WVFDTA** **WG**	**M**	Sales of local produce Visitors accessing Food information

		3.2	Encourage VW to consider a Year of Food...		**MTAG**	**BBSDP** **WVFDTA**		Year of Food agreed
		3.3	Support those developing further 'Food Capital' infrastructure e.g. Food Hub, Skills Centre of Excellence	**1-3**	**MTAG**	**MCC** **NCC**	**L**	'Live' projects
4	Cultural Product Offer	**4.1**	Develop a contemporary creative offer to sit comfortably alongside food, heritage and walking as per Cycling above	**2 -3**	**MCC**	**BBSDP** **WVFDTA**	**M**	Plan developed and implemented
		4.2	Pursue tactical promotional opportunities around filming in the county	**1-3**	**WVFDTA** **BBT**	**MCC** **VW**	**L**	Coverage obtained
		4.3	Develop an iconic 'gateway' feature project to reflect the destination's position, values and creativity	**1-3**	**MCC**	**Arts Council** **VW** **Lottery**	**M**	Planning and funding secured
5	The Monmouthshire Season	**5.1**	Encourage events that create year-round added value, support emerging products and celebrate the County's strengths: Walking, Cycling, Food and Drink, Culture and Heritage (especially those of national status).	**1-3**	**MTAG**	**VW**	**L**	Events held autumn to spring
		5.2	From the forward events programme develop a seasonally themed calendar of events linked to accommodation, activity and retail opportunities	**1-3**	**MCC**	**WVFDTA** **BBT**	**L**	Take-up of calendar by industry and across media

		5.2	Maintain a forward 'clash' calendar of events (including in surrounding areas) for reference	**1-3**	**MCC**	**VW**	**L**	
		5.4	Use events creatively to respond to Wales 'Years of…' initiative e.g. extended River Wye Festival for Year of the Sea	**1**	**MTAG**	**VW** **WVFDTA** **BBT** **WVAONB**	**M**	'New/ rebadged' events linked to 'Year of…'
		5.5	Encourage Event Organisers to deliver events which deliver distinctive 'sense of place' through use of events toolkit: www.visitmonmouthshire.com/eventmanagement.aspx	**1-3**	**MCC**	**BBSDP** **WVFD** **VW**	**L**	Numbers using toolkit
	Support Programmes							
6	A new Partnership	**6.1**	Develop a new inclusive delivery model for destination development and marketing in Monmouthshire	**1**	**MCC**	**BBSDP** **WVFD** **ADTA** **VW** **Other stakeholders**	**L**	New partnership arrangements in place and operating
7	Welcoming Places	**7.1**	Encourage each town to play to its distinctive historic and contemporary strengths and	**1-3**	**MCC**	**Town Councils** **Chambers**	**M**	Plans in place

			therefore enrich the overall visitor experience through 'place plans' e.g. • Chepstow - Walking and Sporting Hub • Monmouth – Local 'Legends' • Abergavenny – Food and Drink • Caldicot – Capital of the Levels • Usk – Town of Flowers			**TAs**		
		7.2	Develop Gateway Feature for border corridor (linked to Living Levels)	**3**	**MCC**	**VW** **City Deal**	**H**	Leverage
8	Welcoming People	**8.1**	Signpost business skills provision	**1-3**	**Business Wales**	**MCC** **WVFDTA** **BBT**	**L**	Numbers taking up training opportunities
		8.2	Product awareness and informal training sessions to support development priorities	**1-3**	**BBT** **WVFDTA**	**MCC** **VW**	**L**	Numbers engaged
		8.3	Maintain Ambassador cohort through CPD and networking	**1-3**	**MCC**	**BBNPA** **BBT** **WVFDTA**	**M**	Numbers of active ambassadors
	Visitor Information	**8.4**	Identify and implement more cost effective and dispersed methods for delivering timely and relevant 'on territory' and pre-visit visitor information	**1,2**	**MCC**	**NCC** **VoU LAG** **WVFDTA** **ADTA** **BBNPA**	**M**	Study completed and recommendati ons implemented

9	Content creation and distribution	**9.1**	Develop consistent content on Monmouthshire products and make it available through a variety of channels and partner campaigns	**1-3**	**MCC** **BBT** **WVFDTA**	**WFFD** **BBSDP** **VW** **Southern Wales**	**M**	Reputation Analysis
10	Database Management and Customer Relationships	**10.1**	Maintain Product and Customer Databases to support management of the customer journey	**1-3**	**MCC**	**BBSDP** **WVFD**	**M**	Numbers on databases and opening rates of communications
		10.2	Undertake qualitative and quantitative research to inform tourism development and performance review	**1-3**	**MCC**	**BBSDP** **WVFD** **VW**	**M**	STEAM outputs Visitor survey results

5. Appendices:

1. STEAM summary infographic
2. Survey Questionnaire proforma
3. 2016 Visitor Survey

STEAM FINAL TREND REPORT FOR 2004-2015

MONMOUTHSHIRE COUNTY COUNCIL

Comparing 2015 and 2012

2012 in 2015 prices (1.073)

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2012 - INDEXED TO 2015

KEY

- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

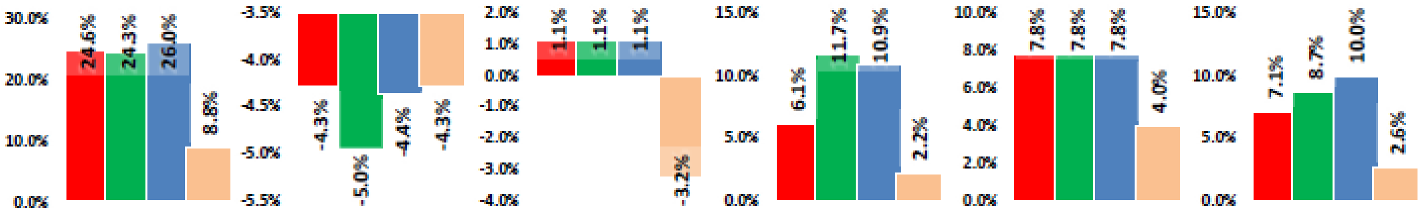
		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
		Serviced			Non-Serviced														
		2015	2012	+/- %	2015	2012	+/- %	2015	2012	+/- %	2015	2012	+/- %	2015	2012	+/- %	2015	2012	+/- %
Visitor Days	M	0.452	0.363	24.6%	0.466	0.487	-4.3%	0.340	0.336	1.1%	1.258	1.186	6.1%	1.696	1.573	7.8%	2.954	2.759	7.1%
Visitor Numbers	M	0.277	0.223	24.3%	0.075	0.079	-5.0%	0.143	0.141	1.1%	0.494	0.443	11.7%	1.696	1.573	7.8%	2.190	2.015	8.7%
Direct Expenditure	£M																141.52	128.17	10.4%
Economic Impact	£M	71.83	57.02	26.0%	42.13	44.05	-4.4%	19.83	19.60	1.1%	133.79	120.68	10.9%	52.86	49.03	7.8%	186.65	169.71	10.0%
Direct Employment	FTEs	893	820	8.8%	639	667	-4.3%	196	202	-3.2%	1,727	1,689	2.2%	519	499	4.0%	2,246	2,189	2.6%
Total Employment	FTEs																2,744	2,703	1.5%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2012 - INDEXED TO 2015

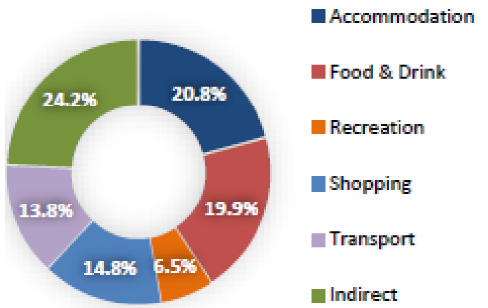
KEY

- Visitor Days
- Visitor Numbers
- Total Economic Impact
- Direct Employment

Serviced | Non-Serviced | SFR | All Staying Visitors | Day Visitors | All Visitor Types

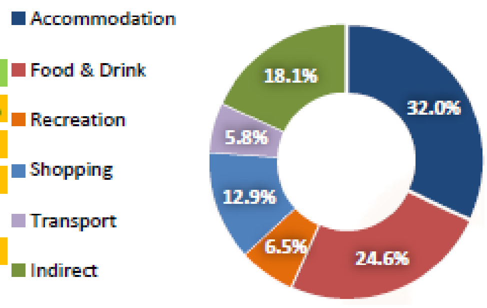


Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2015



Sectoral Distribution of Employment - FTEs

Sectors	Economic Impact 2015	Economic Impact 2012	+/- %	Employment 2015	Employment 2012	+/- %
Accommodation	38.85	31.99	21.5%	879	866	1.5%
Food & Drink	37.21	34.54	7.7%	675	552	22.3%
Recreation	12.08	11.28	7.1%	179	219	-17.9%
Shopping	27.65	26.01	6.3%	355	379	-6.3%
Transport	25.73	24.35	5.6%	158	174	-8.9%
TOTAL DIRECT	141.52	128.17	10.4%	2,246	2,189	2.6%
Indirect	45.14	41.54	8.6%	498	514	-3.3%
TOTAL	186.65	169.71	10.0%	2,744	2,703	1.5%



Report Prepared by: Cathy James. Date of Issue: 22/04/16

STEAM FINAL TREND REPORT FOR 2004-2015
MONMOUTHSHIRE COUNTY COUNCIL

Comparing 2015 and 2012
All £'s Historic Prices

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2012 - IN HISTORIC PRICES

KEY

- An increase of 3% or more
- Less than 3% change
- A Fall of 3% or more

		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
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Direct Expenditure	£M																141.52	119.43	18.5%
Economic Impact	£M	71.83	53.13	35.2%	42.13	41.05	2.6%	19.83	18.27	8.5%	133.79	112.45	19.0%	52.86	45.69	15.7%	186.65	158.14	18.0%
Direct Employment	FTEs	893	820	8.8%	639	667	-4.3%	196	202	-3.2%	1,727	1,689	2.2%	519	499	4.0%	2,246	2,189	2.6%
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PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2012 - IN HISTORIC PRICES

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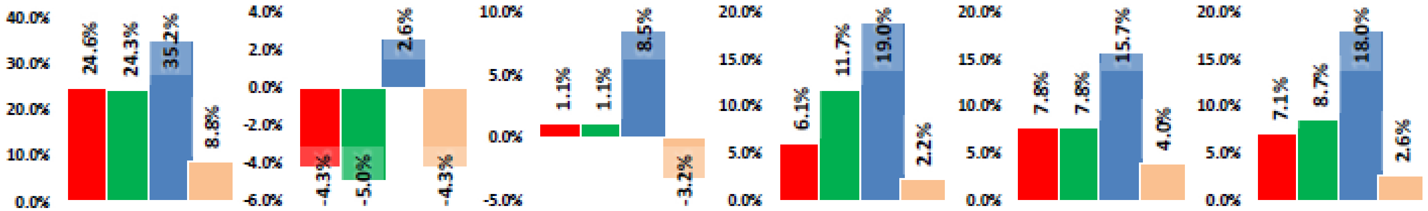
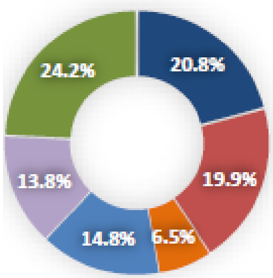


Sectoral Distribution of Economic Impact - £M including VAT in Historic Prices / Sectoral Distribution of Employment - FTEs



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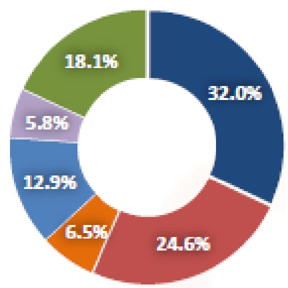

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