

## Visit Monmouthshire Update Destination Partnership Meeting Wednesday 26<sup>th</sup> October 2022

Nicola Edwards, Destination Manager  
Kevin Ford, Destination Marketing Officer

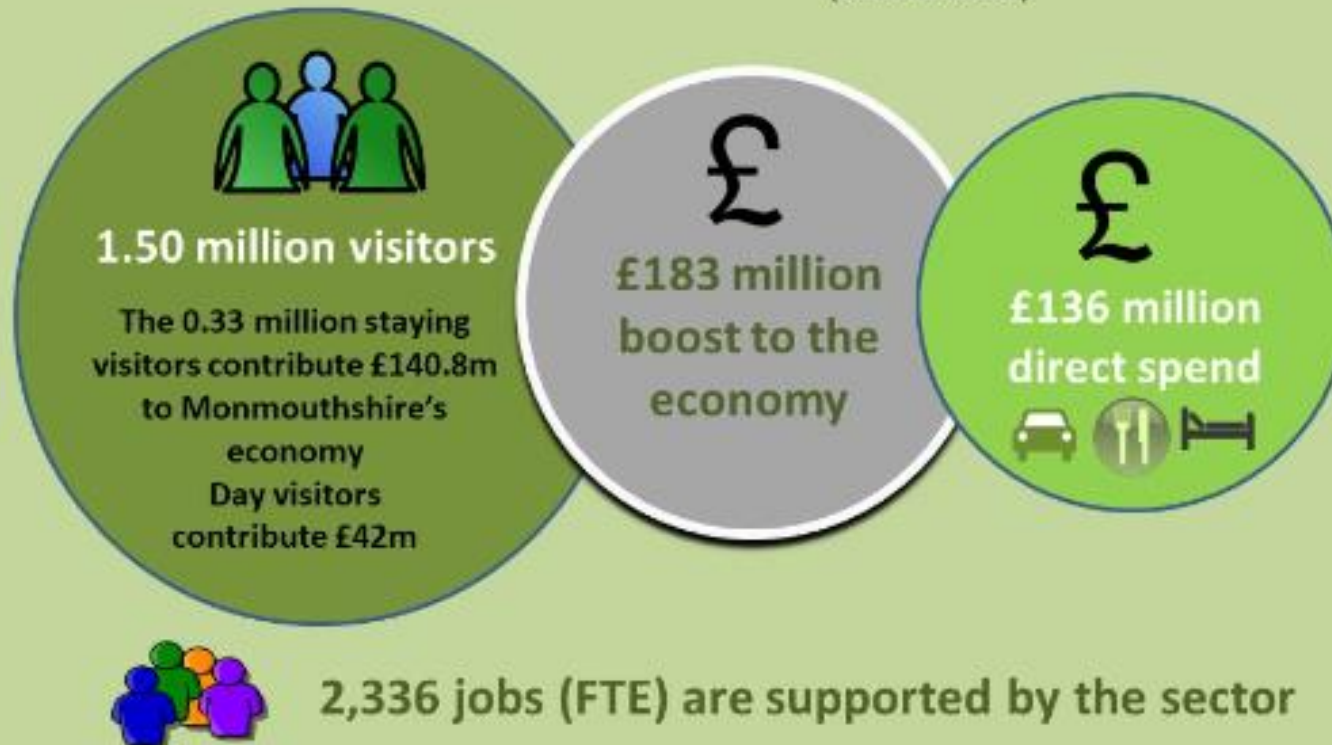


# Destination Performance

## Looking back - STEAM 2021

### Value of tourism to Monmouthshire's economy

(STEAM 2021)



### Encouraging signs of recovery in 2021

- Economic impact of tourism increased to £182.79 million (up 122% on 2020 down 28% on 2019)
- Visitor numbers increased to 1.5 million (up 180% on 2020, down 35% on 2019)
- FTE jobs supported by tourism increased to 2,336 (up 45% on 2020, down 25% on 2019).

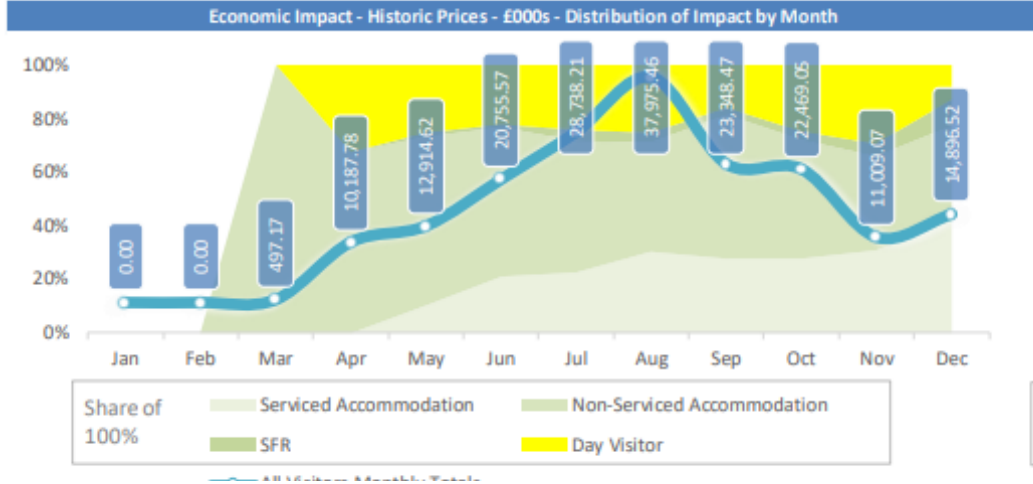
<https://www.visitmonmouthshire.com/destination-management/destination-intelligence>

[Monmouthshire STEAM 2021 infographic](#)

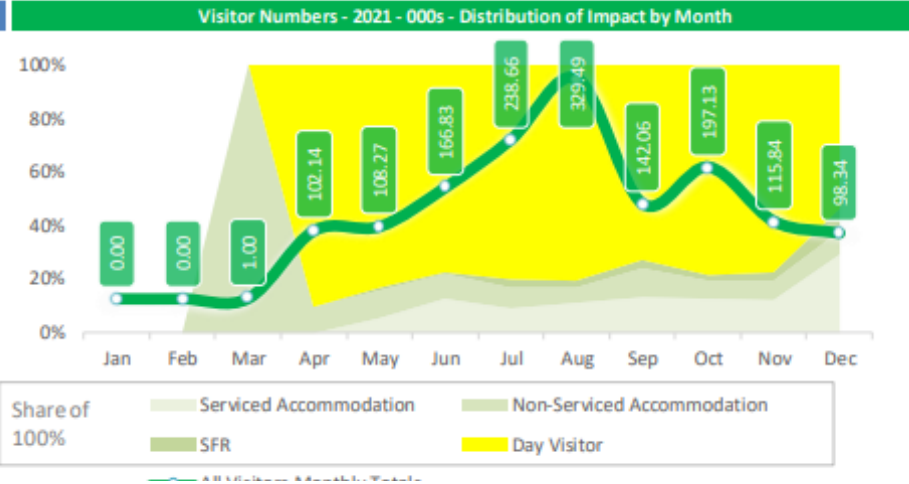
\*STEAM (Scarborough Tourism Economic Activity Monitor)

# STEAM 2021 – Seasonality & spend

## STEAM FINAL TREND REPORT FOR 2010-2021 MONMOUTHSHIRE COUNTY COUNCIL



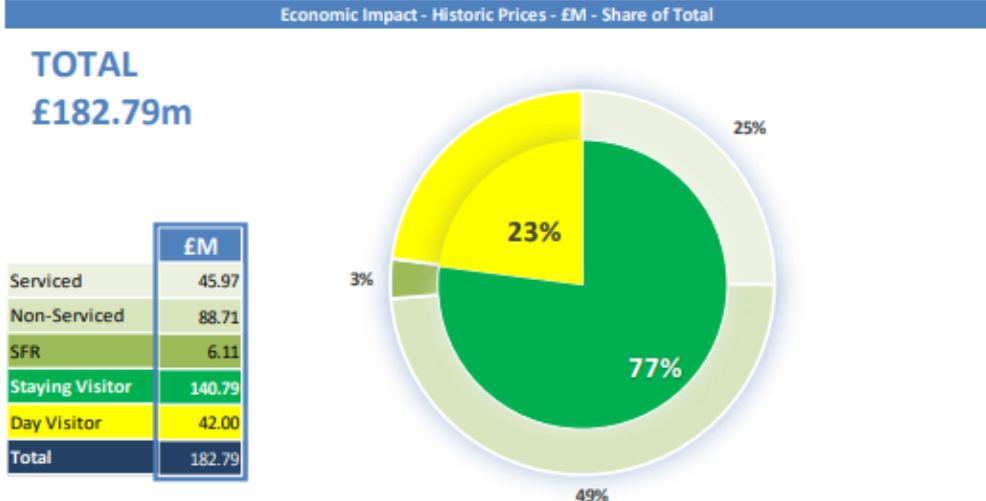
## 2021 Historic Prices



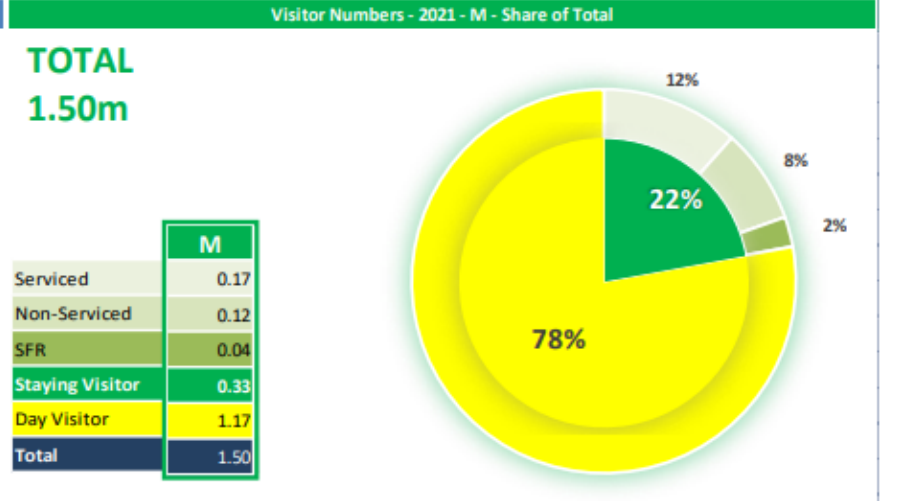
In 2019 (pre-pandemic) 34% of total visitors & 37% of total spend generated Oct - March

In 2021 the average economic impact (EI) of each **day** visitor was **£35.96** compared with the average EI of each **staying** visitor **£424.57**

## STEAM FINAL TREND REPORT FOR 2010-2021 MONMOUTHSHIRE COUNTY COUNCIL



## 2021 Historic Prices



# Monmouthshire Hotel Occupancy Jan – Sept 2022



Occupancy (%)	Year To Date		
	2020	2021	2022
This Year	56.3	67.7	73.4
Last Year	75.0	56.3	67.7
Percent Change	-25.0	20.3	8.5

Occupancy (%)	2021									2022								
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
This Year	31.2	66.9	82.7	83.0	87.6	86.6	78.5	62.6	50.4	42.7	60.6	66.6	80.2	81.0	81.9	82.1	82.1	83.5
Last Year					78.3	71.2	36.8		16.5				31.2	66.9	82.7	83.0	87.6	86.6
Percent Change					11.9	21.6	113.5		205.3				157.5	21.0	-0.9	-1.2	-6.3	-3.6

**% occupancy YTD 2022** - above 2021 & 2020 levels but below 2019

**Average Daily Rate (ADR)** - above 2021, 2020 & 2019 rates (reflecting increased operating costs)

**Revenue per available room (RevPAR)** - above 2021, 2020 and 2019 levels (again reflecting increased operating costs)

**June, July, Aug & September 2022** hotel occupancy levels below 2021

# Wales Tourism Business Barometer – Summer Wave

## 4th October 2022



### Headlines

- Around a quarter (23%) of businesses had more customers this summer than last summer, and 38% have had the same level. However, 39% have had fewer.
- The comparison with a normal pre-Covid summer shows a similar picture. About one in five (19%) had more customers this summer compared to the pre-Covid norm, and around half (49%) have had the same level. About a third (32%) are down.
- Well over half (62%) of businesses intend to remain open for at least some of each autumn and winter month.
- At the time of interviewing and for accommodation operators taking bookings, booked available capacity is approx. 65% for September, 45% for October and 26% for each of November and December.
- 14% of operators are 'very confident' about running their business profitably this autumn, and a further 36% are 'fairly confident'. However, 20% are 'not very confident', and 10% are 'not at all confident'. 20% do not know.

<https://gov.wales/tourism-barometer-summer-wave-2022>

# Looking forward - BVA BRDC Consumer Sentiment

## Tracker (6 October – covering period July to September 2022)



Consumer sentiment tracking survey commissioned to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad. [https://www.visitbritain.org/sites/default/files/vb-corporate/sentiment\\_tracker\\_profiling\\_report\\_jul-sep\\_2022.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/sentiment_tracker_profiling_report_jul-sep_2022.pdf)

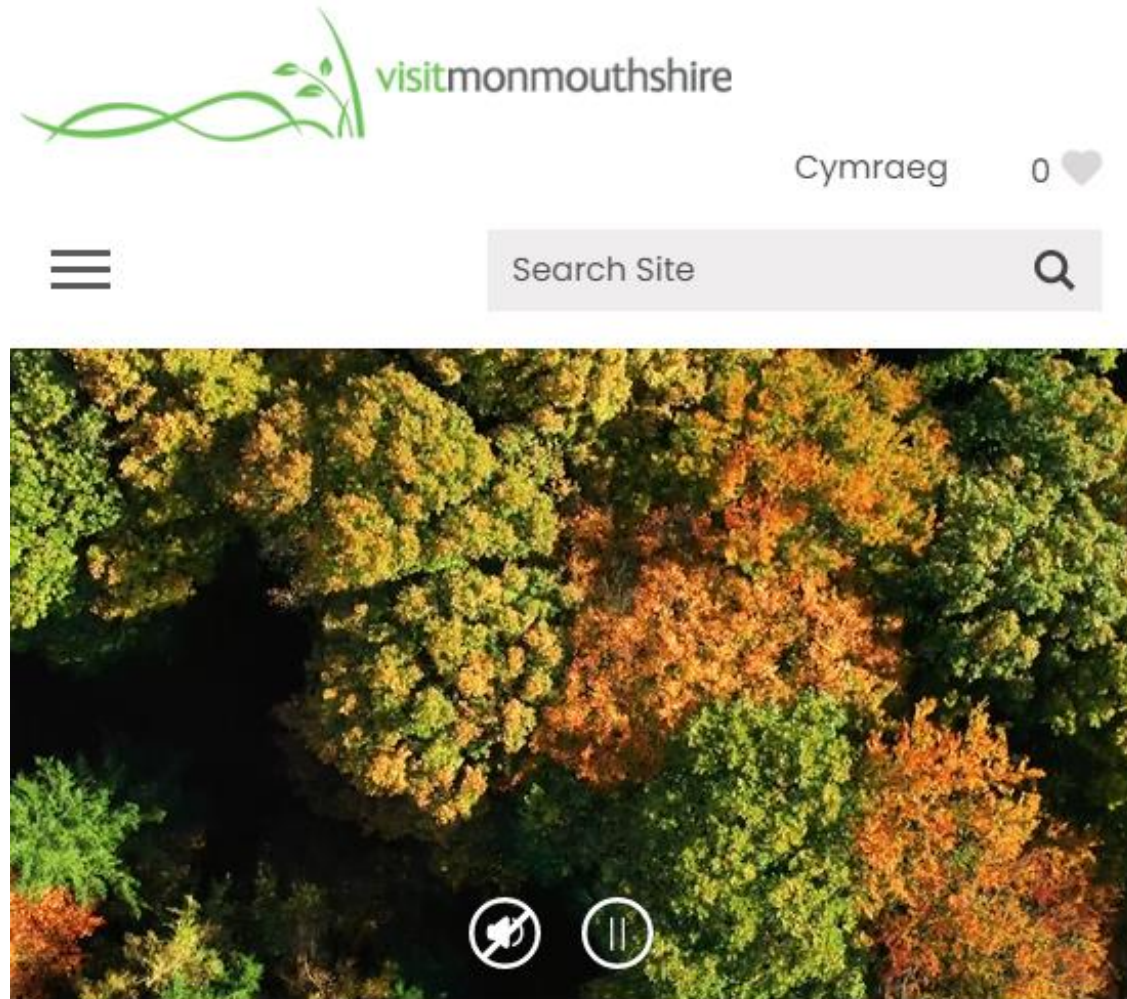
- Overall **4 in 5 are concerned about the cost of living crisis**, expecting ‘the worst still to come’, with Retirees and social grade DE most sceptical.
- **Older Independents** are most likely to have been ‘hit hard’ by the cost of living crisis, while those in AB social grade are more likely than others to say they are actually ‘better off’ or ‘not affected’.
- Confidence in the ability to take an overnight domestic trip does not vary much by life stage but correlates with social grade – higher social grades reporting stronger confidence.
- Compared to the total sample, there are more Families and PreNesters among Trip Intenders, while **Non-Intenders are dominated by Retirees and Older Independents**.
- Both Autumn and Winter Intenders are more likely than average to be social grades AB. Non-Intenders are more likely to be social grades DE.
- **The rising cost of living has consistently been the top potential barrier to taking a UK holiday or short break, and has increased by 10% over the past 5 months.**
- The cost of living crisis is most likely to influence Autumn and Winter Intenders’ behaviour through ‘**choosing cheaper accommodation**’, ‘**spending less on eating out**’ and ‘**looking for more free things to do**’.
- Focusing on day trips, the ‘cost of living crisis’ is most likely to encourage trip intenders to ‘**look for more free things to do**’, ‘**take fewer day trips**’ and ‘**spend less on eating out**’.

# Where are we now and what are our priorities?



- Ongoing review, delivery & monitoring of local and regional marketing plans to generate leads and bookings for businesses (facilitating access to low commission rate TXGB platform) and better distribution of benefits across year and county
- Ongoing research – Bedstock, occupancy, STEAM, Destination survey pilot, Tintern visitor experience survey
- **£250k Welsh Government Brilliant Basics** funding secured which is delivering improvements to visitor experience in Tintern (plus £62,500 MCC match funding) 2022/23 – Visitor signage, smart data infrastructure & car park resurfacing
- Two UK Shared Prosperity Fund applications submitted and approved for inclusion in Monmouthshire’s Local Investment Plan (subject to MCC Cabinet approval 9 November 2022)
  - Monmouthshire Destination for All (local) **£232,513**
  - Cardiff Capital Region collaborative marketing activity targeting group travel, travel trade & business events markets **£45,000**
- Revision of Destination Management Plan to align with WG’s Priorities for the Visitor Economy 2020-25 to grow tourism sustainably for the **benefit of Monmouthshire’s people, communities and environment** – addressing key challenges of seasonality, spend & spread
- Management of Visit Monmouthshire marketing & social channels, marketing & content plans, product, business & visitor databases, events calendar and Digital Asset Library
- Contribution to operation of Abergavenny TIC
- 2023 Welcome to Monmouthshire bedroom browser sponsorship

# Visit Monmouthshire Marketing Activity



Hello autumn in  
Monmouthshire!

- B2C – content marketing, website SEO, email marketing, social media, PR
- Website referrals (52,304 +13%)
- Product, visitor and business databases
- Spread, seasonality, spend
- Digital Asset Library
- Press activity
  - 5 journalists hosted earlier this year  
<https://www.visitmonmouthshire.com/inspire-me/about-monmouthshire/reviews>
  - Stephanie Cavagnaro writing for National Geographic Traveller in Monmouthshire this week



# Email marketing

## Hello summer!



## Magical May in Monmouthshire



visitmonmouthshire   
ymwelwch â sir fynwy

## Here be dragons

## Hello autumn!



(Llancayo Windmill in Usk, taken by [@oohlala\\_linda](#))

## Hello spring in Monmouthshire!



With Easter fast approaching and the prospect of warmer days and sunshine ahead, here are some ideas for making the most of the better weather in Monmouthshire over the coming weeks. Spring is the perfect time to enjoy this beautiful county.

Autumn is one of the most beautiful seasons in Monmouthshire, and as we say a farewell to long summer days there's still plenty to look forward to. Not only the spectacular colours as the leaves on the deciduous trees change from green to red, orange and gold.

Check out our best [autumn views](#) and [walks](#) below, and the wonderful events taking place in the most beautiful surroundings. Autumn is also when we celebrate the harvest, and this year there's lots to celebrate as we bring in an



Dragon's Breath in the Lower Wye Valley, by [@judith\\_angharad](#))

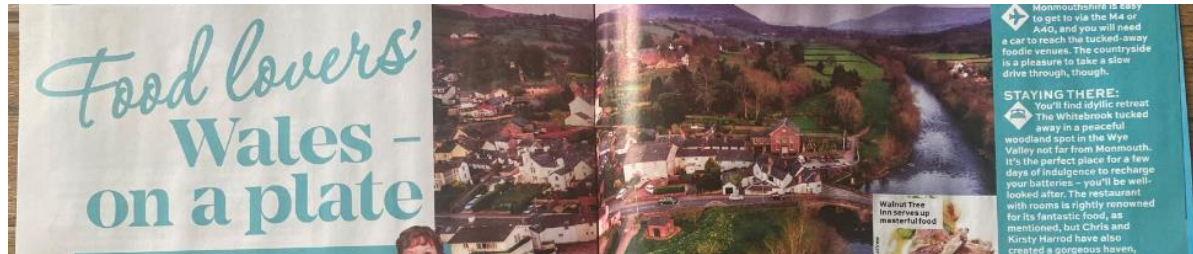
Seeing the clouds winding their way down our river valleys at this time of year is a phenomenon known as Dragon's Breath. Climb above the misty hills

# PR coverage

## What others say about Monmouthshire

Don't just take our word for it. Read what others say about Monmouthshire's stunning landscape, delicious food and drink, and what the best things to see and do in the area are.

<https://www.visitmonmouthshire.com/inspire-me/about-monmouthshire/reviews>



THE WEEKEND AUSTRALIAN, APRIL 30-MAY 1, 2022  
theaustralian.com.au/travel

Travel+Luxury 11

## Survival tactics in the Severn Estuary

VICTORIA TROTT

**T**he Severn, the longest river in Britain at 354km, rises in mid Wales and then curves downwards to Gloucestershire, where it enters the Severn Estuary near the Wales-England border. Until 1966, when the 1.6km-long Severn Bridge opened, if you wanted to get to southwest England, directly across the estuary from south Wales, you'd need to take a ferry from the village of Beachley, near Chepstow in South Monmouthshire, over to Aust, or face a very long drive.

Now, where the ferry once docked at Beachley, directly underneath the bridge, is the base of the Severn Area Rescue Association. It's an es the estuary has the tidal range in the Bay of Fundy in C here in the car park Chloe Newcomb F professional forager Her company, Gatherings, offers services, including foraged herbs and p

1-starred rest d foraging wa unities and gr )-minute Estu orage and Ch erbs do I think ughs. We con first few metr is is my favour rs," Chloe say le, but there's s to the morni well as encou finds, Chloe r



Chloe Newcomb Hodgets of Gourmet Gatherings and wild sprouts on the Severn Estuary, Wales

Outstanding Natural Beauty. The River Wye is the fifth-longest river in Britain at 250km, and, like the Severn, runs from mid Wales down to the Severn Estuary. It's the lower section, between Hereford and Chepstow, that's known as the Wye Valley.

With cars and trucks thundering over the bridge above us, we head on to the muddy river beach. I'm disappointed not to see any of the eight remaining "lave fishermen", who usually fish for salmon using Y-shaped wooden structures draped with nets while standing

THE WEEKEND AUSTRALIAN, JUNE 4-5, 2022  
theaustralian.com.au/travel

10 Travel+Luxury

The Telegraph | The Telegraph

## Britain's newest culinary hotspot is perfect for a cosy festive getaway

Paul Miles

24 November 2021 · 7-min read



## EVERY WELSH WAY



IN THE KNOW

Trains from London Paddington to Abergavenny, changing at Newport, take about 3½ hours. Chauffeur-driven local transport is available from Blackhouse Travel. The Abergavenny Food Festival will be held on the weekend of September 17-18. The six venues in the centre of town include the heritage Victorian Market Hall and the grounds of the Norman-era Abergavenny Castle. Pre-book tickets online for events such as chef talks and demonstrations. visitmonmouthshire.com abergavennyfoodfestival.com blackhoustravel.co.uk whitecastlevineyard.com thewalnuttreinn.com thewhitebrook.co.uk raglancountry.estate wyevalleymeadery.co.uk

Mead makers Kit and Matt Nowell, below. White Castle Vineyard and the town of Abergavenny, below left. Dish at Cŵlon Rhagleri restaurant, inset

Gourmet delights abound in Monmouthshire

VICTORIA TROTT

**A**sk any serious British epicure to name a favourite food festival and chances are they'll nominate Abergavenny. This market town, the largest in the county of Monmouthshire in southeast Wales, attracts more than 35,000 visitors from across Britain – including top chefs, artisan producers and writers – over a



garlic and spring vegetables, is some of the best I've tasted. There are also separate vegetarian and vegan menus. The restaurant, which is aiming for a Michelin Green Star, is part of Raglan Country Estate, a substantial site being developed by Welsh entrepreneur Deri Llewellyn-Davies into an eco-friendly resort, unique in Wales, to rival Soho Farmhouse in Oxfordshire, a favourite of celebrities and royalty. The resort will have specially designed sustainable luxury cabins, the first five of which should be ready in September. Llewellyn-Davies also aims to make the estate's nine-hole golf course the most sustainable in Britain, and other ambitious plans for the site include a retreat centre. "We're con-

# Social Media

**Visit Monmouthshire**  
Published by Kevin Ford · 29 April

This bank holiday (Sunday 1st & Monday 2nd) join the South East Wales Military Vehicle Trust as they return to Caldicot Castle for the annual Wartime Wheels event. The castle and country park gets filled with historic military vehicles, as well as re-enactors to tell you all about them.

Best of all? Entry is completely FREE!

It's just one of a host of events we have on in Monmouthshire this weekend. See the full list on our website... See more



32,315 People reached    1,214 Engagements    +7.4x higher Distribution score

Boost post

30    11 comments    66 shares


**Visit Monmouthshire** ✓  
1,277 Photos & videos

**Visit Monmouthshire** ✓ @visit\_mon · Sep 30

The stunning view from Eagle's Nest in the Wye Valley. You see @Chepstow\_Racing on the right, Chepstow itself in the centre, then the two (old on left, new on right).

worth climbing the 365 steps to reach this viewpoint!

hshire















and 6 others

8    63    63

Sort by newest

**Posts**

Any ▾    Reach ▾    Last year ▾

 2,360	 2,187	 1,801
 1,746	 1,591	 1,582
 1,580	 1,550	 1,528
 1,510	 1,483	 1,480

**Visit Monmouthshire**  
87 followers  
1w · Edited ·


Dragon's Breath (cloud inversion) in the Wye Valley near Chepstow (looking south west into Wales here). We love to see the clouds winding their way down the river valley like this.

It's a real benefit of visiting in autumn / winter, as the longer nights allow for more time for the air to cool close to the ground and form these cloud effects. It's most common on our valley floors (both Usk and Wye), with the Wye Valley viewpoints (eg. Eagle's Nest) and the heights of the mountains around Abergavenny being the best places to see it.

Thanks to @roamingwithbrad on Instagram for sharing this photo.

<https://lnkd.in/gEQseWEH>

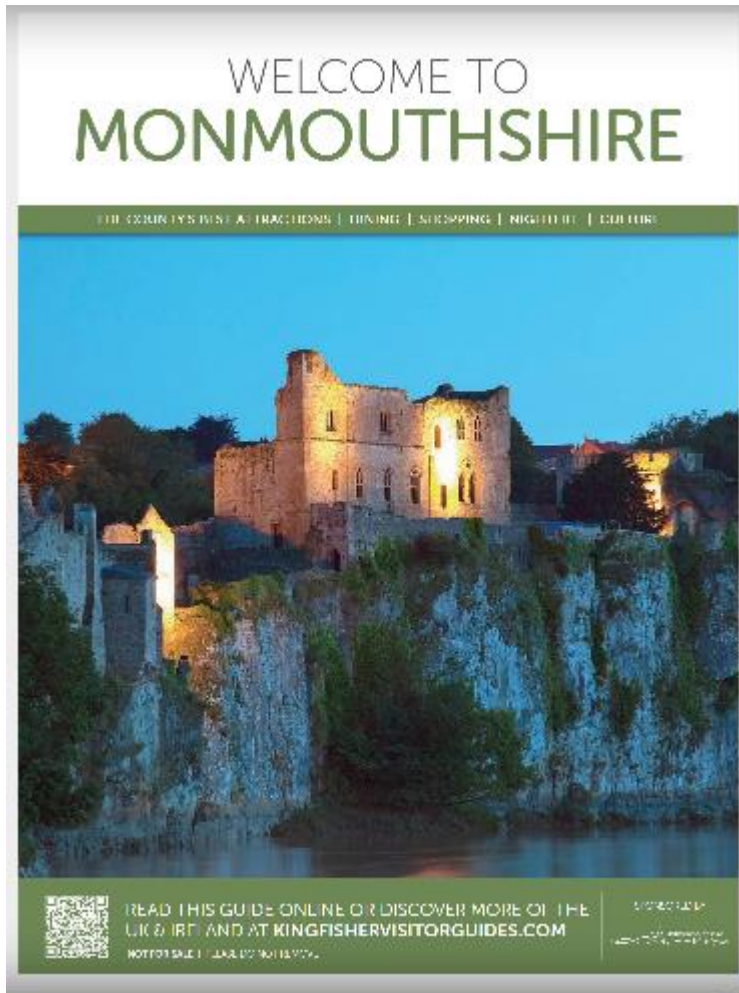
#lovemonmouthshire



Ruth Rourke and 52 others    3 comments · 2 shares

Like    Comment

# Bedroom browser / online visitor guide



<https://kingfishervisitorguides.com/visitor-guides/monmouthshire/>



# Paid advertising (very limited!)

## How to spend 48 hours in Monmouthshire

You will be surprised how much you can pack into 48 hours in Monmouthshire – take some inspiration from our weekend guide

READ FEATURE

## Monmouthshire: Your gateway to adventure

Crossing the River Severn and leaving England behind, you'll find yourself surrounded by some of the most stunning landscapes, fascinating places and finest food and drink to be found in all of Wales. This is Monmouthshire.

Often called 'the gateway to Wales', Monmouthshire offers far more than simply being the first Welsh county that visitors enter when travelling along the M4 and M48 motorways.

Monmouthshire's rolling hills and dramatic landscapes abound not only with historical and cultural treasures, but also with some of the finest food and drink Wales has to offer.

Whether you're looking for outdoor adventure, a comfortable retreat, a good meal, or you just want to get away from it all, Monmouthshire has the answer.

[Monmouthshire: Your gateway to adventure – Kingfisher Visitor Guides](#)



### Blasau a gofiwch am gyfnod hir, gydag enwau yr ydych yn annhebyg o'u anghofio

Sir Fynwy yw prifddinas fwyd Cymru ac mae'n gartref i Wyl Fwyd y Fenni. Oes, mae llawer o loeodd gwych yma i fwyta, gan gynnwys dau fwyty â sêr Michelin, ond mae llawer mwy.

Darganfyddwch gynnyrch eis tir – sut rydym yn gwneud, ffurfio a mwynhau ein bwyd a'n diod â chariad. Gwelwch y graffwain ar y winyssiolen. Blawch ar ein ddiodydd sydd ag enwau diddorol. Caelwch eich Ffroythau Eidd Hun. Dygwch sut i gade gwyrn, ffurfio, pobti bara a chipio newn y gwyrn mewn jar o jam blasu.

CRŴSO I SIR FYNWY AC I WYL FWYD Y FENNI!

### Tastes you'll remember for a long time, with names you're unlikely to forget

Monmouthshire is the food capital of Wales and home of the Abergavenny Food Festival. Yes, there are many super places to eat, including two Michelin-starred restaurants, but there's much, much more.

Discover the produce of our land – how we lovingly make, shape and enjoy our food and drink. See the grapes on the vine. Taste our interestingly-named tipples. Pick Your Own fruit. Learn how to keep bees, forage, bake bread and capture the hedgerow in a jar of delicious jam.

WELCOME TO MONMOUTHSHIRE & THE ABERGAVENNY FOOD FESTIVAL!



#CaruSirFynwy | #LoveMonmouthshire  
[visitmonmouthshire.com/FoodandDrink](http://visitmonmouthshire.com/FoodandDrink)

## Serenog Star-studded

Mae ein goleuadau llachar yr un mor ddeniadol, a dim ond 30 munud o Gaerdydd

Our bright lights are just as alluring, and only 30 minutes from Cardiff



Llawdori Hars Hwyl yn Mawr: Cwrtedrol Barrau Brycheiniog, Gwrteddi Awi! Dywyl! Byngeladol.  
Llanfyny Priory in the Brecon Beacons National Park, an International Dark Sky Reserve

Carnel i ddau chef sêr Michelin: Chris Harrod (Sud) yn The Whitebrook a Shaun Hill yn The Walnut Tree. Hwyl i ddau Michelin star chef: Chris Harrod (Sud) at The Whitebrook and Shaun Hill at The Walnut Tree

#LoveMonmouthshire



[visitmonmouthshire.com](http://visitmonmouthshire.com)

2022 Abergavenny Food Festival Guide

Welcome to Cardiff & the Vale of Glamorgan

# Monmouthshire Digital Asset Library



Cymraeg



My Planner 0 

Search Site



Destination management

Meetings and conferences

Groups

Media

Things to do

What's on

Explore Monmouthshire

Food and drink

Accommodation

Plan your visit

Inspire me

Blog



# Visit Southern Wales B2B activity

CTA Spring Networking Event 2022



Southern Wales  
Tourism  
Group Travel  
Tool Kit

With Covid-19 Recovery Tips

Your guide to attracting more group visits



www.southernwales.com/en/groups/



<https://www.youtube.com/watch?v=oWzc6WwHWAQ&t=4s>

<https://www.visitmonmouthshire.com/dbimgs/Southern%20Wales%20Group%20Travel%20Tool%20Kit%20-%20English.pdf>



Visit Southern Wales - Travel Trade Newsletter

## Christmas 2022 Ideas

The sun might be shining, but we all know that Christmas is just around the corner - so here are a few ideas for special days out for your groups this Christmas.



- Cardiff Christmas Market has announced its provisional dates - 10 November to 23 December. [Check the website for more info.](#)
- After a busy event in 2021, the Winter of Wonder light experience returns to Bute Park, Cardiff between 1 December to 1 January. [Tickets are on sales - check the website.](#)

**Japanese Tour Operator Fams** - postponed

**UKInbound webinar** 2 November

**World Travel Market** Excel London 7-9 November (world-class travel buyers & international press)

**Explore GB** Virtual 27 Feb -2 March 2023 (global hand-picked buyers and the best of the UK leisure travel trade)

**British Tourism & Travel Show (BTTS)** NEC Birmingham 22-23 March 2023 (coach tour operators, wholesalers and group travel organisers)

# Visit Southern Wales – B2C activity

Blogger Van Life with Luci visited the area 26 – 28 July accompanied by friend/blogger @maddy\_aspinall



[Van Life with Luci - A whistle-stop Welsh Day out \(wordpress.com\)](#)



**Bradt**  
ADVANCE BOOK INFORMATION  
**South Wales**  
Author: Norm Longley  
February 2023 1st edition

Bradt's South Wales is the first travel guidebook dedicated solely to a specific area of Wales, offering in-depth coverage of a distinctive region. Experienced travel writer Norm Longley turns the spotlight on assets, values and mountains, catering for walkers, heritage aficionados, wildlife-lovers, families, foodies, mountain bikers and cyclists.

**KEY SALES POINTS**

- The only guide to focus exclusively on South Wales, offering more detailed coverage than any competitor title
- Offers rich information on outdoor pursuits, heritage, history and mountains, which are beloved in South Wales
- Written by experienced travel writer Norm Longley who has explored the region extensively

About Bradt Travel Guides

- Founded in 1974, Bradt is now the largest independent guidebook publisher in the UK with over 200 titles in print
- Jane, WINNER of the Gold award for Best Guidebook Series in the Wanderlust Reader Travel Awards 2018 and 2019
- Bradt guides are written by authors who really know their destinations. Many are residents there, or have been visiting regularly over a number of years
- Each new Bradt guide is backed by a dedicated press and social media campaign

**NEW TITLE**  
BRADT TRAVEL TAKEN SERIOUSLY

**Bradt**

**SPECIFICATION**  
Publication date: February 2023  
13 x 4 1/2 (ISBN) 9781797783378  
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Format: 216 mm x 135 mm  
Illustrations/Maps: 16pp of colour photos & 24 maps

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Created on 12/08/2022

Bradt Travel Guides

New South Wales Bradt Travel Guide about to be published

## A whistle-stop Welsh Day out

14th aug 2022, posted in hiking, photography, roadtrip, travel

If you only have the chance for a day trip head over to Southern Wales to get a good balance of culture, heritage and scenery. Maddy and I, headed out west to go and explore some fantastic places for you to enjoy solo or with the family.



Start your day off with a walk and breakfast in a beautiful typical Welsh town. South of the Brecon Beacons, Abergavenny is an easily accessible town from the A464 or the M4. I recommend starting your whistle-stop of Southern Wales with this pretty quiet town. With its independent shops, I highly recommend brunch at the [Artshop and Chapel](#), click here to find out more. You can easily extend a visit here to mooch around the charming high streets, town hall, and market hall. There is also the Abergavenny Museum inside the Castle. Or if you would prefer breakfast el fresco, check out the Castle Meadows, which will take you past the River Usk and to the river bridge at Llanfoist, a great place to stop and appreciate the nature of having a nice picnic.



# Any Questions?

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