FINAL REPORT

Vale of Usk

Review of On-Territory Visitor Information Provision

Cole & Shaw cyf and Lucy von Weber ltd March 2018

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Executive Summary

The information visitors receive within a destination has a significant influence on what they see and do in the area, their quality of experience and how much they spend with local businesses. A positive experience in turn affects the likelihood of visitors recommending the area to others and returning themselves. This is why getting the basic elements of the visitor experience right, including information, is so critical to delivering sustainable tourism growth.

At the time of researching and writing this report, it is clear that although bricks and mortar Tourist Information Centres (TICs) have suffered a major decline in numbers, opening times and staffing over the last decade, there are still models that work effectively albeit operating in very different ways and still reliant, in part, on public subsidy. While accommodation bookings have moved almost exclusively online there is little evidence that other types of online visitor information can provide the same level of service, welcome and benefit **in destination** as TICs. Finding a sustainable delivery model that is both appropriate and affordable is therefore a priority and demands flexibility in approach dependent on location and circumstance.

The digital information revolution (as it has been called in the Scottish tourism industry) has changed the way that on territory visitor aftercare information is delivered. Though some methods and media are more successful than others the future will be continued digital innovation and sophistication that will sit alongside the more traditional delivery. The focus will be on areas of high footfall and shared facilities, frequently aligned with an attraction and/or catering offer rather than a stand alone facility. For example, Monmouthshire County Council, although currently maintaining a Tourist Information Centre based service has made advances with online product data search and is also considering the potential of services such as "live chat" i.e. harnessing the considerable experience and knowledge of its team to offer choice and optimise staff time.

On a more prosaic note, although 'digital first' may be the choice of many visitors it is evident from the proliferation of print materials experienced (nationally and internationally) that **the appetite for "a free leaflet" is still there** and does not show any sign of diminishing. What is apparent however, is that the complimentary promotional print produced is now largely driven and funded by the private sector with public sector organisations concentrating on aftercare material that is either downloadable or, if in hard copy, subsidised by charging (e.g. walking maps).

The **stakeholder research** undertaken as part of this study showed an overwhelming preference for maintaining physical centres. It was also clear, possibly unsurprisingly, that stakeholders felt that Visit Wales and local authorities should continue to be the principal funders of on territory visitor information service delivery in Wales. The latter aspiration in particular is clearly unrealistic.

National tourism bodies in both Wales and England took a decision some time ago to cease financial revenue support to physical Tourist Information Centre services. With **tourism a non-statutory service and unprecedented cuts to local authority budgets** TIC services have been dramatically reduced across the UK in recent years. This *had* been in contrast to the situation in Scotland where Visit Scotland directly managed and promoted a network of over sixty iCentres, most of which were open all year round. However, in the autumn of 2017 Visit Scotland announced the closure of 39 of those centres citing a 58% drop in footfall as online delivery of information grows.

In Wales there is no longer any public Visit Wales mention or promotion of universal network identity, training or operational standards and Visitwales.com lists Tourist Information Centres (or absence of them/ alternative provision) under destinations and managing organisations as the final option under the Explore Wales link from the home page. 26 locations are listed – less than half those open a decade ago. That said, alternative delivery models are encouraged and promoted and those areas offering such are able to benefit from national sign posting. We know that first time visitors, especially from overseas, are precisely those seeking out visitor information and expecting a visible on-territory information service

The aim of this study is to inform the foundations of a **more sustainable visitor information service across the Vale of Usk**. A service that will engage stakeholders to a greater extent and which maximises and distributes the benefits of the service more widely across the area; all within the context of reducing local authority budgets. Activity recommendations include those relating to:

- consideration of increased commercialisation
- development of stakeholder partnerships that can share the net cost of service delivery
- opportunities to support volunteer programmes and destination beneficiaries, facilitating grass roots information delivery

Introduction

Cole & Shaw cyf, together with Lucy von Weber Ltd, was asked to undertake a review of the provision of 'on-territory' visitor information in the area covered by the Vale of Usk Local Action Group (Monmouthshire and rural Newport) in the light of an increasingly challenging resource, operational and technological environment.

The Task

The task was set out as follows:

- **Review** of existing on-territory visitor information provision (off and online) and support across the Vale of Usk RDP area
- **Research and sharing** of best practice examples of on-territory visitor information provision in other parts of the world
- **Consultation** with a wide range of stakeholders and partners with an interest in on-territory visitor information across the Vale of Usk
- **Development** of recommendations, in consultation with relevant stakeholders and partners, which are appropriate to local circumstances, for delivery of more sustainable on-territory visitor information services across the area (off and online)
- **Identification** of added value visitor information services that could deliver increased benefits to the destination

How things are – the operating environment

These are some of the key initial **issues** and **challenges** we sought to explore through our work:

- **There are intrinsic dilemnas and frustrations faced by those managing and providing on-territory visitor information services**: such services are expensive and labour intensive to provide, taken for granted when working well, accessed by a relatively low proportion of overall visitors, yet provide significant and proven return in terms of added economic value, enhanced reputation and increased visitor satisfaction.

- **Overseas and first-time visitors are much more likely to access information services** – exactly the markets Visit Wales' campaigns and branding are now pursuing - but there is no ongoing central support mechanism for local information delivery.

- **The future may be digital but the present remains stubbornly (and expensively) analogue** for much of the information demand, especially on-territory.

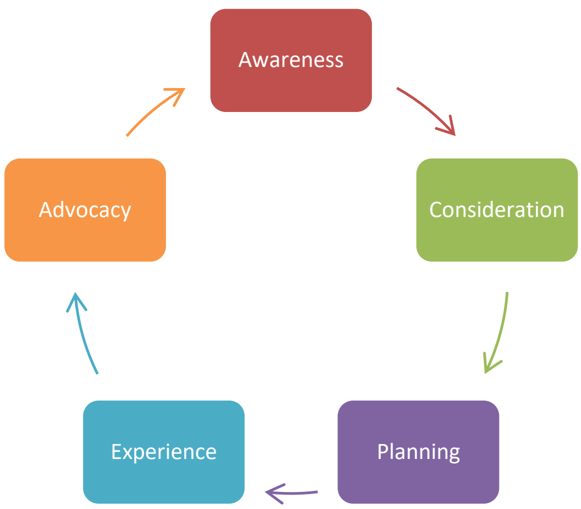
- **There are already many studies from across the UK and beyond addressing similar issues** - indeed other LAGs in Wales are actively looking at related work – which have helped identify good practice examples but also suggest there are no simple 'off the shelf' solutions. The answers for the Vale of Usk need to be tailored to local circumstances and aspirations.

- **The proliferation of plural information sources, especially on-line, means that destination information managers are no longer 'gate-keepers'** but rather need to be trusted curators, editors, influencers and guides within a potentially bewildering information landscape. Similarly the whole destination partnership 'family' has a responsibility to visitors.

- **Successful destination visitor information services have diversified and co-located business streams** to help underwrite core functions, but these 'ancillary' activities may come to dominate the provision.

The essential job that visitor information needs to do for a destination remains the same:

- Enhance visitor satisfaction and advocacy
- Provide a hospitable and friendly welcome
- Facilitate planning, booking and navigation
- Support campaigns, the brand ‘story’ and ‘sense of place’
- Inspire visitors to explore further and deeper
- Increase visitor dwell time and spend
- Disperse tourism benefits across the destination
- Encourage sustainable behaviour e.g. use of public transport, local produce, locally retained income etc
- Inspire repeat visits



To achieve the above information needs to be **consistent, coherent, accurate, accessible, timely, relevant and helpful** as well as prompting positive action from the recipient. Visitor Information is a key tool in the overall customer journey not least in the **Planning** and **Experience** elements.

However we were aware of the danger of over-thinking the subject when many visitor information needs are relatively straightforward…

What we did: Scoping the Task

We have used the following model for identifying the dimensions of visitor information – a framework for initial analysis, appraisal of options and the final recommendations:

Type	Format	Distribution	Origin/Target	Provider
Static Time Sensitive Capacity Sensitive Interactive Free Paid for	**Online:** Dynamic Static **Offline:** Directional Orientational Portable	TICs TIPs e-Kiosks Hosts/ Businesses Ambassadors Web inc. Mobile Signage/ Panels	B2B – destination to industry B2C – destination/ industry to visitors C2C – social media C2B – UGC,review and feedback	LA/ DP TA/ Industry Community Commercial Joint Venture

What's going on out there? – Strategic and Operating Environment

National tourism bodies in Wales and England took a decision some time ago to cease financial revenue support to physical Tourist Information Centre (TIC) services. With tourism a non statutory service and unprecedented cuts to local authority budgets TIC services have been dramatically reduced across the UK in recent years.

This *had* been in contrast to the situation in Scotland where Visit Scotland directly managed and promoted a network of over sixty iCentres, most of which were open all year round. In the autumn of 2017 Visit Scotland announced the closure of 39 of those centres citing a 58% drop in footfall as internet delivery of information grows. Attractions, businesses, local interest groups and even car hire companies are being encouraged to take on the work of the centres designated for closure in what has been called in the press Scotland's "Information Revolution". With the 26 centres surviving the review doing so due to their location in proven "areas of greater demand" and a budget of £10 million earmarked for digital information delivery, Visit Scotland is clear on its position going forward.

Wales wide

In 2011 approximately 60 TICs operated as part of the all Wales network, each destination ran at least one Centre and the network was a cornerstone for Wales' information delivery as well as a very visible presence for the Wales brand "as was" funded in part by a Visit Wales contribution and unified by issues such as uniform, mutual referral between destinations and standardised delivery of core information. At that point, 7 years ago, it was calculated that staffing and on costs such as rent and utilities represented *over 75% of annual TIC service budgets* (Beaufort Research, 2012) and traditional TICs as we knew them began their gradual change form "must have' to "nice to have" aspects of a destination offer.

The view, emanating from national tourism bodies in Wales and England (taken in a climate of both diminishing public sector funding and increased use of the medium) is that the future of visitor information services is digital. However while accommodation bookings have moved almost exclusively online there is little evidence that other types of online visitor information provide the same level of service, welcome and benefit in destination as TICs. Finding a sustainable delivery model that is both appropriate and affordable is therefore a priority and has been approached in different ways dependent on location and circumstance.

Visitwales.com lists Tourist Information Centres (or absence of them/ alternative provision) under destinations and managing organisations as the final option under the Explore Wales link from the home page. 26 locations are listed – less than half those open a decade ago. In terms of the services on offer visitwales.com only says:

Tourist Information provided by people who have a wealth of local information to help you plan the details of your trip and make your visit more enjoyable

So, there is no longer any public Visit Wales mention or promotion of universal network identity, training or operational standards. Tourism Information Network Group (TING) still meets, but infrequently, as a forum for exchange and best practice.

It is hard to find any direct references to Visitor Information Services in the Wales Tourism Strategy – Partnership for Growth - as reviewed in 2016. A little reading between the lines is required e.g.

Promoting the Brand

'Attracting high-growth markets; continuing to prioritise the domestic holiday market, taking a tightly targeted approach in our priority international markets of Ireland, Germany and US and focussing on partner-led and tactical opportunities in wider international markets.'

The 'Wales Way' route-based approach to marketing and development launched in Autumn 2017 is specifically aimed at giving confidence, structure and focus around the Wales offer for overseas visitors. This complements the 'Years of….' approach identifying experiences where Wales has a market advantage – Adventure, Legends, Sea, Discovery – as a way in to the wider, more complex, Wales product.

We know that first time visitors, especially from overseas, are precisely those seeking out visitor information and expecting a visible on-territory information service

Becoming digital-first; developing an integrated digital gateway for Wales, improving www.visitwales.com and Visit Wales international web sites, developing the content ecosystem for Wales and growing social media communities.

Product Development

Utilisation of emerging technology; industry to harness new technology to create exciting, transformative visitor experiences.

Visit Wales is encouraging the migration of information onto digital platforms supported by the creation of rich multi-media content. While we understand that this makes a lot of sense pre-journey when over 80% will search on-line to determine destination, accommodation and experience choices, this proportion more than halves when visitors arrive on-territory.

Partnerships

There are widely held concerns that, despite the importance of the visitor economy across Wales, Local Authorities are under pressure to reduce costs and therefore tourist related services including destination marketing, ***tourism information provision*** *and visitor amenities could be hit. Visit Wales has a role in ensuring the benefits of tourism and the implications of any cuts need to be made clearer to key decision makers at all levels.*

So in this case, while sympathetic, the stated extent of VW's explicit help is to be in terms of advocacy. In addition VW still provides administrative support for TING.

It is clear however from the North Wales case study later in this report that VW is still prepared to support capital investment in Information provision through Tourism Investment Support Scheme/ Tourism Amenity Investment Scheme (TISS/ TAIS) where this leads to more sustainable or innovative operation, and complies with State Aid funding criteria.

Regional and Local

There is no single integrated approach to the provision of visitor information across the Cardiff Capital City Region.

In those areas not embraced by the Vale of Usk, each local authority supports the provision of on-territory Tourism Information in different ways, largely via their respective destination websites and the production and distribution of aftercare print items.

Physical Tourism Information Centres remain in Cardiff, Blaenafon and Caerphilly in each case linked to another attraction or amenity which drives footfall. There is an emerging tier of Tourism Information points (TIPs) both staffed and unstaffed linked to other attractions, amenities and facilities offering local information and at least one destination e.g. Vale of Glamorgan is also experimenting with payment for information by visitors through its dispersed network of such TIPs.

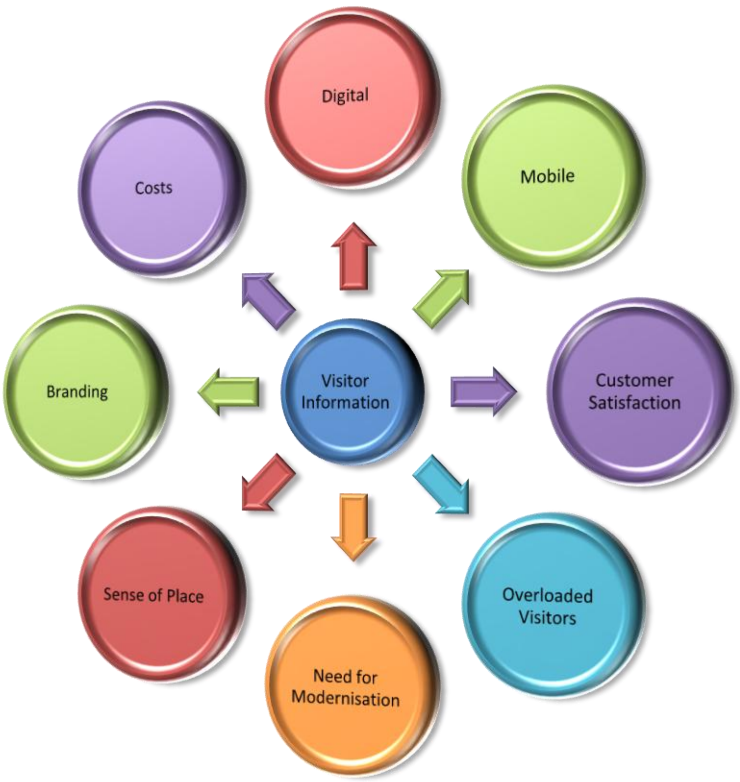
Within the wider Wye Valley and Forest of Dean destination the Tourism Association has supported Coleford Town Council in maintaining a TIC in the town to serve the wider Forest of Dean and using an extensive roster of volunteers to provide the visitor welcome.

In terms of future investment in visitor services Cardiff City Council has proposed a new ‘gateway’ visitor centre for the region as a ‘transformational’ project in the regional Destination Investment Plan. Merthyr Tydfil is negotiating the inclusion of a facility at the new Trago Mills site to the west of the town. Newport Now, the Business Improvement District for Newport city centre, is considering developing a physical information facility and indeed a multi-platform approach to the distribution of visitor information. It is hoped that this will be developed via the new Newport Destination Management Partnership or City Centre management group.

The above indicates a move away from a unified and consistent model of on-territory information just a few years ago to a much more complex mosaic of types of provision and providers now.

Drivers of Change

There are a number of factors, which are driving the changes to the provision of Visitor Information:



- The overwhelming influence and inherent opportunities offered by digital delivery now increasingly aligned to mobile connectivity;
- The ever increasing rise in customer expectation levels but now compounded by a feeling that there is now ‘too much’ rather than ‘too little’ information available;
- The need to evoke sense of place and branding in every touch point that a destination has with its visitor
- The inevitable changes required to facilitate contemporary approaches to delivery
- The rising costs faced by those providing an information service

How is the Vale of Usk doing?

Even within the study area there is a marked divergence of approach to visitor information services reflecting differences in audiences and visitor motivation and behaviour – Newport's key visitors are business, retail, event and day visit related, for Monmouthshire leisure visitors, including many from overseas, pre-dominate:

Monmouthshire:

- 'Full Service' TICs in Chepstow and Abergavenny with LA funding supporting staff and running costs
- Integrated online information driven through the visitmonmouthshire website which is enabled for all platforms and also feeds self-serve kiosks at Abergavenny, Chepstow, Magor, Monmouth and Tintern.
- Local Tourism Information points with limited staffed service at Shire Hall, Monmouth, Rural Life Museum Usk, Old Station Tintern and other attractions
- Leaflet distribution of destination information, activities and attractions together with encouragement to download as an alternative. (NB: in the case of Monmouthshire, all print distributed via the TICs has been provided by others and not originated by the Local Authority)
- Tourism Ambassador Programme
- Town maps, interpretation and signage often developed with local business/ interest support

The building housing the Chepstow TIC has plenty of space which could be put to more productive use. As well as providing a service point for group travel, MCC is keen to develop a showcase for Monmouthshire produce including a café. This is a project which would be supported by Visit Wales subject to finding a worthwhile funding mechanism.

Newport:

- Staffed Tourist Information Points at Newport Library and Museum and 14 Locks Visitor Centre as part of wider citizen engagement and information ethos. Similar at Transporter Bridge but with significant volunteer support.

- Encouragement of ‘Big Brand’ presence and visitor ‘hotspots’ across the city to offer mutual referral and information distribution e.g. National Trust, RSPB, Newport Live, Passport Office, National Museum Wales, Cadw, Celtic Manor Resort, Medieval Ship, Post Office in Caerleon, Retail outlets in Caerleon
- Population and Promotion of the Newport Explorer App (operated by a third party)
- Leaflet distribution of destination information, activities and attractions together with encouragement to download as alternative
- Tourism Ambassador Programme
- Interpretation and signage (some linked to Newport Explorer)

Alternative Delivery Model

After much deliberation MCC has resolved to move to an arms length delivery model (MonLife) for its leisure and cultural services. This will include the tourism services currently offered through the authority. This move should reduce the cost base and provides significant flexibility in terms of investment, staffing and operations and is predicated on medium term service level agreements and funding from MCC.

MonLife has a group structure comprising a local authority controlled company, a charity and a trading company. The majority of it has charitable status and is a non-profit distributing organisation part-funded by Monmouthshire County Council to deliver leisure youth and outdoor education, countryside, tourism, destination development, arts, museums and attractions.

Quantitative Analysis

In 2017 (January through December inclusive) **Chepstow TIC** welcomed 32, 841 visitors – with a significant 16,420 of those visitors originating from overseas, i.e. 50%. UK based visitors and local residents equated to 11,505 and 4926 respectively.

Over 1700 remote enquiries were serviced, the majority via telephone.

In financial year 2016/2017 Abergavenny TIC welcomed 23,710 visitors, an increase of 22.7% over the previous financial year, and generated sales of £20,788. However by the end of the 2017 calendar year visits, transactions and sales were running over 20% down – perceived to be a direct result of the closure of the adjacent Tithe Barn food and drink outlet in the second half of 2017.

MCC's Visitor Services/Chepstow TIC budget forecast (2017/18) is currently as follows:

Expenditure	£
Staffing	84,000
Premises	10,138
Supplies and Services	40,365
Contribution to Abergavenny*	10,000
Total Expenditure	144,503
Income	
Grant	5,500
Sales Income	36,000
Total Income	41,500
Net Expenditure	**103,003**

Analysis of the P+L account for Chepstow TIC over the past few years reveals that the net costs have remained similar, even when opening hours were cut back severely. Given this false economy, (and the criticisms received from the industry and other local businesses) it was decided in the current year to return to more regular year round opening and realistic staffing levels.

*Abergavenny TIC recorded a net loss of £4.6k on a turnover of £34.8k for 2016/17.

Newport City Council has a budget line for information distribution of £3500 in 2017/18. The digital information presence (i.e. Newport Explorer) is delivered via BID funds. There is no current budget to top-up ambassador training. The operation of Tourist Information Points (TIPs) is delivered through the individual budgets of the facilities concerned.

Newport City Council provides visitor information staff within the Libraries service over at least 5 days per week year round (on the first floor of the Museum building) and operates the visitor centre at the Transporter Bridge over 6 months utilising some volunteer support .

Qualitative Survey

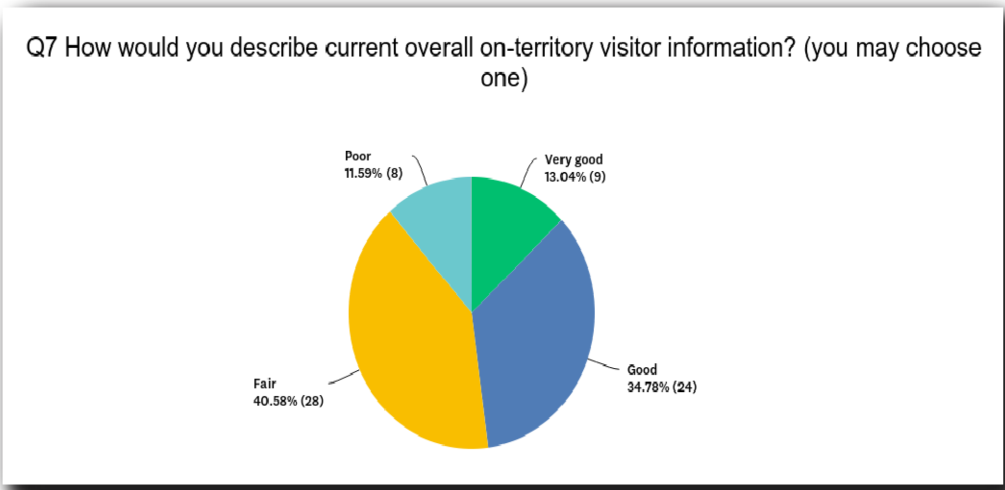
As part of this study, over 90 businesses/individuals took part in an online survey regarding the future of visitor information delivery in the Vale of Usk. Over 50% of those who took part had been in the tourism sector for over 10 years and were members of local tourism trade association (so, arguably, aware of the changes in delivery/information provision over that period if not always the full rationale behind the decisions taken).

As part of the exercise they were asked to reflect on the wider arena of tourist information delivery in the UK and also consider how they viewed local provision.

NB: There was a certain inevitability that when the question regarding tourist information was posed that the majority would, at least initially, focus on physical TIC provision but the research also looked into more detail at other methods of information delivery on territory.

An overview of results follows.

Current service provision was viewed as generally good



There was 100% agreement on the value of certain aspects of a physical TIC service, notably the provision of *"a hospitable and friendly welcome/enhance levels of visitor satisfaction"*.

	IMPORTANT	UNSURE	NOT IMPORTANT	TOTAL
Providing a hospitable and friendly welcome/enhance levels of visitor satisfaction	100.00% 71	0.00% 0	0.00% 0	71
Enabling activity/ event planning, booking and destination navigation (i.e. help people find their way around effectively)	92.96% 66	5.63% 4	1.41% 1	71
Supporting destination campaigns, brand 'story' and 'sense of place' and endorse the best a destination offers	74.65% 53	23.94% 17	1.41% 1	71
Helping to increase visitor dwell time and spend (i.e. staying longer and spending more)	92.86% 65	2.86% 2	4.29% 3	70
Spreading tourism benefits across the destination (by encouraging visits throughout the area)	91.43% 64	5.71% 4	2.86% 2	70
Encouraging sustainable behaviour (e.g. by promoting public transport, local produce etc.)	78.87% 56	18.31% 13	2.82% 2	71
Giving advance information about other neighbouring destinations	60.56% 43	28.17% 20	11.27% 8	71
Enabling late/last minute accommodation bookings	62.86% 44	32.86% 23	4.29% 3	70

The overwhelming majority of respondents cited Visit Wales and the respective local authorities as the organisations who should have not only the ***main role in terms of visitor information provision*** but also the ***responsibility for funding*** it. There was only a minor disparity between what respondents ranked as important **when asked, "How important do you think the following aspects of on-territory information provision for our visitors are/will be"** both now and in the future, all those service elements listed shared similar scores

"How important are the following aspects of on-territory information provision for our visitors NOW?"

	IMPORTANT	UNSURE	NOT IMPORTANT	TOTAL	WEIGHTED AVERAGE
Tourist Information Centres	95.83% 69	2.78% 2	1.39% 1	72	1.10
Tourist Information Points (at staffed sites with limited service)	86.96% 60	11.59% 8	1.45% 1	69	1.28
Leaflet racks and displays at other locations (and the continuing supply of leaflets to service them)	94.44% 68	4.17% 3	1.39% 1	72	1.13
Electronic kiosks at key visitor locations	59.15% 42	32.39% 23	8.45% 6	71	1.90
Information provided directly by accommodation and other businesses to visitors	94.44% 68	5.56% 4	0.00% 0	72	1.11
Tourism Association websites	88.73% 63	8.45% 6	2.82% 2	71	1.25
'Official' Destination websites	90.28% 65	8.33% 6	1.39% 1	72	1.21
Individual business websites	91.67% 66	8.33% 6	0.00% 0	72	1.17
Community Tourism Ambassadors	67.61% 48	29.58% 21	2.82% 2	71	1.68
Tourism Apps for mobile devices	73.61% 53	23.61% 17	2.78% 2	72	1.56
Social Media content (Twitter, Facebook, Instagram etc)	83.33% 60	11.11% 8	5.56% 4	72	1.39
User Generated Content Review Sites (Tripadvisor etc)	83.33% 60	15.28% 11	1.39% 1	72	1.35

"How important do you think the following aspects of on-territory information provision for our visitors will be IN THE FUTURE?"

	IMPORTANT	UNSURE	NOT IMPORTANT	TOTAL	WEIGHTED AVERAGE
Tourist Information Centres	93.06% 67	4.17% 3	2.78% 2	72	1.17
Tourist Information Points (at staffed sites with limited service)	85.92% 61	12.68% 9	1.41% 1	71	1.30
Leaflet racks and displays at other locations (and the continuing supply of leaflets to service them)	93.06% 67	2.78% 2	4.17% 3	72	1.18
Electronic kiosks at key visitor locations	73.61% 53	20.83% 15	5.56% 4	72	1.58
Information provided directly by accommodation and other businesses to visitors	94.44% 68	5.56% 4	0.00% 0	72	1.11
Tourism Association websites	88.73% 63	8.45% 6	2.82% 2	71	1.25
'Official' Destination websites	92.96% 66	7.04% 5	0.00% 0	71	1.14
Individual business websites	92.96% 66	5.63% 4	1.41% 1	71	1.15
Community Tourism Ambassadors	60.56% 43	38.03% 27	1.41% 1	71	1.80
Tourism Apps for mobile devices	81.43% 57	17.14% 12	1.43% 1	70	1.39
Social Media content (Twitter, Facebook, Instagram etc)	87.32% 62	8.45% 6	4.23% 3	71	1.30
User Generated Content Review Sites (Tripadvisor etc)	84.72% 61	13.89% 10	1.39% 1	72	1.32

A third of all respondents took the time to leave general observations, a selection of which are recorded (verbatim) below

- They all perform a great role now, and a facility that would be missed which wold directly affect our principal motivation - revenue, followed by the best visitor experience possible

- Visitors need to be able to access information quickly and easily to ensure they stay in the area and support local businesses and attractions. Online information is fine but good phone signal is important if visitors are to use this service when out and about in the area. There will always be those that prefer printed information and therefore TI points / offices are still important.

- IF too many people and/or agencies become involved in tourism information, the overall effect could be to confuse and muddy. Different groups will have their own specific agendas and will want to promote those over and above other offers. TIC needs to be neutral in the sense of promoting ALL the amazing things an area has to offer. Investing in the right people, ensuring that they have access to the best area information available and creating welcoming spaces for visitors to come to, to ask for information would be ideal.

- If we want to follow through Visit Wales's brand values then having a real human being helping you is Alive, Authentic and Creative. I think investment in kiosks is counter to what VW is trying to promote and generally a waste of money. What differentiates good visitor experience is the contact they have with people on territory - that's everyone, but especially those involved in the tourism industry. The payback for supporting tourist info services is better visitor experiences.

- Tourism Wales and Local Authorities and also Tourism Organisations created for promoting tourism have a responsibility to promote tourism as almost everyone in the locality will benefit in some way. I don't think that we live in an area which is being damaged by too much tourism at present in Monmouthshire.

- The biggest barrier to providing on territory information is proper funding to support its delivery. I think it is the role of Welsh Government to decide if they see tourism as both an economic driver, and the ability to influence visitor behaviour as a way of protecting our natural resources. 'On territory' information services have major impacts on both of these areas, and the reduction in the level of service is already having negative effects on visitor spend, and certainly on visitor behaviour in the countryside.

- Keep Up the Good Work and Good Luck!

Overall, it would be fair to say that while the role that information plays in the marketing and management of a destination is recognised, full appreciation of the diminishing resources which impact on the delivery of that information is still lacking within some parts of the stakeholder community.

Consultations

The consultations with key stakeholders followed the same discussion topics as the survey

The operation of TICs in Monmouthshire was 'top of mind' for all those consulted. There was certainly divergence over how TICs might be run better but none over the need to retain them if at all possible. The other pertinent points raised consistently were as follows:

Rationale for a continuing '1st person'/ physical service

Extending and enriching the stay was seen as critical product of information provision, which industry supports. Noted that overseas visitors in particular would expect to find a physical point of contact with a destination in place. Some concern that TICs end up with the 'timewasting' complex enquiries and spend a disproportionate amount of time dealing with them. There was however no appetite to make visitors pay for information

Digital v Analogue

Recognition of the importance of digital but concern that wholly online solutions excluded many current visitors and ignored rural connectivity challenges. Sometimes simple solutions were all that was needed e.g. town maps, walk leaflets. Of course the more information moved online the less rationale there is to retain a physical presence – ironically MCC's digital prowess and continuously enriched content risks doing itself out of the TIC business…. In this regard the digital kiosks which are 'high maintenance' and prone to breakdown have in any event been superseded by the mobile version of the website which gives superior and more comprehensive information more quickly.

Future Sustainability

Both the Abergavenny and Crickhowell models were identified as good practice in terms of the importance of building partnerships and tapping in to high-performing volunteer networks. It was stressed that no two locations are identical in terms of purpose, operation, environment or fundability however and that it is important to tailor solutions to the particular rather than generic needs of the visitor and community. This mindset would help identify the USP for each location and suggest particular new business lines, partnerships or diversification

Opportunities/ Challenges for the future

It is a fact that destinations benefit from hosting informed visitors who will stay longer and spend more.

On territory information provision is a key facet of influencing this behaviour but the shape of delivery continues to change based largely around resource availability and local arrangements. As part of this study we looked at how other destinations in the UK and abroad are approaching on territory information roll out. Although there is an unavoidable link between extended methods and size of budget there are lessons and examples within all those researched that have a bearing on the foundation dimensions of future delivery for the Vale of Usk.

Changes in the way we look at provision can be summarised as follows:

Dimension	Then	Now and the future
Visitor Motivation	Lack of information	**Information overload**
Role	Gatekeeper (monopoly)	**Informed editor/guide/ curator**
Scope of information /products	All of…	**Best of…**
Status	Support Service	**"Must see" showcase**
Stock	Souvenirs	**Experiences**
Brand	Wales (generic)	**Destination specific (Sense of Place)**
Location	Cost driven	**Footfall driven hotspot**
Set-up	Stand alone	**Shared site/costs**
Ethos	Public service	**Entrepreneurial hub**

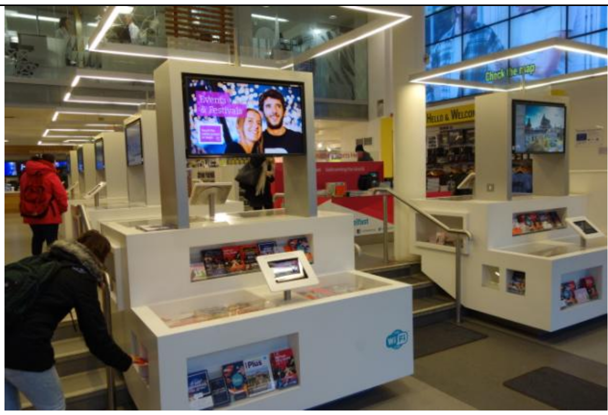
Network	All Wales TICs	**In destination hub and spoke/s**
Opening hours	Working day	**"Never closed" (just alternative delivery)**
Customer Capture	Building a database	**Recruiting destination advocates**

As previously stated, the majority of England and Wales, from Cornwall to Cardiff, Carlisle to Caernarfon, have seen TIC provision cut dramatically in the last decade. Attention has, increasingly, turned to online resourcing of information and opportunities for shared services at key venues. Even Scotland, previously the last representation of an extended TIC service has changed its business plan in recent months, closing nearly 50% of its physical centres and refocusing efforts on alternative arrangements (with a £10 million budget for digital alone).

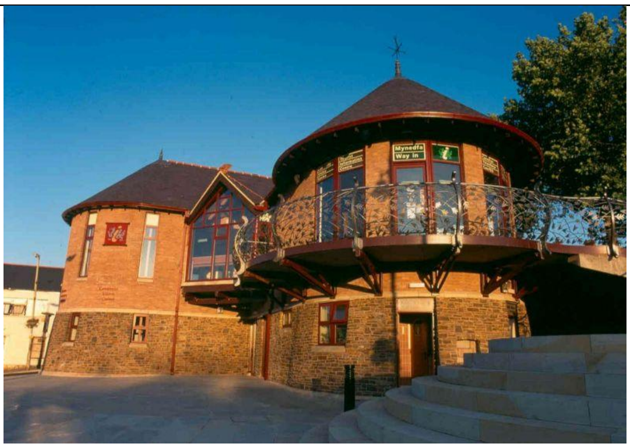
In Northern Ireland both physical and alternative visitor services exist side by side, although, even there, with comparatively healthy budgets, change is evident and those areas with a distinct service provision do so under the umbrella of a judicious business plan and substantial budget allocations. Increasingly, under Tourism Northern Ireland's Visitor Information Plan, VI Centres are concentrated in the areas of highest footfall, linked to major attractions and/or along well-promoted and branded touring routes.

Case Studies

We have identified a number of what we feel are relevant case studies from which the Vale of Usk can learn (additional detail on each included as links within the appendix)

Visit Belfast **Visitor Services**	
Destination	• Capital City and City Region • Expecting to service 850k enquiries in 2018 • 'New' destination following 'Troubles' • Top 10 Lonely Planet for 2018 – Titanic, Game of Thrones, Causeway Coast
Background	• VB supported to deliver 'gateway' information role for Northern Ireland – dedicated display space for other parts of NI • Hub and Spoke Model including 2 airport VICs and remote kiosks – 14 staff • Visitor servicing for Cruise Arrivals • Support Presence at Major Events (Conference, Sport and Cultural) • Awareness Training/ Familiarisation for industry Concierge and Front of House Teams • £800k turnover of which 50% raised commercially (retail, ticket commissions, in-centre concessions, recharge to cruise, digital screen advertising) • Major refit of BWC supported by Tourism Northern Ireland to aid sustainability – site was previously

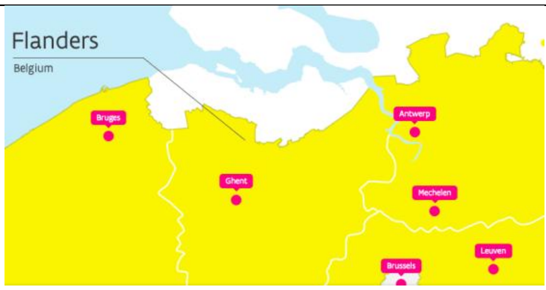
	commercial premises
Future	• Internationalisation - foreign language including Mandarin • More active engagement by VS staff with Social Media • Increasing use of volunteers to supplement core staff • Welcome Training for transport 'touch points'
Critical Success Factors	• City Centre location for main Belfast Welcome Centre next to bus routes, open top tour and coach drop-off • VB relentlessly drives business to BWC through other promotional and visitor servicing activity • High quality visitor environment and consistent brand – same look and feel through all locations, website, kiosk • 'In-store' tech used by staff with customers as much as by customers independently • Ancillary services e.g. left luggage • Plural funding streams • 'Official' Tourism Body but at arms length from Local Authority

Caerphilly	
Destination	• Valleys Town with Wales' largest medieval castle - the primary driver for tourism visits especially overseas visitors • Caerphilly is key point on 'Cambrian Way' – new

	route-based promotion
Background	• TIC was purpose built as part of wider town centre regeneration • Has acted over many years as ‘clearing house’ for wider Valleys campaign enquiries • Reducing levels of core funding • On-site food outlet originally developed to promote authentic local produce (e.g. Caerphilly Cheese) • Café now primary driver of footfall – residents and visitors with high levels of local ‘ownership’
Future	• Consolidation of café with better quality levels of furniture and service • Master-planning of Castle offer and Town Centre currently underway will offer further opportunities for commercial expansion
Critical Success Factors	• Empowerment of visitor service staff to test and develop incrementally new ideas to improve/ diversify the offer • Good relationship with other organisations in the town • Link to local products • Location overlooking castle with adjacent parking (but signage directs castle visitors to park elsewhere) • TIC staff discharge wider destination responsibilities e.g. campaign servicing

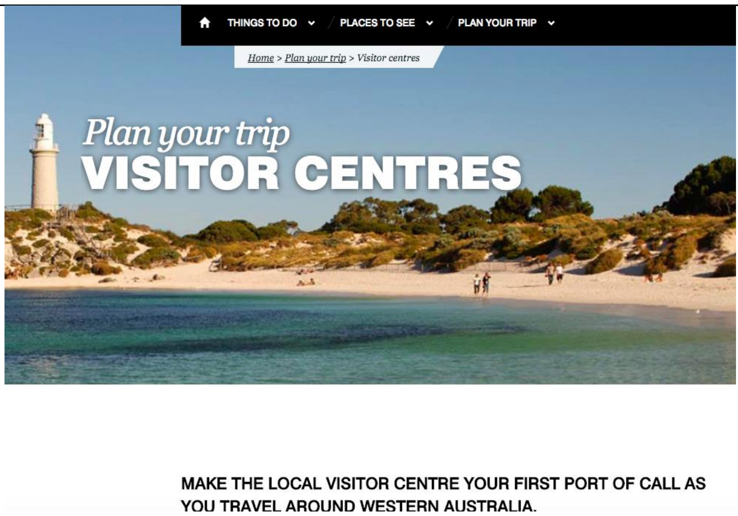
North Wales Tourism	
Destination	• Increasing reputation for adventure activities as well as seaside and cultural attractions • Lonely Planet Top 10 destination 2017 based on

	activity offer
Background	• North Wales Tourism traditionally operated TICs under agency for North Wales destinations but only 2 in Denbighshire left under its management • Go North Wales is NWT's consumer brand for a range of North Wales campaigns • Gwynedd CC closed its last 2 TICs in Caernarfon and Pwllheli but offers them out to appropriate users at attractive rent • Pressure from its members persuades NWT to take on the 2 TICs which are re-opened temporarily in 2017 to provide continuity
Future	• Successful bid to Visit Wales for capital funding to redevelop the TICs as 'Visitor Experience Hubs' • Hubs will re-open in 2018 with extended opening hours
Critical Success Factors	• Brand and description are credible, relevant and distinct to destination, operator and visitors (not 'vanilla' all-Wales) • Industry-led approach (but may still be 'loss leader' for operator) • Visit Wales endorsement for and re-investment in concept

Flanders, Belgium	
Destination	• Key destinations of Antwerp, Ghent, Brussels, Bruges, Mechelen and Leuven

	• Promotion has focus on themes including Art, Food, Cycling, Design, Craft and a strong, sensitively interpreted presence for Flanders Field
Background	• Information centres have been a core facet of delivery for the destination • There have been conflicts between the local service providers and the TICs, which ”hindered exchange” • Current work is based closely around the physical layout of information centres; encouraging intuitive use and blending online resources with engaging “in situ” experiences
Future	Goals are • Retention of physical presence but aligned more closely to digital delivery • To ensure brand consistency • To promote the exchange of information • To develop a new system for the distribution of content (“perfect CMS”)
Critical Success Factors	• Making positive use of a shared responsibility and engaging of Ambassadors (to mediate between the TICs and providers to promote co-operation and innovation, through new management skills, content management systems and overall networking) • Shared content and an up to date, comprehensive CMS for the destination

Turlock, California, USA *(The USA obviously has a wide range of models, we include this one for its low key but effective role)*	
Destination	• Small but lively town in California's Stanislaus county and home to the California State University (second largest town (circa 75,000 population) after Modesto
Background	• Limited budget and promotion of tourism that capitalises where possible on engaging local businesses to act as information ambassadors/providers. • Local chamber is contracted with Hillmar Cheese, the largest attraction in the area
Future	• Promoted as the "best stop on the way to Yosemite" and thriving via a mix of in situ experiences complemented by information on the wider area • The visitor centre carries information on the wider area but is driven and underwritten by its own customers and tours
Critical Success Factors	• Putting the location clearly in context of the wider area • Faithfully echoing the local "brand" • Reciprocal marketing and "being a good neighbour" to local businesses

Western Australia - Visitor Information Centres (VICs)	
Destination	• Western Australia includes Perth as well as areas such as Margaret River (a foodie and surfing hotspot). Alongside key locations in Perth and areas such as Rottnest Island, over 50 accredited Visitor Information Centres exist across the region, operating as a network and promoted as such by Tourism Western Australia • Western Australia has its own trade body representing visitor information servicing (both at Centres and in the wider arena of provision) Visitor Centres Western Australia (VCWA)
Background	• Tourism Western Australia (TWA) assists visitor centres with support to encourage use as an important and reliable resource for informing and educating visitors about local areas and tourism products – not least environmental awareness when visiting sensitive areas • TWA puts great store (and associated promotion) in steering visitors to the Visitor Information Centre network for journey planning (both pre and during) assistance • An Accredited Visitor Centre system is highlighted and supported (displaying the blue and yellow 'i' sign) where the emphasis is on speaking to the local experts

	and getting help with maps, accommodation and tour bookings, information on attractions and events
Future	• Studies (commissioned in 2016 by TWA) to look into the future of VICs and how information delivery elements – on and offline - work together found that despite the widespread use of digital technology by travellers to research and book their travel, visitor centres still play a crucial role in informing and educating tourists about local areas and tourism products. • The future looks secure for VICs at this time but it is important to note that alternative funding and information delivery models (that feature private and third as well as public sector support) are case specific to each area.
Critical Success Factors	• Each VIC and the roll out of associated local information delivery provision (on and offline) on territory operates under different management systems (e.g. from Chambers of Trade to stand alone private attractions) but, crucially, maintains a link to the central accreditation system and its standards for not simply service provision but content of local information on offer e.g. ➢ Free information service ➢ A comprehensive range of local, regional and state wide brochures ➢ Maps and directional information ➢ Information and booking services for accommodation and tours ➢ Information on road conditions and transport options ➢ Unbiased local knowledge on the area ➢ 24-hour access to information, emergency contact numbers and accommodation options ➢ Public toilets onsite or nearby

Options for success

In recommending a way forward for Visitor Information delivery in the Vale of Usk it is important to test proposals against the following critical success factors:

Location:

Where is the information (both on and offline) – how easy is it to find and access? For physical information source is it in a high footfall area? Can a visitor park, safely, easily and freely to access it? Is it a destination in its own right? If physical information simply replicates what is available online why provide it?

Integration and Branding:

The national branding approach is no longer supported or applicable – rather visitor servicing is the opportunity to 'walk the talk' of the destination brand. How does visitor information integrate with the destination brand in terms of look, feel, sense of place, consistency of messages? How do all in-destination visitor touch points work together? How well is the scope and nature of the service on offer articulated?

Stakeholder Mix:

Is provision matched to the needs and profile of visitors – have we asked them what they want? Is industry supportive to the type and level of provision? Is the wider local community buying in and using the service?

Experience:

Is the source point for information somewhere visitors can find stories they can't get anywhere else? Is a physical information point an experience in its own right? Have we got the basics right – free short-term parking, toilets, Wi-Fi, refreshments, multi-modal access? Is it somewhere visitors want to be?

Similarly any recommendations need to be tested against the following practical criteria

- **Affordability** – can it be funded?
- **Likely impact** – what are the outputs and outcomes?
- **Buy-in** – can we take our key stakeholders with us?
- **Partnership opportunities** – what options are there for sharing the load and enriching the visitor experience?
- **Sustainability** – what will it look like in 5 years time?

Recommendations

We believe the case studies and principles outlined above provide a lot of relevant food for thought. In terms of specific recommendations we would identify the following actions:

1. **Integration of Visitor Information into wider destination brand delivery** in terms of content, look, feel, tone of voice, themes, stories, physical imagery. Further development of the destination's Unique Selling Points (USPs) in terms of curation of what is promoted and showcased. The destination needs to recommend the *best*, rather than simply all tourism experiences in order to evoke the brand and deliver on the experience. Such activity would also reinforce the destination manager's role as *the* authoritive body in the context of on territory visitor information.

2. Development of **an 'always on' mindset linking physical and virtual information** provision (also see 7). I.e. when a physical location is closed the visitor is clearly directed to an alternative source of information.

3. Building a **stakeholder consensus** around visitor information based on new Destination Management Partnership arrangements.

4. Identifying **willing partners** to share space, capital and revenue costs and/or operational management and staffing.

5. Conducting **Customer and (non-customer) research** into the specifics of on-territory information needs in order to establish requirements and assist in tailoring both future content origination and delivery.

6. As resources allow **redeveloping physical Visitor Information locations** to be compelling attractions in their own right and adopt the latest retail thinking in terms of layout of physical information points e.g. in Monmouthshire, with the forthcoming advent of MonLife's operations, there is an opportunity to consider space, function and branding that complements the destination overall.

7. **Improving integration of on and offline marketing channels** to deliver not only a better experience for visitors but also improved value for funders e.g. through capacity and skill building of TIC staff in order that they may assist in managing social media accounts and respond to visitor queries in "real time" via innovations such as live webchat facilities.

   NB: Kiosks

   Owing to previous issues in achieving consistent delivery (due largely to broadband fluctuations rather than software and hardware) we would recommend the decommissioning of Monmouthshire's information kiosks, at least in their current locations. There may be potential opportunities around relocation of the units elsewhere within the county, repurposing their form and function when MonLife takes over unified delivery of key attractions and leisure venues

8. **Location specific**

   1. **Chepstow**: There is currently a lack of consensus from stakeholders as regards the optimum model for future TIC service operation. What is certain however, is the need to deliver better value for the destination while reducing costs to the local authority. Here are some

of the ideas identified during our research – all have significant implications for partnership working.

- Showcase: Monmouthshire Food, Wine + Cider
- Wye Valley (Virtual) Tour
- 'Selfie' start/ finish point for Offa's Dyke, WCP, Wye Valley Walk
- Café, Ticket Office and Retail for Castle
- Activities Booking Hub

2. Abergavenny

- A separate study into the future of the St Mary's Centre (including the Tithe Barn) is underway which will offer options for the future management and operation of the TIC

3. Newport

- We would encourage building on the work of Newport Now (the BID) to support ongoing provision of on- and off-line information supported by the City Centre Management Group and the emerging Destination Partnership

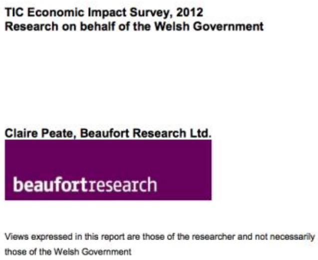
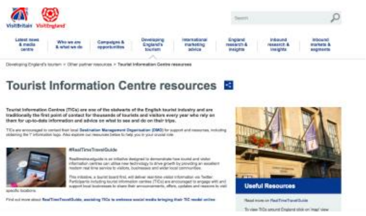
Appendices:

Consultees

- *Lynne Richards, Newport City Council*
- *Nicola Edwards, Monmouthshire County Council*
- *TIC Staff team (4), Chepstow*
- *Peter Johns, Abergavenny Town Council*
- *David Cummings, Monmouth Chamber*
- *Julian Atkins, Brecon Beacons National Park Authority*
- *Sue Kingdom, Chepstow Chamber*
- *Laura Thomas, Brecon Beacons Tourism/ Powys County Council*
- *Aileen Atkinson, Monmouth Shire Hall*
- *Jim Jones, North Wales Tourism*
- *Gerwyn Evans, Visit Wales*
- *Martin Cook, Caerphilly TIC*

Industry Survey copy (attached)

Links to Case Studies, further research documentation and resources and salient news articles in tabular format

General/Policy documents	
http://gov.wales/docs/caecd/research/130726-economic-impact-tourist-information-centres-nov-2012-en.pdf 	Visit Wales/WG review of TIC functions (2012)
https://www.visitbritain.org/tourist-information-centre-resources 	Visit Britain TIC resources online (current)
http://www.culture-first.com/content/download/1395/7673/2011-03-08+Strategic+Options+for+TICs.pdf 	East of England Visitor Info review – options for centres
https://www.visitengland.com/sites/default/files/downloads/centres_of_excellence_tic_0.pdf 	Visit England – thoughts on TIC provision (as centres of excellence)
https://democracy.gloucester.gov.uk/documents/s30086/Review%20of%20the%20TIC%20Appendix%201.pdf	Gloucester – TIC Review (2014)

Gloucester City Council Transforming Your City **Tourist Information Centre** **Service Review** **June 2014**	
http://www.tourisminsights.info/ONLINEPUB/VISITENGLAND/VISIT%20ENGLAND%20(2010),%20Modernising%20Visitor%20Information%20Action%20Plan,%20Visit%20England,%20London.pdf england **MODERNISING VISITOR INFORMATION ACTION PLAN** **Vision** To ensure the availability of world class, tailored information at every stage of the visitor journey, which will contribute to 5% growth, year on year, in the England tourism market by 2020. **Objectives** 1. To share intelligence and best practice on visitor information provision across the industry, identifying gaps and opportunities. 2. To collaborate with partners in both the public and private sectors to optimise technological advances, extend the reach of visitor information services through effective distribution and drive increased cost-effectiveness. 3. To improve visitor satisfaction through the provision of world class customer service, leading to increased spending and the provision of compelling reasons for visitors to return and recommend others to visit.	Visit England Information review (2009)
https://business.jersey.com/news/tourist-information-centre-invitation-tender Jersey ABOUT US TRADE OPPORTUNITIES RESEARCH AND STATISTICS NEWS AND MEDIA LIBRARY Tourist Information Centre - Invitation to Tender Visit Jersey are about to re-tender for the provision of information services on-island. The Tourist Information Centre is an important part of our island's welcome and a source of holiday ideas and experience suggestions for our visitors. We invite you to review the invitation to tender and submit a proposal if appropriate.	Visit Jersey - invitation to tender for TIC service. Now run by Jersey Ports as an arms length company (on behalf of Visit Jersey)
https://bradford.moderngov.co.uk/documents/s13572/Bradford%20Tourism%20Review%20Final%20-%20December%202016.pdf team **Visit Bradford** **Tourism Review** **December 2016**	Bradford - review and recommendations (2016)
https://moderngovdcp.dorsetforyou.gov.uk/documents/s3126/Wes	Dorchester -

t%20Dorset%20Tourist%20Information%20Centres%20Service%20Review.pdf	decision to move/relocate to Library (2017)
News/blogs	
http://www.telegraph.co.uk/travel/comment/tourist-information-centre-closures-fond-farewell/	"An Ode to TICs" Telegraph (October 2017)
https://malvernobserver.co.uk/news/concerns-over-future-of-malvern-tourist-information-centre/	Malvern (2017)
https://www.scotsman.com/lifestyle/travel/visitscotland-to-shut-60-of-tourist-information-offices-1-4585433	Scotland closing centres (October 17)
Article by Gavin Bell (Telegraph) *Our tourist information centres are facing extinction. We need to revitalise them before it's too late.* First they came for our public toilets. And we did nothing. Then they came for our free seaside car parks. And we stood back and watched. Now they're coming for our tourist information centres. Will this prove to be the red line that shall not be crossed? Last week VisitScotland, the nation's state-owned tourist agency announced that it would close 39 of its 65 centres. Across the UK the shutters have been put up for the last time at scores of Tourist Information Centres (TICs), with many more facing an uncertain future. A quintessentially British institution is trundling to extinction. The sickness has even extended to our national parks, with the New Forest now the first in Britain to exist without a visitor centre after the local council closed its building in Lyndhurst. A similar story is emerging at Haworth, the Pennine village where the tree Bronte sisters grew up and where the survival of the visitor centre depends on an agreement being reached between the council and the Bronte Parsonage Museum. Those who sit in judgement cite two justifications: austerity and/or web-based tourism that seems destined to take its rightful place at the centre of everything. Usually, the latter is a handy means of covering up the former. Let's be clear: there is much that is wonderful about e-tourism: we can download a walk, check last-minute hotel availability or see if a seal-watching boat operator is putting on an extra trip. And a website holds much more information than a weather-beaten panel in a car park. That's fine, just so long as you can get hold of the internet - from swathes of Cornwall to mid-Wales and the Scottish Highlands and Islands, that is impossible. And if you can get everything online, do you really want to? I don't believe you have to be a Luddite to enjoy popping into a remote tourist office and chatting to someone who really knows their stuff. Haworth is a case in point. For all the *Wuthering Heights* tat knocking around, you can tell the staff have read the novels and want to share their enthusiasm, even though they've been asked the same question 10,000 times. Ambleside in the Lake District is a shining light too.	Gavin Bell article 28th October 2017 Daily Telegraph

Despite the zillions of people who walk in every year, they still treated me as though mine was the first face they had seen for a week and gave genuinely helpful tips on where to take the kids during the overhead monsoon that was passing overhead. My favourite of all is another centre with the axe hovering over it, the magnificent VIC in Durness, a remote village in the top left-hand corner of Sutherland. The centre boasts perhaps the best view of any, overlooking the glorious Sango Bay, while also hosting superb displays of local wildlife and geology, presented in accessible form by real experts in their field. Essentially, this tells you all about the landscape you've just driven through, one of the primordial parcels of the UK. Above all, what stays with me is the friendly face that greeted us as we walked through the door after a long journey through the wilds of Wester Ross and Assynt. "Come far?" she smiled. Everyone who makes it to Durness has come far. Ingenuity will be needed on an epic scale if they are to survive. In many places, local communities will step in. VisitScotland clearly expects this to be the case, because it is self-evidently in the interests of local people. VisitScotland says its centres will be replaced with 1,500 "information partners", comprising local businesses, such as B&Bs and distilleries. Meanwhile VisitBritain, its UK-wide parent, has been negotiating with Waterstones to host information leaflets in its book stores. Of course, not all TICs are great. Many are past their sell-by date, as is their Eighties business model predicted on commission from booking accommodation for travellers in an age before Airbnb and the rest. One obvious solution would be to make them more dynamic. Rather than selling people a laminated Loch Ness Monster, why not offer tea and cake, a retro Fifties milk bar; hand the premises over after sundown to local community clubs; or invite musicians to entertain visitors with local tunes? That though, would involve human beings interacting with one another. And in the age of the internet it's not altogether clear if that's what the tourist boards want.	
https://www.theguardian.com/society/2011/feb/07/tourist-information-centre-closures	"TICs face extinction" Guardian (2011)
http://www.dailypost.co.uk/news/north-wales-news/fear-future-tourist-information-centres-6281279	Daily Post - Snowdonia closures (2013)
http://www.lowestoftjournal.co.uk/news/debate-on-future-of-tourism-information-centres-in-lowestoft-and-southwold-1-4417418	Lowestoft (2016)
https://www.westsussextoday.co.uk/news/town-looks-to-a-future-without-its-tourist-information-centre-1-6533198	Worthing (2015)
http://www.bbc.co.uk/news/uk-england-cornwall-22152888	Cornwall TIC funding fears (2013)
https://www.northumberlandgazette.co.uk/news/update-on-review-of-northumberland-libraries-and-tourist-information-services-1-8038490	Northumberland (2016)

<table>
<tr><th>Presentations</th><th></th></tr>
<tr><td>https://www.slideshare.net/tthompson/the-visitor-center-of-the-future

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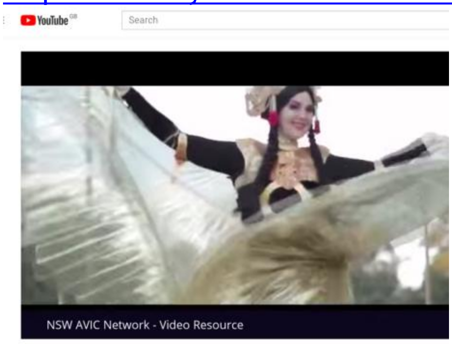
<tr><td>http://www.ttra.com/assets/1/18/5._The_Right_Analytics_that_Maximize_Visitor_Centre_Experience_and_Value.pdf

</td><td>Australia (2016)</td></tr>
<tr><td>https://www.youtube.com/watch?v=WwyWPsiBl1g

</td><td>Future of Visitor Information Centres
NSW Australia (2016)</td></tr>
<tr><td>http://kwaliteit.toerismevlaanderen.be/onthaal/inspiratiedag-the-future-of-tourist-information-centres-in-flanders

</td><td>Future of tourist information in Flanders (2016)</td></tr>
<tr><td>https://www.rogerbrooksinternational.com/Visitor_Info_Handout.pdf</td><td>USA examples for delivery – best practice case studies and advice (2013)</td></tr>
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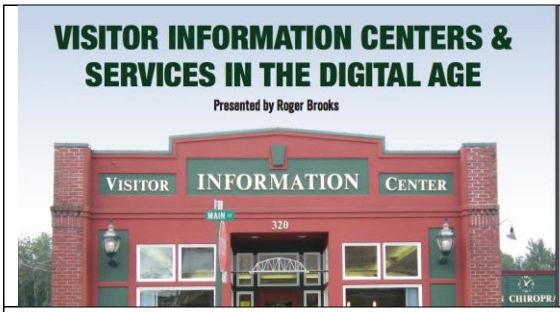VISITOR INFORMATION CENTERS & SERVICES IN THE DIGITAL AGE Presented by Roger Brooks VISITOR INFORMATION CENTER MAIN 320 CHIROPR		

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