



BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

# DESTINATION MANAGEMENT PLAN 2023-2033

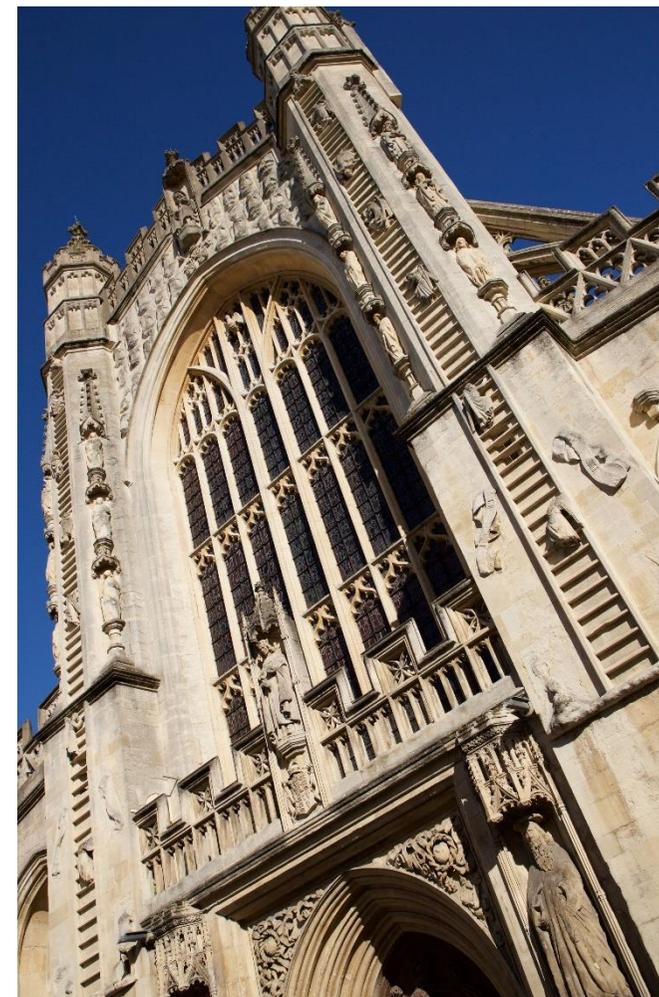
REPORT FOR VISIT WEST

MAY 2023

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# 1 ABOUT THIS PLAN

This is the first Destination Management Plan (DMP) for the Visit West area covering Bristol, Bath and North East Somerset, South Gloucestershire and North Somerset.

Each of the areas have had their own strategies and this Plan builds on those to add value, focusing on things that makes sense regionally, bringing wider benefits, and recognising that the Visit West area can be more than the sum of its parts. Tourism is an intensively competitive business, and a distinctive offer is essential to attracting attention. The tourism assets of the West of England across its cities, coast and countryside have the potential to offer exactly that.

This DMP identifies the shared themes and market opportunities which the entire region can exploit, adding to, rather than replacing, the current markets and propositions prioritised by each of the areas individually. The Plan is built on a detailed market and trend analysis, consideration of the strategic local, regional and national priorities, and input from around 100 consultees from across the area.

The DMP is for all those involved with tourism, guiding activity and focus and influencing investment. It is for Visit West as the accredited Local Visitor Economy Partnership (LVEP), for local authorities and the West of England Combined Authority, and for those providing tourism experiences and services from the private, public and third sectors. Its aim is to strengthen and support a tourism sector which benefits the people, communities and businesses of the West of England.

A successful, resilient and sustainable tourism sector will require a commitment to ongoing investment of time and resources - in Visit West as the lead agency for tourism, and by the public agencies and private sector organisations involved in the visitor economy. This DMP sets out how that investment should be deployed, building on what is already happening and future opportunities.



## 2 THE VISIT WEST REGION NOW

As a visitor destination, the West's offer is undeniably compelling. It is one of variety and juxtaposition, spanning tradition, heritage and contemporary across two cities and four different local authority areas.

Here is a snapshot of the visitor offer within each of the areas that make up the West of England:

- ▶ **Bath** is one of England's foremost heritage cities and what many international visitors think of when they imagine England. With its beautiful Georgian cityscape, historic sites, and Roman Baths, it has significant national and international appeal as a visitor destination. The surrounding countryside and market towns of North East Somerset provide opportunities for walking, cycling, and other activities and, for many, could be a base to stay.
- ▶ **Bristol** is considered a cool contemporary city with a broad cultural appeal including music, theatre, and visual arts. Its range of heritage and cultural attractions make up a family friendly daytime offer but it also has a diverse nightlife. It is an international leader in street art and consistently ranks within the top 10 UK destinations for business events.
- ▶ **South Gloucestershire** is home to a collection of market towns and is perhaps the least well-known area as a visitor destination within the Visit West portfolio. But that is changing with the opening of attractions such as Aerospace Bristol and The Wave and with several large-scale developments in the pipeline e.g. YTL Arena and Bristol Zoo Project.
- ▶ The rural and coastal towns of **North Somerset** host some significant tourism assets such as the Mendip Hills AONB. The seaside town of Weston-super-Mare, while still offering traditional favourites has undergone a renaissance in recent years with a strengthened cultural offer sparked by Banksy's Dismaland exhibition in 2015, See Monster in 2022, and ambitious regeneration plans.



The headline numbers are impressive with over 37million visits pre-pandemic and £2.33bn in spend generated in the local economy. Under the top line other findings which have implications for this plan include:

- ▶ Staying visitors, both domestic and international, are clearly valuable to the area making up just 12% of visitor numbers yet generating 43% of spend
- ▶ Bath and Bristol, as the region’s cities and main identifiable brands, unsurprisingly account for the lion’s share of both staying and day visits; with spend from domestic markets exceeding that from international (8.3m domestic nights yielding £600m spend and 6.3m overseas nights yielding £400 m)
- ▶ Trip purpose varies greatly between the different areas. Bath & North East Somerset and North Somerset attract significant numbers of holidaymakers, whereas Visiting Friends and Relatives (VFR) dominates both Bristol and South Gloucestershire
- ▶ Business and business event visitors have an important role to play, particularly in Bristol and South Gloucestershire where they account for approximately 30% of spend

All of this points to a need for a destination management plan that capitalises on the strengths of the region but that recognises the differences in each of the areas and avoids a homogenous approach.

### PIPELINE PROJECTS

Looking ahead, there are several transformational projects in the pipeline which build on the existing offer and shown the right level of support, will have major benefits for the West of England’s visitor economy. These include:

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>▶ Development projects in Bristol Harbourside, including Western Harbour, Albion Dock and Wapping Wharf</li> <li>▶ Bristol Temple Quarter development</li> <li>▶ YTL Arena &amp; Brabazon development</li> <li>▶ Bristol Parkway development</li> <li>▶ Ashton Gate – Sporting Quarter &amp; Convention Centre (SCC)</li> </ul> | <ul style="list-style-type: none"> <li>▶ Bristol Beacon</li> <li>▶ Milsom Fashion Quarter development</li> <li>▶ Bath Rugby Stadium</li> <li>▶ Weston-Super-Mare Regeneration</li> <li>▶ Bristol Airport expansion</li> <li>▶ MetroWest rail project</li> </ul> |
|--|---|



In addition to these exciting developments, there are numerous ongoing public realm investment, town centre and regeneration projects which will support the visitor experience by creating new and improved public spaces, better linkages between areas and neighbourhoods and improved accessibility.

## POLICY CONTEXT

The DMP takes account of the extensive local, regional and national policy and plans, seeking alignment while retaining focus and distinctiveness.

Of particular relevance is the Visit England LVEP programme which facilitates the implementation of the de Bois independent review of Destination Management Organisations (DMOs) in line with government response. The solutions proposed in the review called for more collaboration, and stronger skills and expertise in DMOs as well as better governance with both public and private sector involvement. As the recently accredited LVEP for the West of England, Visit West has a leading role in the delivery of this Plan.

Another major shift affecting tourism is concerned with addressing climate change and sustainability. Destinations and businesses are increasingly looking to reduce and mitigate impacts at every level. The West of England Combined Authority (WECA) has published an ambitious Climate Action Plan in 2023 and this, alongside the plans and commitments of other local authority plans, means there is already progress in the West of England. While the public sector is developing plans and projects, tourism businesses need help and encouragement to consider their impacts, produce their own plans and implement changes that can collectively start to have a significant impact.

This drive for a more sustainable tourism economy is balanced by clear requirements for inclusive economic growth within the West of England Local Industrial Strategy, a balance which this plan aims to address.

In recent years, destination management plans have existed at the local level for Bath & NE Somerset, Bristol and South Gloucestershire with North Somerset working to a shorter-term visitor economy recovery plan post-Covid. Common themes across the plans on which this Plan aims to build, were:

- ▶ Future growth in the visitor economy lies in attracting value over volume – longer (weekend) stays, higher spend, more off peak and mid-week visits
- ▶ Tourism must be sustainable and responsible
- ▶ Culture and creativity are central to the identity of the West of England – a theme underpinned by the WECA Cultural Plan and Compact.

### 3 THE VISION

The fundamental aim of this Destination Management Plan is to achieve longer stays from visitors coming to the West of England.

Over the 10 years of this DMP the Visit West area will see an increase in how long people stay in the area. This will be achieved by focusing on a few particularly strong propositions targeting visitors with which these propositions will resonate and who are more likely to stay longer.

The West of England will deliver a wide range of high-quality, unique and special experiences so that over time it will develop its reputation as a region worthy of spending more time in and getting to know a lot better.

This can only be achieved through greater and more effective cooperation among the region’s many stakeholders, led by Visit West, realising that working together brings many more benefits than competition. And a recognition that tourism is ultimately for the benefit of those who live here and must enhance their quality of life. Success will result in profitable businesses and provide quality jobs rewarded with fair wages. It will support the infrastructure and cultural and leisure facilities. It will enhance the area’s credentials as a place to live, to invest, to do business and to study.

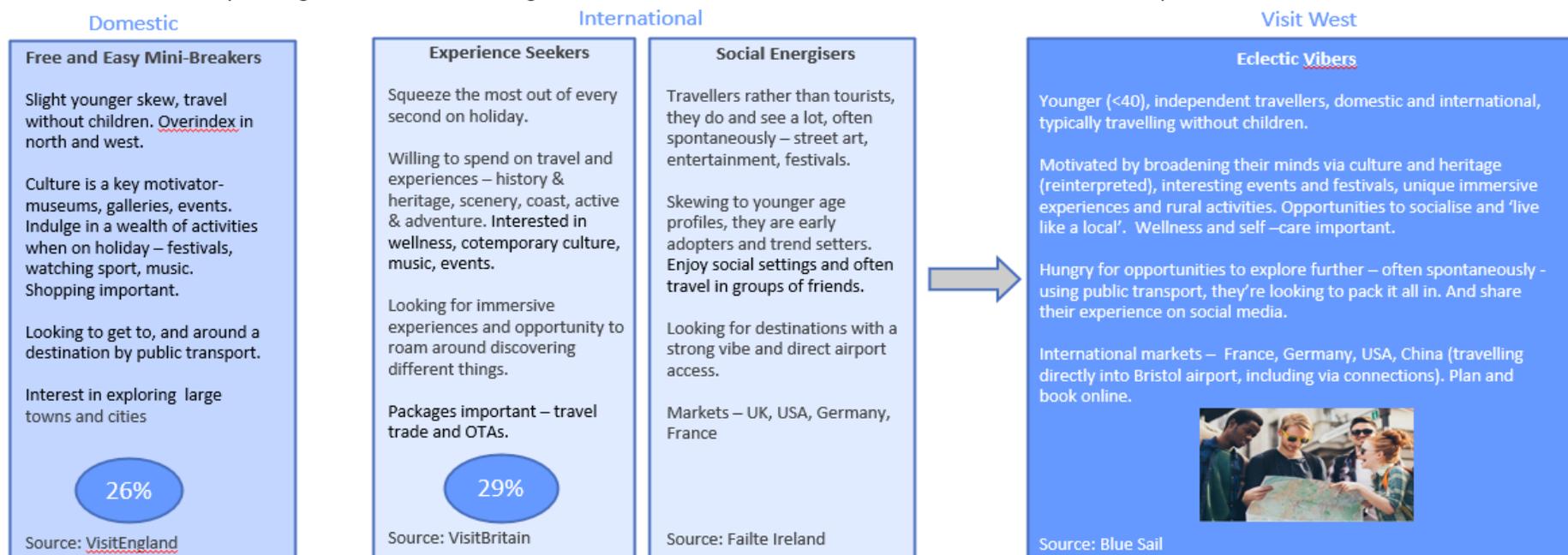
The final plank of the DMP is sustainability. Explicitly recognising the need for action against climate change, sustainability must be the default position with all decisions around the delivery of this Plan being taken through that prism. The core premise of longer stays is more value per carbon spent by each visitor in getting here.



## 4 MARKETS

The opportunity at regional level is to add value to existing markets by targeting visitors who have the propensity to stay in the region longer and to explore it more fully, thus helping to achieve the goal of extending stays.

‘Eclectic Vibers’ have been identified as the best prospect longer stay visitor type for the Visit West region. As illustrated below, this is a visitor type that has been built on market knowledge and robust market research and segmentation by VisitBritain and Fáilte Ireland which shows that the types of visitors more likely to include multiple experiences and activities in their trip are younger, domestic and international independent travellers, typically travelling without children. They offer growth value to the region because of the size of the market and their likelihood to spend.



n% Size of UK visitor market/size of international visitor market

Over the next 5-10 years the aim will be to attract more of these Eclectic Vibers via Visit West’s key brands of Bristol and Bath and then retain and disperse them across the region by tapping into the growth themes identified in the next section and giving them reasons to travel beyond the cities.

Each of the individual destinations have their own distinctive offer and market appeal which will be important for them to maintain. The ‘family fun’ market segment for example will continue to be a priority for Bristol attractions and Weston-super-Mare, and Bath will continue to attract its more traditional heritage enthusiasts.

In addition to the Eclectic Vibers, there are two other visitor types offering growth potential for the region. These are business travellers and those visiting friends and relatives (VFR). The rationale for these is detailed below.

VISITOR TYPE	WHO THEY ARE	RATIONALE	WHERE’S THE OPPORTUNITY?
<p><b>VFR</b></p> 	<ul style="list-style-type: none"> <li>▶ Domestic and international</li> <li>▶ To some extent, reflective of the local population which in Bristol is younger and more diverse than the average for England and Wales (2021 Census)</li> <li>▶ Generally undertaking a visit for social purposes</li> <li>▶ May stay with a friend or relative or in tourist accommodation</li> <li>▶ Looking for things to see and do whilst visiting friends and relatives – often seeking the host’s advice</li> </ul>	<ul style="list-style-type: none"> <li>▶ High existing volumes of VFR in Bristol and South Gloucestershire</li> <li>▶ Participate in many activities</li> <li>▶ Capitalising on high number of students in the region</li> <li>▶ Engagement of residents as consumers of tourism</li> <li>▶ Opportunity to activate international links</li> <li>▶ Less affected by seasonality than other visitors</li> </ul>	<ul style="list-style-type: none"> <li>▶ Engagement with residents to encourage and influence visitor behaviour e.g. day trips to explore the region, local ambassador schemes</li> <li>▶ Engagement with the universities to encourage extended visits from family</li> </ul>
<p><b>Business &amp; Business Event Visitors</b></p> 	<ul style="list-style-type: none"> <li>▶ People who travel for work or professional services including for events, conferences, exhibitions etc</li> <li>▶ Domestic and international</li> <li>▶ Looking for things to do outside of work timetables</li> </ul>	<ul style="list-style-type: none"> <li>▶ Delegate numbers are lower than average despite Bristol’s top 10 ranking in UK league tables for business events but pipeline projects will increase capacity for business tourism</li> <li>▶ Aligns with national policy to address opportunities within the Business Events market</li> <li>▶ Delegate (and in some cases wider family) spend</li> </ul>	<ul style="list-style-type: none"> <li>▶ Levering benefits from:                             <ul style="list-style-type: none"> <li>• extending business trips to take in leisure activities</li> <li>• returning leisure breaks</li> <li>• social programmes</li> <li>• incentive proposition</li> </ul> </li> <li>▶ Maximising the opportunities presented by pipeline developments and economic development</li> </ul>

## 5 GROWTH THEMES

The focus of the DMP is on three themes with growth potential for the whole Visit West area.

The Visit West area is not short of outstanding assets – iconic names and attractions, urban, rural, activities, culture and history. Georgian Bath is internationally known, Bristol lays claim to a cool, contemporary vibe, Weston-super-Mare is in the process of reinventing its beach resort offer and the rural parts of North Somerset and South Gloucestershire have their own quiet charm. This DMP does not override these but rather identifies three themes which will appeal to the target market of Eclectic Vibers, encourage exploration and discovery and so have growth potential across the whole Visit West no matter what point a visitor ‘enters’. While elements of each can be dialled up or down as appropriate within destination marketing or by individual businesses or providers, it is in combination that the themes create a mutually beneficial proposition which differentiates the Visit West area.

The themes are based on the assets and current strengths of the whole area, projects and developments which are in the pipeline and respond to market trends. They are:

- ▶ New Culture
- ▶ Heritage Reinterpreted
- ▶ Wellbeing

Each of these areas – described in more detail on the next page – is already to an extent market ready. There are however plenty of gaps to fill and opportunities to develop new experiences. On page 12 is an ‘Ansoff’s Matrix’ indicating where each of the themes likely sits in terms of its potential (size of circle), the extent of product development required and appeal to existing or new markets. This shows that New Culture is the theme most market ready, and the opportunity is to take it to the Eclectic Vibers in a more effective way. Heritage Reinterpreted and Wellbeing both require relatively more product development, with Wellbeing having potential as a new proposition for Eclectic Vibers and Heritage Reinterpreted working across both existing and new markets.

### Key Market Trends

- Health, well-being and self-care
- Spending time out of doors – doing and being
- Appeal of less visited/ undiscovered places with distinctive local culture
- Authenticity and pursuit of ‘real’ experiences which give insight into local culture and history
- Living like a local – interest in everyday places and small-scale experiences
- Blurring boundaries between work time and leisure time.

### NEW CULTURE



Credits  
 Bristol Harbour Festival – Paul Box  
 Sean Street Art by Cheo – Visit Bristol

‘New Culture’ embraces a range of creative endeavours found across the area. It includes the street art and film and TV of Bristol to the fashion stories and shopping experiences in Bath. It includes music and performance, events, arts and crafts. It includes sport – spectating and participating. And the new food and drink offer - locally produced and delivered by creative young chefs, particularly in the urban areas.

### HERITAGE REINTERPRETED



Credits  
 Roman Baths – Visit Bath  
 SS Great Britain – SS Great Britain

‘Heritage Reinterpreted’ acknowledges the range and depth of the area’s history and heritage and takes a forward-looking perspective to examine new ways that this can be experienced. This includes new and under-represented stories told in imaginative new ways whether at attractions, on tours, by local communities, on the ground and in marketing communications.

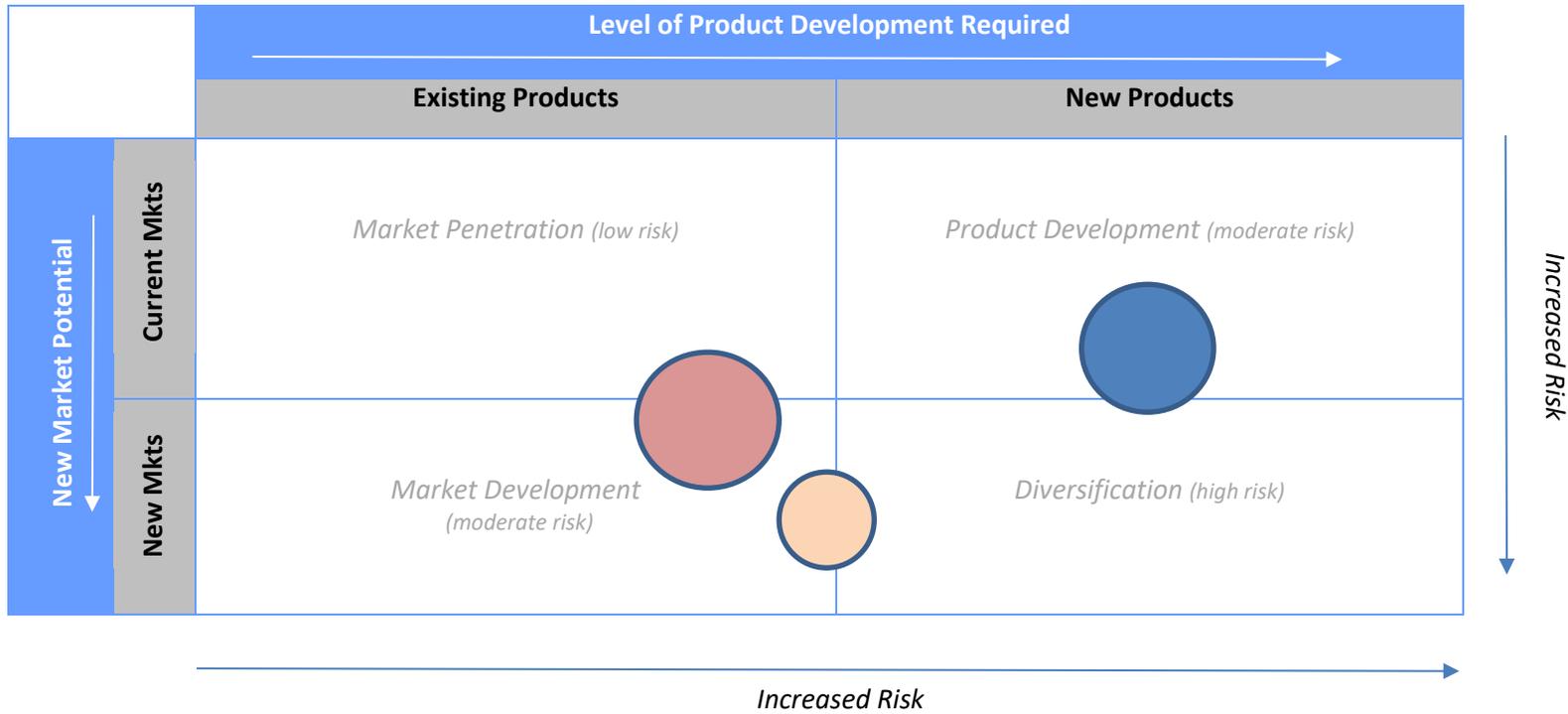
### WELLBEING



Credits  
 Ellenburgh Park West – Visit Weston- super- Mare  
 Thermae Bath Spa – Visit Bath

‘Wellbeing’ taps into the increasing interest in physical and mental health and self-care. It takes Bath’s spa as a starting point and extends it to include the green and blue spaces of the area. It includes the range of activities from gentle to challenging, and simply being as well as doing. It includes healthy living expressed in food and drink, locally produced and prepared.

Visit West Ansoff Matrix



Key:

- New Culture - music, performance, art, film, sport, fashion, food & drink
- Heritage Reinterpreted - new ways to experience heritage, building on strong assets and stories
- Wellbeing – spa, outdoors, green & blue spaces, activities, food & drink

## 6 MARKETING THE REGION

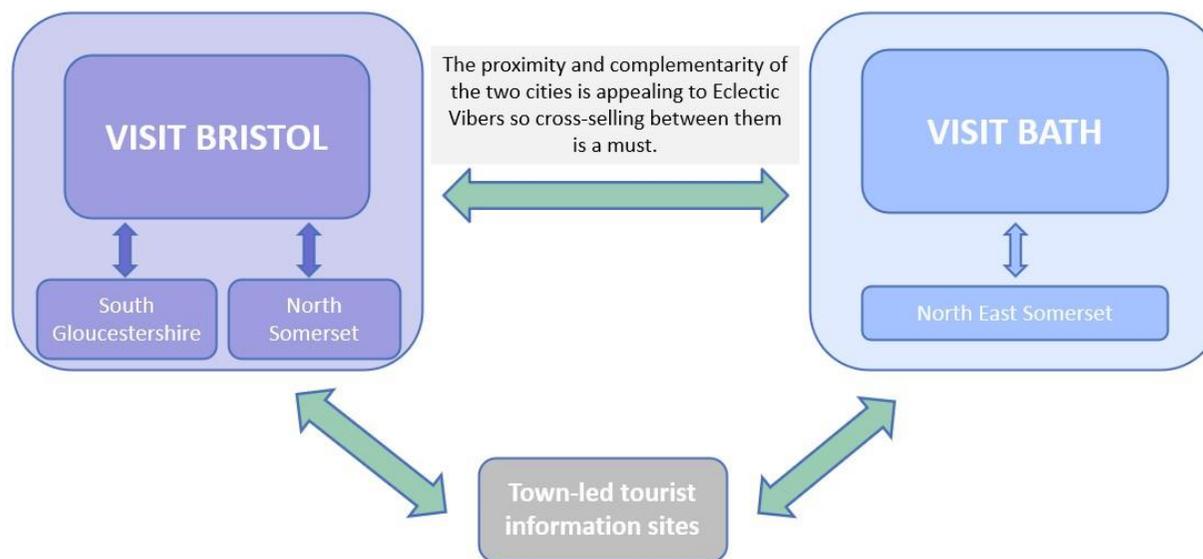
Visit West is responsible for delivering the destination marketing activity for the region.

On the consumer side, this is done primarily via Visit Bristol and Visit Bath which are both established brands within the tourism marketplace. While there is a temptation to think that bringing the marketing activity together under one Visit West brand would be a more coherent proposition for the visitor, it is the two cities of Bristol and Bath that are the primary attractors to the region and the main reason/s that people - particularly those travelling from overseas - will visit. So, the future marketing focus for the region should not be on restructuring its brand architecture. Rather, it should lie with organising the information in a way that makes sense to potential visitors and improving the links between the existing destination brands and other good quality town-led tourist information websites – such as Visit Weston-super-Mare - so that they showcase the critical mass of experiences and bigger proposition on offer during a visit to the West of England. Taking this interdependency approach between visitor information sources will equip the priority Eclectic Vibers market with the knowledge needed to increase their length of stay and to explore the region more fully.

The diagram here illustrates broadly how this might work.

Marketing should target Eclectic Vibers in both UK and international markets; with the balance towards the UK given familiarity and proximity. Internationally the focus should be on cities with flight connections to Bristol and opportunities generated through VisitBritain activity.

Digital marketing channels – where most resources are deployed - will reach both domestic and international markets, reinforcing the wisdom of targeting a visitor type which runs across markets.

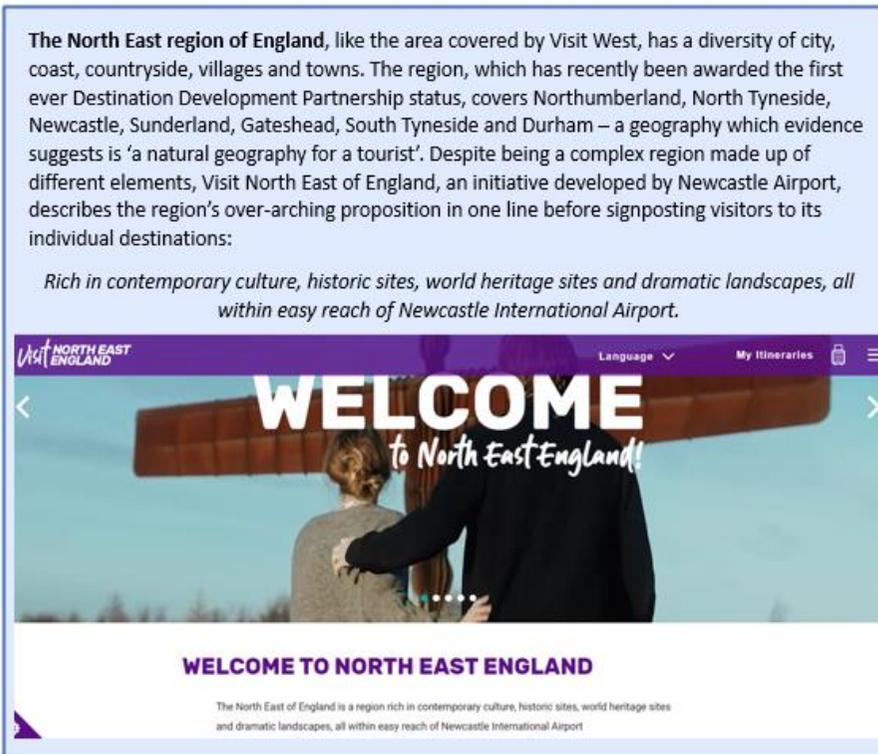


There are three more marketing recommendations which will help to further consolidate and amplify the region's wider proposition.

- ▶ The first is the **development of a regional narrative** for use externally in communication with prospective visitors by Visit West and other key tourism stakeholders. Ideally, this is a short piece of text that describes the region's offering in a simple yet effective way, contextually and geographically positioning it in the minds of visitors before signposting them to those established brands where they can find out more about the individual destinations. A good example of a region that has developed and used a concise regional narrative like this is the North East of England as demonstrated in the case study to the right.
- ▶ The second is to **improve the visibility of the region's tourism offer at its key visitor entry points**. North Somerset's Bristol Airport for example is the primary entry point for international visitors into the West of England yet it is very difficult to find anything about the region's tourism offer on its website – this should be much more visible to a prospective visitor. Other stakeholders hosting key entry points to the region where visibility of the offer could be improved might include the universities, Great Western Railway, Bristol Cruise Terminal, and other transport providers including the new West Link travel website.
- ▶ Thirdly, **Visit West should engage with large attractions in counties** on the periphery of the region's boundaries with a view to including them in Visit Bristol and/or Visit Bath activity and enhancing the wider offer of the respective destination.

**The North East region of England**, like the area covered by Visit West, has a diversity of city, coast, countryside, villages and towns. The region, which has recently been awarded the first ever Destination Development Partnership status, covers Northumberland, North Tyneside, Newcastle, Sunderland, Gateshead, South Tyneside and Durham – a geography which evidence suggests is 'a natural geography for a tourist'. Despite being a complex region made up of different elements, Visit North East of England, an initiative developed by Newcastle Airport, describes the region's over-arching proposition in one line before signposting visitors to its individual destinations:

*Rich in contemporary culture, historic sites, world heritage sites and dramatic landscapes, all within easy reach of Newcastle International Airport.*



**WELCOME TO NORTH EAST ENGLAND**

The North East of England is a region rich in contemporary culture, historic sites, world heritage sites and dramatic landscapes, all within easy reach of Newcastle International Airport

## 7 ACTIVATING THE GROWTH THEMES

To bring some immediacy to this 10-year plan, short-term action is required to activate the three growth themes.

The actions below have been carefully selected to work towards the ‘stay longer, explore further’ ambition.

ACTION AREA 1: MARKETING		TIMELINE
Taking the new proposition to market in a considered way will have internal and external benefits. As well as raising the profile of the West to its new priority market, it will give focus and reason for businesses to develop product and act as a catalyst in bringing the sector together.	<b>Integrate the growth themes into the content on existing marketing channels</b> e.g. the Visit Bath and Visit Bristol websites and social media channels, dialling up and dialling down as appropriate. This might be via the ‘Inspire Me’ or blog sections of the websites, or via a thematic takeover on social media channels whereby businesses related to one of the themes are the only ones to post content for a specific period of time.	2023 – immediately following the launch of the DMP
	<b>Launch a series of ‘Year of...’ marketing campaigns</b> with each of the growth themes taking turns as the headline act. Given the level of market and product development required for each of the themes, it might make sense for New Culture to headline in 2025, followed by Wellbeing in 2026, and lastly Heritage Reinterpreted in 2027.	2025-2027
	<b>Extend the range of visitor experiences linked to the growth themes that are bookable online</b> working with businesses and existing platforms operating in the region e.g. Headfirst and TXGB	2023 onwards
ACTION AREA 2: EVENTS		TIMELINE
Events are another effective way to build profile for a region, attract visitors and provide focus around particular themes.  There are a number of ‘quick win’ actions that could be linked with developing events but the longer-term strategic partnership approach outlined here will deliver better results for the region.	<p><b>Develop a regional events strategy</b> with key partners (e.g. WECA) which makes the case for events as a significant contributor to the visitor economy, culture and economic success, as well as supporting the wellbeing of residents and place. While this may be wider in scope than the three growth themes identified here, it gives the opportunity to build them into programming ideas from inception and build profile over the life of the strategy.</p> <p>The specific actions within a regional events strategy will fall out of the development process but may include:</p> <ul style="list-style-type: none"> <li>▶ An audit of events already happening across the region to identify whether there is opportunity to elevate one or more of them into a signature regional event with national/international appeal</li> <li>▶ Development of a brand new regional mega-event linked to market focus and one (or more) of the growth themes. This also ties in with the actions identified within the cultural strategy</li> <li>▶ Bidding for one-off events which are linked to market focus and priority themes, which showcase the area and deliver a strong sense of place, maximising the potential of some pipeline developments e.g. the YTL Arena</li> <li>▶ Use events as the catalyst for longer stays</li> </ul>	Strategy developed 2023/2024 with events delivery from 2025 onwards to tie in with ‘year of’ campaigns.

ACTION AREA 3: PACKAGING & ITINERARIES		
Packaging products and experiences into suggested itineraries is an effective way of showcasing the critical mass of product available related to each theme. It allows visitors to see the types of things they could do including those more off-the-beaten-track, authentic experiences and can encourage them to travel to places they may not otherwise.	<b>Carry out an audit of the existing experiences</b> across the region by theme that would appeal to the priority market segment. This may also highlight gaps for product development ideas.	2023
	<b>Develop a flagship itinerary for each theme</b> that can be used on existing marketing channels. The itinerary should include several complementary experiences as unearthed in the audit as well as logical routes between them and suggestions for travel, food & drink and accommodation.	2024
	<b>OTAs and travel trade</b> – the online marketplace is important for the Eclectic Vibers to gather information and ideas, and also for booking so working through these channels will be a useful and targeted route to market. The travel trade is particularly significant for Eclectic Vibers in some international markets – North America and China	2023 onwards
ACTION AREA 4: ACCOMMODATION IN RURAL AREAS		
The purpose of the regional growth themes is to appeal to the priority market’s interests and appetite to pack in a lot of things across both city and rural areas. Despite Bristol and Bath being the primary attractors, not all visitors will want to base themselves within the cities. So, the accommodation offer in more rural areas needs to be right for this market (i.e. non-serviced camping/ glamping/eco-accommodation type options) in serving as a base for exploration. This also provides a growth opportunity for the rural areas.	<b>Carry out an analysis of current non-serviced accommodation supply</b> (focusing on camping and glamping) in rural areas of the region including quality checks via the regional accommodation study (see p19).	2023
	<b>Engage with good quality existing rural camping and glamping</b> sites with a view to extending promotion on existing destination marketing channels.	2024
	If it transpires that demand outweighs supply and more non-serviced rural accommodation is required, the following actions may apply: <ul style="list-style-type: none"> <li>▶ Encouragement of small-scale expansion of existing rural businesses</li> <li>▶ Identification of sites where larger-scale non-serviced accommodation development projects might be acceptable, potentially starting with those sites with some existing infrastructure and leisure or tourism provision, where impact might be less e.g. sites with an existing leisure use like reservoirs or attractions</li> </ul>	2024 onwards

**INNOVATING THROUGH BUSINESSES**

The West region has good quality product and experiences in each of the three growth themes – that is after all one of the main reasons they were chosen - but key to their growth is continual development and innovation to remain ahead of other destinations. As the LVEP for the region, Visit West should identify the innovating businesses in each of the growth themes and facilitate sessions in which they collectively decide on future development priorities.

## 8 SUSTAINABILITY BY DEFAULT

Sustainability is not an afterthought but is the default position for everything that happens as a consequence of this Plan.

Sustainability is complex, balancing a range of factors – economic, social and environmental. Each of these aspects are woven through the DMP and is fundamental to the strategic approach. By focusing specifically on generating longer stays and resulting greater spend targeting markets with growth potential, this DMP aims to be economically sustainable. By encouraging exploration it aims to spread the benefits to communities across the area supporting facilities and businesses, and creating local jobs. By focusing on longer stays then the carbon impact per visit is reduced.

It is worth saying more about environmental sustainability given the climate challenge and the priority this has in local and regional strategies and plans and that has emerged from the consultation. The West of England Combined Authority and each of the local authorities has in place a climate strategy and action plan. This DMP should sit alongside these reflecting its status as a key component of the action the West of England takes against climate change and allowing the visitor economy to capitalise on any programmes, initiatives and funding streams which emerge.

Given the complexity and the need for joint working a ‘Sustainable Destination Action Group’ of influential partners and decisionmakers should be established to review what is already happening – locally, regionally and nationally - and develop a programme of action which builds on this.

While the impact on the environment must be continually considered in the delivery of the DMP there are a number of specific areas of focus for:

- ▶ Business - supporting businesses in reducing impacts
- ▶ Visitor - helping visitors make good choices
- ▶ Destination – good practice in developing and managing the destination.

Suggestions for priorities and potential actions are made in the table below, with some examples of good practice.

Business	
<ul style="list-style-type: none"> <li>▶ Build business capacity e.g. by providing a toolkit, ideas, inspiration, funding sources, and sources of advice to businesses to encourage reduction in carbon emissions</li> <li>▶ Celebrate and disseminate good practice and innovation among tourism business</li> </ul>	<p><b>For inspiration</b></p> <p><b>Blenheim Palace</b> depends on car borne visitors and despite, or because of this, are tackling their carbon footprint, measuring it to inform decisions, set targets and track progress, and making their <a href="#">commitment</a> visible. Actions include carbon offsetting through tree planting, solar power generation, discounts for those arriving by cycle, walking, or bus; free transport from rail station; new cycle routes; staff incentives for green travel; community grants and loans.</p> 
Visitor	
<ul style="list-style-type: none"> <li>▶ Provide information and ideas for visitors to encourage sustainable behaviours and choices – e.g. car free travel, cycle hire, other businesses with good practices</li> <li>▶ Actively discourage visitors from visiting overcrowded/sensitive areas and encouraging visits to less crowded areas/times</li> </ul>	<p><b>Scottish Community Tourism</b> <a href="#">pulls together</a> community owned providers of tourism services with money generated reinvested locally so visitors make a positive impact on social, environmental, economic, cultural and place-based aspects of communities. Suggestions include places to stay, eat and drink, activities, arts and culture. This theme is picked up and <a href="#">promoted</a> at national level by <b>Visit Scotland</b>.</p> 
Destination	
<ul style="list-style-type: none"> <li>▶ Map local initiatives and programmes, identify opportunities, gaps and how to utilise</li> <li>▶ Encourage local purchasing and short supply chains</li> <li>▶ Promote low impact transport options – walking, cycling, bus and rail; highlight the new Westlink on-demand bus service</li> <li>▶ Promote and encourage low carbon/sustainable construction for new developments and refurbes</li> <li>▶ Joint research project with universities on measuring carbon footprint of tourism and developing solutions to other sustainability challenges</li> </ul>	<p><b>Edinburgh and Stirling Castles</b> – owned and managed by Historic Environment Scotland - have introduced '100 mile menus' for their corporate events. Their catering partner Benugo Events Scotland have devised a sustainably sourced menu, using only local ingredients from within 100 miles of Edinburgh and Stirling.</p> 

## 9 STRENGTHENING THE FOUNDATIONS

A flourishing tourism sector meeting the needs of visitors must pay attention to the fundamentals.

Four specific areas are prioritised for action within the DMP:

- ▶ Accommodation
- ▶ Jobs & Skills
- ▶ Business Support
- ▶ Quality Standards
- ▶ Accessibility

The table below provides more detail with an indication of what action is required.

<p><b>Accommodation</b></p> <p>Having a range of good quality accommodation across the whole area is fundamental to encouraging and facilitating longer stays. While there is some dated information on the numbers of establishments and from planning approvals, there is no comprehensive picture of the current stock – type, location, size, quality - to inform an analysis of the market needs and opportunities. Greater knowledge around accessibility and sustainability practices within the sector would also be useful.</p>	<p><b>What’s required</b></p> <ul style="list-style-type: none"> <li>▶ Undertake a comprehensive accommodation study across the whole Visit West area; identify gaps and opportunities particularly with respect to target markets of Eclectic Vibers and Business Event Visitors</li> <li>▶ Informed by study identify suitable sites and develop a prospectus making the case for investment</li> <li>▶ Disseminate the results of the study to current operators to encourage investment</li> </ul>
<p><b>Jobs &amp; Skills</b></p> <p>People are fundamental to an excellent visitor experience. Recruiting and retaining the right people with the right skills and attitudes can be a challenge for tourism as a result of long hours, seasonal contracts and low wage levels. Part of the solution must be providing excellent conditions of employment, and</p>	<p><b>What’s required</b></p> <ul style="list-style-type: none"> <li>▶ Identify skills gaps</li> <li>▶ Access local programmes and government initiatives for tourism businesses</li> <li>▶ Make links with educational sector at all levels</li> <li>▶ Expand apprenticeships</li> </ul>

<p>opportunities for advancement. Specific shortages e.g. for chefs will require creative recruitment approaches and training programmes.</p>	<ul style="list-style-type: none"> <li>▶ Widen recruitment efforts</li> <li>▶ Encourage peer learning &amp; mentoring</li> <li>▶ Develop or tailor training programmes to address skills gaps</li> <li>▶ Implement fair wage programmes</li> </ul>
<p><b>Business Support</b></p>	
<p>Advice, mentoring, finance and inspiration is required by tourism businesses to help them grow, invest and innovate responding to market demands and using the latest digital tools. The West of England Growth Hub is the dedicated business support service for small to medium sized enterprises including tourism businesses, providing free and impartial advice.</p>	<p><b>What's required</b></p> <ul style="list-style-type: none"> <li>▶ Provide advice, guidance and signposting for tourism businesses</li> <li>▶ Provide flexible learning opportunities – online, modular, mentoring etc</li> <li>▶ Tailor local programmes and government initiatives to needs of tourism businesses</li> <li>▶ Leverage opportunities for digital transformation</li> </ul>
<p><b>Quality Standards</b></p>	
<p>Quality should be at the forefront of the visitor experience across all types of service provision. This covers everything from safety requirements to delivering an accredited five-star experience. Beyond systems and laws, quality should also be driven by the expectations and needs of the market.</p>	<ul style="list-style-type: none"> <li>▶ Compliance with basic legal requirements – fire, safety etc</li> <li>▶ Businesses consider membership of quality assurance schemes</li> <li>▶ Market insights shared</li> </ul>
<p><b>Accessibility</b></p>	
<p>As the population ages accessibility has become more pressing, but all kinds of visible and unseen disabilities can limit the opportunities for people in any age groups. Many sources of advice and resources are in place to help tourism operators including Visit England's accessibility guides, training and other resources provided by Tourism For All, and Euan's Guide (visitor information on disabled access and advice for operators)</p>	<ul style="list-style-type: none"> <li>▶ Compliance with Disability Discrimination Act</li> <li>▶ Business take up and use of resources, guides and training</li> <li>▶ Business advice and support includes accessibility</li> </ul>

## 10 DELIVERY THROUGH PARTNERSHIP

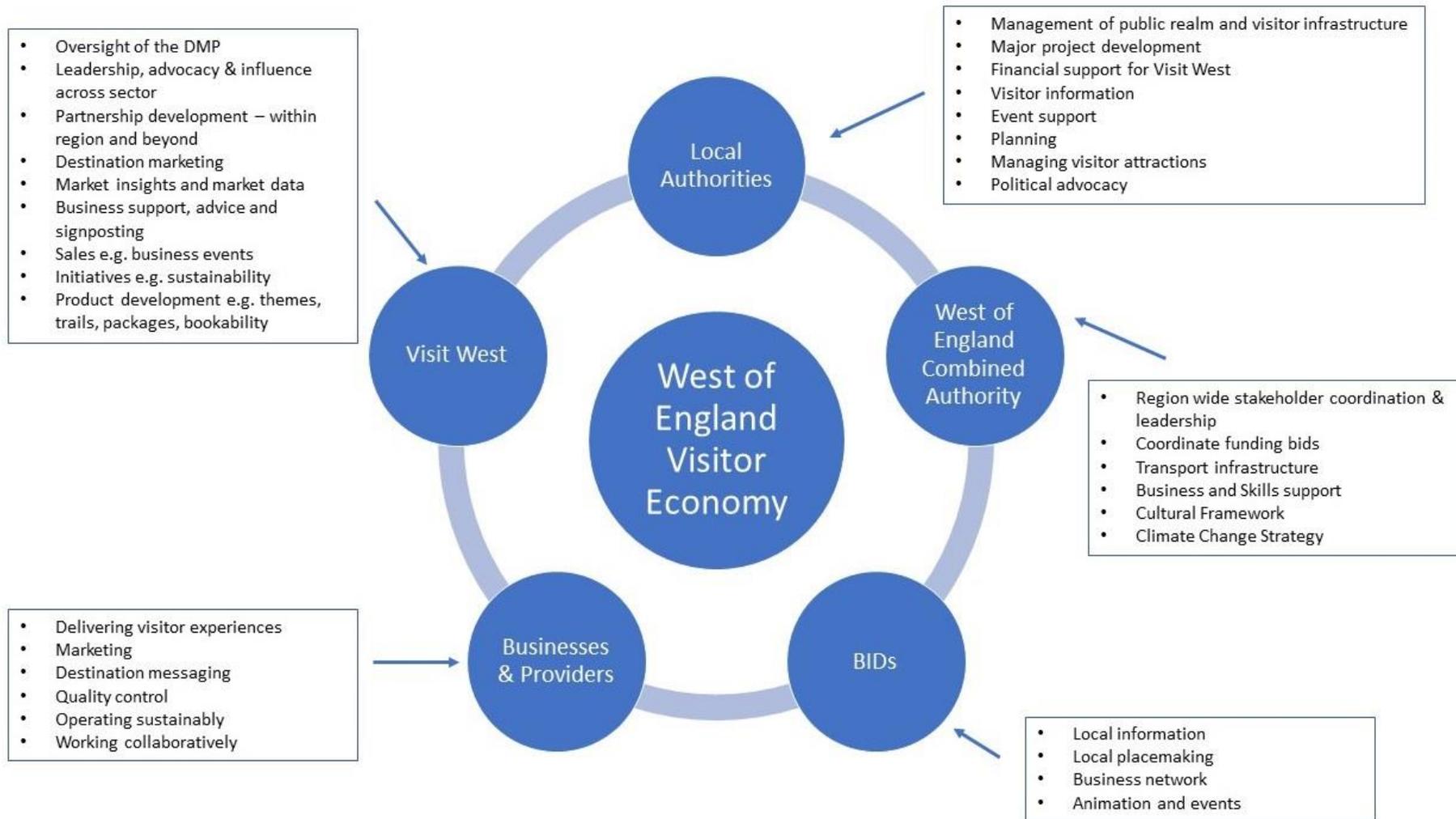
A successful, vibrant visitor economy depends on effective collaboration among all those involved in tourism.

The DMP is not the responsibility of any one organisation – it is a road map to guide and inspire tourism businesses, public agencies and communities. All have a part to play and there are clear benefits of aligning investment, development and marketing.

Clearly Visit West has a key leadership and enabling role as the accredited Local Visitor Economy Partnership within Visit England's new system. 'Visit West' is also a relatively new concept bringing together four areas and there is ongoing work to be done in fostering relationships across the public and business sectors. A desire for more opportunities to meet, share and collaborate was widely expressed during consultation.

The roles and responsibilities for the different organisations that support the visitor economy in the West of England are illustrated in the diagram on the next page, and it will be for each of them to take forward the implementation of the DMP. There are however some specific actions required to support that implementation.

1. **Visit West**, as the accredited Local Visitor Economy Partnership, will **coordinate the implementation of the DMP**, make the right connections, bring influence to bear, evaluate progress and refine accordingly. A **delivery working group** – with a flexible membership - will be established bringing together the right people at the right time from public agencies and private sector organisations to set in motion or deliver specific activity.
2. The **pan-regional annual tourism conference** which brings together Visit West members, partners and stakeholders should be used as the vehicle to launch and/or promote initiatives emerging from the DMP e.g. the sustainability toolkit (see p18) and the 'Years of' events programme (see p15). An **interim event** should be arranged for autumn 2023 to launch the DMP and encourage action through presentations, discussions, networking and idea generation.
3. **Each area** should look in detail at the implications for them of this DMP, the opportunities arising, and what actions they need to take forward working within the strategic framework provided by the regional DMP.
4. Looking beyond the boundaries of the Visit West area **partnerships with other destinations** should be developed focusing on either surrounding areas such as the Cotswolds and wider Somerset, or picking up on the themes of this DMP e.g. heritage cities, social history, street art, fashion, coastal regeneration etc.



## 11 GETTING STARTED

The goals of this plan are designed to be realised over a 10-year period but to provide a starting point, here are the actions to roll out in the remainder of 2023/24 including some quick wins marked with a 

Strengthening the Foundations	Who	When
Undertake or commission a comprehensive accommodation research study across the whole Visit West area to identify gaps and opportunities particularly with respect to target markets of Eclectic Vibers and Business Event Visitors.	Visit West	Summer/Autumn 2023
Marketing		
Improve the online links between existing destination brands as illustrated in the diagram in section 6 	Visit West	Immediately
Create a short regional narrative for use externally in communication with prospective visitors and roll out its use across Visit West-owned channels and via other key tourism stakeholders 	Visit West	Autumn/Winter 2023
Activating the Growth Themes		
Integrate the growth themes into content on existing marketing channels 	Visit West, businesses and tourism providers	ASAP following the launch of the DMP in Autumn 2023
Carry out research into the existing experiences that would appeal to the Eclectic Vibers segment with a view to: <ul style="list-style-type: none"> <li> Extending the range of existing visitor experiences linked to the growth themes that are bookable online </li> <li> Creating a flagship itinerary for each of the growth themes</li> </ul>	Visit West	Immediately
Begin discussions around the development of a new regional events strategy which has the three growth themes at its core.	Cultural Compact	Next Cultural Compact meeting
Identify and recruit several innovating businesses operating within each of the growth themes. Facilitate initial 'future development' meetings to set out and agree terms of reference for each of the groups	Visit West, businesses and tourism providers	ASAP following the launch of the DMP in Autumn 2023

Sustainability		
Set up and recruit members to a Sustainable Destination Action Group of influential partners and decision makers to work through and prioritise the potential actions outlined in section 8.	Visit West	ASAP following the launch of the DMP in Autumn 2023
Delivery		
Arrange an interim annual conference to launch the DMP and to encourage local authorities, BIDs, businesses and providers to take action through presentations, discussions, networking and ideas generation 	Visit West	Autumn 2023
Identify suitable members from public and private sectors to form a DMP delivery working group and diarise an initial kick off meeting. 	Visit West	Immediately with an initial meeting to take place in Autumn 2023

## 12 MONITORING PROGRESS

The primary focus of this DMP is extending reach into the new target markets and attracting them to visit for longer stays. While the objectives are clear, measurement is less straightforward.

Length of stay is measured by the national surveys but due to lack of continuous data, changing methodologies and the lack of robust data even at regional level, there is no easy way to establish a baseline, set a target and measure success. And this is before acknowledging the large number of external variables which can affect the target. So, a more nuanced approach is required. The table below lists a series of key performance indicators which can be used to assess progress in a practical, cost-effective way, focusing on those areas where the region’s tourism players have direct influence and responsibility.

What to measure	How to measure it	Description/Notes
Average length of overnight stays (1)	National surveys – GBTS and IPS	Total number of nights stayed divided by total number of overnight visitors. Baseline set in 2023, 3-year averages to give robust data.
Average length of overnight stays (2)	Feedback from partners	Anecdotal. Track over time.
Market profile	Feedback from partners	Anecdotal.
Accommodation occupancy	STR	Measures occupancy and RevPAR by day of week, month of year. Does not explicitly measure length of stay although may indicate increases.
Perceptions & intentions	Annual visitor survey of VW database	Market profile. Awareness and interest in priority themes. Length of intended and actual visit. Intention or actual behaviour in visiting more than one location. Net promoter score.
Marketing impact	Campaign evaluation	Intended and actual length of stay. Awareness and perception of the priority themes.



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