

WEST OF ENGLAND TOURISM DEVELOPMENT PLAN

EXECUTIVE SUMMARY

Context

Tourism is the world's biggest industry. In the UK, it accounts for 3.5% of the nation's economy with a value in excess of £80 billion, and employs 1.4 million people. Tourism is also an important part of the economy of the West of England accounting for 29,000 jobs and 6% of *GVA*, and generating over £1 billion in business turnover annually in hotels and attractions, in shops and restaurants, through transport providers and other local services.

The West of England is an important player within the region's tourism economy accounting for 13% of the South West's staying visitors, 25% of its overseas visitors and 19% of business tourism.

Although the West of England's tourism economy has grown spectacularly in the last 40 years, competition from both domestic and overseas destinations, and changes in the way consumers make decisions, as well as the demographic make up of the market, will present serious challenges in the future. Visitors' expectations in terms of quality and individuality will rise and emerging technologies will present opportunities to communicate with new markets, while the effects of, and responses to climate change will presents both opportunities and threats to the tourism industry.

The Tourism Development Plan is a part of the West of England's response to these challenges. It supports the West of England Economic Strategy and complements the regional tourism strategy *Towards 2015*. Importantly, it forms a key part of the foundations of the forthcoming destination management plans for Bristol and South Gloucestershire, for Bath and NE Somerset, and for North Somerset.

The plan provides an analysis of the sub-region's strengths and weaknesses, its priorities and potential, and opportunities for collective action that will help deliver a prosperous future for the sector.

Delivery of this plan will be co-ordinated through the West of England Partnership and delivered by the local authorities, the destination management organisations and their private sector partners.

The production of this plan was co-ordinated through the West of England Partnership and developed by *The Tourism Company* in collaboration with Bath and NE

Somerset Council, Bath Tourism Plus, Bristol City Council, Destination Bristol, North Somerset Council, South Gloucestershire Council and South West Tourism.

The plan was funded by the South West Regional Development Agency.

Where we stand

The West of England has a strong tourism offer although it is not a single coherent tourism entity. It presently exists as a collection of complementary but individual, mainly urban destinations, surrounded by attractive countryside and both rural and coastal towns and villages.

Its core strengths are:

- Accessibility by road, rail and air
- A large, relatively affluent and growing population and a buoyant economy
- Bath and Bristol, destinations with a national/ international profile, a distinctive sense of place and high quality urban environment
- A diversity of attractions with some major draws and particular strengths in heritage, culture and shopping
- A well established programme of high quality and popular festivals and events
- A substantial accommodation base
- Professional and focused destination marketing and management organisations
- Well developed plans to deliver major capital cultural and leisure projects that will improve its competitive position

Its principal weaknesses are:

- Labour supply and skills shortages, exacerbated by the strong local economy
- Few iconic/nationally known attractions
- The quality of some of the accommodation stock in the middle and lower ranges
- The declining staying visitor market in Weston-super-Mare
- The lack of purpose-built conference and exhibition facilities
- Lack of suitable development sites in the urban areas

The challenges ahead

The tourism industry in the West of England faces a number of challenges:

- Increasing competition, both at home and abroad, from existing and new destinations
- Limited prospects for organic growth in the market
- Delivering sustainable tourism development
- The changing expectations and aspirations of visitors

- Communicating with consumers in ways that exploit every available technology
- Constraints on public sector spending that impacts on the resources available for marketing, and maintenance and improvement of the public realm

A sustainable tourism sector

Growth in both the volume of visitors and unit spend is necessary to support the planned expansion of retail and cultural infrastructure, stimulate new investment in the product, and create a thriving and sustainable tourism sector which will benefit the region as a whole.

But this growth must be balanced by increasing the adoption of more environmentally sustainable operating practices by service providers and measures aimed at reducing carbon emissions arising from tourism visits.

In essence this means:

- Encouraging appropriate investment to enhance the sub-region's appeal to visitors
- Securing growth in volume as well as increasing value
- Improving quality so that tourism enhances the image and standing of the sub-region
- Looking for synergy between the requirements of visitors and the needs of the local community, and supporting investment which benefits both

Vision and principles

This West of England Tourism Development Plan focuses on supporting the vision adopted by the West of England Partnership-

Our vision is that by 2026, the West of England will be one of Europe's fastest growing and most prosperous sub-regions that has closed the gap between disadvantaged and other communities driven by major developments in employment and government backed infrastructure improvements in South Bristol and North Somerset.

The plan is founded on the underlying principles of the West of England Economic Strategy:

Delivery through partnership

Tourism is a highly complex sector that depends upon a network of independent yet interdependent, service providers. Numerically, it is dominated by small businesses, but it is major flagship projects that more often than not act as catalysts for tourism visits. To succeed, the industry

needs to increasingly work in harmony and through partnerships, both within destinations and across the sub-region to respond to future challenges

Sustainable economic growth

Tourism by its very definition is about the movement of people, and usually involves the discretionary use of resources. High or inappropriate levels of tourist visits can also contribute to the degradation of important sites and increase traffic congestion. But at the same time, tourism and supports thousands of local jobs, and underpins services, shops and local heritage projects that benefit local people and which would, without visitor spend, be unviable.

A successful and sustainable tourism sector is one that balances these competing pressures and delivers a high quality and distinctive product, while through modifying visitors' behaviour patterns, minimises their contribution to climate change.

Regenerating communities

The effects of a successful tourism sector are felt throughout the host community. However, many of these benefits of a thriving tourism sector have in the past, tended to be felt most obviously in relatively small areas - areas that attract visibly high concentrations of visitors. Opportunities exist to spread these benefits to support the regeneration of rural communities and smaller towns and villages, and ensure that the impact of greater visitor spend is felt in deprived communities throughout the West of England.

Destination brands

Marketing will be led at the destination level by 3 discrete brands - Bath, Bristol and Weston-super-Mare.

Although the main marketing focus will remain on the urban centres, there is potential to develop and exploit the linkages between the urban areas, and between the urban areas and the nearby countryside which brings another dimension to the product, and which can add value and encourage extended stays.

The message will be about complementary destinations which offer a total quality experience in a distinctive and attractive setting - places to stimulate the senses, refresh body and mind, providing an eclectic mix of enriching and enjoyable experiences.

Delivery

The West of England is committed to the delivery of its tourism priorities through the destination management organisations, and to supporting the priorities of the regional tourism strategy Towards 2015:

- Providing a quality experience to visitors through a skilled workforce and high quality products and services
- Delivering truly sustainable tourism that benefits the host communities
- Developing effective destination management organisations that work collaboratively with local and regional partners

Strategic priorities

A number of strategic priorities have been identified, that will be delivered through sub-regional collaboration, and will provide broad benefits to the tourism industry across the West of England:

Research

Work will be undertaken to develop a better understanding of the 'internal' market within the West of England, to assess the interdependence of local populations and tourist attractions, and the degree to which attractors operate in a complementary way.

The research will be extended to assess the dependence of the sub-region's tourism economy on markets outside of the West of England within the south of England

Sustainable tourism development

Proposals will be developed to formulate a 'green tourism' strategy for the West of England aimed at promoting sustainable business practice, community acceptance of tourism, locally produced goods, and low-impact behaviour patterns by visitors to the sub-region.

Events and festivals

The West of England hosts one of the most diverse and exciting programmes of events and festivals in the UK, yet this lacks any central co-ordination or programming, and little cross-promotion occurs. Action will be taken to improve forward planning to drive the development of a 52 week year programme of events, festivals and celebrations.

Improvements in the public domain

Many of the services provided by local authorities are core elements of the visitor experience and it is essential that the impact that these have on the tourism sector is understood at all levels. Services that are of greatest significance to the tourism sector are car and coach parking, traffic management, public toilets, signage and information, street cleanliness, and public safety. Action will be taken to evaluate the level by which destinations are meeting visitor needs and appropriate interventions planned.

Defining the principal attractors

While the West of England benefits from location related, environmental and historical strengths, it is the buildings, attractions, cultural programmes and

events, which provide the key triggers for most tourist visits. It is important that the principal attractors are defined and supported.

Work will be done to identify these key attractors, based upon their:

- High existing volume of visitor numbers
- Uniqueness
- Potential for future growth
- National or international importance

Gaps in provision

If the West of England is to remain competitive, action must be taken to rectify deficiencies in its product offer. This means supporting the regeneration of the retail sector in Bristol and Bath, delivering new cultural venues, conference centres or convention hotels, and developing at least one or two new iconic attractions of national significance.

The story lines

Through their promotion of tourism, the destination management organisations communicate with millions of visitors. The adoption of a common set of story lines that reflect the unique combination of strengths and aspirations of the West of England will improve the coherence of marketing message.

Key themes will include:

- Events and festivals
- Arts and heritage
- Food
- Sustainability
- Access to countryside
- Contemporary culture

Traffic signage

The four unitary authorities having adopted policies on brown and white traffic signing, and the opportunity exists now to review policies to develop an agreed approach to cross-boundary signing.

Developing people

The Tourism Skills Network is responsible for co-ordinating the development of workforce development programmes for the tourism sector across the South West. A new regional plan has been commissioned by the South West RDA and is scheduled for publication in 2007 and this will identify the main priorities for skills development in each of the sub-regions.

In the West of England, this will be expected to address key craft skills shortages, facilitate the development of higher level management and supervisory skills, and the needs of migrant workers as well as measures to improve the quality of visitor welcome,

Delivery of the strategy will be co-ordinated through the sub-regional Tourism Skills Network steering group.