



# **TOURISM STRATEGY FOR WORCESTERSHIRE 2002-2005**

**AUGUST 2002**

\* Worcestershire Tourism is a partnership between Worcestershire County Council, Bromsgrove District Council, Malvern Hills District Council, Redditch Borough Council, Wychavon District Council, Worcester City Council and Wyre Forest District Council

# **TOURISM STRATEGY FOR WORCESTERSHIRE 2002-2005**

## **CONTENTS**

<b>Section 1</b>	<b>Tourism in Worcestershire</b>	<b>3</b>
<b>Section 2</b>	<b>The outcome of consultation with Tourism stakeholders</b>	<b>6</b>
<b>Section 3</b>	<b>Meeting the challenge – the Tourism Strategy for Worcestershire 2002-2005</b>	<b>12</b>
<b>Section 4</b>	<b>The Action Plan</b>	<b>17</b>
<b>Appendices</b>		<b>22</b>

## SECTION 1

# TOURISM IN WORCESTERSHIRE

### 1.1 Introduction

Worcestershire County Council has taken the lead in producing this strategy for tourism in Worcestershire. It has collaborated with the District Councils and consulted key stakeholders to produce a strategy document which is intended to support and guide all local authority tourism work over the next three years.

This strategy offers an agenda for greater partnership working between Worcestershire's local authorities, the tourism sector and other bodies. Its success will depend on the commitment which all partners bring to the support and development of this increasingly important area for both visitors to and residents of the county.

### 1.2 What is tourism?

Tourism is usually **defined** as:

The temporary short-term movement of people to destinations outside the places where they normally live and work and the activities during their stay at these destinations.

Tourism is a growing concept and **covers a broad range of activities**. *Tomorrow's Tourism* (Department for Culture, Media and Sport, 1999), the government strategy for tourism, states that:

'For most of us 'tourism' is simply the business of going on holiday. But tourism covers a multitude of leisure-time activities ranging from sightseeing and shopping to attending sports events or visiting friends and relatives. Now film tourism, farm tourism, specialist activities and interests of every kind are extending tourism in new ways and into new regions. Business conferences, trade fairs, study courses and language learning spread the net wider still.'

In order to ensure the long-term benefits of tourism to local areas and their economies it is important that tourism in Worcestershire is developed on a sustainable basis. The World Tourism Organisation defines **sustainable tourism** as:

Sustainable Tourism development meets the needs of the present tourist and host regions whilst protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that the economic, social and aesthetic needs can be fulfilled whilst maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.

This strategy seeks to support tourism in its many established and newer forms and to ensure that it develops in a sustainable way.

### 1.3 The economic importance of tourism

One important reason for producing this strategy is that tourism is a vital part of the Worcestershire economy and its healthy growth will benefit the local economy. Based on a 1997/8 survey, the key facts about Worcestershire's tourism economy are:

- 12.9 million visitors come to Worcestershire each year
- Only 11% of these visitors stay overnight with the large majority on a 3 hour or more trip from home or a holiday base
- An estimated total of £399 million was spent by these visitors to Worcestershire
- This expenditure supports 11,370 jobs directly and a further 4,200 non-tourism jobs dependent on the 'multiplier effect' from tourism
- Tourism supports jobs directly in five key business sectors in the county, these are accommodation, retailing, catering, leisure/attractions/entertainments and transport services

*(An appendix sets out a detailed breakdown of these visitors and their economic contribution.)*

Tourism in Worcestershire is **part of an important global business**, for example:

- Travel and tourism account for 4.4 per cent of the world's GDP and tourism is due to become the world's largest industry (World Travel & Tourism Council, 1999).
- The World Tourism Council estimates that tourism accounts for 3.1 percent of direct employment, or 8.2 per cent when 'multiplier effects' are taken into account.
- In the European Union, tourism is proportionally of even greater importance, representing 5.5 per cent of GDP and 6 per cent of all employment – or 9 million jobs.
- Here in the UK, tourism expenditure is estimated at £63.9 billion (DCMS, 2000), whilst the 'value added' by the tourism industry is estimated to account for between 4 and 5 per cent of UK GDP.
- Tourism is a growing employment sector, 1.86 million people are directly employed in tourism in the UK, 7 per cent of all employment, up from 1.2 million employed in 1984.

### 1.4 The wide contribution of Tourism to the county

Tourism also has **wide-ranging benefits**, for example, *Tomorrow's Tourism* (DCMS, 1999) suggests that tourism can bring real benefits particularly to areas where traditional industries or agriculture are in decline. It can contribute to:

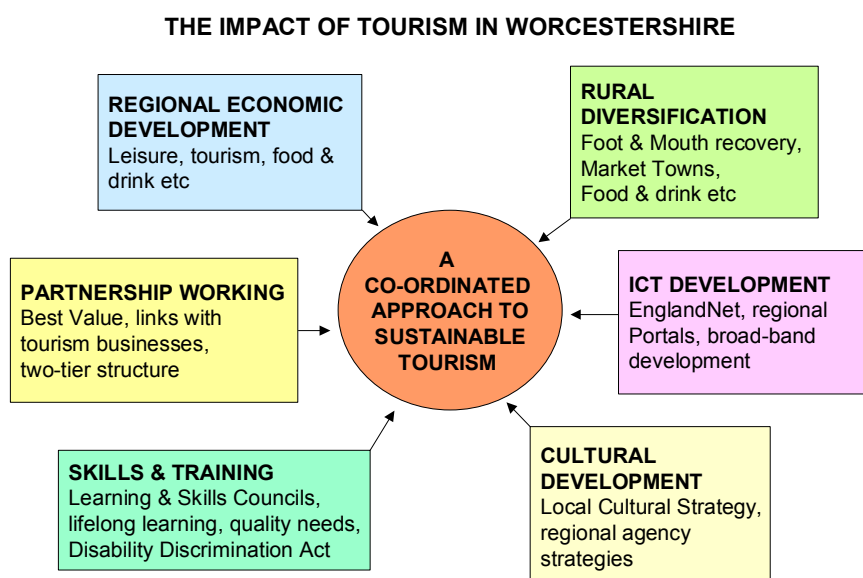
- The regeneration of urban and rural areas
- The preservation and re-use of existing resources (such as historic buildings)
- The protection and enhancement of the local environment
- Maintaining the economic viability of local businesses (through increasing sales, diversification of farm activities, for example)

These and other benefits are available to Worcestershire with the development of its tourism industry, this **wider contribution** includes;

- Linking with initiatives to make public services and information electronically available to everyone ('e-government') and with national tourism internet initiatives like EnglandNet
- Helping to revitalise market towns and villages and contributing to rural diversification
- Linking to and supporting cultural strategies that seek to improve quality of life and leisure
- Supporting initiatives for increasing access for disabled people to all facilities and activities
- Being an important focus for skill development and employment initiatives
- Forming an important area for local authorities to work in partnership with the private sector and other public sector bodies and with regional development agencies
- Contributing to Worcestershire's local authority role in supporting the economic, social and environmental well-being of its communities.

*(An appendix summarises the policy context for tourism strategies in more detail.)*

Support for tourism is not a marginal or isolated activity. It is **linked to a wide range of issues that are being addressed and which can contribute to the well-being of the county**. The diagram below illustrates the links and the potential impact that a healthy and vigorous tourism sector can have in Worcestershire.



## SECTION 2

# THE OUTCOME OF CONSULTATION WITH TOURISM STAKEHOLDERS

### 2.1 Introduction

An important step in developing this strategy has been to investigate the views of those involved with tourism in Worcestershire, for example: providers of accommodation and visitor attractions; policy makers and planners within the county and in regional bodies, Tourism Officers and other Local Authority staff.

Consultation in developing the tourism strategy has covered:

- a) meetings with the Tourism Officers and other key officers in each Local Authority
- b) face-to-face and telephone interviews with stakeholders within the local authorities, in regional and other bodies and tourism providers
- c) a presentation to and facilitation of three workshop sessions at the Tourism Forum in April 2002
- d) a questionnaire distributed to key stakeholders including private sector providers
- e) review of the residents' survey carried out in 2001 for the Worcestershire Cultural Strategy
- f) comments on a consultation draft circulated in July 2002.

This section will focus on the outcome of this extensive programme of consultation with these tourism stakeholders. It will summarise what they felt are the major barriers to, and opportunities for, tourism in Worcestershire.

*(Fuller details of the findings are attached as an appendix to the Strategy.)*

### 2.2 Worcestershire's strengths

Worcestershire has widely recognised strengths. Stakeholders were very clear about the county's assets which include:

<b>Strengths</b>
Geography and natural beauty
History and heritage (including historic houses, Cathedral, Civil War links)
Central location, good road transport (motorways)
Shopping and retail
Visitor attractions
Arts and culture
Food and drink
Sport and leisure
Some good conference facilities
Family appeal

Stakeholders also valued the work of council Tourism Officers, and appreciated their achievements within the limited financial and staffing resources available to them.

### 2.3 The opportunities for tourism

Stakeholders reflected that this is an exciting and important time to be reviewing how tourism is supported in the county. Stakeholders pointed to a **wide range of opportunities**:

- Tourism as part of the **cultural and creative economy is a growth sector** in both Europe and the UK and it is an industry which is currently high on the Government's agenda
- The county has a **great wealth of assets** listed above and the **road links** with potential markets are good
- There are **important growth and value-added tourism markets** that Worcestershire is well placed to develop and benefit from (including cultural or heritage tourism, food and drink, business and conference visitors, longer-term stays)
- Potential links with **regional initiatives like Birmingham's Capital of Culture** bid and promotion by urban centres of surrounding rural areas
- Great potential for the development of **new tourism product**: sports tourism in Redditch, for example, with the major new facilities planned for Abbey Stadium
- Worcestershire could reap benefits from **raising its profile** and a more distinctive identity for visitors
- More can be achieved through **effective management of visitors** to spread impact and spending around the county
- **Advantage West Midlands, the Regional Development Agency, is leading on regional economic development**, making funding available to support tourism and related industries
- There are **models of good practice**, both within the county and in neighbouring counties
- There is **support for local authority involvement in tourism** and for **partnership working** to make a greater impact through marketing and promotion, tourism development and research.

### 2.4 Some key concerns

Stakeholders identified a number of key concerns or what they believed were serious barriers to progress in creating a dynamic approach to tourism development. These included:

- Lack of a **clear image, profile or identity for Worcestershire** as a whole
- Lack of **clear vision and leadership** on tourism and few strong partnerships
- Insufficient **high-level political support** for the tourist industry

- Lack of **funding and investment** in tourism (for product, promotion and infrastructure): this needs to be linked to economic development
- Shortage of **collaborative thinking and working** on tourism, across the county and beyond its boundaries
- Need to **raise aspirations and to target excellence**, especially in Small to Medium Enterprises (SMEs) and in rural areas, and seek to raise basic business skills training
- Need to address **poor quality** of what's on offer and of service standards in customer care
- There should be a move towards a **customer's eye-view** of what it is like to be a visitor to Worcestershire
- There is a recognised **lack of longer-stay visitors** (4-5 nights) and hotels to accommodate these
- The need to **promote sustainable tourism**, including promotion of a wider range of visitor destinations and management of well established and busy attractions including traffic
- The tendency to **overlook the potential business and conference tourism market**

## 2.5 Tourism Forum, April 2002

This county-wide gathering (in three workshop sessions) raised a number of issues including:

- a) Everyone involved in tourism should recognise the interdependency between the interests of the tourism sector and the wider community and that issues like the quality of the environment are important both for residents and visitors
- b) Tourism and its small and medium enterprises make a major economic contribution which needs to be valued, and links and networks should be fostered in order to work more closely with local authority functions like planning
- c) Tourism is everybody's business!
- d) Worcestershire's key strengths - which include its countryside, heritage and cultural links - need pro-active niche marketing, together with valuable markets like conference and business tourism
- e) Worcestershire should be promoted as one brand emphasising its diversity - with a matrix of themes and sub-brands within it
- f) Marketing needs to be more focused on key growth areas, such as cultural tourism and special interest tourism, to make better use of new media, and to be based on effective partnerships

- g) A high quality experience for visitors depends on a range of factors including good information, service training, visitor management and facilities – Worcestershire should develop an holistic and strategic approach to use of limited resources

## 2.6 The Stakeholder Questionnaire

The questionnaire was distributed to about 50 stakeholders identified by Tourism Officers and the results reinforce the findings of both the interview programme and the forum session. When asked about weaknesses and gaps in the tourism offer, the respondents identified the following (ranked in order of importance):

<b>Weakness</b>
Image and marketing
“Where is Worcestershire?”
Lacking hotels and quality accommodation
Poor coach and bus services
Appeals more to older generation
Under-developed riverside in Worcester
Poor rail links
Limited range of attractions in some parts of the county
Parking problems including cost
Lack of international ‘Icon’

### **Gaps**

Respondents were also asked about gaps in tourism support and provision in the county. Respondents listed a number of perceived gaps (also ranked in order of importance) including the following:

<b>Gap</b>
Branding and marketing
High quality hotels
Co-operation between service providers
Activities for children and younger people
Signposting
Year round activities
Lack of international ‘Icon’

### **Open question on key concerns**

An open question asking what stakeholders saw as key concerns drew the following key points:

- The lack of any **orchestrated campaign celebrating the Worcestershire experience**, which develops national awareness of location and is marketed centrally
- The need to **develop more accommodation, especially for business and longer-stay** trade
- Greater effort to create a **family-orientated product**
- The need to raise the **profile of Tourism Officers within councils**

- **The need to create a tourist information pack** that builds a picture of Worcestershire and raises its profile nationally
- The desire to see **still greater co-ordination** from all bodies, district, county, and regional
- Improvement in **research, understanding and targeting of key markets**
- **Better recognition** by all councils of the financial value of tourism to Worcestershire

## 2.7 Comparisons with previous consultation on tourism

Respondents to the questionnaire were asked to put issues identified in earlier consultation in order of priority, the results were:

Issue	Priority
Create a stronger image/building brand identity for Worcestershire	1
Make Worcestershire a year round destination	2
Create a more complete experience for visitors	3
Reduce dependency on day visitors & increase overnight visitors	4
Compete in conference/business visitor market	5
Identify additional funding	6
Reduce dependency on cars & encourage more sustainable transport	7
Improve provision for those with a disability	8

## 2.8 What should the Tourism Strategy deliver?

Overall, stakeholders were clear in identifying what they felt are the most important challenges facing the industry. The improvements they look to the strategy to make reflect the concerns already summarised. These include:

- **Create a strong image and improve awareness of Worcestershire** and its location, aiming to attract all ages
- Develop the **existing and potential strengths of the county**, for example as a destination, for sport, recreation and industrial heritage
- Unite **many attractions to create a package**
- Generate a **coherent approach to fostering quality** tourism in the area
- Ensure **infrastructure is improved and support transport and access**: give real support to lobbying for building bus/coach stations and redeveloping the railway stations
- Be clear in **communicating strategic direction to service providers** so they can support the strategy correctly
- **Improve the visitor experience**

- **Integrate tourism, leisure and business**
- Improve **brand awareness of major attractions**
- Promote the **cultural strengths** of the county to visitors
- Bring **more overnight visitors** to the area
- Work with the Learning and Skills Council to **develop a tourism training strategy** for Worcestershire

## **2.9 How should Local Government focus its efforts?**

The stakeholders (including partners, providers and regional bodies) are clear about what local councils should try to achieve in working with them, highlighting many of the key concerns and opportunities already identified:

- Develop and **promote an overall identity and image** for Worcestershire
- Focus on **practical support for initiatives** aimed at the providers and visitors
- Build **customer focus, build links with the providers**
- Identify **significant levels of funding** to be effective
- Develop **common goals across all tourism bodies**
- Give support **for better networks** including considering a **possible partnership body** and better links with planning and economic development
- More **concerted action is needed on co-ordination of public transport and access**
- **Commissioning of longer-term planning and research** on the future development of leisure and tourism
- **Raise standards and professionalism and co-ordination of effort**, for promotional material, signage, Tourist Information Centres, web access for example

### SECTION 3

## MEETING THE CHALLENGE – THE TOURISM STRATEGY FOR WORCESTERSHIRE 2002-2005

### 3.1 The mission and policy aims for tourism support in Worcestershire

Tourism is a key part of Worcestershire's economy and it can deliver many economic, social and environmental benefits.

The overall **mission** for work in supporting tourism is:

**To help provide a high quality experience for all our visitors and to bring economic, social and environmental benefit through a growing and sustainable visitor economy.**

This strategy seeks to help fulfil this mission. It is guided by **five policy aims** which are:

To **increase the income from tourism** through increasing visitor spend and reducing the seasonality of visits

To **increase the range and number of places and activities which attract visitors** thereby increasing the benefit to local businesses and lessening any adverse impact on established 'honey pot' destinations

To **build partnership working** between local authorities, with the tourism sector and other agencies concerned with tourism to ensure an effective strategic approach

To **strengthen links and co-ordination between tourism support and other initiatives** including Community Plans, Economic Development, and Cultural Strategies

To ensure **value for money and effective use of the limited resources** available to support tourism in the county.

### 3.2 The strategic priorities

Set out below are the challenges that the strategy needs to respond to and the strategic priorities and the key actions that will be taken during the period of this strategy by Local Authorities and their partners.

The strategy needs to focus on the most pressing challenges and grasp those opportunities which offer most benefits to the county and its visitors. From the extensive consultation and review work carried out, **four strategic priorities** for the Worcestershire tourism strategy have been identified:

- A: Build a strategic approach to supporting tourism**
- B: Address quality issues in tourism**
- C: Provide effective support to tourism businesses**
- D: Work for a sustainable future for tourism in Worcestershire**

### **Priority A: BUILD A STRATEGIC APPROACH TO SUPPORTING TOURISM**

Changes in the economic and political working environment demand a more strategic approach to how local authorities and their partners work to support tourism development. The strategy must address challenges and current weaknesses which include:

- The changing policy context set by central government and regional bodies to which the tourism strategy needs to be closely linked if it is to make a major impact on development in Worcestershire
- Growing competition for visitors from other areas, including immediate neighbours
- Missed opportunities resulting from the county's weak image or identity
- The limited resources available for tourism support and development and the low place in council hierarchies for local authority Tourism Officers
- The perception of unclear and overlapping responsibilities between the County and District Councils
- The willingness of the private sector to work in greater partnership with an expectation that tourism support will be delivered effectively and in a coordinated way

To respond to these challenges and **to build a more strategic approach to tourism support in Worcestershire** we will:

**A1:** Seek widespread adoption of this strategy and promote the value of tourism to key decision makers in all local authorities and other key partner agencies

**A2:** Carry out a thorough review of how tourism support is currently delivered within the county by the County and District Councils and identify structures and ways in which strategic and partnership work can be most effectively delivered

**A3:** Develop a programme of profile raising for the county including a joint project with the county wide Economic Development Partnership to raise awareness of and to create a positive image for the county to potential visitors and investors

**A4:** Identify ways in which we can work closely with regional agencies, especially Advantage West Midlands and cultural development organisations, to ensure that tourism in the county benefits from leisure and tourism sector, rural and cultural development programmes

### **Priority B: ADDRESS QUALITY ISSUES IN TOURISM**

We operate in an increasingly competitive market which is characterised by rising expectations among visitors and increasing variety and quality among tourism competitors and other leisure activities. The quality of our tourism offer, its facilities and services, is a key concern if we are to continue to compete. We need to address a number of quality challenges including:

- Quality in tourism businesses and associated businesses, including accommodation, information and service varies considerably across the county
- Not all accommodation businesses see the need to become inspected and many other businesses do not address quality issues in a recognised way
- At present local authorities have a rather passive approach to non participation in quality and registration schemes, often simply not including businesses in guides and other promotional literature if not inspected
- There is a very low priority given to disability access issues by many tourism businesses and recent training in preparation for the Disability Discrimination Act has been poorly taken up

To respond to these challenges and **address quality issues in Worcestershire's tourism sector** we will:

**B1:** Develop a pro-active approach to quality and registration schemes, seeking ways to positively encourage businesses to participate in service and quality improvement and registration schemes

**B2:** Seek to work with other quality schemes run by other bodies to facilitate common promotion of such schemes to tourism businesses

**B3:** Develop a joint approach to create awareness of disability issues among tourism businesses and develop effective training and preparation for the implementation of the Disability Discrimination Act in 2004

#### **Priority C: PROVIDE EFFECTIVE SUPPORT TO TOURISM BUSINESSES**

The strategy needs to identify ways to support the extensive range of businesses that make up Worcestershire's tourism sector. There are a number of challenges which need a response including:

- The reliance on day visitors and low spending visitors within Worcestershire
- Limited attention to and information about development of business and conference tourism and other niche and/or growth markets that may reduce seasonality and increase visitor spend
- The need to fully grasp opportunities for extending use of ICT, for example linking with regional initiatives such as information 'gateways'
- Concern within the sector about the perceived unfair or bureaucratic application of planning and highways guidance on signage and some tourism development proposals

To respond to these challenges and **provide effective support to tourism businesses in Worcestershire** we will:

**C1:** Establish an annual programme of priority research on potential tourism development areas (eg conference and business tourism, cultural tourism, special interest visits including food and drink), seek with partners to fund research which will be of assistance to the future planning of tourism businesses and disseminate the results of research widely to businesses

**C2:** Identify ways in which the tourism sector can benefit from regional and county development programmes such as the regional technology corridors,

business and conference development and regional promotional programmes and promote the involvement of the tourism sector in these programmes

**C3:** Work jointly with other local authority departments including planning and highways to ensure that the needs of tourism businesses are recognised and that planning, signage and other regulations seek to respond to their needs wherever this does not conflict with other policies

**C4:** Work jointly and with county and regional partners to maximise the benefit of ICT development for tourism businesses and visitors drawing on the professional expertise of local authority ICT departments and other agencies.

#### **Priority D: WORK FOR A SUSTAINABLE FUTURE FOR TOURISM**

Tourism is one of the county's key business areas and we need to ensure that it continues to develop and has a beneficial impact on the economic, social and environmental development of the county. In seeking a sustainable future for tourism in Worcestershire there are a number of challenges that the strategy needs to respond to, including:

- The tourism business sector is characterised by small and diverse businesses many of which are sole traders and most of whom will have skill and business development needs at some point
- The tourism business is not always attractive to those seeking a career due to seasonality, low pay and lack of clear entry routes and career paths
- There is a need for visitor management in some of the more popular and environmentally sensitive areas to protect the environment and maintain a balance with residents' interests
- There is a need to extend the range of places to which visitors to the county are attracted
- There is a heavy dependence on car use by visitors and limited opportunities, nationally or regionally, for seriously reducing this.

To respond to these challenges and to **work for a sustainable future for tourism in the county** we will:

**D1:** Work with key partners in economic development and skill development and training organisations to ensure that business and skill development needs of tourism businesses are identified and provided for

**D2:** Explore how we can jointly support and extend visitor management initiatives by local authorities and other agencies (such as the Malvern Hills Area of Outstanding Natural Beauty)

**D3:** Work with cultural and other organisations to broaden the number and range of destinations and activities that can be promoted to visitors across the county

**D4:** Encourage walking, cycling, the development of 'quiet lanes', public transport interchange points and coach parks and other transport initiatives that strengthen our appeal to visitors.

**D5:** Identify ways in which we can increase the benefit of tourism to local businesses including building on existing support for the promotion and use of local food and drink by local tourism businesses, support for local food markets and for local branding of produce.

## SECTION 4 ACTION PLAN

The Worcestershire Partnership will take overall responsibility for ensuring that this Strategy is implemented. Successful implementation will require input by all local authorities and a wide range of other agencies. This Action Plan sets out a framework for ensuring successful implementation of the strategy's priorities.

For each strategic priority and key action identified:

The **Lead body or agency** is shown in **bold** in the tables. Other bodies or organisations are the key partners in implementing the action.

The human and financial **resources** (existing or potential) are indicated. However this will not be an exhaustive list in most cases and it will be up to lead bodies and partners to fully explore available resources from the wide range of national, regional and county programmes some of which may become available during the timescale of this strategy.

An indicative **timescale** for completion of key actions is indicated as follows:

Short-term:	within 6 months to a year
Medium term:	within 1 to 2 years
Long term:	within 2 to 3 years

Potential **outputs** are identified and it will be up to lead bodies and partners to further develop outputs, milestones and performance measures appropriate to the detailed programme of action once agreed.

The strategy will be **reviewed after one year** to assess progress and to further develop objectives and key actions.

Strategic priority	Key action	Lead & partners	Resources	Timescale	Outputs
<b>A: Build a strategic approach to supporting tourism</b>	A1: Seek widespread adoption of this strategy & promote to key partners	<b>All Local Authorities (LAs)</b> Worcestershire Partnership The tourism sector	LA Tourism Officers Senior corporate officers Member portfolio holders	Short	Adoption of Strategy by all LAs by end 2002  Promotion to key partners including private sector businesses by end 2002  Initial review and further development of Action Plan outputs by end 2002  Review commissioned by end 2002 and completed mid 2003.  Future structure agreed by late 2003 and initiated by end 2003
	A2: Carry out thoroughgoing review of how tourism support is delivered & identify how strategic & partnership work can be effectively delivered	<b>Worcestershire Tourism partners</b> Tourism sector AWM, Heart England Tourist Board Regional cultural, countryside agencies	LA Tourism Officers Senior corporate officers Member portfolio holders	Short & Medium	Agreement with Economic Development Partnership on project by late 2002  Profile raising programme in operation early 2003
	A3: Develop programme of profile raising including a joint project with Economic Development Partnership to promote county	<b>Worcestershire County Council</b> All LAs Econ. Devel Partnership Worcestershire Partnership	LA Tourism Officers ED Partnership members & ED funding programme	Short and ongoing	Discussions with agencies completed by end 2002  Ongoing programme of involvement implemented beginning of 2003
	A4: Identify ways to work closely with AWM, cultural agencies etc to benefit from sector and cultural development programmes	<b>Worcestershire County Council</b> All LAs AWM, West Midlands Arts, Sport England, Area Museum Council (new successor body)	LA Tourism and Cultural Officers AWM, LA and agency funding	Short and ongoing	

Strategic priority	Key action	Lead & partners	Resources	Timescale	Outputs
<b>B: Address quality issues in tourism</b>	B1: Develop a pro-active response to quality and registration schemes & encourage businesses to participate	<b>Worcestershire Tourism partners</b> Tourism sector Quality/registration agencies	LA Tourism Officers Registration/quality scheme officers	Short and ongoing	Programme to encourage participation in quality schemes promoted to tourism businesses by mid 2003  Increased number of tourism businesses involved in schemes by end 2003
	B2: Seek to work with other quality schemes to facilitate common promotion	<b>Worcestershire Tourism partners</b> Tourism sector Quality/registration agencies	LA Tourism Officers Other quality agencies	Medium and ongoing	Common approach agreed with other schemes by end 2003  Promotion to tourism sector from end 2003 onwards
	B3: Create awareness of disability issues and develop effective training for DDA	<b>Worcestershire County Council</b> LA Tourism Officers Disability sector/trainers Tourism sector	LA Tourism Officers LA and partner training budgets	Short and ongoing	Agreed approach by LAs & partners by end 2002  Training programme developed by early 2003  Higher number of tourism businesses trained during 2003

Strategic priority	Key action	Lead & partners	Resources	Timescale	Outputs
<b>C: Provide effective support to tourism businesses</b>	C1: Establish an annual programme of priority research and development areas, seek to fund research and disseminate results to tourism businesses	<b>Worcestershire County Council</b> LA Tourism Officers Economic Development Officers AWM, BACD, HETB Tourism sector	LA Officers, research funds from partners	Short and Medium	Research priorities identified for 2003 by end 2002  Research programme(s) funded by mid 2003  Results disseminated from late 2003
	C2: Identify ways in which tourism can benefit from regional programmes and promote involvement of tourism sector in these programmes	<b>Worcestershire County Council</b> LA Tourism Officers Economic Development Officers AWM, British Assoc. Conf. Destinations, HETB Tourism sector	LA Officers Economic Development & cultural programmes/funds Partner Officers and funds	Medium and ongoing	Discussion with agencies and review of programmes and opportunities for tourism completed by early 2003  Promotion of opportunities and involvement early 2003 onwards  Review of extent of involvement and emerging opportunities on annual basis from late 2003
	C3: Work with other LA departments to ensure needs of tourism business are recognised	<b>LA Tourism Officers</b> , Planning & other LA Officers Tourism sector	LA Officers	Short and Medium	Discuss strategy with key Officers and identify key issues early 2003  Regular consultation, 2003 onwards
	C4: Work jointly to maximise benefit of ICT development	<b>Worcestershire Tourism partners</b> LA Tourism Officers LA ICT and PR Officers AWM, HETB, Learning and Skills Council, etc	LA Tourism Officers LA & partner ICT resources	Medium and ongoing	Review current ICT provision by mid 2003 with key ICT Officers and agencies  Develop proposals for coordinated access for tourism businesses, visitors and residents to ICT portals etc end 2003  Demonstrate increase usage and profile in 2004

Strategic priority	Key action	Lead & partners	Resources	Timescale	Outputs
<b>D: Work for a sustainable future for tourism</b>	D1: Work to ensure that business development and training needs are identified and provided for	<b>Learning &amp; Skills Council</b> LA Tourism Officers Econ Devel Officers Tourism sector Training agencies	LA Tourism Officers LA & partner training resources	Medium and ongoing	Establish review of business & training needs by mid 2003 Ensure inclusion of tourism sector needs in programmes from mid 2003
	D2: Jointly support & extend visitor management initiatives and other measures that address environmental impact issues	<b>Lead dependent upon activity</b> LA planning, countryside officers Malvern Hills AONB	LA & partner programmes and funding	Medium and Long	Establish annual review of visitor management programmes by mid 2003 Agree objectives and support programme late 2003 onwards
	D3: Broaden number and range of destinations & activities promoted to visitors	<b>Worcestershire Tourism partners</b> LA Tourism Officers LA Cultural Officers Tourism & cultural sector	LA and partner programmes, publicity	Medium and Long	Identify joint programme of work with cultural Officers by mid 2003 Promotion of wider range end 2003 onwards
	D4: Encourage walking, cycling, quiet lanes, public transport and coach parties that strengthen appeal to visitors	<b>Worcestershire County Council</b> LA Tourism Officers LA planning and countryside officers Transport providers Tourism sector	Sustainable Transport programmes Other LA and partner programmes, publicity	Medium and Long	Liase with relevant agencies by mid 2003 Review current promotion by end 2003 Increase promotion from end 2003 onwards
	D5: Increase the benefit of tourism to local businesses including support and promotion of local food & drink, local markets, local brands	<b>Worcestershire County Council</b> LA Tourism Tourism sector Heart of England Fine Foods HETB AWM	LA Officers (tourism, planning, conservation etc) Current programmes	Medium and Long	Review opportunities and benefits with relevant agencies by end 2003 Support programme and increased Works participation in regional initiatives in place early 2004

## **APPENDICES**

- Appendix 1: Visitors to Worcestershire
- Appendix 2: Resources for tourism support in Worcestershire
- Appendix 3: The policy context for tourism support
- Appendix 4: Models for delivery
- Appendix 5: Details of those consulted
- Appendix 6: Summary of questionnaire responses

## APPENDIX 1

# VISITORS TO WORCESTERSHIRE

### Who comes to Worcestershire?

Although we have not been able to survey visitors since the outbreak of Foot and Mouth we have information from our last survey in 1998 (Heart of England Tourist Board) about who comes to Worcestershire and we have been able to confirm this pattern in discussion with tourism businesses.

The **key points from our survey** shows that:

- The majority (56%) of visitors are on a day trip from home, 14% are domestic touring visitors, 22% are domestic visitors staying overnight in the county, and 8% are visitors from overseas
- Many of our visitors come from neighbouring counties in the West Midlands (27%) with visitors from the rest of the UK headed by the North West (14%). Only 8% are from London and a further 14% are visitors from within the county
- Whilst almost a quarter of visitors (24%) are in the county for the first time, 76% are repeat visitors although the proportion of those staying overnight who are first time visitors is higher (35% and 46% for those touring)
- Most of our visitors come by car (80%), with tour buses bringing 10% of visitors and only 7% using the train or bus
- Adult couples make up 32% of our visitors with a further 7% in larger groups, 42% are solo visitors and only 21% had children with them (although this rose to 27% if overseas visitors are excluded)
- Visitors are predominantly from higher social classes, 40% are classified as AB, with a further 23% as C1
- Spend per head is at £9.64 for day visitors which is comparable to other places for day visitors.

### Why do our visitors come and where do they go?

Whilst in a diverse destination like Worcestershire the purpose of visits will vary from place to place, our visitor survey shows that overall the main activities undertaken by visitors were (more than one response was possible):

General sightseeing	45%
Visiting attractions	39%
Restaurants/cafes	25%
Exploring countryside/picnicking	25%
Exploring towns	24%
Shopping	18%
Rambling/walking	14%
Public houses	11%

What people **most liked about the county** included:

The beautiful countryside and scenery	30%
The atmosphere	10%
Scenic qualities	9%
Strong links with waterways	8%
Accessibility as a base	7%

### **Where did they stay?**

Of the domestic and overseas visitors staying overnight in the county identifying forms of accommodation:

Staying with friends/relatives	24%
Using hotels and motels	20%
Staying in a caravan	16%
In guesthouse or bed and breakfast	14%
Stopping on a boat	13%

### **Purpose of visit**

The purpose of visits was largely for pleasure, as follows

Pleasure/day out/holiday	76%
Visiting friends and relatives	10%
En route to other destinations	3%

### **Group Structure**

32% of all groups are adult couples, with groups of adults making up another 7% of all visitors. Solo visitors accounted for 42% of all visitors. The average party size was 2.0 people. Over three quarters (79%) of visitors did not have children in their party therefore only 21% had children with them, this rose to 27% of UK day visitors. Most overseas parties are without children.

### **Socio-economic groups**

40% of visitors are classified as AB, 23% as C1, 29% are C2 and 8% are DE. The UK touring market in Worcestershire has 70% ABC1, the highest domestic market segment. The overseas markets see 88-97% ABC1.

### **Visitor spending in the local economy**

Overall visitor spending varies significantly between the market segments. However, in total, all visitor spending went on to the following range of services:

Accommodation	45%
Eating/drinking out	17%
Shopping - food	11%
Shopping – other	5%
Leisure/entertainment	4%
Transport/fuel	4%
Other	14%

**Spend per head** varies by market segment. The UK Day Visitor spent £9.64 per head per day, the UK Overnight (staying with friends and relatives) spent £7.94 per head per night, UK Overnight (all) spent £32.74 per head per night. UK overnight

visitors staying in serviced accommodation spent £53.58 per head per night and Overseas Overnight visitors in serviced accommodation spent £52.75 per head per night. Overnight visitors spent a total of 5.2 million nights in Worcestershire.

During their visit to the County a total of £399m was spent by tourists. On average, about £33m is spent in the local economy each month. Visitors staying overnight spent £161m, compared with £238m from those on an irregular day trip.

The **main beneficiaries of visitor spend** are:

Catering	£141m
Retailing	£105m
Accommodation	£59m
Transport/parking/fuel	£55m
Entertainment/leisure/attractions	£38m

## APPENDIX 2

# RESOURCES FOR TOURISM SUPPORT IN WORCESTERSHIRE

### Worcestershire Local Authorities

Local authorities play a key role in tourism development. It is estimated that in England they invest £75m each year into tourism, a 50% increase since 1987. In Worcestershire, whilst tourism development resources vary considerably between local authorities, both the County Council and all District Councils invest in tourism development.

These resources include:

- Full time professional staff across the Worcestershire local authorities whose main role is tourism development
- A larger number of part-time, casual and volunteer staff who mainly operate Tourist Information Centres
- Limited marketing and promotion budgets with occasional external funding for research and tourism development offset by earned income from other activities.

Tourism development also benefits from, and contributes to, other activities carried out by Worcestershire's Local Authorities. Of particular importance is **economic development** and three of the county's tourism services are part of economic development departments. In other authorities tourism development is linked with **planning, leisure and cultural services**.

Worcestershire's Local Authorities primarily focus on marketing and promotion work, supported by some tourism development work and research. **Major activities** for some or all Worcestershire local authorities include:

- The production of visitor guides, supported in some cases by events leaflets and other specialist leaflets
- All but one of the Districts manage local Tourist Information Centres
- National marketing of the local area
- Visitor research
- Event organisation and support
- Administering web sites

### Other resources

Tourism development is supported by the work of regional bodies, particularly the **Heart of England Tourist Board (HETB)** and **Advantage West Midlands (AWM)**, the Regional Development Agency. HETB promotes the region to the UK domestic market and oversees other business and marketing support programmes, whilst AWM focuses on economic development and business support for the West Midlands including the leisure and tourism sectors. **British Waterways** is another key agency for Worcestershire and it is involved in the development of water-based holiday and recreational activity on and around the county's canals and rivers.

Within the county are other agencies with a key role in promoting and managing visitors, including the **Malvern Hills Area of Outstanding Natural Beauty** and the **Malvern Hills Conservators** and groupings bringing together retail, hotel and other business sectors.

### Worcestershire Tourism

All the local authorities support Worcestershire Tourism, a networking and partnership group comprising the local authority Tourism Officers. Worcestershire Tourism operates on a very limited budget and draws on the time of Tourism Officers but it allows the county's local authorities to work together in:

- International marketing
- Visitor and general research
- Seminars and conferences for the local tourism industry
- Press and PR activities
- Media and group travel operator visits to the county
- Attendance at trade exhibitions

### The Tourism Forum

Worcestershire Tourism organises an annual Tourism Forum which brings together a wide range of tourism operators, tourism development and other Council Officers and regional agency representatives. Although a relatively recent initiative, the Forum offers an opportunity for representatives of the diverse businesses involved in tourism to discuss key issues, such as the impact of Foot and Mouth Disease, and to be consulted on key tourism development initiatives.

### Summary of Worcestershire Local Authority Tourism Support Resources

Local Authority	Full-time staff	Part-time staff	Facilities
Worcestershire County Council	1.0	See note 1	None
Malvern Hills DC	1.0	TIC = 8 contracted staff + casuals & volunteers	Malvern, Upton, Tenbury TICs Upton Heritage Centre
City of Worcester	5.0	2 part time + summer casuals	Worcester City TIC Worcester Christmas Fayre (see note 2) organisation – 4 day annual event
Wyre Forest DC	1.0	6 part-time TIC staff (2 seasonal)	1 fully networked TIC at Bewdley plus satellite unit at Kidderminster Library
Wychavon DC	1.0	none	TICs run by Town/Parish Councils, inc Broadway, staffed by volunteers
Redditch BC	2.0 TIC/Box Office (note 3)	5 part-time TIC/Box Office Assistants	TIC/Theatre Box Office (note 4)
Bromsgrove BC	1.0	2 x p/t (TIC)	TIC in Bromsgrove Museum

### Notes:

1. Worcestershire Tourism received £150K Foot and Mouth Recovery Funding which has generated projects requiring 75% of 3 members of staff drawn from other responsibilities of the WCC unit.
2. City of Worcester staffing costs include cost of organising Christmas Fayre, the operational costs of which are self-financing
3. Redditch full-time staff shared between Box Office and TIC, estimated 0.3 fte allocated from Leisure and Tourism Officer
4. Redditch staff costs include both TIC and Theatre Box Office costs which cannot be disaggregated as functions are fully integrated.

## APPENDIX 3

# THE POLICY CONTEXT FOR TOURISM SUPPORT

### **The importance of tourism support**

Tourism support and development is about local economies and businesses, development of rural and urban areas, and the quality of the local environment. It is also important for the nature and type of cultural facilities and activities and Worcestershire's profile and image. The healthy and sustainable development of tourism and of places for visitors should concern and benefit the county as a whole.

### **National, regional and county policy context for tourism support**

Government at national, regional and local level has recognised the importance of the visitor economy and the role of tourism support. Tourism support is not a statutory duty for local authorities so it is important to set out the policy context for the contribution that tourism can make to the well-being and development of the county.

Among **national policies** which set the strategic context for Worcestershire's Tourism strategy are:

The **Local Government Act of 1999** which establishes a Local Authority power to support economic, social and environmental well-being of local communities. This has two aspects of particular importance to our strategy: first, the encouragement of partnership working with the private and voluntary sectors through the development of Local Strategic Partnerships – such as the Worcestershire Partnership for the County; and second, the development of Community Plans which set out key priorities for each local authority area based on consultation with residents and businesses.

There are two key initiatives from the Department of Culture, Media and Sports. First, the national tourism strategy **Tomorrow's Tourism**, 1999, which sets out priorities for the development of tourism, recognises its economic and social importance and the need for a national strategic framework for its development. Second, the development by local authorities of **Local Cultural Strategies** which seek to bring together a wide range of 'quality of life' issues and also to set out how local authorities and their partners can develop inclusive and vibrant local social life for their communities.

The establishment of the **English Tourism Council** in 1998 as a new national body for tourism in England and its strategies for sustainable tourism, and of initiatives such as **EnglandNet** (2001) to develop greater use of the internet for tourism marketing and information and proposals for a new **Sector Skills Council** to improve skill levels in tourism businesses.

The **Rural White Paper** which focuses on rural diversification, transport, the development of Market Towns and on tourism in rural areas and the DEFRA **England Rural Development Plan 2000-2006** which seeks to put these policies into action.

**Working for the Countryside**, the policy setting out the work of the **Countryside Agency** which will work with the ETC on the development of rural tourism business and the quality of the experience for visitors.

The requirements of the **Disability Discrimination Act** and the challenges this will pose to all businesses but particularly heritage facilities and to instigating a more inclusive visitor ethos.

Among **regional policies** that support tourism are:

**Agenda for Action**, the economic development strategy of **Advantage West Midlands**, the Regional Development Agency. This seeks to develop a diverse and dynamic economy through regeneration zones, economic clusters which include leisure and tourism, and high technology corridors and has led the response to Foot and Mouth Disease through encouragement of recovery plans.

The Advantage West Midlands **Tourism & Leisure Sector Action Plan** which is seeking to address issues including improving research and intelligence, quality, access, gateway information, rural innovation and product development and marketing of the region.

**The Heart of England Tourist Board** strategy **Visitor Focus**, which seeks to raise the profile of tourism, link it with economic development, strengthen tourism information and improve quality.

The policies of other agencies such as **British Waterways** which has produced regeneration, arts and visitor strategies, and of the regional cultural bodies, **Sport England**, **West Midlands Arts**, and the **Regional Museums Council** which seek to develop cultural facilities and activities for residents and visitors alike.

**County policies** which are important to tourism are included in a number of strategic documents:

The **Community Strategy for Worcestershire**, led by the Worcestershire Partnership, which is developing priorities including economic development, the environment and culture which will link with tourism development.

The Cultural Strategy for Worcestershire, **Living Life to the Full**, which contains a significant number of priorities and initiatives which seek to bring visitor and resident interests together in the development of cultural activities and facilities. Further details are given below.

Following the outbreak of Foot and Mouth disease Worcestershire has instituted a **Foot and Mouth Disease Recovery Plan** with economic development, business support, tourism and food and drink action areas.

**The County Structure Plan** and the more detailed **District Local Plans** provide an important planning context for tourism including requiring tourism to account for its environmental impact.

**The Countryside Access and Recreation Strategy** will cover a 10 year period from 2002 and its priorities, which include environmental management,

rural regeneration, access, traffic and transport provide many links with tourism priorities.

An important document for part of our county is the **Malvern Hills AONB Sustainable Tourism Strategy** which seeks to improve visitor information and signage, visitor resources, and institute visitor and transport management initiatives.

Other county-wide strategies currently under development including a and **Worcestershire Arts Strategy**.

### **Links with the Worcestershire Cultural Strategy**

The County Council and the District Councils will publish the cultural strategy for Worcestershire shortly. Its themes and priorities indicate a potentially rich set of linkages between tourism development and cultural development. These links include:

- The promotion of cultural activities to introduce residents and visitors to the rich cultural, natural and historical heritage of the county and supporting the management of visitors to a widening range of places and the development of sustainable and environmentally friendly tourism
- Making cultural development an element of rural diversification programmes and identifying where visitor use can improve the viability of local and rural cultural facilities
- Putting the needs of visitors and residents for greater access to cultural facilities and activities and identifying innovative transport solutions
- Promoting links between the local and more high profile festivals and events to widen the range of cultural activities enjoyed by both residents and visitors
- Exploiting ICT to develop innovative access to cultural facilities and activities and a clearer branding of Worcestershire as a cultural destination.

### **Making the links – a holistic approach to tourism development**

The tourism strategy will need to link up with this wide range of policies. There are challenges but also a **great number of opportunities in the new policy context for tourism development** including:

- The **regional economic development agenda**, its programmes and funding for growth clusters in leisure, tourism, food and drink and other relevant economic activity areas which present us with a challenge to ensure inclusion of Worcestershire's tourism sector in bids for partnership funding
- The focus on **rural diversification, development of Market Towns** and rural sustainability given Worcestershire's strength as a rural destination and the opportunities to link tourism development to rural diversification and other initiatives
- The **development of partnership working by local authorities** that can assist local councils to consider a wide range of options to meet the challenge of delivering a non-statutory service like tourism development within a two-tier structure in a way that meets Best Value criteria
- The **rapid development of ICT** and the national and regional initiatives to develop information gateways for tourism businesses and visitors and to further 'democratise' information and offer interactivity to visitors and to

extend opportunities for Worcestershire to attract a wider range of longer-stay and higher-spending visitors

- **Skills and training initiatives** seeking to improve quality of service within tourism, catering and related businesses through the work of Learning and Skills Councils and educational and training programmes
- Generating real synergy with **cultural development** in the county through building practical links with the county cultural strategy and strategies of regional cultural bodies.

## APPENDIX 4

# MODELS FOR DELIVERY

### 1 Introduction

To secure maximum benefits from a strategic approach to tourism development across Worcestershire, Worcestershire's local authorities and its partners will need to create an organisational structure to achieve success. The Action Plan proposes a thorough review of tourism support in Worcestershire as part of this process.

This appendix sets out a framework for reviewing the structure of tourism support.

### 2 Factors in success

In reviewing our structure for tourism development, we should be guided by the principles which underpin the strategy, and examine critically how we can deliver against our priorities. Our strategy points to the following factors that will impact on future success:

- I The need to demonstrate better value for money and greater effectiveness
- II The need to offer a stronger basis for partnership with the private sector and other bodies working to support tourism
- III The ability to strengthen our relationships with regional agencies
- IV The ability to make the case for tourism as a key part of economic development in the county
- V The likelihood of survival and sustainability
- VI The ability to win political support from all councils

### 3 Potential models

Four possible models can be usefully examined, and these are described briefly below:

**Option A:** the **status quo**, in which the County and District Councils carry on with their current work and functions, together with the limited joint activities of the Tourism Officers group, Worcestershire Tourism

**Option B:** we retain the status quo with **much greater development of partnership work** focussed around a range of strategic projects into which additional resources (time and funding) is put by all councils and their key partners (eg the profile raising project in partnership with economic development partners, possible research work with AWM and others and a range of the priorities identified in this strategy)

**Option C:** we **outsource some functions on behalf of the county as a whole** on contract to an existing body with the County and Districts as joint client, with the County and Districts continuing other functions

**Option D:** in which we **establish an independent partnership body** to undertake all county-wide and local functions, with the councils and stakeholders represented on the Board

It should also be possible to examine the **potential benefits of greater linkages** with neighbouring counties and their tourism offers particularly Warwickshire, Shropshire and Hereford.

These are not, of course, the only possible models, and the review will examine these and others critically as part of the delivery of the tourism strategy's action plan.

#### 4 Models reviewed against key assumptions

An initial assessment should be carried out of how the options might perform against the key assumptions, and these should be graded thus: very likely to deliver (high); possibly able to deliver (medium); unlikely to deliver (low).

Option	I Value for money/ Effectiveness	II Stronger basis for partnership	III Relationships with regional agencies	IV Case for tourism in economic devpt	V Likely survival/ sustainability	VI Likely political support
Option A						
Option B						
Option C						
Option D						

#### 5 Models reviewed against delivery of strategic priorities

The most crucial factor in evaluating the options will be examining how well they might deliver the strategy's four priorities. These, too, should be graded as: most likely to deliver (high); possibly able to deliver (medium); unlikely to deliver (low).

Option	A Build a strategic approach to supporting tourism	B Address quality issues in tourism	C Provide effective support to tourism businesses	D Work for a sustainable future for Tourism
Option A				
Option B				
Option C				
Option D				

## APPENDIX 5 DETAILS OF THOSE CONSULTED

### A One-to-one meetings or telephone interviews

Name	Organisation	Position
*Maggie Booth	Wyre Forest District Council	Tourism Manager
*Ray Cooke	Redditch Borough Council	Leisure & Tourism Officer
*Frances Johnson	Bromsgrove District Council	Tourism & Marketing Manager
Lynn Johnston	Worcestershire County Council	Strategy & Policy Officer
*Angela Lessimore	Malvern Hills District Council	Tourism Officer
*Angela Tidmarsh	Wychavon District Council	Tourism Officer
*Kathryn Wagstaff	Worcestershire County Council	Tourism Officer
*Andrea Watkins	Worcester City Council	Tourism Manager
Pat Laughlin	Advantage West Midlands	Director of Business Growth
Katie Foster	Advantage West Midlands	Strategy Consultant
Penny Hadland	Heart of England Tourist Board	Director, West Midlands
David Armitage	Malvern Hills AONB	AONB Project Officer
Ian Bamforth	Worcestershire County Council	Country-side Operations Manager
Steve Boffy	Worcestershire County Council	County Arts Officer
Amanda Savidge	Royal Worcester Porcelain	Visitor Services Manager
John Pattin	Cottage in the Wood	Proprietor
Janet Sinclair	Worcester Cathedral	Visitors Officer
Alan Scott Davies	British Waterways	
Tony Rogers	British Association of Conference Destinations	Executive Director
Cllr Alwyn Davies	Worcestershire County Council	Cabinet Member for Economic Development and Regeneration, Environment and Sustainability
Richard Wigginton	Worcestershire County Council	Director of Environmental Services
Natalia Silver	Herefordshire Council	Cultural and Community Liaison Manager
Jo Amos	Heart of England Fine Foods	Project Officer
Jenny Beard	Learning & Skills Council	Workforce Development Adviser
Stewart Alcock	National Trust	Hanbury Hall Manager
Becky Wright	BBC Wood Norton	Sales Office Manager
Bobby Heavens	Association for Promotion of Herefordshire	Manager
Louise Cross	South Shropshire District Council	Tourism Officer
Alex Holmes	South Warwickshire Tourism	Chief Executive
Ivan Knezovich	West Midlands Safari Park	Director

\* Members of Worcestershire Tourism

### B: Questionnaire Recipients

Questionnaire was distributed to 43 organisations, working in private, public and not for profit sectors.

**C: Tourism Forum, April 2002**

Attended by approximately 100 individuals, from the private, public and not for profit sectors.

**D: Presentation to Economic Development Partnership, May 2002**

Attended by Officer and Member representatives of county Local Authorities

**E: Presentation to Chief Executives Panel, June 2002**

Attended by county local authority Chief Executives.

## APPENDIX 6

# SUMMARY OF QUESTIONNAIRE RESPONSES

**Question 1: What, in your view, are the main strengths, weaknesses and gaps in the tourism offer to visitors in Worcestershire?**

### Strengths

From 17 respondents who listed 1 or more strengths:

<b>Strength</b>	<b>Number of respondents mentioning</b>
Geography/natural beauty	12
History/heritage (inc. Cathedral, Castles)	10
Location/road transport (motorways)	6
Shopping/retail	6
Visitor attractions	5
Arts & culture	5
Food & drink	3
Sport & leisure	2
Conference facilities	1
Family appeal	1

### Weaknesses

From 17 respondents who listed 1 or more weaknesses:

<b>Weakness</b>	<b>Number of respondents</b>
Image and marketing	8
"Where is Worcestershire?"	4
Hotels & quality accommodation	3
Coach & bus services	2
Appeals more to older generation	2
Under-developed riverside	2
Poor rail links	2
Lack of attractions in north of county	1
Parking problems	1
Lack of international 'Icon'	1

### Gaps

From 14 respondents who listed 1 or more gaps:

<b>Gap</b>	<b>Number of respondents</b>
Branding & marketing	6
High quality hotels & beds	5
Co-operation between service providers	2
Activities for children & younger people	2
Signposting	1
Year round activities	1
Lack of international 'Icon'	1

**Question 2: What, in your view, are the key issues for developing tourism locally?**

- An orchestrated campaign celebrating the Worcestershire experience, which develops national awareness of location and is marketed centrally
- Develop more accommodation, especially for business and longer-stay trade
- Create a family-orientated product
- Raise profile of Tourism Officers
- Create tourist information pack that builds a picture of Worcestershire
- Co-ordinated approach from all parties, with districts co-operating to market whole county
- Research, understanding & targeting of key markets and better council recognition of the value of tourism to Worcestershire
- Area needs a focus and an identity that providers can link to
- Further product development needed
- Improve infrastructure: good hotels, better rail communications and parking facilities
- Use good, consistent images & ideas in marketing and promotion
- Marginal businesses do not look for added value opportunities to market during the closed season by creating 'packages'

**Question 3: Below are listed the key issues identified in the previous tourism strategy. In your view, which are the most important? Please mark these in priority order.**

<b>Issue</b>	<b>Priority</b>
Create a stronger image/building brand identity for Worcs	<b>1</b>
Make Worcestershire a year round destination	<b>2</b>
Create a more complete experience for visitors	<b>3</b>
Reduce dependency on day visitors & increase overnight visitors	<b>4</b>
Compete in conference/business visitor market	<b>5</b>
Identify additional funding	<b>6</b>
Reduce dependency on cars & encourage more sustainable transport	<b>7</b>
Improve provision for those with a disability	<b>8</b>

**Question 4: What role(s) for the County and District Councils do you see as most important or helpful to you?**

<b>Role</b>	<b>Priority</b>
Marketing and Promotion	<b>1</b>
Tourism development work	<b>2</b>
Research	<b>3</b>

**Question 5: What would you like Worcestershire's tourism strategy to do for you?**

- Create a strong image & improve awareness of Worcestershire & its location, aiming to attract all ages
- Develop the north of the county as a destination, for sport, recreation and industrial heritage
- Unite many attractions to create a package
- Generate a coherent approach to fostering quality tourism in the area
- Ensure infrastructure is improved and support transport and access: build a coach station and redevelop the railway stations
- Communicate direction to service providers so they can support the strategy correctly
- Increase visitor experience
- Integrate tourism, leisure and business
- Improve brand awareness of major attractions
- Create leaflet devoted solely to the cultural strengths of the county
- Bring more overnight visitors to the area
- Raise our profile and awareness of the product both at home & abroad
- Work with the LSC to develop a planned tourism training strategy for Worcestershire