

WARWICK DISTRICT COUNCIL DRAFT TOURISM STRATEGY

November 2011

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1. INTRODUCTION

1.1 Background and context

This report aims to define a high level strategy which articulates Warwick District Council's role in relation to tourism and the visitor economy – a strategic plan to provide direction and management options for the tourism service, including an assessment of partner roles and partnership opportunities.

This is a particularly opportune time to reassess the Council's role in tourism. Nationally and sub-regionally, there have been important changes in the level and nature of public sector support for tourism, with a greater emphasis on the role of the private sector. Visit England has just launched a new strategic framework. Regional Development Agencies are being wound down and replaced by Local Enterprise Partnerships (LEPs). Locally, the demise of South Warwickshire Tourism in spring 2010 has created a vacuum in some areas of service delivery and business engagement.

These changes provide new challenges and opportunities for tourism in Warwick District. Some of these challenges can be tackled alone, but some are best tackled in partnership with others.

The purpose of this paper is to illuminate where the Council's involvement will add greatest value. It has been prepared with support from external consultants, Tourism Engineers, within six weeks of commissioning – a tight timetable in recognition of the need to respond rapidly to changing circumstances. It sets out the Council's strategic priorities and rationale for involvement – **what** and **why**. It does not define the detail of **how** – this is a matter for wider consultation with partners over the coming months, to enable the Council to develop more detailed delivery plans setting out partnerships, programmes and resources.

1.2 The brief and methodology

Our brief to the consultants invited them to prepare a tourism strategy for WDC, taking account of the changing policy and market context impacting upon the industry.

The conclusions are the outcome of a 3-stage work programme.

The first stage involved an information gathering exercise to assemble a complete picture of the internal and external environment in which WDC's tourism service operates. The audit comprised a mix of desk research and consultations, covering tourism policy (national, sub-national and local), the market context, and a service audit. The study also draws on best practice from other parts of the country.

The second stage involved discussing the interim findings at a workshop attended by local internal and external stakeholders on 17th August 2011. The session provided an opportunity to discuss a vision for the strategy, future priorities and roles. (Notes of this meeting are attached in Appendix 1). The results were then fed into the third stage – writing up recommendations in this final report.

1.3 Report structure

The report is in four main sections, as follows:

- Strategic context – findings from the policy and marketing audit
- Where are we now? A review of the current operation, highlighting key issues and gaps
- Where do we want to be? Vision and guiding principles
- How are we going to get there? Opportunities and options for future action with conclusions and recommendations

2. STRATEGIC CONTEXT

This section highlights some of the wider contextual issues arising from the audit which impact directly upon WDC's future tourism strategy. They are captured as a series of simple headlines relating to strategic policy and market issues.

2.1 Policy context and best practice

- Government policy is to harness the potential of tourism to grow the economy
 - *Visit Britain's role is refocused to a pure marketing remit: selling the UK abroad*
 - *Visit England has a stronger role to lead on national tourism, albeit with reduced resources*
 - *Advocates delivery at local level through Destination Management Organisations (DMOs) led by the private sector, in partnership with Local Authorities/LEPs*
 - *Destination boundaries to be determined by the local tourism industry*
 - *Tourism bodies to become more independent and sustainable through commercial means. It is envisaged that LEPs may raise funding (e.g. Regional Growth Fund) and commission activity.*
- Visit England's strategy is to grow tourism by 5% per year over the next 10 years
 - *Key action areas are: "wise growth", marketing, accessibility, destination management, visitor welcome, research and intelligence, rural tourism, seaside resorts, modernising visitor information, and business tourism*
 - *Stresses the importance of having a destination management plan*
- Visit England has identified Warwick as a national "attract brand"
 - *The "Attract" brands are a list of England's best known destinations, based on objective research of visitor numbers and consumer perceptions*
 - *Along with Stratford it is one of 39 destinations which will be used by VE to sell England*
- The Coventry and Warwickshire LEP has recognised tourism as a priority
 - *One of the eight key sectors for targeted support to accelerate the growth of the sub-regional economy*
 - *Strategy and business plan in preparation*

- There are some common best practice trends emerging as destinations respond to the new policy context, for example:
 - *Closer alignment of destination tourism strategies with national/sub-regional policy*
 - *Clear, sustainable growth targets*
 - *Local Authorities are increasingly looking at private sector-driven/ industry-led DMOs*
 - *Growing trend of linking inward investment marketing with tourism*
- Stratford District Council (SDC) is re-thinking its tourism strategy and is an important potential partner
 - *Draft strategy focuses on the "Discover Stratford" brand*
 - *The vision is to work in partnership with others to develop prosperity*
 - *Detailed delivery plan has yet to be developed*
- Warwickshire County Council (WCC) and Warwick Town Council (WTC) are important tourism partners
 - *WCC is a major tourism player (museums, country parks, economic development etc) and has a key co-ordination role, sourcing funding and rural development*
 - *WTC has an important visitor information and promotional role for Warwick town*

2.2 Local market context

- Tourism in Warwick District is big business
 - *3.1m trips a year generate more than £220m and over 4,850 jobs*
- The district has strong appeal to key visitor markets in the UK and abroad
 - *Tends to attract older (over 45 years), relatively affluent visitors*
 - *Mainly families and adult couples*
 - *Most are day visitors living within Coventry/Warwickshire/West Midlands*
 - *Most staying visitors are on short breaks from other parts of the UK, mainly from London, the South East and North West England*
 - *The District has a significant overseas market making up 13% of all trips. They come mainly from US/Australia/New Zealand, staying and touring locally, often as part of a bigger itinerary including London, Bath and Oxford.*
- The strongest brand for the area is "Shakespeare Country"
 - *Independent research measured audience perception and awareness ("have visited" or "would consider visiting")*
 - *Among non-locals, Warwick has the third strongest destination brand awareness in the region (65%) after Stratford (78%) and Birmingham (71%)*
 - *Leamington Spa is not far behind (62%) and has particular appeal to affluent "Cosmopolitans"*

- *Among attraction brands, after Shakespeare's Birthplace (73%), Warwick Castle has the strongest awareness (70%)*

2.3 National market trends

- WDC tourism strategy needs to respond to the growth in key markets
 - *Short breaks: growing demand for weekend breaks (mainly couples) and midweek/longer breaks (older age groups)*
 - *Staying with friends and relatives: growing partly due to increased mobility, student numbers, and reunions*
 - *Overseas: The UK profile will grow towards 2012. Prime markets continue to be USA and Western Europe, but with Eastern Europe and China emerging.*
 - *Day visits: especially health-related and outdoor activity*
 - *Business tourism: A trend towards smaller and shorter meetings.*
- The strategy will need to respond to difficult economic conditions
 - *Fears of recession: growing demand for value for money, without compromising quality*
 - *"Staycation": domestic holidays or staying with friends and relatives*
 - *Overseas demand has been depressed by uncertainty in international markets*
 - *Business tourism has been badly hit with a drop in the conference/meetings market*
- The strategy should capitalise on positive lifestyle trends
 - *The quest for experiences: what we do is increasingly more important than where we do it*
 - *Value for time: time will become an increasingly precious commodity*
 - *Niche activities: will become more important as we seek to assert our individuality*
 - *Eco-tourism and sustainability: influenced by global warming and desire to minimise our carbon footprint*
 - *More ABC1s, singles and ethnically diverse societies*
 - *More demand for authenticity, distinctiveness and community*
 - *Well-being and "recharging": tuning out, turning off and taking part*
- The strategy must respond to an internet-savvy generation of consumers
 - *In the UK 76% of the population now uses the internet. We are making increasing use of technology to research, book and relate our travel experiences*
 - *On the move information and booking systems*
 - *By 2012, 2 out of 3 phones sold will be "smart"*
 - *Informal, independent advice and information networks: e.g. TripAdvisor*
 - *User-generated web content and online communities offering tourist information*

2.4 Implications for Warwick District Council

The challenge for WDC is to respond proactively to the shifting policy and market context described above, drawing on the lessons offered by national best practice.

In view of the downward pressure on public sector resources, there is likely to be a particular emphasis on partnerships and new business models, with a view to maximising performance, quality and return on investment.

3. WHERE ARE WE NOW?

This section provides a brief review of WDC's current tourism-related operations. This is a position statement of what is actually happening now, but with an emphasis on highlighting the biggest issues and challenges moving forward.

3.1 Service overview

Warwick District Council is a key player in tourism.

- It runs a museum and art gallery at the Pump Rooms which attracts 95,000 visitors a year, of whom half are tourists
- It supports exhibitions, arts events and festivals
- It provides a range of sports venues and parks which attract visitors and host key events, notably England's women's bowls
- It runs, or sub-contracts, a range of entertainment and catering facilities, including the Spa Centre, at the Pump Rooms, and in Jephson Gardens
- It runs and/or funds Tourist Information Centres at Leamington and Warwick
- It supports proactive town centre management – promoting, developing and animating town centres through events and information for visitors and locals
- It has been an innovative player in co-ordinating and promoting tourism

3.2 Financial context

There is downward pressure on WDC resources for tourism. In the current year, 2011/12, the total budget directly allocated to tourism is in the region of £304,000. This is made up of:

- £43,700 internal recharges (an amount which varies annually)
- £60,000 contribution towards Warwick Town Council HLF Bid
- £55,000 tourism reserve (currently a one off sum for 2011/12 financial year)
- £25,300 contribution to Warwick Town Council
- £120,000 Leamington TIC, promotional material and consultancy – of which the majority is currently the TIC.

The £304,000 excludes Town Centre Managers' salaries (and their small discretionary spend – about £5,000 per town), and other departmental management overheads.

3.3 Key issues and challenges

The audit has highlighted a number of weaknesses in current provision/policy. The key gaps appear to be:

- **Strategy and leadership:** This is the single biggest gap, and it is what this strategy is seeking to address.

What is the vision? What are the key objectives and targets? Is it growth? If so, what target do we want to set for growing the visitor economy? What needs to change in order to achieve this growth?

The central purpose of the strategy is to define the Council's role in tourism – what it will do and how it intends to intervene in the industry. There is a need for a high level policy statement providing a clear direction of travel.

Having agreed a sound strategic framework for the Council's involvement, WDC is then in a good position to consult more widely with a range of external partners about how it can deliver its objectives for tourism. This is well timed, as other local and sub-regional partners start to firm up their own policies. It will enable WDC to plan more detailed delivery plans setting out partnerships, programmes and resources.

- **Co-ordination and advocacy:** The Council lacks a tourism specialist to champion the sector and co-ordinate activity within and outside the District. How can WDC engage sub-regional and national partners most effectively? To be successful, the area will need a professional Destination Management Plan.
- **Business engagement:** Following the loss of South Warwickshire Tourism (SWT), the area's DMO, how do businesses get their views heard?
- **Business advice:** How are business advice/start up queries handled? Could Coventry and Warwickshire Chamber play a role in future?
- **Resources and partnerships:** Resources within WDC are very stretched. How do we strengthen local partnerships with the private sector and key players like Warwick Town Council, the County Council, Stratford District Council and the Coventry and Warwickshire LEP? Have we fully exploited out of area partnerships (e.g. Oxford) to facilitate joint work and cost-sharing? Which partnerships will help lever additional funding? Who will explore Tourism BIDs?
- **Website/data management:** a critical issue and messy, given the continuing involvement of Shakespeare Country. How accurate and up to date is the information? Does Warwick need a separate site? How will data stewardship be handled in future? What stance will the Council take on promoting non-assessed accommodation stock?
- **Print:** A major issue. What print is needed for which markets and who should produce it? The current haphazard approach, with the TIC helping out, is not sustainable. There needs to be a strong private sector lead and contribution.
- **Branding:** Can the Warwick brand be used to sell the wider District?
- **Marketing:** More generally, there is no marketing strategy and creative packaging of the offer. There is a need for better, co-ordinated marketing of the Council's and area's assets to target audiences at home and abroad. Town Centre Managers cannot undertake this wider marketing role without

being distracted from their core remit. There are notable gaps in the current marketing programme, such as a lack of dedicated travel trade promotions. Post SWT, how do we fill the gap in proactive PR for the area? Given the growing importance of Stoneleigh, should the Council take a more proactive role in promoting business and conference tourism?

- **Market intelligence and performance monitoring:** The legacy of market and economic impact studies is good, but this needs to be sustained in order to guide future work and assess effectiveness. What is the best way of gathering good market and performance data for the District in future?
- **Rural tourism:** The focus of Town Centre Managers is on the three towns. How well is the rest of the District promoted? Should there be stronger engagement with the County Council to promote activity-based tourism? The National Trust are important partners too.
- **Private sector leadership:** This is the central thrust of Government thinking. WDC's innovation helped form one of the first DMOs in the country. There are now some 40 DMOs elsewhere in England, but Warwick does not have one. What is the mechanism to ensure effective business leadership in future? How can we build on what the Castle (with the RSC and Shakespeare's Birthplace Trust) is doing to sell overseas? Are there spin-off benefits in working with the Ricoh Arena pre/post 2012? The World Shakespeare Festival is a major opportunity.
- **TICs:** Is there a clear funding rationale? Current resource allocation does not reflect the relative strength of the Warwick brand. There is duplication of effort. Leamington is costly, by comparison with Warwick and staffing arrangements would benefit from a full review. Has there been proper consideration of alternative commercial business models? There is a major opportunity to improve the retail offer to evoke a stronger "sense of place". This is clearly missing in the Pump Rooms at present.
- **Land use planning:** Is there a clear strategy defining land use planning policy for tourism? A local development framework to promote central hotel/spa development in Leamington, for example.

4. WHERE DO WE WANT TO BE?

This section proposes a vision and some guiding principles to underpin the strategy.

4.1 Vision

The vision is based around the feedback from the **Stakeholder Workshop** (see Appendix 1) and takes account of the policy context and market trends described earlier.

"Working in partnership with others to present a clear, compelling message about the area's unique strengths, which has the active support of local businesses and communities, and which is founded on the highest standards of visitor welcome".

To grow the value of tourism to the District's economy by more than 5% per annum over the next 10 years.

4.2 Guiding principles

The vision is underpinned by 7 guiding principles:

- **Sustainable growth:** which is better than the national average and mindful of environmental impact
- **Value not volume:** marketing campaigns encourage visitors to stay overnight, stay longer, spend more, and to return
- **A distinctive offer:** investing in a "sense of place"
- **An inspiring message:** backing a coherent identity which builds on acknowledged market strengths
- **A strong partnership approach:** which avoids duplication and clarifies roles
- **Local ownership:** initiatives have the widespread backing of business communities
- **Quality experience:** offering excellent, easily-accessible information and joining up services to make high-quality, memorable experiences.

5. HOW ARE WE GOING TO GET THERE?

This section contains recommendations for the District Council's future role and strategy. The structure is designed to mirror the national policy framework.

Warwick District Council's role, working with other public partners, is to create the right circumstances for growth, to enable the private sector to trade successfully and profitably, thereby creating jobs and wealth.

To achieve the vision, it is recommended that the Council should focus on 4 main priorities (colour-coded for ease of reference). They are:

A. Marketing the destination to deliver sustainable growth

B. Place shaping: to create a distinctive destination experience

C. Business engagement: to strengthen industry-led co-ordination and advocacy

D. Visitor services: to enhance the quality of visitor information and welcome

A brief description of the rationale and role (Why? and What?) underpinning the Council's involvement is given below.

Each topic concludes with a series of high level recommendations to take the strategy forward. The recommendations require more discussion internally and externally with a range of partners, in order to prepare more detailed delivery plans (How?).

A: Marketing the destination to deliver sustainable growth

Rationale

In order for tourism businesses to achieve their growth potential, they require good quality information about the District's visitors and cost-effective ways of reaching them.

So research and intelligence and collaborative marketing campaigns are essential. This is something that the private sector, consisting of so many small and micro-enterprises, does not have the time, or the money, to do cost-effectively on their own.

There is a need for co-ordinated marketing of the Council's and area's assets to target audiences at home and abroad.

Role

WDC's role is to work with partners to support effective destination marketing, providing the "glue" to link common themes and products which are attractive to target markets – consumers, travel trade and media. It involves packaging and promoting the disparate elements of the destination to create a compelling visitor offer, which encourages people to visit, to stay longer, and to return.

The first step is to consult with partners to develop a cohesive marketing strategy, defining which segments will deliver the best return on investment for the area. Based on the findings from the marketing audit these are likely to be:

- Day visitors from within the region and VFR (friends/relatives visiting local residents)
- UK short breaks
- Overseas visitors
- Business visitors (conference and meetings market)

The foundations of any marketing strategy are built on sound market and performance data. Which traditional and emerging markets will deliver sustainable growth for the area in the long term? There is a need to sustain investment in market research and economic impact studies for the District to guide future work and assess effectiveness.

The marketing strategy should clarify detailed programmes, resources and partnerships. It is recommended that this be done in close consultation with other private and public sector partners at local, sub-national and national level, to avoid duplication and maximise economies of scale. Each market will require a different partnership.

There are clear linkages between the Council's tourism marketing role and other economic development work – particularly town centre management promotions and inward investment marketing. The marketing strategy must take account of these wider opportunities and partnerships.

Allegiance to destination marketing is sometimes only secured at local town centre level. The aim should be to achieve buy-in not only from the major tourism players but also business partners at the grass roots. This calls for a balanced mix of

marketing activity, which attracts customers in to the destination “funnel” and distributes them effectively once they are here: an **“attract and disperse”** marketing policy.

Closer markets can be more easily accessed by businesses, but more distant, less familiar markets are larger in size and spread. These require larger budgets and wider partnerships.

Getting the branding right is essential. The area has two strong attract brands: the positive place associations connected with “Shakespeare”, and the “Warwick” destination brand. It is recommended that a hierarchy of brands and partnerships be developed, which are “fit for market”. For example:

- “Shakespeare’s England” (or similar) works best for overseas marketing with Stratford, but could also be used for short breaks promotion in the UK.
- “Shakespeare’s England, Oxford and the Cotswolds” embraces neighbours.
- Without Stratford, “Warwick” is the strongest umbrella brand for short breaks promotion in the UK, or “Stratford-upon-Avon and Warwick” for joint activity (this echoes Visit England’s “attract brands”).
- “Warwickshire” and the other town brands are most relevant for in-destination print to encourage wider visitor dispersal and for niche segments (e.g. “Royal Leamington Spa” is a strong brand for independent “Cosmopolitan” shoppers)
- Day visitor/VFR marketing is best tackled with partners in Coventry and Warwickshire, or as discrete “Days out on your doorstep” campaigns for local residents.

For business tourism, Birmingham is the single biggest brand, but for inward investment marketing the connection with Shakespeare is still very relevant. Marketing Birmingham, and Coventry and Warwickshire, are likely to be the lead partners. Given the current economic climate and growing environmental concerns, there may be value in developing a “stay local” conference and meetings campaign targeted at local businesses.

Special interest marketing should be explored. There is growing demand for activity based experiences, where people participate and learn. Connecting the countryside to the town offer will be an important component of “attract and disperse”. This requires closer partnership with the County Council and key attractions such as Stoneleigh and the National Trust.

Events which celebrate the area’s history and traditions are a major marketing asset and help to spread tourism throughout the year. The World Shakespeare Festival is a major opportunity.

In preparing the recommendations, it has been important to remain aware of the legacy created by the demise of the DMO, Shakespeare Country. The brand lives on in the form of a private company. Once the tourism strategy is agreed, it is proposed that there should be early discussions between WDC and Shakespeare Country to reach agreements on future collaboration. This will avoid potential confusion and duplication of effort.

Shakespeare Country has been particularly active in producing marketing collateral – especially print and websites – and this is the most important area to address in the

short term. Businesses need certainty that when they “buy in” to destination marketing, it is supported by all tourism bodies – at local, sub-national and national level. This way their message is publicised through multiple channels and they are not asked for the same information (and more money) twice.

Private/public partnership is essential to ensure an objective, comprehensive and accurate marketing proposition is presented to potential visitors. There is a need to rationalise current print and websites to convey a compelling, unified message about what the area has to offer.

Summary of principal recommendations

- A1. Develop a marketing strategy for Warwick District in consultation with partners which targets day visitors, UK short breaks, overseas visitors and business tourism
- A2. Exploit the potential of distinctive local events, activity and special interest marketing campaigns
- A3. Invest in research and intelligence to guide the marketing strategy and assess performance against targets
- A4. Integrate town centre promotions and inward investment marketing into the plan
- A5. Work towards an “attract and disperse” marketing policy which is owned and supported by local business communities
- A6. Develop an appropriate suite of brands and partnerships which are “fit for market”
- A7. Collaborate with local, sub-national and national partners on the most appropriate, cost-effective, delivery mechanisms
- A8. Rationalise print and websites to present a single, cohesive proposition for the area which has the backing of all private and public partners

B. Place shaping: to create a distinctive destination experience

Rationale

Unlike other sectors, the tourism industry is heavily dependent on the quality of the local environment to achieve success. Without an attractive, welcoming and safe locality, tourism businesses cannot thrive. Many of the things which influence a visitor's decision to return are the responsibility of the Council: especially the quality of the public realm, and the planning process which influences the character of the destination. A thriving visitor economy contributes to the economic and social well-being of local communities, stimulating local pride and a "sense of place".

WDC is a major player in place shaping. It runs a museum and art gallery, supports events and festivals, and provides sports venues, parks and gardens, as well as core infrastructure such as car parks and public toilets. Maintaining and developing the quality of the public realm is crucial to the District's long term success, not only for tourism but for other inward investment marketing.

Place shaping relates to how a destination plans, develops and maintains its offer, presenting a coherent, consistent, distinctive position, message and brand which can engage businesses, investors and visitors, to build confidence and competitiveness.

Role

WDC's role is to create the right environment in which tourism can thrive – through a conducive planning policy, development of the public realm, conservation and management of heritage and landscape, promoting quality, and town centre animation.

Visitors crave distinctiveness in a world which is dominated by the same high street brands and out of town shopping centres. The 3 towns have their own distinctive strengths, but the full potential of tourism will only be realised when there is more focus on developing a sharper "sense of place".

For example, Leamington Spa has a strong independent retail offer, but in order to flourish this requires visitors to overnight and stay longer. This calls for investment in related tourism infrastructure – new quality hotel development within the town centre. Likewise, the town lacks a Health Spa offer befitting its name, which would build on local complementary therapy strengths. Tourism is the single largest creative industry which has a major role to play in development of the cultural quarter and Old Town.

It is recommended that the Council should review its Local Plan policies in respect of tourism to capitalise on its distinctive place shaping role.

Of course, it is not just the built environment but the people which shape a place and its identity. The strategy must recognise the importance of local communities in building a unique visitor offer. This is partly about celebrating local traditions and culture through events and festivals, and partly about developing the warmth of the welcome. To encourage repeat business, we have to deliver distinctive visitor experiences, backed by excellent customer service and value for money.

There is scope to build on Warwick's growing reputation as a "Festival Town". Events on the Market Square are a major generator of tourism. The Council's proactive town centre management programme has a key role to play in animating the three town centres and attracting visitors off-peak.

WDC has a strong track record of investing in heritage and culture – the Spa Centre, Pump Rooms, gardens, arts and sports present a really attractive backdrop. They are essential elements which enhance and distinguish the destination experience for leisure and business visitors. Ongoing development and management of these assets will be essential to maintain the area's distinctive appeal for visitors.

Summary of principal recommendations

- B1. Integrate "place shaping" into planning and economic development policies to enhance the distinctiveness of the District's visitor offer
- B2. Target investment which strengthens the District's unique "sense of place"
- B3. Build on local events and festivals to reinforce Warwick's identity as a Festival Town
- B4. Develop town centre management initiatives which celebrate local distinctiveness
- B5. Sustain WDC's investment in the public realm, especially key heritage and cultural assets.

C. Business engagement: to strengthen industry-led co-ordination and advocacy

Rationale

Government policy advocates business-led tourism partnership. Active engagement with the tourism business community is fundamental to success.

Business engagement ensures the strategy addresses business priorities and has “buy in”. It provides collective leadership and cohesion. It ensures an effective voice for a fragmented industry dominated by small businesses. It builds resources and support networks to implement activity, and it demonstrates to the public sector a visible return on their investment.

Role

WDC’s role is to work with private and other public sector partners to build effective structures which deliver industry-led partnership. Ultimately, this should create a highly focused and efficient Destination Management Organisation (DMO) for the area led by, and increasingly funded through, the tourist industry itself.

However, at present the reality is that we are faced with market failure. In a difficult economic climate, the local DMO lost its way and has collapsed. What is required now is strong leadership, galvanizing the support of respected business leaders. This will take time, but it should start with building dialogue through the Warwick District industry group brought together to lead this strategy.

Clearly, public sector funding will continue to be squeezed in the years ahead, so the strategy must seek to maximise resources from partners who share similar objectives. Engagement with the national tourism agencies – Visit Britain and Visit England – will be essential. So will the need to partner with local and sub-regional players – the LEP, the County Council and Stratford District Council. It is also recommended that there be closer co-operation with Warwick Town Council, to ensure economies of scale and avoid the duplication that currently exists.

This is easy to say, but not so easy to achieve. It requires collective agreement and adherence to a single “Destination Management Plan”, as recommended in the new Visit England strategy. The following is an extract:

“Creating effective relationships between Local Enterprise Partnerships, Local Authorities and tourism businesses will be critical in providing strategic leadership in developing local visitor economies. Building and sustaining those relationships requires the right people, with knowledge and understanding of the visitor economy, and with the credibility to speak for the businesses in the sector”. (*Destination Management: A Strategic Action Plan for Tourism, 2010-2020, Visit England*).

It is recommended that WDC support the appointment of a local champion to lead the work. The aim would be to adopt national best practice in working towards a single co-ordinated and focused 3-year Destination Management Plan.

With this consensus, the industry will be better able to articulate business issues and champion solutions, influencing the development of policy and support at local and national government level.

The industry can only be championed effectively if it can prove its worth. So, alongside this stronger advocacy role, there must be objective measurement of performance to ensure that targets are achieved.

The vision for the strategy is one of growth. This requires special attention be given to helping new business start-ups and advising tourism businesses in the early years. (The imminent closure of the regional Business Link office means that on-the-ground support will become less visible). We see a possible role here for the Council's existing enterprise and business advice team. Coventry and Warwickshire Chamber of Commerce (C&WCC) are also potential partners.

The council should consider how it can build local capacity to deliver peer support and encourage interaction between businesses. For example, there is no longer a local hotel association. This used to share valuable information on occupancy and best practice. Active tourism associations, perhaps coalescing around the towns, should be encouraged. These would be valuable sounding boards for new marketing activity. There is a natural linkage here between tourism and the work of the District's Town Centre Managers and Business Improvement District (BID) partners.

Tourism is a people business. If the industry is to achieve its growth targets it must attract the best young people and ensure they are equipped with the skills industry needs. This means promoting tourism as a career – the "employer of choice" – and investing in training. WDC will want to influence the work of key training providers such as Warwickshire College and, at a sub-national level, work with the LEP to draw down resources and support.

Summary of principal recommendations

- C1. Work with the Warwick District industry group towards the development of a sustainable private sector-led tourism body embracing sub-regional partners
- C2. Appoint a local champion to lead the development of a 3-year Destination Management Plan co-ordinating and focusing the work of all key partners
- C3. Represent the views of the District's tourism sector and advocate its importance to influence policy at local and national level
- C4. Institute a robust, objective performance measurement framework to gauge success against industry growth targets
- C5. Consider options to extend business advice and support to new start ups in the tourism sector
- C6. Exploit town centre partnerships and BIDs to engage local tourism businesses and encourage the formation of peer support networks and tourism associations
- C7. Work with partners to support the development of key skills needed by tourism businesses and to promote tourism as a career.

D. Visitor services: to enhance the quality of visitor information and welcome

Rationale

Visitor information services – such as Tourist Information Centres (TICs), information boards, local print and websites – have traditionally been run by the public sector. They often perform an important information role for local residents and, in combination with other civic functions, offer economies of scale which are not easily achieved by individual tourism operators.

Visitor information services provide a comprehensive, accurate and unbiased perspective of what the destination has to offer. They are the public “face” of the destination, which add to a sense of arrival and welcome. They help reinforce the character of an area and are designed to deepen the visitor’s understanding of the place.

Done well, they have a major impact on encouraging visitors to stay longer, spend more, and to return.

Role

WDC’s role is to deliver and enable a range of appropriate information and welcome services to guide and shape the visitor’s journey and experience of the District.

Visitors can only fully experience the destination if it is joined up by local transport and if they are fully informed about what is on offer.

Planning effective visitor services is a key role of the District Council and needs to be based around the “visitor journey”. This is a destination management model which traces the behaviour of visitors from the point at which they first choose to visit the destination, plan and then book, pack, travel and go, and then reminisce afterwards, and hopefully return. In other words, it puts the customer at the heart of the journey.

The “visitor journey” starts from home when planning and preparing to travel. Contact with a TIC by phone or email; websites offering detailed information and itinerary planning options; maps mailed in advance of travel – all these things help influence what a visitor does and how long s/he spends in the District. There is a natural synergy with the destination marketing role described earlier. Visitor services are the “Disperse” element of an “Attract and Disperse” marketing approach.

It is proposed that WDC should pursue an active visitor information role but it needs to be set in the context of a review of current visitor services. It is recommended that WDC commission a review of its visitor information services to take advantage of the latest best practice and explore the role of new technology in delivery.

Getting the balance right in planning visitor services is essential. Staffed information centres are usually the most costly element of a destination’s tourism service. The Council needs to be sure that it is maximising the return on investment from such services. Does the current investment in the centre at the Pump Rooms offer value for money? A thorough review is required to reappraise the business model and

assess alternative forms of delivery, perhaps in conjunction with Leamington Town Council.

There is a pressing need to review how the Council's tourism budget is currently allocated across the District to reflect the importance of Warwick as a hub. Putting local politics aside, from a pure tourism standpoint, the issue here is how can WDC maximise the return for the local economy from its investment in visitor services?

In recent years, the growth of new media has revolutionized the way destinations deliver their visitor services. Mobile phone technology and portable internet devices offer visitors new opportunities to access information where and when they want it.

This is an opportune time to review information systems. Nationally, Visit England has published its "Modernising Visitor Information" Action Plan and announced it will cease support for the EnglandNet platform, the national tourism product database which enabled destination data to be published on tourism websites at home and abroad. The technology will be made available for use by third parties to build new systems.

Through its DMO, Warwick District was one of the first to adopt a Destination Management System (DMS) to capture data about the area's tourism products for publication via EnglandNet and for use by TIC staff. With the demise of the DMO, the legacy private company ("Shakespeare Country") now owns the DMS assets and the area no longer has an official recognised online inventory of tourism services. This impasse is arguably the most important subject to resolve. It is felt that this is a key project for the LEP, working on behalf of all sub-regional partners. The most cost-effective solution is likely to be a sub-regional DMS to which all partners contribute.

The DMS is the key tool which helps the destination manage its interaction with visitors throughout their journey, from planning a holiday, through the visiting stage, to keeping in touch when they have gone home. Of course, there is a multiplicity of other suppliers involved in the visitor journey – accommodation operators, consolidator sites (such as Late Rooms), transport providers, attractions and so on. The review should take account of how destination data can effectively be integrated within third party websites to boost exposure for local businesses.

The concept of the "visitor journey" involves working with a range of partners to deliver timely information. Some of this requires a national lead, working with and through the LEP – for example, encouraging rail operating companies to develop their visitor information service for passengers. For the most part, it requires a local approach tailored to the needs of visitors and local circumstances.

Town Centre Managers are well placed to co-ordinate local visitor management initiatives – print, interpretation, signage, trails and so on – but this must be aligned to the marketing strategy (Section A above refers), so that work is "joined up" and avoids duplication.

WDC's focus should be on building information partnerships with local tourism providers. Sometimes, this is simply a matter of providing an information rack, but for the bigger players it could embrace a wider "ambassador" role, ensuring an excellent level of visitor welcome on the front line. Such schemes should form part of the wider review of visitor services advocated above.

Last, but by no means least, visitor information services must be modeled around what the market needs. Warwick District has a higher proportion of older visitors than other destinations. WDC will want to be sure that its provision caters adequately for those who are less able and is accessible to all.

Summary of principal recommendations

- D1. Review visitor services strategy in the District to ensure the right mix of information services, taking account of new business models and alternative delivery channels
- D2. Review the tourism budget to recognise the importance of Warwick as the District's premier visitor information hub
- D3. Encourage the LEP to instigate a review of visitor information systems to deliver a DMS solution which is supported by all partners in the sub-region
- D4. Co-ordinate local visitor management projects through Town Centre Management and BID initiatives
- D5. Extend visitor information services by working with local tourism operators
- D6. Ensure visitor services are accessible to all.

APPENDIX 1: NOTES OF STAKEHOLDER WORKSHOP

Warwick Arms Hotel, High Street, Warwick CV34 4AT

11.00am Wednesday 17th August 2011

Present: Sarah Baker, Mallory Court Hotel
Janet Baldry, Park Cottage B&B, Warwick
Heidi Briggs, English Heritage
Richard Drakeley, Warwickshire County Council
Tim Harrison-Jones, Warwick Castle
Liz Healey, Warwick TIC
Stephanie Kerr, Leamington BID
Jeremy Kynaston, Rose & Crown, Warwick
Cat Philpott, National Trust
Tara Robinson, Mallory Court Hotel
Louise Sheepy, Holiday Inn, Kenilworth
Holly Woodward, English Heritage

Also in attendance: Joe Baconnet and Matt Caddick (Warwick District Council)
Alex Holmes (Tourism Engineers, facilitator),

FEEDBACK NOTES

1. Vision: What are we trying to achieve? What are our key objectives and targets?

- Address confusion: who is doing what?
- Consistent partnership
- Extend stay. More overnight visitors
- Develop a strong identity for the area
- An umbrella brand with a strong message
- The boundary should be determined by the market
- Marketing further afield
- Generate repeat visits/VFR tourism linked to the University
- Encourage local people to visit: Days out on your doorstep
- Local businesses need to know what is going on
- Avoid competing events on the same date
- Better co-ordination
- Better linkage to Town Centre Management/inward investment
- A single website/portal
- Extend success of "Shakespeare's England"
- Inspiring message
- More destination content on private sector (e.g. hotel) sites
- Growth – better than 5% average pa for England
- Better packaging – accommodation and attractions/events
- Collective ownership by local tourism industry – supported by localities
- Backed by quality of experience
- Joined up product experiences

2. **Action:** What are the priorities for action to help us achieve this vision? What needs to change to achieve it?

- Need collective buy-in and ongoing consultation with our tourism sector
- Council backing and partnership
- Core visitor information – e.g maps
- Define the area by the markets – natural visitor geography
- Define marketing strategy
- Resolve the legacy of “Shakespeare Country”
- Partner according to the market targeted, e.g. corporate with Birmingham/Cov
- Days out with Coventry and Warwickshire
- Overseas with Stratford, Cotswolds, Oxford
- Need to build up tourism associations – network information, e.g. hotels assoc
- Monitor our success against targets, e.g. occupancy
- Clarify what a DMO looks like

3. **Roles:** Who should do what? Roles and responsibilities.

- WDC roles:
 - Promote the area. Synergy with inward investment marketing
 - Play positive planning role and support co-ordination
 - Support a climate of investment
 - Help shape and develop the offer
 - Advocacy – explain the value of tourism to members and residents
 - Support private/public partnership
 - Define the delivery structure
 - Provide linkages to other resources/tourism support bodies, e.g. BID