

Local Economy Scrutiny Panel – 21 July 2009**LE72*****Informal Scrutiny Group Final Report: Tourism Strategy Review***

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Purpose of the Report

The Scrutiny Panel is asked to consider this matter as part of its role in:

- acting as a critical friend in examining proposals for the development or review of key Council policies and programmes.
- reviewing the overall benefit to the public from services provided by the City Council and other organisations.
- organising its own work in an efficient and effective manner.

In July 2008, Members of this Scrutiny Panel agreed that an informal scrutiny group (ISG) be established to support officers in the review of the current tourism strategy for the district, which is approaching the end of its five year life. Cllrs Anthony, Sanders, Stephens, Love and Bell were nominated as members of the ISG.

The group has now met four times and concluded its work, based the terms of reference:

The tourism strategy informal scrutiny group will:

- i) *review the tourism strategy for Winchester District for 2004 – 2008 and consider its success in meeting the specified objectives, and*
- ii) *guide the development of a new strategy for 2009 – 2012 to ensure that:*
 - a) *the opportunities of the London 2012 Games are fully exploited, and*
 - b) *a sensitive balance is retained between the interests of local people, those of visitors to the district and those of the environment.*

A detailed progress report was brought back to this committee after three meetings of the group in November 2009 (LE 64 refers). This report therefore provides an updated summary of the ISG's recommendations in relation to part (ii) of the above terms of reference, and does not attempt to duplicate findings in relation to part (i) which have previously been reported.

It also outlines a revised timetable leading to presentation of a new, combined strategy for the economy and tourism for approval by Cabinet in September 2009.

Links to the Community Strategy

The tourism strategy directly supports the community strategy outcome of economic prosperity by supporting and promoting tourism businesses across the district.

However, it is also an important tool in managing visitors and tourism development in a way that is sensitive to the historic townscapes and natural landscapes of the district. It therefore supports the strategy's high quality environment outcome.

The visitor economy supports the vibrancy of our towns and villages by bringing people and revenue to shops, eateries, arts activities, museums and other facilities that equally

contribute to the quality of life enjoyed by our residents. The tourism strategy, therefore, also contributes to the health and wellbeing outcome of the community strategy.

The process of strategic planning also supports the efficient and effective council priority in terms of offering excellent customer service, providing community leadership, working well with others and so on.

Executive Summary

The tourism strategy ISG interim report detailed the content and key findings of Members after three of its four meetings.

Since this time, Members of the group have met a fourth and final time, principally to consider the results of the 2009 Visitor and Resident Survey. During this meeting, they put forward two further recommendations for the new strategy.

The work of the group is now concluded, and it has made a positive contribution to tourism objectives and actions in the new economic strategy. All Members of this Panel will have a further opportunity to comment on the full, revised strategy as part of the formal consultation process later this year.

Recommendation

Members are asked to note the contents of this report, including the proposed timetable for the completion of the ten year economic strategy for the District.

Background Documents

[LE 64 - Informal Scrutiny Group Progress Report: Tourism Strategy Review, November 2008](#)

[**Creative Winchester** - A Tourism Strategy for the Winchester District 2004 - 2008](#)

The [Winchester Visitor and Resident Survey 2008](#)

Appendices

Appendix 1: Final Report of the Informal Scrutiny Group

Appendix 2: Headlines from the [Winchester Visitor and Resident Survey 2008](#)

Appendix 1: Final Report of the Informal Scrutiny Group

a) Summary of final meeting

The fourth and final meeting took place on 16 February 2009. The agenda included a presentation of the main findings of the Winchester Visitor and Resident Survey (see Appendix 2 of this report) carried out between June and October 2008. It also included a brief summary of workshop actions from the Culture Conference held in January 2009, some of which were relevant to the strategy for tourism.

This followed three previous meetings during which Members had heard a series of presentations from Council colleagues and from tourism stakeholders, businesses and industry representatives. Over the course of the four meetings, Members were able to develop an understanding of:

- a) the range and extent of the Council's activities in support of tourism;
- b) the effectiveness and quality of the tourism service;
- c) current tourism trends and research, to inform future strategy.

b) Timetable for completion and adoption of the strategy

As the performance monitoring report elsewhere on this agenda shows, work on the strategy has been delayed as a result of the rapid introduction of a package of recession support measures at the start of this financial year. However, this has meant that the production of the strategy will now follow the adoption of the Preferred Options for the Local Development Framework (LDF) which is perhaps a more appropriate sequence of events, given that the LDF is designed to ensure a healthy, prosperous and sustainable community for the next 20 years. The new economic strategy will be a shorter term plan designed to start delivering against LDF objectives.

The revised timetable for completion and adoption of the economic strategy is therefore:

August 2009	Updated draft strategy circulated for officer comment
September	Cabinet approval of pre-consultation draft
October	Public consultation
November	Strategy refined in the light of consultation responses
	Strategy presented to Local Economy Scrutiny Committee for consultation
December	Final strategy submitted to Cabinet for formal adoption

c) Recommendations from the ISG for the new economic strategy

In the progress report submitted to Members last November, the following recommendations were made:

i) *Continued relevance of current objectives relating to:*

- marketing;
- ensuring that tourism development brings benefits for local people, and
- environmental sustainability.

ii) *Continued use of strategic 'SMART' targets:* Members suggested that the two most important indicators for the health of the tourism sector were:

- a) the value of tourism revenue to the local economy, and
- b) the number of overnight stays in the district.

iii) *Capitalise on Winchester's cultural offer* by working closely with festivals and events organisers

iv) *Pool marketing resources* with other districts and transport operations

v) *Prepare for the legacy of additional visitors after the London 2012 Olympic and Paralympic Games* by building on customer service standards, sector training, destination accessibility and international marketing reach.

These recommendations are all represented in the draft action plan for the economic strategy which was presented with the ISG progress report last November.

At the fourth meeting, Members proposed the following additional recommendations:

- i) particular effort should be made to attract younger visitors, in view of the ageing profile of the city's main visitor market and the declining spend per head reflected in the most recent visitor survey. The 'DINKS' (double income, no kids) age group was considered to be the most helpful target market.
- ii) an objective of the new strategy should be to increase the daily spend of visitors to the District – particularly during overnight stays – as this is currently noticeably lower than in other comparable destinations;
- iii) the new strategy should address workshop actions agreed at the January Culture Conference, such as:
 - increase the marketing emphasis on the District's festival offer;
 - consider brand power ('ancient capital' or 'modern creative centre'?) and ensure that this makes Winchester distinctive in the marketplace;
 - seek to address the shortage of hotels in the town area;
 - seek to retain/protect heritage assets (eg Textile Conservation Centre) which contribute to Winchester's cultural image.

d) Conclusions

The ISG has made a helpful contribution to the development of tourism objectives and actions in the new economic strategy for the district. Members have already seen the draft strategy, presented in November, and this is being revised in the light of the additional recommendations above as well as other emerging priorities.

Members of the Local Economy Scrutiny Panel will be invited to look at the whole draft strategy again in November as official consultees.

Appendix 2: Headlines from the Winchester Visitor and Resident Survey 2008

Members can find the full report by clicking on the title above or logging on to www.visitwinchester.co.uk/xsdbimngs/Winchester%202008%20research%20revised%20draft%20report%20210109.pdf

The presentation which follows is a summary of the key points relating to the visitor experience.

Winchester Visitor Survey 2008



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Objectives

- a) provide up to date data on the profile, origin, behaviour, use of facilities and opinions of visitors to help improve understanding of tourism with the district and city
- b) identify trends and benchmark to determine improvement priorities



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Objectives (cont)

c)compare visitor opinions with those of local residents to enable priorities that will benefit resident community as well as visitors



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City Council

Methodology

- June to October 2008
- Abbey Gardens, Outer Close, TIC
- professional interviewers
- 28 interview sessions
- Face to face interviews
- 401 visitors and 211 district residents



Visitor Statistics

- ✓ Day visitors 88% of all visitors
- ✓ Most common visitor group composition two adults (50%) – only 15% with one or more children
- ✓ Most common age group 55 – 64 years (24%)
- ✓ 83% visitors in ABC1 socio-economic groups



Visitor Statistics (cont)

- ✓ Only 5% of groups included one or more persons with a disability
- ✓ 90% domestic visitors
- ✓ 70% of domestic visitors from Hampshire
- ✓ Most common age group 55 – 64 years (24%)
- ✓ 83% visitors in ABC1 socio-economic groups



Transport

- ✓ 65% came by car
- ✓ 22% public transport
- ✓ 6% coach tour
- ✓ Increased use of P&R (15% cf 8%)
- ✓ 44% drivers parked in long stay car parks



Information

- ✓ 26% had used the TIC
- ✓ Most popular attractions were the cathedral grounds (86%), shops (74%) and eateries (65%)
- ✓ 77% repeat visitors – had prior knowledge of the city
- ✓ 16% internet



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Spending

Staying visitors:

- ✓ Avg £89.54 per 24 hours, including accommodation £62.94
- ✓ Below avg eating out, entertainment, travel

Day visitors:

- ✓ Avg £16.92 pp per day – well below avg of £26 per day for other destinations



Length of Stay

- Down to avg 3.57 from 7.63 nights in 2003 (5.19 nights in all destinations)
- 81% staying visits were 1 to 3 night duration
- Longer stays tend to be with friends and family or at language schools
- Day visitors stay avg 4.36 hours – slightly shorter than other destinations (avg 4.82 hrs)



High Satisfaction

Visitors:

General atmosphere, feeling of welcome, TIC, upkeep of parks and open spaces

Residents:

General atmosphere; design/appearance & cleanliness/maintenance of parks & open spaces; ease of travel into Winchester; range of places to eat and drink



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Scope for Improvement

Visitors:

Cost of parking, cleanliness of public toilets

Residents:

Range of shops; overall parking experience; choice of nightlife/evg entertainment; availability and cleanliness of public toilets



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Overall Enjoyment

- ✓ 89% enjoyment 'high' or 'very high'
- ✓ 97% 'likely' or 'very likely' to recommend a visit to a friend
- ✓ 83% said nothing had spoiled their visit



Conclusions for Economic Strategy

- ✓ Investment in high quality visitor facilities (eateries, attractions, hotels) needed
- ✓ Continued development of web marketing to reach new audiences
- ✓ Need to increase visiting among younger age group (30+)



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