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| <b>SUBJECT:</b>                 | <b>MONMOUTHSHIRE'S DESTINATION MANAGEMENT PLAN 2025-30</b> |
| <b>MEETING:</b>                 | <b>CABINET</b>                                             |
| <b>DATE:</b>                    | <b>WEDNESDAY 19TH NOVEMBER 2025</b>                        |
| <b>DIVISION/WARDS AFFECTED:</b> | <b>ALL</b>                                                 |

**1. PURPOSE:**

**To seek approval of Monmouthshire's Destination Management Plan 2025-2030 and proposed Destination Management Partnership arrangements.**

**2. RECOMMENDATIONS:**

That Monmouthshire County Council Cabinet approve Monmouthshire's Destination Management Plan 2025-2030 and proposed partnership arrangements.

**3. KEY ISSUES:**

Tourism delivers a wide range of benefits for Monmouthshire, including the generation of visitor spend to support rural services and high streets, to maintain local heritage, and to sustain an interesting programme of events, experiences and year-round employment opportunities for the benefit of locals. In addition, place branding has a significant impact on the way the area is perceived by residents and visitors, and these perceptions affect quality of life for citizens and the area's attractiveness for investment.

Anian Ltd was commissioned in August 2024 to review and renew Monmouthshire's Destination Management Plan, the strategic plan which drives tourism development, management and marketing of the destination. Monmouthshire's previous Destination Management Plan ran to 2020 when Covid hit.

The new draft Plan is based on in-depth research and collaboration with a wide range of local and national partners. It aims to drive sustainable growth through a more regenerative approach (and better alignment with the Council's Community and Corporate Plan) within the context of a fast-changing policy and economic environment. Although MCC Cabinet has confirmed that Monmouthshire will not be an early adopter of the visitor levy, there are a range of other changes influencing the environment for tourism businesses in Wales. The Plan has also been shaped by

insights from successful destinations and partnerships from comparable areas across the UK and overseas.

96 stakeholders were engaged directly in the development of the draft Plan to ensure that while the Plan is informed by the market, it has been shaped by local people and businesses (including 12 MCC councillors and officers, 18 key industry representatives and leaders, and 9 representatives from partner bodies and organisations). In addition, 155 residents, 61 businesses and 80 visitors completed the online survey. The draft Plan was presented to the key stakeholder group via an online Teams call on 14<sup>th</sup> May 2025 and was received positively.

While the development of the Plan has been led by Monmouthshire County Council, it has been designed to provide a common direction for all public, private and third sector organisations with an interest in nurturing tourism in Monmouthshire to bring positive benefits to our communities, and to guide all tourism investment in the county.

In 2024, 2.28 million visitors came to Monmouthshire, spending 3.53m visitor days in the county, generating more than £352 million benefit for the local economy, and supporting 3,422 full time equivalent (FTE) jobs (approximately 15% of Monmouthshire jobs) with 78% of the economic impact of tourism coming from staying visitors.

There has been strong and sustained growth in tourism in Monmouthshire over the last ten years with a 28% real terms increase in the value of tourism since 2015. Monmouthshire recovered faster from the pandemic than other parts of the South-East Wales region and has significantly outperformed region-wide growth levels over that same period.

This growth was mostly driven by a surge in non-serviced accommodation, including a 121% increase in self-catering provision. In 2024 however, recovery of Monmouthshire's serviced sector helped maintain economic growth. Most of the direct economic impact comes from accommodation, followed by food and drink.

2024 and the start of 2025 have been more challenging for the industry, but as an established, accessible and high-quality destination, there is clear capacity for ongoing growth focused on year-round high spending visitors. And the results of our resident survey show that our communities support future tourism growth, and that they are welcoming and optimistic about tourism's role in enhancing the environment, towns and quality of life.

Tourism is however a globally competitive industry, and there is a need to continue to work hard to ensure Monmouthshire remains competitive and that it appeals to future generations of visitors. The Plan's guiding purpose is for Monmouthshire to become a blueprint for next generation regenerative rural destinations. And to become the most

inspiring, connected and liveable place to stay, invest and work so that by 2030 Monmouthshire is Wales's stand-out rural destination, rich in imaginative experiences and cultural vibrancy.

The Plan identifies the following wide range of wealth and wellbeing benefits as strategic objectives to grow business, resident and visitor satisfaction with the destination, to ensure tourism works for everyone in Monmouthshire:

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- Economic Growth: 25% real terms increase in value and jobs over the life of the Plan.
- Improved Infrastructure: Better basics like transport, signage, and facilities.
- Vibrant Culture: More cultural opportunities and civic pride.
- Enhanced Experiences: High-quality, place-based experiences.
- Environmental Protection: a zero-carbon tourism pathway and responsible access.

Three key priorities are identified for achieving these strategic objectives, which are aligned with Visit Wales' core product themes and which inform proposed product and marketing priorities:

- Revitalising the County's characterful towns and villages through high quality tourism
- Reigniting Monmouthshire's natural landscapes with activity and adventure, in ways that are sensitive and creative
- Developing imaginative experiences with a distinctive sense of place, that enrich our quality of life

All three priorities aim to drive a more vibrant and youthful place brand, designed to support the Council's vision to ensure Monmouthshire's communities are socially and economically sustainable by attracting and retaining younger people to rebalance the County's ageing demographic. All experiences being held together with a 'Monmouthshire-Made' value proposition celebrating Monmouthshire's unique sense of place and creative energy.

Six drivers of growth are highlighted in the Plan, three of which – seasonality, spend and spread – are taken from Welsh Government's tourism strategy, with three additional drivers specific to Monmouthshire – stand out, stay and sense of place. With four enablers of delivery identified as partnership marketing, strong support structures, sustainable and inclusive delivery, and creativity and innovation.

It's proposed that Monmouthshire County Council will support the Plan in two ways: coordinating and overseeing the delivery of the Destination Management Plan through the Destination Management Partnership; and by taking a cross-authority approach to

deliver the Plan's key priorities harnessing all available levers from policy to planning and placemaking. To stand out and compete in an ever-changing marketplace, it's more important than ever to work together to deliver impactful experiences that inspire both visitors and locals.

The UK domestic market is identified as the primary market, accounting for approximately 90% of visitors to Wales. While there has been decline in this market in recent years for a variety of reasons (including weather and the cost of living crisis), 80% of recently surveyed UK residents stated an intention to take an overnight domestic trip within the next 12 months and over 40 million people live within 3-4 hours of Monmouthshire. Attracting and inspiring residents (including families and young people to experience what's on offer locally) is also fundamental to the regenerative approach proposed although Monmouthshire is also well placed to attract and capitalise on international visitors.

The Plan identifies the following specific opportunities to strengthen Monmouthshire's existing product offer, and to breathe new life into its inherent strengths in relation to:

- Its characterful market towns and colourful villages
- The great outdoors
- Destination defining accommodation
- Signature and year-round events
- Gastronomy and food and drink
- Boutique and unique experiences
- Creative industries and inspiration
- Better basics

Monmouthshire's product offer is currently a good fit for four of Visit Wales's key target segments: Pre family explorers, Active family Explorers, Scenic Explorer Couples and Older Cultural Explorer Couples. There is potential to grow younger Independent Explorer cohorts. There is also scope to target specific niche growth audiences, including specialist hiking, road cycling, golf, water sports, fishing, equestrian and garden markets with innovative products and marketing.

Monmouthshire also offers a wide range of innovative high quality wedding venues that lead the industry at UK level. These help to sustain other accommodation and service providers and there is scope to do more to repeat staying visits via coordinated retargeting, direct marketing and cross-promotions.

Improved transport networks provide opportunities to position the area as an attractive corporate base for those working in the wider region, and we aim to re-establish strategic relations between the area's key accommodation and experience providers, especially those located along the M4 corridor and ICC Wales. Monmouthshire also

offers unique experiences within the region for rural and wellbeing-orientated team building, partner programmes and incentives.

The Plan has been developed to capitalise on global tourism trends and to complement and align with a broad range of national, regional and Monmouthshire specific strategies impacting the destination's future. These include the national tourism strategy 'Welcome to Wales: Priorities for the Visitor Economy 2020 – 2025', Monmouthshire's Community & Corporate Plan, Monmouthshire's Draft Replacement Local Development Plan, Monmouthshire's Economy, Employment & Skills Strategy and Monmouthshire's Rivers and Oceans Action Plan.

To support delivery of the Plan, it is proposed that the Council establish a strengthened Destination Management Partnership, empowered and resourced to make a difference. The Partnership will meet quarterly and will be chaired by a member of MCC's Cabinet. It will include a cross section of public, private and third sector partners and report regularly to the South East Wales Tourism Forum. The Destination Management team will continue to engage with local tourism associations with the aim of gradually rebalancing the model so the Destination Management Partnership becomes the strategic group, underpinned by a network of strong tourism associations overseeing the Plan's delivery by 2030.

#### **4. ENGAGEMENT ON AND AMENDMENTS TO THE PLAN**

The DMP has evolved over time given input and engagement with key stakeholders, MCC officers and Cabinet Members.

Below is a list of some of the amendments made through this process following feedback from, stakeholders, key officers and cabinet members

- 'Objectives' and 'Plan on a Page' added to the contents page
- Amount estimated to be generated by the introduction of a visitor levy removed
- References to the Marches Forward Partnership, Living Levels Partnership, and the Blaenavon Industrial Landscape World Heritage Site' added.
- Addition of 'Local education providers'
- Additional emphasis on the climate and nature strategy commitments and Business and Skills Development.
- Integration of consideration of water pollution in the Wye/Usk and Monmouthshire Rivers and Ocean Action Plan
- Inclusion of Monmouthshire-made Experiences reflecting the strategic objectives and key priorities of the Plan to focus on high quality enriching experiences, which are firmly rooted in Monmouthshire's unique sense of place and creative spirit.

The strategy acknowledges the Community and Corporate Plan as being the driver for the Council's vision from which the Destination Management Plan sets out its purpose for delivery. Greater emphasis was also integrated in the DMP to align it with the RLDP and its focus on supporting opportunities for families and young people in our Destination offer.

**5. INTEGRATED IMPACT ASSESSMENT, (includes equality, future generations, social justice, safeguarding and corporate parenting).**

Integrated Impact Assessment attached.

**6. OPTIONS APPRAISAL**

| <b>Option</b>                                                                                                                                                                             | <b>Benefit</b>                                                                                                                                                                                                                                                                                                                                                                                         | <b>Risk</b>                                                                                                                                                                                                                                                                                                                                                             | <b>Comment</b>                                                                                                                                                                                                                                   |
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| Cabinet approves the draft Destination Management Plan, as amended following consultation with the key stakeholder group, key MCC officers, Business Cabinet and Place Scrutiny Committee | Monmouthshire's approved Destination Management Plan is out of date and a new plan is required to capitalise on current opportunities for growth within the context of a fast-changing policy landscape. Monmouthshire's Draft Destination Management Plan has been developed to respond to the area's unique opportunities to grow regenerative tourism for the benefit of everyone in Monmouthshire. | Funding and resource constraints currently limit our ability to deliver on this ambitious plan.<br><br>Targets for growth included in the draft Plan were set based on current accommodation bedstock capacity and profile, skewed in favour of non-serviced accommodation. These need to be reality tested in light of predicted reductions in self-catering capacity. | This is the preferred option to capitalise on global tourism trends and Monmouthshire's unique opportunities for regenerative tourism growth. Tourism contributes significantly to objectives within Monmouthshire's Community & Corporate Plan. |
| Cabinet does not approve the draft Destination Management Plan and officers continue to work with individual businesses, and                                                              | Less ambitious, potentially more affordable option.                                                                                                                                                                                                                                                                                                                                                    | This would inevitably mean less co-ordination and less opportunity for engagement with partners to drive a more regenerative                                                                                                                                                                                                                                            | This is the least preferred option as it generates less benefits to support other parts of Monmouthshire's economy and the facilities and                                                                                                        |

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| with regional and national structures to support the sector. |  | approach, and less opportunity to maximise inward investment and the benefits of strategic/whole-authority working. There's an additional risk that the key stakeholder group will become disengaged if the Plan they've helped develop is not taken forward. | services on which local communities depend. |
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## 7. EVALUATION CRITERIA

The baseline for evaluating performance against a wide range of economic and wellbeing objectives will be set by the Destination Management Partnership when established. It's proposed that progress on delivery will be reported on a regular basis to the South East Wales Tourism Forum.

## 8. REASONS:

Monmouthshire's Draft Destination Management Plan is presented for approval.

## 9. RESOURCE IMPLICATIONS:

Monmouthshire's draft Destination Management Plan includes both funded and unfunded opportunities. The existing small Destination Management Team will need to secure significant levels of external grant funding to implement the Plan effectively and deliver the maximum potential benefits for Monmouthshire communities.

## 10. CONSULTEES:

Destination stakeholder group and Lead Portfolio Cabinet Member.

## 11. BACKGROUND PAPERS:

Monmouthshire's Draft Destination Management Plan

## 12. AUTHOR: Nicola Edwards, J/S Destination Manager

**13. CONTACT DETAILS:**

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**Appendix 1: Monmouthshire's Destination Management Plan 2025-2030**

**Appendix 2: Plan on a Page**

**Appendix 3: Minutes of Place Scrutiny Meeting 9<sup>th</sup> October 2025**



## **Appendix 1**

### **Monmouthshire's Destination Management Plan**

## Appendix 2

### PLAN ON A PAGE

Here's a one-page summary of the detailed Plan that follows:

#### Purpose

Monmouthshire is the birthplace of British tourism and now we're shaping its future.

**Our guiding purpose:** to become a blueprint for next generation regenerative rural destinations.

The most inspiring, connected and welcoming place in Wales to stay, invest and live.

#### Ambition 2030

By 2030 we want to be Wales's stand-out rural destination. A place of imaginative experiences and characterful places to eat, drink, and stay – rich in sense of place. We'll celebrate Monmouthshire's creative energy: encouraging the next generation to get inspired, get involved, and shape the future.

#### Aim

We'll bring vibrancy to our high streets, adventure to our landscapes, and confidence to our communities through more and better tourism that celebrates and enriches our quality of life.

#### Objectives

| Economic growth                                  | Improved infrastructure          | Vibrant culture                                | Enhanced experiences                           | Environmental protection                                      |
|--------------------------------------------------|----------------------------------|------------------------------------------------|------------------------------------------------|---------------------------------------------------------------|
| Economic growth. More private sector investment. | Sense of arrival. Better basics. | Community participation. Improved civic pride. | Signature experiences. Keynote places to stay. | Improved visitor awareness & behaviour. Public transport use. |

Visitor, business and resident satisfaction with tourism.

#### Future Growth Markets: Wider UK and International Markets

|                                                               |                                                                           |                                                                                       |
|---------------------------------------------------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Local residents</b> , including families and young people. | <b>Independent Explorers from within 2hrs</b> – encouraging longer-stays. | <b>New visitor markets from across the UK and beyond</b> , including younger cohorts. |
|---------------------------------------------------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------|

#### Special interest markets:

Outdoor Activities; Equestrian; Gardens; Weddings; Corporate.

#### Proposition

**Monmouthshire-made experiences that are uniquely local, distinctively Welsh and international in quality.**

|                                           |                          |                          |
|-------------------------------------------|--------------------------|--------------------------|
| <b>Vibrant communities</b>                | <b>Natural adventure</b> | <b>Inspiring culture</b> |
| Creative spirit – a place of inspiration. |                          |                          |

#### Drivers

|                  |             |                       |
|------------------|-------------|-----------------------|
| <b>Stand out</b> | <b>Stay</b> | <b>Sense of Place</b> |
|------------------|-------------|-----------------------|

#### Priorities

|                                                                                                                             |                                                                                                                                            |                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Vibrant Places</b><br>Integrated placemaking. Better basics – including connectivity. Living Welsh culture and language. | <b>Active Landscapes for healthy lifestyles</b><br>A walking and cycling county. A boosted activity sector. Promoting responsible tourism. | <b>Enriching Experiences</b><br>Monmouthshire-made experiences and events. High-quality accommodation. Showcasing local produce. |
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#### Enablers

|                            |                                  |                                           |
|----------------------------|----------------------------------|-------------------------------------------|
| <b>Brand marketing</b>     | <b>Strong support structures</b> | <b>Sustainable and inclusive delivery</b> |
| Creativity and originality |                                  |                                           |

**Appendix 3**

Minutes of Place Scrutiny Meeting 9<sup>th</sup> October 2025