

FOREST OF DEAN & WYE VALLEY

Destination Management Plan

2015 – 2020

A business plan for building, managing, maintaining and marketing the visitor economy for the destination of the Forest of Dean and Wye Valley.

WORKING DOCUMENT



Foreword	3
ONE: Introduction	4
TWO: About the Destination Management Plan	6
THREE: Strategic context	7
- National	7
- Regional and strategic partners	11
- Local	14
FOUR: Priorities and action	20
FIVE: Facts, figures and intelligence	24
- Volume and value (national)	24
- Volume and value (destination)	25
- Visitor profile	26
- Visitor activity and response	28
SIX: Destination Audit	30
- Strengths	30
- Opportunities	32
- Issues to consider	35
Annex one AONB management plan extract (2015-2020)	38

FOREWORD

This Destination Management Plan has been developed by the strategic partners involved in the destination management, development and marketing of the Forest of Dean and Wye Valley, which includes private sector members.

The plan sets out a direction of travel which not only provides a foundation for the partnership, but also focuses on the key priorities and actions that will develop and build our tourism industry.

The key priorities are Evidence and Intelligence, Partnership, Place and Product Development, Marketing and Promotion, Welcome and Information, and Business Development.

The plan is supported by the Forest of Dean District Council, Monmouthshire County Council, the Forestry Commission, the Wye Valley AONB and the Wye Valley and Forest of Dean Tourism Association (WVFDTA) and its 300 plus members.

This partnership will work together to develop actions and activities which will deliver the aspirations of the plan.

ONE: INTRODUCTION

Tourism is major contributor to and a key catalyst in the growth of the economy of the Wye Valley and Forest of Dean. The success of developing tourism in our destination is dependent upon an effective tourism partnership made up of many different bodies and organisations working collaboratively to deliver their part of the picture, cross county and cross country.

This Destination Management Plan (DMP) brings together the strategic vision of key stakeholders within the Wye Valley and Forest of Dean destination area; a destination which lies in 3 counties and 2 countries.

The DMP will help to provide a focal point for all of those bodies and organisations that look after tourism and its associated industries and will:

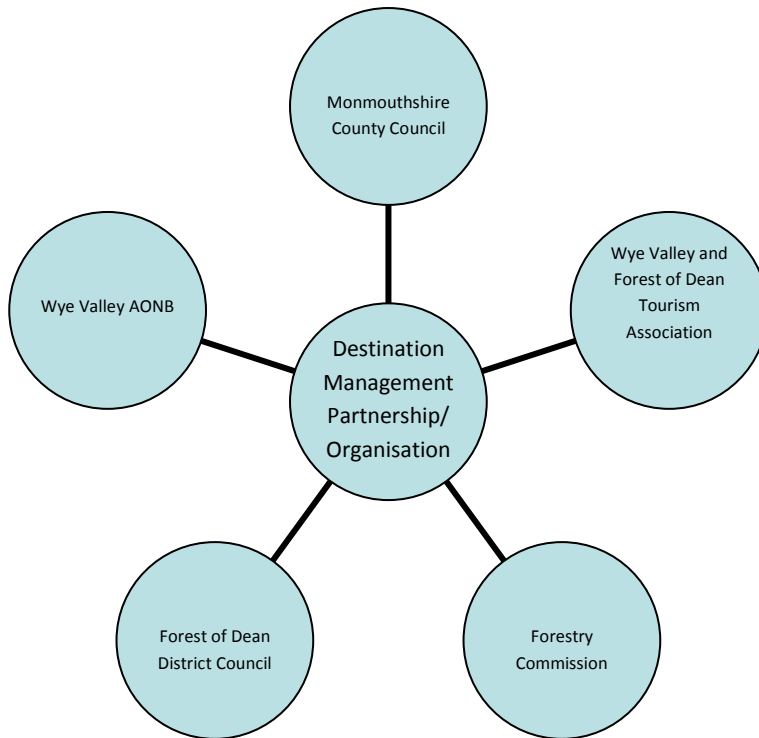
- prioritise actions to enable financial and human resource to be managed efficiently and effectively;
- help us to achieve our objectives by identifying key stakeholders and understanding what their roles are;
- Allow us to be being clear about our actions, allocate appropriate resource and identify areas that are out of scope and where additional collaboration is required.

Additionally this DMP will strengthen and support applications for projects requiring funding.

It will keep everyone focused on the national perspective identifying how our objectives can be achieved through a localised approach to tourism and by treating our destination as a geographic physical destination rather than looking at local authority boundaries.

The development of this plan, and the joined up approach to tourism development, management and marketing is being driven by the Wye Valley and Forest of Dean

Destination Partnership/Organisation¹ (DMP/DMO). This is a partnership between the Forest of Dean District Council, Monmouthshire County Council, Wye Valley and Forest of Dean Tourism Association, Forestry Commission and the Wye Valley Area of Outstanding Natural Beauty. This is a strong tourism partnership that effectively and efficiently manages tourism at destination level.



The DMP has been developed by taking into account national, regional and local growth/tourism strategies and plans, objectives and priorities. It outlines the strategic priorities for our tourism industry. It keeps a focus on the national perspective and identifies how objectives can be achieved through a localised approach to tourism and by a focus on a geographic / physical destination recognised by visitors rather than local authority boundaries, and provides a framework of short to medium term priorities including opportunities for growth and funding.

TWO: ABOUT THE DESTINATION MANAGEMENT PLAN PROCESS

A DMP sets out a joined up and shared vision for the management and development of a destination, agreeing priorities, roles and responsibilities of key stakeholders and identifying clear actions that they will take and the resources required.

In order to deliver a successful economy across England and Wales, Destination Management Plans (DMPs) are essential tools. National Government policy encourages Destination Partnerships/Organisations to become focused and efficient bodies using a DMP as a critical element to achieve this. The DMP provides a structured plan to bring public and private, independent and individual partners together to focus resources, maximise investment and reduce duplication to the benefit, and development, of the visitor economy.

This process of influencing and co-ordinating the management of all aspects of a destination ultimately contributes to a visitor's experience and ensures delivery is customer focused, taking account of the needs of visitors, local residents, businesses and the environment.

THREE: STRATEGIC CONTEXT

National

➤ UK Government Tourism Policy

In March 2011 the UK Government's first ever tourism policy was published setting out the Government's priorities and objectives to develop and promote tourism and how they envisaged, VisitEngland and other organisations would work together to grow this sector of the economy.

UK Government Tourism Policy sets a focus on

- Destinations: with strong industry led tourism bodies guided by VisitEngland.
- Standards: raising industry standards through improved rating systems, consumer feedback and better tourist information.
- Development: skills and product development, and bringing packages together.
- Transport: providing better infrastructure for visitors and to support the visitor economy.

In the foreword by the Prime Minister the essence of the national policy is captured with:

“Our strategy sets out how we will modernise tourism bodies to ensure they reflect the natural geography of a tourist area, allowing businesses and organisations to work together in partnerships to market their area in the most effective way. Most importantly, this strategy will ensure decisions on local tourism policy are driven by those that know their area best and allow the industry to take responsibility for its own future”

The Prime Minister went on to describe the industry: *“For an industry of its size, the tourism sector is surprisingly dependant on public funds for much of its destination marketing*

activity. This is partly caused by the sector's need for tourism firms to cooperate in promoting a shared visitor destination, rather than an individual attraction, restaurant or hotel.....But given the current fiscal situation and given that market failures are generally undesirable, allowing this status quo to continue is both unaffordable and unacceptable. We wouldn't expect taxpayers to pay for the marketing budget of any other sector of our economy."

And a way growth will be achieved: "So we will refocus and reform VisitEngland to become an industry-led sector body charged with driving up productivity in our visitor economy. This will ensure we remain a competitive, value for money and attractive destination for a large and growing proportion of international visitors in future. This means becoming one of the top 5 most competitive visitor economies in the world, and staying there consistently in future."

A full copy of the government's tourism policy can be viewed at:

<https://www.gov.uk/government/publications/2010-to-2015-government-policy-tourism>

➤ **VisitBritain**

VisitBritain Growth Strategy 2012 to 2020: Delivering a Golden Legacy is a growth strategy for inbound tourism to Britain from 2012 to 2020. It highlights the potential for visitor numbers to grow by 23% to 40 million, to add 200,000 jobs and to generate £8.7 billion in additional foreign exchange revenue.

To achieve this, the strategy has 4 clear strands:

1. Enhance Britain's image by playing to its strengths such as heritage, traditional and contemporary culture. At the same time, build on the positive perceptions of Britain generated by our year in the global spotlight.

2. Ensure that Britain is packaged and sold more widely by working with the travel trade in key markets.
3. Broaden Britain’s strong product offering so that it continues to meet the expectations of new visitors from growth markets.
4. Make visiting Britain easier by addressing limiting factors such as aviation capacity and the current visa process.

VisitBritain is to work in partnership, with organisations across the public and private sectors so they can align to deliver tourism’s full economic growth potential over the remainder of this decade. VisitBritain are entering the third year of its match-funded Great Britain campaign using key triggers for Britain – culture, heritage and countryside, supported by shopping, food, sport, adventure and music.

A full copy of Delivering a Golden Legacy can be viewed at:

http://www.visitbritain.org/Images/Britain%20Strategy_tcm29-37329.pdf

➤ **VisitEngland**

VisitEngland leads the marketing of England as a visitor destination to domestic and overseas markets. In championing the visitor experience, VisitEngland is seeking to increase the value of the nation’s tourism by 5% per annum over the next ten years, leading to c.250,000 new jobs.

VisitEngland’s **England: A Strategic Framework for Tourism 2010-2020** sets out 4 key priorities:

1. To increase England’s share of global visitor markets.
2. To offer visitors compelling destinations of distinction.
3. To champion a successful, thriving tourism industry.

4. To facilitate greater engagement between the visitor and the experience.

A full copy of A Strategic Framework for Tourism 2010-2020 can be viewed at:

http://www.visitengland.org/Images/Strategic%20Framework%20main%20document_tcm30-33240.pdf

➤ **Wales and VisitWales**

The Welsh Government Strategy for Tourism has a focus on 5 key areas:

- Promoting the Brand
- Product Development
- People Development
- Profitable Performance
- Place Building

The Great Britain domestic market continues to be the main market and focus for marketing activity with an ambition to grow tourism earnings in Wales by 10 % or more by 2020.

A full copy of The Welsh Government Strategy for Tourism 2013-2020 can be viewed at:

<http://wales.gov.uk/docs/drah/publications/Tourism/130211tourism2020eng.pdf>

Regional (county wide and strategic partners)

➤ GFirst Local Enterprise Partnership (LEP)

In order to be in a position to bid for growth based investment funds from Government (the single pot), LEPs must have a Growth Plan in place, identifying specific local objectives and the actions that will enable them to meet those objectives.

Our DMP will demonstrate our partnership and collaborative approach to working; will add to the support received from the national tourist boards and ultimately add weight to the Gloucestershire Growth Plan hopefully resulting in a larger funding allocation for the county.

A full copy of The GFirst LEP Growth Statement can be viewed at:

<http://www.gloslep.co.uk/Portals/12/PDFs/GFirstLEPGrowthStatementApril2013.pdf>

➤ Forestry Commission

The England Forestry Strategy ‘A New Focus for England’s Woodlands’ recognises that woodlands are a major resource for recreation, tourism and sport, particularly highlighting that famous ancient woods like the New Forest and Forest of Dean are major holiday destinations whilst local woods are often visited daily by people living nearby.

The Forestry commission reports that Forest of Dean hosts over 1 million visits per annum. The famous Symonds Yat viewpoint and the Sculpture Trail at Beechenhurst are well-known tourist destinations, whilst local people use the forest’s extensive network of paths. As well as walking, the forest is popular for a host of outdoor activities including cycling, birdwatching and orienteering. There are 300,000 camper nights per year on sites managed by Forest Enterprise and tourism generates an estimated £30 million each year for local businesses.

The Government’s programme of Forestry for Recreation, Access and Tourism aims to provide more and better-quality access to woodlands. The programme includes opportunities for ensuring that woods and forests continue to be used for a wide range of recreational pursuits as well as complementing and supporting other leisure interests, notably the tourist trade.

Three hundred million visits are made to England’s woods and forests every year. Woodlands provide a setting for a wide range of different recreational activities from walking and quiet enjoyment to more specialised activities, including orienteering and horse riding. Woodlands can also absorb large numbers of visitors.

A C T I O N S W E W I L L	
<p>INCREASE ACCESS TO WOODLANDS</p> <ul style="list-style-type: none"> ● draw on the Forestry Commission’s report on woodland access in England in implementing the Strategy; ● target grants to increase the opportunities available to visit woodlands, particularly in areas where there are shortages of access; ● promote a network of forest tracks suitable for cycling as part of the National Cycle Network and our Integrated Transport Strategy. 	<p>ENHANCE THE NATION’S FOREST ESTATE</p> <ul style="list-style-type: none"> ● give priority to acquiring freeholds of leasehold land in areas close to centres of population, particularly in the Community Forests and the National Forest, when there is a shortage of existing woodland access; ● develop the Forestry Commission’s Woodland Park network close to towns and cities; ● work in partnership with sports’ governing bodies to accommodate noisy or intrusive recreation in suitable woodlands and relieve pressure on sensitive sites; ● improve recreational and other facilities through private-sector partnerships.
<p>IMPROVE THE QUALITY OF INFORMATION ABOUT ACCESS</p> <ul style="list-style-type: none"> ● in partnership with woodland owners and others, explore ways of making up-to-date information available on woodlands to visit and improve the quality of information, building on the Forestry Commission’s Walkers Welcome package. 	<p>PROMOTE BETTER UNDERSTANDING</p> <ul style="list-style-type: none"> ● support research into the economic contribution that woodlands and forests make to tourism and the potential for forest-based tourism initiatives to benefit local communities; ● engage with the public to promote the benefits of trees, woods and forests; ● support the Forest Education Initiative by developing the national network of local groups to encourage children and young people to better understand the importance of woods and forests.

Area of Outstanding Natural Beauty (AONB)

The AONB Partnership adopted a Wye Valley AONB Sustainable Tourism Strategy in 2011, which contains an analysis of the tourism industry and an action plan to develop the area as a sustainable tourism destination. The AONB Unit services a Tourism Co-ordination Group to deliver the Strategy.

The following six functional objectives provide the framework for the action plan:

Promoting the Wye Valley brand: To raise the profile of the Wye Valley as a special place to visit throughout the year, by strong presentation of the brand in all area marketing

Strengthening information outreach: To ensure that all visitors are aware of the range of activities and experiences available throughout the Wye Valley through effective information services

Linking conservation and tourism: To encourage tourism that is based on, respects and helps to conserve the environment and the Special Qualities of the landscapes and habitats of the Wye Valley

Promoting experiences of the river and wider countryside: To strengthen provision and awareness of a wide range of opportunities to find and follow the River Wye and to access the wider countryside

Celebrating heritage: To promote enjoyment and understanding of the special heritage of the Wye Valley, building on the legacy of Overlooking the Wye

Raising quality in key centres and enterprises: To ensure that the towns, key villages and individual businesses provide a quality experience for visitors in line with the Wye Valley brand values, strengthening investment, management and performance where needed.

More detail can be found at ANNEX ONE

Local

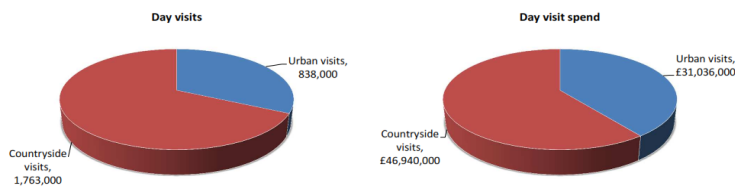
➤ **Forest of Dean**

The Forest of Dean welcomes over 2.5 million day visitors annually, with 266,300 staying visitor trips (equating to 946,000 visitor nights). This leads to a total visitor related spend of £134,821,000 and an estimated actual employment of 3,139 which is 8% of a proportion of all employment.

Key Facts	
266,300	Staying visitor trips
946,000	Staying visitor nights
£50,918,000	Staying visitor spend
2,601,000	Day visits
£77,976,000	Day visitor spend
£128,894,000	Direct visitor spend
£5,927,000	Other related spend
£134,821,000	TOTAL VISITOR RELATED SPEND
3,139	Estimated actual employment
2,250	FTE employment
8%	Proportion of all employment

Forest of Dean - Day visits by location

Total day visits	Total day visit spend
2,601,000	£77,976,000



The Economic Impact of Forest of Dean Visitor Economy 2013 – a full copy can be viewed here:

<http://www.wyedeantourism.co.uk/system-images/files/Forest%20of%20Dean%202013.pdf>

The Forest of Dean District Council strategy for tourism, “Sowing the seeds for tourism growth 2010 – 2012” required renewing particularly in light of changes that have taken place since its launch in 2010. It was agreed by the emerging tourism partnership in late 2012 that this would be led by the Forest of Dean District Council, but be a shared plan for the future of the destination that is the Wye Valley and Forest of Dean, this DMP is the resulting document.

http://www.fdean.gov.uk/media/Assets/Business/documents/Tourism_Marketing_Strategy_2010_to_2012_Final.pdf

➤ **Herefordshire**

The visitor expenditure, comprising spending by staying tourists and day visitors, makes a significant contribution to Herefordshire’s economy. In 2008 this ‘visitor economy’ was worth almost £411 million to the County. Almost two thirds of this total (£262m) came from direct visitor spending with £149 million produced by indirect spending and VAT payments. Almost 8,900 jobs are supported by visitors to Herefordshire.

During the last couple of years and in line with Government challenges the way tourism has been supported within the county has changed from being solely local authority managed to a Destination Management Partnership being formed, funded via the private sector with a diminishing funding agreement from the county council.

A Tourism Strategy for Herefordshire 2010-2015 was completed with a focus to establish Herefordshire as a must visit rural destination for leisure and business tourism, this has resulted in new branding, new website www.visitherefordshire.co.uk and a review of the business tourism market. The supporting research identified that the county has a split

offering with the Wye Valley being a focus destination within the county and where many tourism businesses in the south see their natural fit.

A full copy of A Tourism Strategy for Herefordshire 2010-2015 can be viewed at:

http://visitherefordshire.co.uk/wp-content/uploads/2013/01/herefordshire_tourism_strategy_final_3910.pdf

➤ **Monmouthshire**

Tourism is vital to Monmouthshire's economy in terms of providing employment and enterprise opportunities. The sector generates income to support a wide range of businesses that directly or indirectly benefit from visitor spending or that supply and service the county's tourism industry, including the retail and catering sectors and food and drink producers. According to STEAM (a tourism economic impact modelling process), tourism revenue in Monmouthshire grew by 1% between 2012 and 2013, generating £165m for Monmouthshire in 2013 with more than 2m visitors - of these 484,000 were staying overnight. Of the £165m tourism revenue in 2013, just under £117m was generated by staying visitors. Serviced accommodation has performed particularly well in 2013 with an 8% increase in revenue and a 6% increase in visitor numbers and days showing that visitor yield is recovering in this sector since 2012.

In contrast non-serviced accommodation – which represents 60% of the county's total accommodation – has continued to perform poorly, as it has for Wales as a whole, with an 8% drop in revenue, a 9% fall in visitor numbers and an 8% reduction in tourist days (i.e. less visitors staying in non-serviced accommodation for less time than in 2012).

Direct and indirect visitor spending supported 2702 FTE jobs in 2013. This represents approximately 12% of all employment in the county. Tourism revenue per capita is the

highest in SE Wales, highlighting the fact that Monmouthshire is more reliant on its visitor economy than other local authorities in the region.

Monmouthshire's current Destination Development Plan and Destination Marketing strategy were approved in November 2012. [Monmouthshire's Destination Development Plan](#) was based on a comprehensive destination audit and provided a framework for:

- Addressing the priorities for improving and developing Monmouthshire's visitor product
- Partnership working to drive up the quality of the visitor experience
- Future funding bids

The plan identified seven priority programmes for delivering growth which were as follows:

- Visitor accommodation development – which aimed to improve and further develop the visitor accommodation offer of the county to:
 - Address current quality deficiencies
 - Capitalise on opportunities for the development of new high quality accommodation businesses
- Town and village visitor experience programme – which aimed to establish fully integrated market-led plans for improving the visitor experience of the county's towns and Tintern as part of the process for developing the Whole Place Plans for these settlements
- Walking Product Development Programme– which aimed to develop a more strategic and better coordinated approach to the future development of the walking product (in terms of promoted walks and the access infrastructure which supports them) for Monmouthshire's key target visitor markets
- Food Tourism Programme – which aimed to capitalise on the Regional Development Programme Axis 4 Food Tourism Programme to expand and further develop a distinctive and exciting food and drink visitor offer across Monmouthshire.

- Events & festivals programme – which aimed to develop new financially sustainable events and festivals to boost off-peak demand alongside ongoing development of the Abergavenny Food Festival, the Monmouthshire Walking Festival and the RDP Axis 4 festivals and events programme.
- Visitor information programme – which aimed to maintain and further improve visitor information in terms of:
 - Visitor information services
 - At-destination visitor information print
 - Digital visitor information content
- People development and skills programme – which included the development of a plan for addressing the tourism industry’s staff training and business support needs.

The success of the plan was measured in terms of improvements to visitor satisfaction; improvements to tourism business performance, growth in visitor numbers, visitor spending and tourism employment; and the development of off-peak business.

A fully integrated Destination Marketing and Brand Strategy was developed and approved at the same time which made recommendations on: How best to attract visitors to Monmouthshire.

A review of the approved plan is currently being undertaken and the revised priorities will be included here in due course.

One of the key objectives is *“To focus firmly on the priorities in order to make the best use of resources.”* In recognition of this a partnership approach has been taken to PR in the two destination partnership areas: the Brecon Beacons National Park and the Wye Valley and Forest of Dean. 2015 targets for growth are for 2.5 million visitors, £200m spend and 4,000 FTE tourism jobs.

A full copy of the Monmouthshire Destination Development Plan 2012-2015 can be viewed at: <http://business.wales.gov.uk/dmwales/sites/dmwales/files/documents/monmouthshire-dm-plan.pdf>

FOUR: PRIORITIES AND ACTION

After careful consideration of all the intelligence gathered the partnership agreed to focus all actions on seven key areas to ensure consistency and focus. Detailed action plans will be produced and delivered upon by each of the destination partners.

1. EVIDENCE AND INTELLIGENCE

- Develop a mechanism for joined up collection of data and evidence, and sharing of intelligence across the Wye Valley and Forest of Dean by the public bodies, supported by industry 'how's business' information. This will involve encouragement of WVFDTA members to participate in VisitWales / VisitEngland occupancy surveys
- Conduct an accommodation needs appraisal – the general accommodation offer is felt to be relatively strong but with specific gaps for five star B&Bs/hotels and at the other end of the scale for simple campsites. There may also be potential for a limited number of more innovative accommodation options. An accommodation development opportunities report has already been undertaken for Monmouthshire. This needs to be extended to cover the partnership area and roles and responsibilities for delivery agreed. This could also include development of supplementary planning guidance to help communicate the types of tourism development the different counties would like to see in their area, including hotel retention policies to prevent further loss of valuable serviced accommodation within the area.

2. PARTNERSHIP

- Explore further opportunities for joint working, cross promotion and sharing resources which would benefit the whole area.
- Encourage and explore opportunities for more joint working across the river between wildlife trusts, heritage bodies, Forestry Commission, countryside departments, tourist information centres, attractions and Local Enterprise Partnerships.
- Facilitate the joint working between tourism businesses and heritage/wildlife/cultural bodies to increase knowledge, develop new offers and raise awareness.

3. PLACE

- Focus on the upkeep and appearance of the market towns, and the provision of visitor services (eg car parking/toilets). Representatives from town communities will need to be involved in this process.
- Encourage further revitalisation of the market towns of Chepstow, Cinderford, Coleford, Lydney, Monmouth and Ross-on-Wye, as these are seen as important destinations for visitors exploring their heritage and accessing local facilities. As previously stated above - representatives from town communities will need to be involved in this process and it needs to be based on a comprehensive audit of the current visitor experience.
- As Lydney has the only railway station in the Forest of Dean, improved connections from the station to the town and improved townscape will encourage cyclists using public transport.
- Review traffic and visitor management issues and consider ways to create a better quality visitor experience (particularly in Tintern), including a review of tourism signage
- Improve the coach offer to encourage coach visitors to explore more of each market town and the countryside and to ensure coach parking is well managed.

4. PRODUCT DEVELOPMENT

- Develop products and linked promotions to attract visitors at less busy times of year (as well as visitors to the area in general)
- Implement the recommendations of Monmouthshire's walking product development strategy to package and promote existing routes to relevant markets and help to maintain existing routes to ensure a positive walking experience for visitors. Particularly strengthen information and services for walkers (such as more circular routes, walking events, facilities at accommodation, routes using public transport).
 - Look to increase income from services provision to Walkers. At present much of what is provided is free of charge and contributes little to the local economy.
- Ensure a close connection with the organisation, Walkers are Welcome.

- The Foresters Forest, Heritage Lottery Funded project will have a direct impact on tourism as well as local communities.
- Establish Wye Valley Cycle route to position the area as a cycling destination, enable cycling breaks and link with the well-established Forest of Dean and the emerging major events / road cycling offer of Monmouthshire. Encourage more accommodation businesses to develop their offer for cyclists e.g. by gaining the cyclists are welcome accreditation.
- Review and develop appropriate launch sites for canoes and kayaks along the River Wye to capitalise on the growth in popularity of water-based activities, and make a closer connection to accommodation and campsites.
- Interpret more of the built, industrial and natural heritage of the area such as the geology, nature reserves, churches and churchyards, orchards and architecture (following the Overlooking the Wye project).
- Assess the potential of staging more events and festivals celebrating the area's heritage and culture especially in the area's unique spaces such as heritage sites or the riverside.
- Explore opportunities to promote and develop the distinctive character and authenticity of each market town, promoting them as hubs for exploring the Wye Valley and Forest of Dean (start points for walking/cycling, heritage routes and return points for accommodation/ food/retail)

5. PROMOTION AND MARKETING

- Improve the package, product and marketing proposition for visitors to the area, connecting landscape and wildlife, historical heritage, walking and other activities, and focusing on key themes of culture/heritage, activities and attractions, local produce, arts and artisans and outdoors/nature to deliver a more unique visitor experience.
- Communicate the Forest and woodland destination to visitors and to encourage more woodland walks, interpretation and woodland based activities.

- Develop partnership approaches to special promotions, particularly to promote and develop the food and drink offer and local arts and crafts; focusing on local sourcing, distinctive quality products, more flexible opening and special activities.
- Build specific promotions around Film and TV locations to encourage film tourism.

6. INFORMATION AND WELCOME

- Review the provision and operation of information provision, considering new technology and industry support, knowledge and information.
- Better communicate about the natural, cultural and built heritage assets of the area, via familiarisation visits and events for local residents, business owners and staff in order that they can act as knowledgeable ambassadors for the area. Particularly capitalise on events like English and Wales Tourism Week. This needs to include development of interpretation to tell the stories of the Forest of Dean and Wye Valley to visitors.
- Provide a quality destination welcome via World Host and the destination welcome programme.

7. BUSINESS DEVELOPMENT

- Work with businesses to improve the evening economy, opening up a wider choice of things to do and see in the evening, which could include shops and eateries staying open for longer.
- Provide opportunities for networking for businesses around key themes which link to place, product and promotional plans.
- Provide training and workshops for businesses to improve their offer and profitability, particularly around welcome, social media, access and accessibility and partnership working.

FIVE: FACTS, FIGURES AND INTELLIGENCE

Volume and Value (nationally)

Tourism is ranked as the sixth largest industry in the UK and has continued to show growth over a number of years, but still it is operating significantly below capacity. In 2009 tourism made a total contribution to the UK economy of £115.5bn, 8.9% of Gross Domestic Product.¹

- £96.7bn in England (8.6% of GDP)
- £11.1bn in Scotland (10.4% of GDP)
- £6.2bn in Wales (13.3% of GDP)
- £1.5bn in Northern Ireland (4.9% of GDP)

One in every twelve jobs is either directly or indirectly supported by tourism. Tourism expenditure is forecast to grow at an annual growth rate of 3% per annum and that it will continue to contribute a similar proportion to the economy in 2020.

The tourism sector can continue to be more productive, competitive and profitable particularly with its domestic market and is one way to deliver rapid economic growth.

More than 33% of Britons are holidaying in the UK because they think it is better value for money compared with the average foreign holiday. The ‘staycation’ trend has hit record levels in 2013 with a 41% rise in people opting to spend their summer holiday in the UK, however we currently take significantly fewer holidays of this nature than other European countries.²

¹ source: Deloitte ['The Economic Contribution of the Visitor Economy – UK and the nations'](#)

² source: Travelodge survey

Volume and Value of the Visitor Economy in the Wye Valley and Forest of Dean

Tourism in 2013 for the Forest of Dean and Monmouthshire contributes £135 million and £165 respectively to the local economies. The total value of tourism to the economy has increased by 200% from 1999 to 2011 and by 26% from 2007 to 2011, a substantial growth pattern.

- For the Forest of Dean the total visitor related spend in 2013 was almost £135million with actual employment in the industry of 3,139 which is 8% of a proportion of all employment in the district.
- The Visitor Economy was worth almost £411 million to Herefordshire (2008). Almost two thirds of this total (£262m) came from direct visitor spending with £149 million produced by indirect spending and VAT payments. Almost 8,900 jobs are supported by visitors to the county.

Visitor numbers in the **Wye Valley AONB** are calculated at 1.58million per annum (STEAM 2013), enjoying 2.3 million tourist days per annum, with over 1.3million being day visitors. They arrive in over 300,000 vehicles but also spend nearly £134million in the local economy. The value of tourism to the local economy is therefore significant; both in terms of direct spend (over £100million) and indirect spend (over £33million) and supporting over 2,250 full-time equivalent jobs. However 44% of spend came from visitors staying in non-serviced accommodation (self-catering, caravan, camping etc.) compared to 29% of spend coming from day visitors.

The **Forestry Commission** reports that the Forest of Dean hosts over 1 million visits per annum and that tourism generates an estimated £30 million each year for local businesses. *(based on data compiled through car park ticket sales and spend at the Forestry Commission franchised sites)*

Visitor Profile

The **Forest of Dean District Council** conducted an online visitor survey (November 2013-January 2014) using an email database of 36,000 contacts that had been accumulated through requests for Visitor Guides and sign ups to broadcast emails. The survey generated an excellent 3.7% response rate. The survey results were split into three categories: visited once, visited more than once and never visited and ACORN demographic profile software used to analyse demographic types. The main findings are:

- Respondents who have visited the area are aged 55-64, 65+
- Respondents who have never visited are 45-54, 55-64 and 65+
- Most respondents were from England

Visits are primarily short-breaks with a partner or family with children or friends, mainly a one off visit, with the main reason for non-return being the distance coupled with the cost of fuel and accommodation. The main reason for return visits were due to the beautiful scenery, countryside, peace and quiet, abundance of attractions and activities. Over 90% of people travelled to the area by car and continued to do so whilst in the area.

Those who did not visit stated that their lack of knowledge was the reason they stayed away, followed by distance and other destinations taking priority.

Visitors to the area stated that their main interests include walking, nature/wildlife, history/heritage, cycling and visiting film locations. Importantly, local food and eating out is also an emerging trend.

When planning their visit, over 50% of respondents said they used the visitor guide and destination website to plan their visit. Non visitors reported that they tend to utilise a

website more prior to a visit to their chosen destination but 40% state that they still use a visitor guide.

Accommodation establishments were rated highly amongst visitors. Camping is a growing market. There is a need to improve and increase facilities for motorhomes and camper vans, their use is increasing and currently there are very few sites available in the destination; this form of transport should be encouraged as it is used to move around the area and could encourage and improve the length of stay.

Symonds Yat Rock is visited by nearly 70% of visitors followed by Cannop Ponds, Beechenhurst and Offa's Dyke. Coleford was the most popular town visited in the Forest of Dean, with Monmouth and Ross-on-Wye being the most popular in the Wye Valley.

Over 90% of respondents would recommend the area to family and friends. The most popular visitor attractions included visits to Dean Forest Railway, Clearwell Caves, Puzzlewood, Perrygrove Railway, Tintern Abbey, Sculpture Trail, Symonds Yat Viewpoint and aMazing Hedge Puzzle and Crazy Golf. The most popular activities included canoeing, cycling and mountain biking, walking and the Wyedean Rally.

Respondents also gave the main reason for their visit and this included film location, Severn Bore, wild boar, Geocaching, photography and bluebells.

Research conducted as part of the development of the AONB Strategy and Action Plan for Sustainable Tourism (2011 – 2016) provides an overview of the visitor and industry profile across the Forest of Dean and Wye Valley destination. The customer profile of visitors to the Wye Valley includes quite a high proportion of couples (46% of staying visitors are couples), with businesses identifying more of their visitors as under 45 (49%) than 45+ (40%). 45% of visitors are first time to the area, suggesting that the Wye Valley is continuing to win new visitors while encouraging a reasonable proportion of previous visitors to return.

Short breaks of 1-3 nights are more or less in balance with longer holidays, perhaps reflecting the presence of self-catering properties and caravan/camping sites amongst respondents.

The most frequently used accommodation was a rented cottage or apartment (40%); with 27% staying in B&B, guesthouse, pub or inn; 10% in a hotel; and 9% in a tent, caravan or hostel. 51% were on a short break of 1-3 nights; 20% stayed 4-6 nights; and 29% were staying for a week or more. Two thirds of all visits included a Friday or Saturday night.

The most frequent party size was 2 (51% of parties), with 26% in a party of 3 or 4; 17% were in a larger group of 6 or more. 80% of parties included a husband and wife or partner, with almost half of these also including at least one family member from an older or younger generation (child or grandparent). Groups of friends or more extended family accounted for one quarter of all parties. 8% of parties included someone using a pushchair or buggy, while 3% included someone using a manual wheelchair. 95% of respondents used a private car to reach the Wye Valley.

London and the South East was the most frequent region of origin for visitors, accounting for almost one third (32%) of respondents, more than twice as many as the West Midlands or the South West of England. Wales accounted for just 9% of respondents, while one quarter of respondents came from other parts of the UK. A small number of visitors, 6% of respondents, came from outside the UK.

Activities during visits

The most frequently visited main settlements were Monmouth and Ross-on-Wye, each visited by over one half of respondents, followed in order by Tintern, Chepstow, Hereford

and Coleford. The various parts of Symonds Yat were the most frequently visited sites, followed by Tintern Abbey, Abbey Mill and Chepstow Castle.

Amongst activities undertaken while visiting the area, general sightseeing and touring was most frequently mentioned, followed by going for a short walk; going for a long walk was only slightly less popular. Over one in five (21%) of respondents mentioned that they had been birdwatching, while 14% of respondents had been canoeing and 13% cycling during their visit. When asked about the main activity during the visit, walking was mentioned most frequently (31%), following by sightseeing activity (25%).

Leaflets picked up at attractions were the most commonly used source of information, used by 75% of visitors. Tourist information centres were also important, having been used by 45% of visitors.

Visitor response to the Wye Valley

70% of visitors say that they would definitely make another visit to the Wye Valley, while 83% would definitely recommend it to a friend or relative as a place to visit.

Over one half of respondents (57%) were on their first visit to the Wye Valley or their first visit in more than two years, in equal proportions. One quarter of respondents were occasional visitors to the Wye Valley, having visited 1 or 2 times in the past 2 years. The landscape of the Wye Valley was found to be the most important factor in the decision to visit the area, followed by the quality of accommodation and then the heritage and history of the area.

The feeling of welcome was the most highly rated aspect of the visit, followed by general atmosphere, the feeling of safety and security by day, and the friendliness of the people.

SIX: DESTINATION AUDIT

Strengths

Visitor surveys consistently identify that the landscape of the Wye Valley and Forest of Dean is the most important factor in the decision to visit the area. However the rich cultural and industrial heritage and the valley's long history as a visitor destination are also notable factors.

Key elements that make tourism more sustainable in the area include visitors staying in the locality rather than using it as a touring base, using local products and spending time exploring and getting to know local heritage, communities and ways of life.

The Wye Valley and Forest of Dean has considerable appeal in the spring, autumn and winter with its woodland, moderately easy activities and good access.

General/Landscape

- Tourism is a significant employer within the area and the volume is increasing
- Beautiful landscape along river, historic towns and villages and Forest of Dean and other special woodland habitats, including interesting wildlife
- National profile of the Wye Valley and Forest of Dean
- Peace and tranquillity; Distinctiveness and diversity
- Community passion for their local areas
- Landscape Natural Environment (Rivers, Gardens, RSPB sites etc)

History and Heritage

- Tintern, Offa's Dyke, castles, churches, Welsh-English borderland
- Heritage of Picturesque Movement
- Art, Culture, Heritage Sites, Museums, Churches
- Mining and steel industries

Activities, attractions and events

- Distinctive visitor attractions, successful festivals and events; a year round offer of attractions, activities, walking and promoted walking routes, cycling and promoted cycling routes, water based and equestrian
- Rights of way and long distance walking routes
- Outdoor and water based activities: growth in UK participation in canoeing/kayaking – monthly participation up 43% from 2005-06

Retail

- Small distinctive shops and businesses
- Authenticity and local arts and artisans

Food, drink and local produce

- Good local food and drink producers
- A limited number of excellent places to eat

Accommodation

- Wide range of accommodation choices; Guest Accommodation, Self-Catering, Hotels, Camping, Caravanning, Cabins, Glamping

Tourism provision and support

- Strong tourism association in WVFDTA and good cross border co-operation
- Tourist Information Centres/Points and a good number of local guides
- AONB designation and team

Access and accessibility

- Good Rail access at north and south – Hereford and Chepstow
- Lydney has the only railway station in the Forest of Dean
- Good road access – Chepstow, Ross-on-Wye and Gloucester

Opportunities

Nationally the tourism industry is forecast to grow. Every visitor £ spent protects existing jobs and creates new ones. Locally, there is potential for growth without impacting negatively on resident's ways of life or on the natural environment.

The potential exists to encourage entrepreneurial thinking and innovative product development in creating products, promotions and events which will make the area a 'cool' place to visit, and continue to develop the destination for all weather, all seasons.

To capitalise on the 'Staycation' and tap into the increasing worldwide demand for adventure and activities, making the most of our unspoilt natural environment. In recent years there has been a significant growth in the demand for recreational activities. This demand will continue in the future as people look for new ways of using their leisure time.

Develop and maintain the momentum and commitment to partnership working and growth in membership of Wye Valley and Forest of Dean Tourism Association, as well as developing further cross border activity (looking west and seeking increased partnership working) and a strengthened relationship with the Forestry Commission.

Further develop heritage, culture and environmental projects, such as the Picturesque movement, Cadw interpretation plans for 'Artistic responses to the Landscape' and 'Churches and Chapels' and the possibility of revisiting World Heritage Site nomination. Review a series of Earth Heritage Trust landscape and geology trails and the Nature Improvement Area designation.

HLF funding that is being managed by the Forestry Commission which will deliver a number of projects to improve the history and heritage.

Development of the walking, riding, cycling and water-based product (for example, 'Walking with Offa', cycle ways, Connect2 projects at Monmouth and Hereford, Tintern to Chepstow cycle route, new riding trails) and continued investment in visitor attractions.

Cycling is a popular activity which provides an opportunity to enjoy the countryside in a unique way. It is non-polluting, promotes good health and is widely affordable. About half the population has access to a bicycle, but less than 5% of leisure journeys are made by bicycle. Forests provide significant opportunities for off-road cycling. Cycle hire facilities provide positive encouragement for cycling in forests and family-oriented routes encourage group cycling.

The Forestry Commission recognise that more innovative ideas are still needed in the cycle product; existing and future facilities for cycling should build on their wider aims for sustainable development. Links with sustainable transport initiatives need to be encouraged, through public transport partnerships and joint promotion. Forest cycle facilities should be linked to other networks such as the National Cycle Network and rights of way. This will require partnerships between landowners, local authorities, recreation managers, local communities and cycling interest groups.

Potential investment in new hotel development in the area, coupled with increasing 'staycations' and shorter breaks close to home.

Public awareness of area increased through TV/film exposure (Including Star Wars, Harry Potter, Merlin, Doctor Who, Atlantis, Escape to the Country and Countryfile).

Development and co-ordination of events provides a clear opportunity for all market towns as evidence shows that additional events could be accommodated between the peak and low season, to further increase footfall as this time of the year.

Evidence is building to support the collective and active management of town centres after dark to increase visitor confidence, improve perceptions, prevent crime and disorder, and provide a healthy trading environment for a range of businesses and providers who operate at night. This can have a positive financial impact locally and enhance the sense of community.

Wet weather is common throughout all UK destinations, however, the recent Forest of Dean District Council visitor survey found that visitors are seeking an increase in wet weather offer (referenced indoor play area, dog friendly establishments, Centre Parcs, Conkers www.conkers.com)

The visitor survey also highlighted the need for more Motorhome/Romahome facilities, dog friendly establishments, improved signage – including roads, paths and cycle tracks and indoor play options for children. Respondents also noted the need for improved way markers for the walks (“on more than one occasion I had to abort different walks as they just ran out”) and improvements required to public transport

The visitor survey continues to highlight that the destination is one of the UK’s best kept secrets, and therefore, there is a need for further promotion of the abundance of accommodation available in the Forest of Dean and Wye Valley that is all comparable to other UK destinations, as well as generally promoting the area as an all season, easily accessible destination.

Distance has been heralded a negative for the destination from those that have only visited once or has never been to the area – market the area as an ‘undiscovered area that deserves to be explored’, one day is never enough’, market short-breaks thus making a visit worthwhile for those that live further afield.

Food is an emerging market and increasingly visitors are looking for quality local food to purchase and enjoy throughout their visit. Opening hours of eateries could be extended during the high season.

Issues to consider

The importance and vulnerability of tourism has been highlighted during the foot and mouth disease outbreak in 2001 when a wide range of businesses were seriously affected and to a lesser extent during the wet summers of 2007, 2008 & 2012. The recession in 2008-9 also hit consumer confidence, although nationally the economy appears to be recovering, but still fragile. These all put pressure on leisure spending. Those tourists who are spending now expect more for less money, with the food and drink industry often hardest hit. Trends such as late booking and discounting is reducing margins for many businesses, with usage of online booking agents often adding to those pressures. Rising costs generally are also exacerbating competitiveness.

However, there is a continued lack of joined up evidence, intelligence and data about visitors, their activities and views.

Whilst public access needs to adapt and modernise to meet the needs of the 21st century user, there are conflicts, real and perceived, between some types of activities, for example between canoeists and fishermen on the river, and variously between walkers, horse riders, various types of cyclists and trail bike and 4x4 drivers on Public Rights of Way. Specific issues emerge with the popularity of some paths and trails and sections of riverbank where users can cause severe erosion from over use.

Increasing operating costs are seen as the main barrier to growth, followed by regulations on business. 'Not enough tourists or market growth' and 'lack of financial capital' are significant barriers, followed by planning restrictions on new development.

It has to be recognised that the majority of tourism businesses are very small scale. The accommodation sector is made up of a large number of generally small enterprises, with caravan and camping sites contributing very significantly to the bed spaces for the area (but consequently vulnerable to poor weather). Therefore the 'industry' is composed of a multitude of potentially competing small enterprises and somewhat weather dependant. There is a disjointed and variability in tourist information provision (further TIC closures and loss of knowledgeable TIC staff).

Tourism is seasonal, but changes can be seen over time where more day trippers are encouraged 'out of season' particularly to enjoy walking and cycling. More can be done to encourage out of season visits and longer out of season stays. Businesses are slow to respond to last minute decision making by visitors, there is limited packaging and varied business opening (opening hours of some facilities and attractions are reduced) which does not capitalise on the varied seasonal visitor patterns.

There are few points to view the valley landscape, there is limited access to river/riverside along much of its length and relatively few stopping points for picnics, walks, exploring.

Visitors pass through too fast without being able to stop and a lack of tours exploring the area. Weight limit on Bigsweir Bridge restricts coach tours up and down the valley

There is limited public transport to much of the area, limited parking in places and poor parking for coaches. In general signage in the area could be improved, both in terms of road signage and the quality of signage and waymarking for walkers.

The overall food offer is patchy, with few options to eat and drink late afternoon/early evening. Accommodation quality is improving but still variable, there are a few larger

quality accommodation businesses and a reduced number of B&Bs. There is a lack of camping in places, and inconsistent approach to new sites.

Festivals and events are very dependent on volunteers – some events cease to exist. Town/village services (for example pubs, shops, post offices, bus services) continue to be lost.

There is a feeling that the Wye Valley and Forest of Dean as a visitor destination is under-performing – despite its heritage as a birthplace of tourism, awareness nationally is moderate and the reasons to visit are not as clear as they should be. Visitors come to the area for landscape and wildlife, historical heritage, walking and other activities. However the offers are not very well linked together either on the ground or as marketing propositions. There is a desire among many to deliver a more unique visitor experience.

ANNEX ONE – AONB

Extract from the Post-Consultation draft - Wye Valley AONB Management Plan 2015-2020

THEME 4

AONB Aim: Sustainable tourism based upon the natural beauty and local distinctiveness of the AONB continues to enrich the lives of visitors, operators and employees while contributing positively to the conservation and enhancement of the area

Sustainable Tourism Strategic Objectives

WV-S1	Encourage and promote the AONB as a sustainable tourism destination with forms of tourism activity and development that are based on the conservation, enhancement and enjoyment of the Special Qualities and features of the AONB <i>[see also WV-P5 and WV-P7]</i>
WV-S2	Promote the improvement of the visitor experience, particularly at the most heavily visited sites, and facilitate the opportunity for visitors to explore and discover other appropriate but less used locations throughout the AONB, thus spreading demand and balancing pressures across sites where this does not conflict with the Special Qualities of the AONB and the SACs <i>[see also WV-A1, WV-P3 and WV-P7]</i>
WV-S3	Ensure adequate provision of co-ordinated tourism data and visitor engagement to inform strategic and practical decision making on conserving or enhancing the Special Qualities of the AONB <i>[see also WV-P8]</i>

WV-S4	Encourage the mitigation and/or reduction of the adverse impacts of existing tourism activity and attractions, particularly where they are concentrated around certain locations or sites, and/or those that fall outside the aim of conservation, enhancement and enjoyment of the Special Qualities and features of the AONB. Highest priority will be given to addressing the issues in the Symonds Yat and Tintern areas <i>[see also WV-L3, WV-D2 and WV-D3]</i>
--------------	--

AONB Aim: People continue to enjoy active recreation in the Wye Valley that does not detract from the natural beauty of the area

Recreation & Access Strategic Objectives & Targets

WV-R1	Encourage and promote recreational pursuits and responsible access compatible with the AONB purposes, particularly linking sustainable transport and town and village facilities. Associated development and new access to land should be subject to WV-D2 and WV-D3 <i>[see also WV-T1, WV-A1 and WV-P3]</i>
WV-R2	Assist the resolving of conflicts, real and perceived, between recreation, conservation and local interests, including other economic activities, and between different recreation interest groups in relation to the purposes of the AONB designation <i>[see also WV-P1 and WV-P5]</i>
WV-R3	Support appropriate levels of sustainable design, repair, signage and maintenance on public rights of way, recreational trails and sites, using

	<p>materials in keeping, in order to conserve or enhance the character and natural beauty of the AONB</p> <p><i>[see also WV-P4 and WV-P5]</i></p>
WV-R4	<p>Assist in identifying gaps in access and recreational provision, including for under-represented and minority groups, and work with appropriate bodies and stakeholders to support and promote access improvements & even access for all, where this does not conflict with the Special Qualities of the AONB and the SACs</p> <p><i>[see also WV-P5, WV-P7 and WV-P8]</i></p>

AONB Aim: Increase people’s appreciation and understanding of why the area is designated

Appreciation and Understanding Strategic Objectives

WV-A1	<p>Increase the profile of the Wye Valley AONB, promoting awareness and understanding of the designation and the Special Qualities of the AONB, through communication with, and interpretation for, residents, visitors, organisations and businesses and measure effectiveness</p> <p><i>[See also WV-L5, WV-B6, WV-G4, WV-H3, WV-F5, WV-W5, WV-C2, WV-E4, WV-S2, WV-R1, WV-P5, WV-P6, WV-P7 and WV-P8]</i></p>
--------------	--

[February 2015]

ⁱ Terminology: Destination Management Partnership (VisitWales) | Destination Management Organisation (VisitEngland)