

SUBJECT: Monmouthshire Tourism Performance 2015

MEETING: Economy & Development Select Committee

DATE: 13 October 2016

DIVISIONS/WARDS AFFECTED: All

1 PURPOSE

- 1.1 To provide members with a report card that considers Monmouthshire Tourism Performance for 2015 against the objectives and outcomes set out in the Council's Improvement Plan.

2 BACKGROUND

- 2.1 This report card for Tourism provides a line of sight between Tourism activities and the outcomes and priorities which the council is committed to.
- 2.2 This report provides members with the baseline information to assess where we are and what progress we are making to demonstrate whether anyone is 'better off' as a result of our work.

3 KEY ISSUES

- 3.1 This report card highlights performance against key performance indicators for 2015. In a climate of increasingly stretched resources it has been vital to focus firmly on priorities and to maximise partnership working and opportunities to access external funding.

4 RECOMMENDATIONS

- 4.1 Members should use this report and the associated indicators to scrutinise whether services are being delivered in line with expectations and are contributing to the agreed outcomes.
- 4.2 Members should identify any areas of underperformance or concerns that require further investigation.

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Monmouthshire Tourism Performance 2015

Objective: We want to enable our County to Thrive

Council Priority: Supporting enterprise, entrepreneurship and job creation

Council & Single Integrated Plan Outcomes: Business and Enterprise & Protect and Enhance the Environment

Why we focus on this

Tourism is vital to Monmouthshire's economy generating income to support a wide range of businesses that directly or indirectly benefit from visitor spending or that supply or service the county's tourism industry, including the retail and catering sectors and food and drink producers. According to STEAM 2015, tourism generated £187m for Monmouthshire in 2015, a 6.6% increase on 2014. 2.19m visitors came to Monmouthshire in 2015, a 4.4% increase on 2014 and a 6.7% increase on 2013.

Tourism also provides opportunities for enterprise and employment, and is a significant employer in the county. 2,744 FTEs were supported by tourism in 2015, (an increase of 6.8% from 2014) accounting for approximately 10% of the workforce.

Each visitor day brings an average of £63.19 to the local economy, ranging from £31.18 for day visitors to £158.77 for visitors staying in serviced accommodation. Each staying visitor generates an average income for Monmouthshire of £270.70 per visit.

Performance context

2015 was the final year of Monmouthshire's Destination Development Plan which was approved in November 2012.

Tourism team reduced by 25% from 4 to 3 full time members of staff in May 2015. The reduced staff team comprised a Food & Tourism Strategic Manager, a Digital Tourism Marketing Officer, and a Business Development Coordinator / TIC Manager. In addition, a small number of TIC staff were employed on zero hour contracts to provide visitor information at Chepstow TIC.

TIC budget reduced by 35% between 14/15 and 15/16.

2015 Destination Performance

Key Figures: Economic Impact

Economic Impact Es 2015		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (£ Millions)	EM	71.832	42.135	19.826	133.793	52.86	186.654
2014 (£ Millions)	EM	66.123	38.259	19.775	124.157	50.908	175.065
Change 14/15 (%)	%	+8.6	+10.1	+0.3	+7.8	+3.8	+6.6
Share of Total (%)	%	38.5	22.6	10.6	71.7	28.3	100.0

Tourism generated £186.65m for Monmouthshire in 2015, a 6.6% increase on 2014. This rate of growth was slightly higher than the national (5%) and regional growth average (6%).

Staying visitors accounted for £133.79m (77%) of the total amount generated by tourism in 2015 and stayed an average of 2.5 nights. The relative importance of staying visitors has increased year on year which is having a positive effect on visitor yield.

Key Figures: Visitor Numbers

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2015 (Millions)	M	0.277	0.075	0.143	0.494	1.696	2.190
2014 (Millions)	M	0.254	0.068	0.142	0.465	1.633	2.098
Change 14/15 (%)	%	+8.7	+10.2	+0.3	+6.3	+3.8	+4.4
Share of Total (%)	%	12.6	3.4	6.5	22.6	77.4	100.0

Key Figures: Employment Supported

Employment Supported		Direct Employment						Indirect and Induced	Total
		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	Total Direct		
2015 (FTEs)	FTE	893	639	196	1727	519	2246	498	2744
2014 (FTEs)	FTE	852	594	188	1635	482	2117	452	2569
Change 14/15 (%)	%	+4.7	+7.5	+4.1	+5.6	+7.7	+6.1	+10.1	+6.8
Share of Total (%)	%	32.5	23.3	7.1	62.9	18.9	81.9	18.1	100

2.19m visitors came to Monmouthshire in 2015, a 4.4% increase on 2014 and a 6.7% increase on 2013. This is slightly higher than the 4.2% increase on 2014 for South East Wales as a whole.

The staying visitor market saw highest growth levels between 2014 and 2015, with +6.3% change in visits compared to 2014. This was driven by improved performance in both the serviced and non-serviced sectors. The 8.7% increase in serviced accommodation continues the strong growth of recent years, with an average increase of 8% per annum since 2012.

The number of visitors staying in non-serviced accommodation grew by 10.2% from 2014-2015. This is a welcome improvement following annual falls in the sector since 2011, though this trend has been Wales-wide rather than specific to Monmouthshire.

2,744 FTEs were supported by tourism in 2015, an increase of 6.8% from 2014.

The largest portion of the direct employment supported is associated with the activity of visitors staying in serviced accommodation, accounting for 893 FTEs. Tourism spend supports the most employment in the Accommodation (879 FTEs) and Food & Drink (675 FTEs) sectors.

What did the Tourism team do in 2015?

CORE ACTIVITY DELIVERED BY TOURISM TEAM IN 2015

- Management of destination marketing campaigns / channels including launch of new website and domain (www.visitmonmouthshire.com) January 2015.
- Development / management of partnerships and collaborative projects.
- Data stewardship of Wales Tourism Product Database (which feeds visitmonmouthshire.com, visitwales.com, and DIGITAL visitor information kiosks)
- Business support including advice /support on marketing, grants & planning application consultation responses
- Management of market research, STEAM & bedstock data
- Management of MCC's interests in TIC network at Abergavenny and Chepstow
- Applications for funding and management of externally funded projects

WEBSITE / SOCIAL MEDIA PERFORMANCE

Business entries 2015

By December 2015, Visit Monmouthshire had 165 accommodation businesses published on the website, (and on the Wales Tourism Product Database) and 345 non-accommodation businesses (including 50 events).

There were 135,421 referrals to Monmouthshire accommodation websites in 2015 (from visitmonmouthshire.com), and 703,911 referrals to Monmouthshire non-accommodation businesses (including events).

Users 2015

The total number of unique users to Visit Monmouthshire over 2015 was 64,663, with a 429% increase in monthly users over the year.

Social media increase 2015

Facebook – 25% increase (900 – 1205)

Twitter – 29% increase (4000 – 5600)

ADDITIONAL ACTIVITY DELIVERED WITH EXTERNAL FUNDING

DESTINATION Monmouthshire (RTEF PROJECT LED BY MONMOUTHSHIRE TOURISM)

1. **Production & promotion of 3 Agincourt videos** to tell the stories of the Welsh archers who fought at Agincourt and add value to the Agincourt Wales trail developed with previous Agincourt 600 Legacy funding.

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

2. Familiarisation Trip

26 Monmouthshire Eisteddfod Ambassadors & tourism businesses participated in a familiarisation trip on 30 June 2016 led by a Wales Official Tour Guide with the following itinerary:

- Guided tour of Llandegfedd Visitor Centre
- Guided tour of Shire Hall, Monmouth
- Lunch at The Bell, Skenfrith
- Tutored tasting at Apple County Cider
- Visit to Veddw Gardens

3. Monmouthshire Ambassador Training

37 Monmouthshire businesses / ambassadors received WorldHost training under this programme in December 2015

4. Volunteer Management Training

Key Monmouthshire attraction and tourism staff attended a training session on 11 December 2015 which included an element on best practice led by National Trust. Link to training presentation here

http://prezi.com/ktz2x0hw_iiy/?utm_campaign=share&utm_medium=copy&rc=ex0share

5. VisitMonmouthshire Networking Event

4-6pm Thursday 17 March 2016 Marriott St Pierre – 34 Monmouthshire businesses / ambassadors attended. Presentations by National Eisteddfod and Wye Valley AONB promoting opportunities to capitalize on the 2016 Monmouthshire & District Eisteddfod and the 2016 Wye Valley River Festival. Monmouthshire Ambassadors presented with their WorldHost certificates.

6. Production & distribution of 10 Top Ten Videos

10 Top Ten Monmouthshire Adventure videos produced. First Top Ten Welsh Adventures video distributed via VisitMonmouthshire Facebook page <https://www.facebook.com/visitmonmouthshire/> on 15 June with a prize draw competition to win a family ticket to the 2016 Monmouthshire & District Eisteddfod. 9 remaining Top 10 videos to be distributed via online channels during the remainder of Wales' 2016 Year of Adventure <http://www.visitmonmouthshire.com/walesadventures.aspx>

7. Development of Event Management Toolkit & ROI Model

Toolkit developed to support effective event management in Monmouthshire <http://www.visitmonmouthshire.com/eventmanagement-introduction.aspx>

8. Production of Monmouthshire Eisteddfod Fringe Guide (to encourage eisteddfod visitors to see and do as much as possible while they're in Monmouthshire to spread the benefits of the event across the county).

36 Monmouthshire events / special offers promoted including three short break offers <http://www.visitmonmouthshire.com/eisteddfod.aspx> 15,000 copies printed for distribution via key visitor sites. Distribution of electronic copy via online channels and by email to visitors staying in eisteddfod caravan and camping sites. Opportunity for businesses to embed Monmouthshire Eisteddfod Fringe widget into their own websites.

Cardiff Capital Region Food Tourism (P4G Project Led by Monmouthshire Tourism)

- 9 participating LAs across SE Wales (all LAs except Blaenau Gwent)
- 9 LA food & drink business databases cleaned
- Regional Food Tourism Marketing Plan developed
- 11 food tourism videos produced and promoted – one for each LA plus 2 regional (one food & one drink) <http://www.visitmonmouthshire.com/cardiffcapitalregionfood.aspx>

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

- Ongoing development/ management of dedicated travel trade / group travel website www.southernwales.com
- Group Buyer Showcase, Hensol Castle 2 February 2016
- Group Buyer Fam trip 1 Feb 2016
- Attendance at Discover Wales, World Travel Market, Britain & Ireland Marketplace, British Travel Trade Show, Explore GB
- Monmouthshire Group Buyer Guide <http://mediafiles.thedms.co.uk/Publication/MW-Mon/cms/pdf/Monmouthshire%20Group%20Travel%20Guide%20Final.pdf>
- Monmouthshire Familiarisation trip for SE Wales businesses and ambassadors 9 February 2016 with 27 attendees led by Wales Official Tour Guide with the following itinerary:
 - Caldicot Castle & Country Park
 - Wyndcliffe Sculpture Gardens
 - Guided tour by Clerk of the Course followed by lunch at Chepstow Racecourse
 - White Castle Vineyard – guided tour followed by tutored tasting

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

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

DARK SKIES ADVENTURES (RTEF PROJECT LED BY RCT CBC)

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

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

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

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

WG Funding secured for 2016/17

Monmouthshire Tourism has secured £20k of the £25k requested to deliver the following programme of activity this financial year:

- Review of Destination Plan and Partnership arrangements
- Development of visitmonmouthshire.com to improve the experience for users of mobiles and tablets
- Legendary Monmouthshire – specialist Agincourt travel trade training / product development and identification & testing of a new St Tewdric's cycle route to link the Wye Valley with the Wales Coast Path

The Cardiff Capital Region Travel Trade / Group Travel Project also secured WG RTEF funding.

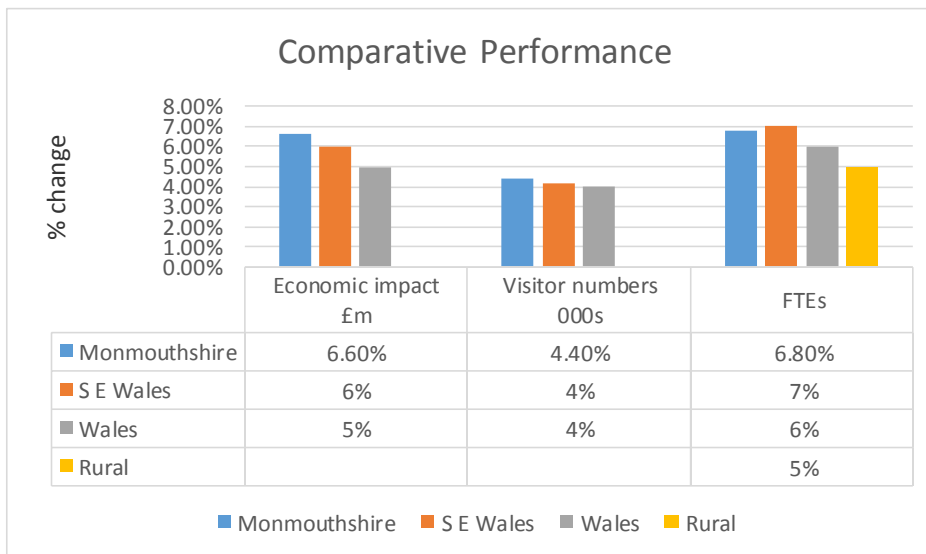
In addition, £58k was secured from the Active Travel Quick Wins fund for upgrading of software on existing visitor information kiosks and installation of new hardware at 3 sites.

Monmouthshire Tourism also secured £25k of RDP funding to deliver the Vale of Usk Country Kitchen programme at the 2016 Monmouthshire & District Eisteddfod, to raise the profile of the area as a high quality food tourism destination and encourage Eisteddfod visitors to purchase local food & drink products.

Prospects for 2016	<p>Headline results from Wales Tourism Business Barometer: Wave 3, Summer 2016 http://gov.wales/docs/caecd/research/2016/160922-wales-tourism-business-survey-wave-3-2016-en.pdf</p> <p>Excellent summer season for Wales' tourism industry The tourism industry in Wales has enjoyed a busy summer. Close to half (46%) of tourism businesses have had more visitors than last summer, and more than a third (38%) have received the same level. Only a minority (16%) report being down.</p> <p>'More British people staying in the UK' is the top reason given for being busier – stated by a third (33%) of businesses receiving more visitors. Some industry leaders believe this is, in part, due to a weak pound and/or the threat of terrorism in mainland Europe.</p> <p>All sectors and regions have enjoyed a good summer The increased visitor levels have been seen across all industry sectors and regions of Wales. In particular, caravan and campsites have had an excellent period, with two in three (67%) reporting to be up on visitors compared to last summer. Some fine weather and more British people staying in the UK are thought to have combined to make a successful summer for this sector.</p> <p>German and other European markets are also up this year As well as the domestic market performing well, operators have also seen more visitors from mainland Europe to date this year. About two in five (41%) businesses have had more visitors from Germany compared to last year, and a similar proportion (43%) have had the same level.</p> <p>About two in five (39%) operators have had more visitors from other European countries, and about half (47%) have had the same level.</p> <p>Confidence for rest of the year is fairly high Following a good summer, about a quarter (27%) of operators say they are 'very confident' for the rest of the year, and many others (57%) say they are 'fairly confident'.</p>
Collaboration/ Partners we are working with	Abergavenny TC, Abergavenny & District Tourism Association, St Mary's Priory Trust, Brecon Beacons NPA, Wye Valley AONB, Brecon Beacons Tourism, Wye Valley & Forest of Dean Tourism Association, Visit Wales, Welsh Government, Monmouthshire Ambassadors, Monmouth Chamber, Chepstow Chamber, Chepstow TC, Chepstow Marketing Group.
What we have spent on this objective	The core Tourism budget for 2015/16 was £132,489. An additional £35k of external funding was secured to deliver approved activity, £20k under RTEF & £15k under P4G.

	The TIC budget for 2015/16 was £42,358, a 35% reduction on the budget for 14/15.			
How are we performing?				
	How much did we do?	2014	2015	2015 Target
	Total Number of tourists per year ⁱ	2.098m	2.190m	>2.098m
	Total number of day visitors	1.633m	1.696m	>1.633m
	Total number of visitors staying overnight	0.465m	0.494m	>0.465m
	Number of visitors to Abergavenny TIC	24,927	19,327*	>24,927
	Number of visitors to Chepstow TIC	37,843	30,931*	>37,843
	How well did we do?			
	Total employment supported by tourism (Full Time Equivalent, FTE)	2569	2744	>2569
	Is anyone better off?			
	Income generated from tourism per year ⁱⁱ (£ millions)	£175.07m	£186.65m	>£165.08
	Total value of overnight visitors (£ millions)	£124.16m	£133.79m	>£116.94
	Total value of day visitors (£ millions)	£50.91m	£52.86m	>£48.13

How do we compare with other areas



In terms of economic impact, Monmouthshire’s growth (6.6%) was slightly higher than the national (5%) and regional average (6%) between 2015 and 2014.

Monmouthshire’s 4.4% increase in visitor numbers between 2015 and 2014 was also slightly higher than the 4.2% increase on 2014 for South East Wales and 4% for Wales.

For FTEs, the % change was above the Wales and rural average but slightly below the S E Wales average.

ⁱ Based on annual calendar year data produced by STEAM

ⁱⁱ All 2014 figures are given in £s 2015 to remove inflation effects.

* Reduced opening hours / periods of TICs during 2015.