

# VISIT WILTSHIRE

## Business Plan: 2010 to 2014

VisitWiltshire is a membership organisation which, as described in this Business Plan, will be established as an independent company limited by guarantee with continuing financial support from Wiltshire Council. Our role is to promote tourism in Wiltshire – to attract more visitors and to encourage them to stay longer and spend more. This business plan charts the way forward for the next four years. It concludes that the emphasis should be on:

- **effective marketing** of Wiltshire's attractions, accommodation, and other tourism offers.
- **building our membership** and offering our members improved support.

### 1. The visitor economy in Wiltshire

Tourism is Britain's fifth most important industry, with spending valued at around £114 billion a year. Of this 84% is spent in England providing employment for over two million people. 2009 saw a growth in domestic tourism with overnight trips up 7% and leisure travel up 18% – a reversal of the downward trend over recent years.

South West Tourism estimates that Wiltshire receives 10.9 million people on day trips and 1.6 million staying visitors a year. Total visitor related spend in the County is around £780m – about 6% of the county's economy. The sector directly employs 19,535 people (14,459 full time equivalents), about 6% of total employment. 35% of tourism spend comes from visitors staying overnight while the balance (65%) comes from day trips to and within the county.

In addition to this direct spend, a further 40% is generated in the local economy through the multiplier effect. This brings the total tourism benefit to Wiltshire to over £1 billion per year.

Tourism also enhances the quality of life within the county by offering a greater variety of activities than could be sustained just by local residents. So, by helping to make Wiltshire an even more attractive place to live, tourism also helps to encourage businesses to move here.

However, the marketing of Wiltshire has until recently been fragmented between various councils and with a relatively small budget compared to the County's main competitors.

### 2. The origins of VisitWiltshire

During 2007 the old Wiltshire County Council, the four District Councils, and Swindon came together with private sector representatives to set up a single county wide Destination Management Partnership (DMP). It was recognised that bringing all the existing promotional activities together would deliver more impact with lower overheads.

VisitWiltshire was launched in January 2008, a Head of Partnership was subsequently appointed, brand values were established and the first joint publication (*Ancient Modern*) distributed. The continued co-operation between the local authorities led to the publication in January 2009 of three new county-wide brochures promoting accommodation, attractions and group visits. At this point VisitWiltshire was still operating under an informal arrangement between the various councils.

Following the creation of Wiltshire Council on 1 April 2009 VisitWiltshire became fully operational, with its own budget. This has enabled the organisation to commit itself to a full business planning process.

### 3. The role of VisitWiltshire

VisitWiltshire is committed to:

- **Increasing the value and profitability of the visitor economy** – our bottom line.
- **Raising the quality of the visitor experience** – people's expectations are constantly rising.
- **Improving the environmental sustainability of the industry** – because the natural environment is one of Wiltshire's primary attractions.
- **Engaging with those involved in tourism** – meeting the needs of key stakeholders

We face stiff competition from other tourist destinations in the UK. So, to achieve our aims, we must raise the profile of the county. We don't want to be another "best kept secret" or just somewhere on the way to the West Country. Wiltshire must be recognised as a popular destination in its own right. This plan is therefore focussed on two fundamental activities – marketing Wiltshire and building and supporting our membership.

VisitWiltshire will work to achieve four outcomes:

#### 1. Raising the profile of Wiltshire

Wiltshire does not have as high a level of brand awareness as other destinations within the UK. We need to raise the profile of what the county has to offer. This can be achieved by creative advertising, direct mail, exhibitions, publications and the development of the VisitWiltshire website – and of course by effective public relations to achieve free publicity.

We can measure an increased profile through:

- increased use of the website (the trend is upwards)
- the level of brochure enquiries (though the national trend is downwards)
- the value (in terms of equivalent advertising cost) of the publicity generated through PR in the regional, national and international press.
- the number of visitors – both staying and day visitors
- attracting additional funding (e.g. through sponsorship)

#### 2. Ensuring that visitors enjoy positive, quality, sustainable experiences

While we have control over our own activities – our publications and website – it is the various tourism businesses in the county that actually deliver the product and service to visitors. So VisitWiltshire must seek to influence and assist these end providers. We must promote an understanding of consumer needs at each stage of the *Visitor Journey*<sup>1</sup>; increase the proportion of accredited providers and involve more non-accredited ones. We must offer skills training within the sector and promote environmental sustainability.

We can measure visitor satisfaction through:

- satisfaction surveys of visitors during their stay in the county
- feedback from local residents and businesses both directly to VisitWiltshire and from the Community Area Boards and local economic partnerships.
- feedback from the various social networking sites.

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<sup>1</sup> The 'Visitor Journey' concept (see appendix 3) was used by *Tourism Engineers* as the basis of a research project commissioned by VisitWiltshire in 2009. The project looked at the methods of communicating with and influencing the decisions of potential and actual visitors to Wiltshire, including the role played by TIC's.

### 3. Engaging with all organisations involved with tourism in the county

VisitWiltshire must satisfy the aspirations of its three key customers – the public sector and its primary funder, Wiltshire Council; its private sector members (now approaching 400 businesses) and the end user – the visitor to Wiltshire.

Our level of engagement with our own members can be measured by:

- the total number of members we attract and retain;
- our membership as a proportion of the total tourism related businesses in the sector;
- the geographic spread of our members across the county

In addition we also have a range of other partners:

**VisitBritain:** VisitWiltshire acts as the data steward for Wiltshire accommodation providers. We must provide at least an annual update to the VisitBritain database.

**VisitEngland:** The new framework strategy was launched on 18 March 2010 (see Appendix 2). It encourages regional tourist boards and destination management partnerships to link their plans with the national framework. The key VisitEngland themes are reflected in VisitWiltshire's objectives.

**South West Tourism:** SWT is undertaking its own review to ensure that its objectives are aligned with those of VisitEngland and we need to play our part in that.

VisitWiltshire also acts as the voice of the County's tourism industry and as such should be interacting with the media, Area Boards, TICs, the Chambers of Commerce and other Economic Partnership organisations.

### 4. Provide a sustainable service offering value for money

VisitWiltshire, as a public/private sector partnership, seeks to provide a long term service for the public and private sectors within the geographical county of Wiltshire (which includes Swindon), and for visitors to the county. We believe we can best achieve this by establishing VisitWiltshire as an independent membership based organisation with service level agreements with public sector authorities.

## 4. Our current situation

This plan seeks to address two key issues: the scale of our budget relative to those of our competitor counties and how best to use those funds.

### The scale of our budget

In seeking to determine the size of an effective, future budget, and in the absence of appropriate and reliable historic data, we have benchmarked Wiltshire against the marketing spend and size of our competitor destinations in the south west.

### Current tourism budgets in adjacent counties in 2010/11

	Marketing spend <sup>1</sup> £	Value of tourism <sup>2</sup> £	FTE employment <sup>2</sup> £	Percentage of all employment
<b>Cornwall</b>	Over 500,000	1,711,231,000	39,667	22%
<b>Cotswolds</b>	Over 500,000	829,256,000	16,791	8%
<b>Devon</b>	500,000	2,138,485,000	46,140	11%
<b>Dorset <sup>3</sup></b>	421,000	1,457,650,000	30,250	13%
<b>Somerset</b>	510,000	1,080,833,000	23,549	9%
<b>Wiltshire</b>	<b>189,910</b>	<b>780,000,000</b>	<b>14,459</b>	<b>6%</b>

- <sup>1</sup> Estimate of the combined marketing spend by county and district councils (excluding staff).  
<sup>2</sup> South West Tourism 2008 Volume & Value survey  
<sup>3</sup> This figure excludes Bournemouth/Poole – the marketing spend for Bournemouth alone is over £526,000

In our view, based on the above figures Wiltshire spends too little on marketing aimed at bringing people into the county and too much on providing information to those already here. The creation of a unitary authority presents a real opportunity to deliver an effective, co-ordinated and marketing led approach which will see Wiltshire starting to gain the recognition it deserves

This business plan recognises the current (and likely future) financial situation of Wiltshire Council and so proposes a reduction in the funding of VisitWiltshire over the next four years, but also a radical shift in the way that reduced budget is spent.

## How to spend it

The inherited pattern of funding and expenditure is as follows:

### Visit Wiltshire Source and Use of Funds 2009/10

Source of funds £		Use of Funds £	
<b>Grants and membership fees</b>		<b>Marketing</b>	<b>189,910</b>
Wiltshire Council	788,631	<b>Total funds allocated to marketing</b>	<b>189,910</b>
Membership	78,300	<b>VisitWiltshire funded TIC operations</b>	
SWT/SWRDA		<b>SE Region TICs (Salisbury)</b>	
Sponsorship		Premises and utilities costs	39,140
RDPE		Centre running expenses	2,920
Others	23,550	Traded goods purchases	31,850
<b>Total: Grants &amp; membership fees</b>	<b>890,481</b>	Employment costs	160,200
<b>Income from trading in the VisitWiltshire funded TIC's</b>		<b>Total funds allocated to the South &amp; East Region TICs</b>	<b>234,110</b>
SE Region traded goods profit	87,790	<b>NW Region TICs (Devizes, Marlborough, Avebury and Corsham)</b>	
NW Region Traded goods profit	70,000	Premises and utilities costs	41,000
<b>Total income from TIC trading</b>	<b>157,790</b>	Centre running expenses	12,070
		Traded goods purchases	50,500
<b>Total Funds</b>	<b>1,048,271</b>	Grants	53,925
		Employment costs	153,723
		<b>Total funds allocated to the North and West Region</b>	<b>311,218</b>
		<b>Total funds allocated to TICs</b>	<b>545,328</b>
		<b>Administration</b>	
		Premises and utilities costs	1,450
		General operation costs	109,936
		Employment costs	201,647
		<b>Total funds allocated to Administration</b>	<b>313,033</b>
		<b>Total use of Funds</b>	<b>1,048,271</b>

This shows only too clearly that of the total funds available to VisitWiltshire only 18% was spent on marketing to attract visitors to the county and that VisitWiltshire has inherited a situation where some 52% of its total funding is committed to operating or supporting six (of the 18) Tourist Information Centres in Wiltshire.

Based on information collected by the TICs themselves, only 4% of the visitors to the county ever use one of the TIC's in the county and less than 2% (237,000) visit the four larger ones currently funded by Wiltshire Council through VisitWiltshire – at Avebury, Devizes, Marlborough and Salisbury. It should also be noted that, by definition, all these visitors have already made their decision to visit the county *before* using a TIC. The Business Plan response with regard to VisitWiltshire's involvement with TIC's is set out in section 8 below.

## **5. The way forward**

This business plan places the emphasis on using funds in a more effective manner to achieve VisitWiltshire's objectives. This will require a significant switch of resources away from running TICs and into marketing and membership development.

### **Where are we now?**

The full SWOT analysis is set out in Appendix 4. In summary it says:

#### ***Strengths***

- A wealth of attractions, especially with an historic/heritage/archaeological theme,
- An attractive rural environment
- Easy access from large, densely populated areas
- Proximity to national and regional airports and to the cruise port of Southampton

#### ***Weaknesses***

- Lack of awareness of Wiltshire as a county
- Unequal spread of visitors across the county
- We are currently only allowed to work with accredited accommodation providers.
- Limited stock of self-catering accommodation, especially camping and caravans
- Too few 4 star hotels and conference facilities.
- Not enough wet weather attractions
- Not enough high profile events
- Lack of up to date market intelligence

#### ***Opportunities***

- Improvement in the visitor facilities at Stonehenge
- Spare hotel capacity (in Swindon at weekends and in the rural areas during the week)
- Greater use of the Wiltshire website for on-line bookings and information 24/7
- Our growing membership bringing in new ideas and opportunities

#### ***Threats***

- Shortage of trained staff
- Reduced Government funding leading to lower levels of investment in the public realm
- Natural disasters and the effects of climate change
- Rise in the popularity of short breaks overseas

## **Where we would like to be by 2015?**

By 2015 Wiltshire will be an established, quality destination, popular with couples living in London, the South East and the Midlands. It will have a reputation for offering value for money, underpinned by quality of service and a friendly welcome. Wiltshire will be strongly associated with relaxation and rural activities.

Independent minded travellers will explore the many attractive market towns and villages throughout our county; its history; its pubs and restaurants. They will enjoy walking and cycling across Wiltshire. The story of our ancient history will be told in an engaging way across the county and presented as an important and distinctive part of Wiltshire's appeal.

Longleat, Lacock, Salisbury and Stonehenge, despite the cancellation of its proposed new visitor centre, will not only continue to attract significant numbers of visitors from across the UK and from overseas but also offer gateways to the wider Wiltshire experience.

Swindon will be on its way to achieving its regeneration ambitions as an attractive, vibrant urban location. Business tourism remains important, with leisure tourism on the increase.

Wiltshire will be working with its neighbouring destinations of Bath, the Cotswolds and the New Forest to benefit from their long established brand reputation and offer a wider range of leisure opportunities.

In seeking to increase the value of tourism, VisitWiltshire however recognises there are factors outside our control which impact on the visitor economy – not least the state of the wider economy – and the weather!

## **How are we going to get there?**

By concentrating all our effort on marketing and by building a stronger membership. VisitWiltshire recognises that TICs have a role to play in terms of the services they provide to residents and to visitors already in Wiltshire. However, given the limited budget, we believe that Wiltshire will see a greater return by increasing the amount spent on marketing to bring additional visitors to the county. As a result, we believe TICs should be taken under local control – see section 8 below.

## **6. Marketing**

Our marketing objectives are to:

- raise the profile of Wiltshire as a distinctive destination for short breaks and day trips all year round
- increase total visitor numbers and visitor spend
- increase the average length of stay
- increase visitor numbers in the low season and midweek
- maximise the advantage of Wiltshire's already well established iconic attractions
- broaden the appeal and knowledge of the county so as to help to spread the business across the county

A detailed Marketing Plan covering the years 2010/11 to 2014/15 is under development and will be presented to the VisitWiltshire Board after this Business Plan has been adopted. The marketing plan will include provision for collaboration with the marketing already carried on by the county's major providers.

The plan will go into detail about how the Wiltshire Brand is going to be developed and how the county and local requirements are to be met. The use of "England's Historic Capital" will be considered as one of the options for a positioning statement for Wiltshire. We will apply out of the box thinking and clever ways of spending the budget and as a result the marketing activity will be highly creative and innovative with a huge "Wow factor".

## Target markets

Our target markets are:

### **Staying visitors**

Staying visitors currently contribute 35% of the overall visitor spend in the county. These are higher spending, older adults from within the UK and overseas staying an average of 3.7 nights. They have a higher daily spend than day visitors.

### **Day Visitors**

Day trips to Wiltshire by UK nationals and overseas visitors contribute the other 65% of current visitor spend. It is vital to maintain this sector, while looking for new opportunities to attract additional off-peak business.

VisitWiltshire will target the following three key components:

- local residents living in Wiltshire (including people 'visiting friends and relatives')
- day trippers (1-2 hours travel time, including those staying in other destinations)
- overseas visitors (primarily those staying in London hotels)

### **Groups**

There is no readily available data on the size and value of the group market in Wiltshire. Data from the coach park ticket machines in Salisbury indicate that around 8,000 coaches per year (estimated at least 280,000 people) pay to park in city. We also know that some 360,000 people a year visit Stonehenge as part of a group.

### **Business and Conference Travel**

Business travel accounts for around 21% of overnight visitor spend and includes both those travelling on business and those attending meetings and conferences. It is the sector of the market that has been most hit during the recent recession. We need to encourage greater take-up of our existing capacity and look at the scope for wider provision for conference facilities – most of the current offer is concentrated in Swindon.

Discussions are currently taking place with Swindon Borough Council about their hosting a "Wiltshire Conference Bureau" as part of their contribution to VisitWiltshire. We are keen to see this progressed.

## Market research

One of the weaknesses identified in the SWOT analysis is the lack of up to date market intelligence. The main source of data on the value of tourism to the county comes from the annual 'Volume and Value' study undertaken by South West Tourism. When this information is published (usually around April) it is already 15 months old.

The latest report (2008) includes the following data:

### **Wiltshire visitor numbers and direct spend (excluding the multiplier effect)**

		<b>Number of people</b>	<b>Direct Spend £</b>
Overnight visitors (Average stay 3.7 nights)	UK residents	1,335,000	186,552,000
	Overseas	300,000	77,230,000
Total overnighters		1,635,000	263,782,000
Day visitors		10,893,000	474,111,000
Friends & relatives			40,600,000
Second homes			842,000
<b>Total visitors</b>		<b>12,528,000</b>	<b>£779,335,000</b>

For a fuller summary see Appendix 5

According to 2008 VisitEngland figures the average daily spend for day visitors was £43. However the visitor survey carried out by South West Tourism in 2009 put the figure at £25. For staying visitors the figures are around £58 (UK) and £66 (overseas)

VisitWiltshire is keen to work with the industry to find a way to obtain information which is more up to date and provides a more immediate picture of short term trends.

## 7. Membership development

We will seek to expand our membership, help members to market themselves more effectively and to raise standards.

### Existing membership

In its first year VisitWiltshire had 314 members. By the end of the second year this number had risen by 16% to 365. Since January 2010 a further 40 members have been recruited.

#### VisitWiltshire membership

	<i>Attractions</i>		<i>Accommodation</i>		<i>All members</i>	
	2008	2009	2008	2009	2008	2009
Bradford on Avon	0	2	11	18	11	20
Chippenham (incl Calne)	1	6	33	41	34	47
Corsham	1	2	11	11	12	13
Devizes	3	5	27	29	30	34
Malmesbury	1	2	8	10	9	12
Marlborough	0	3	15	16	15	19
Melksham	0	0	2	5	2	5
Pewsey	1	1	3	4	4	5
Salisbury & S Wiltshire	39	34	105	101	144	135
Swindon	4	8	15	24	19	32
Trowbridge	0	1	4	9	4	10
Warminster	2	2	12	13	14	15
Westbury	0	0	0	2	0	2
Members outside Wiltshire	8	6	8	10	16	16
<b>Total</b>	60	72	254	293	314	365

### Expanding the membership

Encouraging and retaining a broader membership base across the county is an important element in ensuring the long term success of VisitWiltshire. A detailed Membership Development Plan covering the years 2010/11 to 2014/15 is being worked up and will be presented to the VisitWiltshire Board for approval later this year.

Currently membership is only open to accredited accommodation providers and attractions that have signed up to the national quality assessment schemes and code of conduct. Within the VisitEngland/AA accreditation schemes in Wiltshire there are some 400 accommodation providers – with 73% of them already signed up to VisitWiltshire. But we estimate that there are almost as many non-accredited tourism businesses. If, as expected, VisitEngland's rules are relaxed there will be considerable potential in recruiting additional members in the next few years. We have been advised by VisitEngland that a new 'fit for purpose', (minimum standards accreditation & inspection) scheme should be in place by April 2011.

To date attention has been focussed on recruiting accommodation providers and attractions. As VisitWiltshire begins to work with other local organisations to produce second stage literature (for people who have already arrived in the county) there will be new opportunities to attract other types of business (e.g. shops, pubs, restaurant, cafes etc) into membership. There will also be an opportunity to create a new category of TIC members as VisitWiltshire develops its relationship with this group.



The aim is of course to increase membership and the following table sets out targets which are achievable if the membership rules are relaxed.

### VisitWiltshire membership targets

	2010 (current)	2011	2012	2013	2014
Accommodation	293	325	450	550	620
Attractions	72	85	100	100	120
Shops	0	50	100	150	175
Restaurants etc	0	50	100	150	175
TICs	0	10	15	15	15
<b>Total Members</b>	<b>365</b>	<b>520</b>	<b>765</b>	<b>965</b>	<b>1105</b>
Annual increase	16%	42%	48%	26%	15%

Figures are for membership as at 1 January that year

To achieve these significant increases in membership we propose to employ two membership managers, one for the south east and one the north west of the county. They will be target orientated with a remuneration package which rewards results. Local TICs will also be financially rewarded for helping to increase and retain membership.

The membership managers, working with the TICs, will also have responsibility for membership retention through building closer ties with all members, being seen out and about, working with members around the county.

### Building quality

VisitWiltshire will work with its members to help them achieve better marketing and higher quality provision of their services. This will include promotion of the regional and national award schemes.

### Skills training

The tourism industry in Wiltshire has a very high proportion of small businesses. VisitWiltshire has an important role to play in helping to raise standards through identifying, encouraging and promoting skills training.

There are many organisations with whom VisitWiltshire can partner in this respect. However few of these have the same direct ongoing relationship with tourism providers. Responsibility for identifying training needs and providing for these will fall under the two Membership Development posts. They will also work with partners, signposting members to third party courses where these meet the requirements of members.

## 8. TIC's and other sources of tourist information

TICs operate essentially as stand alone units providing information on their immediate locality to residents and to visitors already in Wiltshire. Of the 18 TICs in Wiltshire, nearly two-thirds are already funded locally. (See Appendix 6) The six TICs funded by VisitWiltshire (and which currently account for 52% of the total VisitWiltshire funding) have face to face contact with less than 2% of visitors to Wiltshire – and those visitors have already made their decision to come here. While these TICs can generate additional spend, this is relatively small (under £2m a year based on a model produced by VisitEngland) compared to the opportunity of generating additional visitors and spend to the county by concentrating VisitWiltshire's funding on marketing to new customers.

For this reason we believe that the operation of TICs should not be our responsibility. VisitWiltshire should be focusing its efforts on influencing visitors at stages 1 to 5 and 7 of the Visitor Journey (See appendix 3). It is therefore proposed that the responsibility for managing

the six TICs currently funded through VisitWiltshire (Avebury, Corsham, Devizes, Marlborough, and Salisbury [2]) should be passed to Wiltshire Council as soon as possible during this year with a view to the Council reviewing the range of services the TICs provide and passing them on to local control where appropriate.

VisitWiltshire will of course remain in contact with TICs across the county as they are both a distribution network for VisitWiltshire brochures and a source of information as they are in close contact with providers locally. We will create a new VisitWiltshire membership category for TICs establishing a new type of relationship. Whilst the majority of the VisitWiltshire budget will be spent on attracting visitors to the county some will be used to support the TIC's through local marketing area, staff training and in developing and supporting VisitWiltshire members.

#### **Tourist Information Points (*roadside information boards*)**

Based on the audit done in 2009, VisitWiltshire will seek to identify external funding to update and replace the various roadside information boards across the county which offer a mix of local and countywide information.

#### **Brown and White Tourism Signs**

The new policy developed jointly by VisitWiltshire and the Council's Highways Department is expected to be adopted by Wiltshire Council later this year. This policy seeks to set out the criteria for the approval of Brown and White Tourism Signs in the county and the procedures relating to their application and installation.

Once adopted there will be an immediate high demand for new signs. This would be one of the responsibilities of VisitWiltshire's new Administration Manager post. VisitWiltshire receives £200 per formal application and income from this activity has been included in the Source and use of Funds data in the budget.

We will also encourage all those towns involved in tourism to adopt a common and co-ordinated signing policy for their destination.

## **9. The new organisation**

VisitWiltshire is currently a public/private partnership but is seen by many in the private sector as another department of Wiltshire Council. To give greater confidence to potential private sector members it is essential that VisitWiltshire is recognised as an autonomous and independent organisation.

Visit Wiltshire will, therefore, be set up as a company limited by guarantee. Its Board will have full responsibility and authority to make and implement decisions on all the aspects of running VisitWiltshire and to manage its budget and staff within the context of the agreed business plan and a Service Level Agreement with Wiltshire Council.

#### **Board Structure**

The Board will direct the operation of VisitWiltshire. Four of the members will act as "Support Directors" and have oversight of particular areas of the work to ensure that the key performance targets are met – as follows.

- **Chairman:** from the private sector
- **Board Member (Offline Marketing):** from the private sector
- **Board Member (Membership Development – South/East):** from the private sector
- **Board Member (Membership Development – North/West):** from the private sector
- **Board Member (Online Marketing):** from the private sector
- **Board Member:** Wiltshire Councillor Portfolio Holder for Economic Development and Tourism (with the Cabinet member as a substitute)
- **VisitWiltshire Executive Director**

Board members will not receive any remuneration however they will be able to claim reasonable expenses. Their term of office will be three years after which they may stand for re-election.

The four support directors will meet the Executive Director and appropriate staff every six weeks to review progress. The full board will meet once a quarter to consider the quarterly accounts and to receive an update from the Executive Director, the Membership Managers and the Marketing Managers on activity and performance against key performance targets.

### **The Staff**

The current headcount is 22.9 FTE (assuming all posts are filled) but the aim is to restructure based on a much smaller number of people, in order to deliver the fundamental change in organisation's focus and style of operation.

There will be 6 FTE positions within the new company including an Executive Director who will have overall responsibility for the work of VisitWiltshire. This compares with 5.6 FTE within the existing central team of VisitWiltshire currently based in Salisbury and employed by Wiltshire Council. The focus of the work will be on marketing and membership development. Subject to a due diligence process to be undertaken by Wiltshire Council and staff/trade union consultation, the aim will be to fill these positions through a TUPE transfer of staff from the current central team.

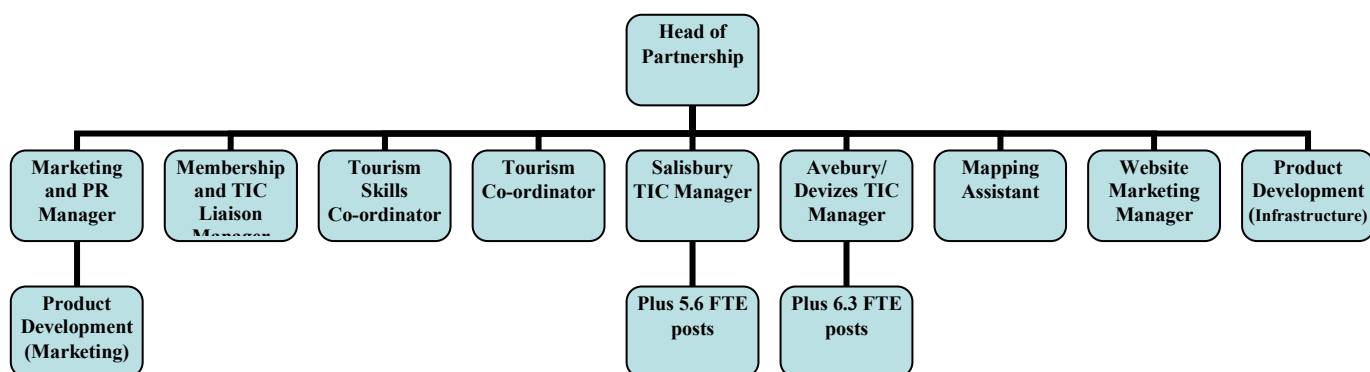
### **New Employees**

Following the TUPE transfer of staff, any subsequent appointments to VisitWiltshire will become employees of the new company under the terms and conditions of employment determined by the company.

It is recognised that the set up of the new company will take time as proper procedures must be followed with regard to the proposed TUPE transfer process. The objective is to have this whole process completed and the new team in place soon as possible.

# VisitWiltshire staffing structure

## Existing Organisation (22.9 FTE)



## Communications

VisitWiltshire is very conscious of the need to communicate with all its Stakeholders, not just its members, and for them to remain confident about the performance of the company. Regular updates will be provided in the fortnightly e-newsletter to members. Information will also be communicated through the various members' networking meetings. A more formal presentation will be given annually at the Tourism Forum, usually held in November.

## Offices

VisitWiltshire will need a self-contained office for six staff and it is very important for the development of the necessary creative environment and culture that this office is independent of any other activity. Wiltshire Council has offered to provide office space free of charge at Bourne Hill, Salisbury and to cover all the costs associated with the use of the offices, furniture, equipment, IT, and telephones etc. VisitWiltshire is also looking at a possible alternative offer of accommodation from the National Trust. As this would also be free there is no provision in the Visit Wiltshire budget for any of these items.

## 10. Budgets

The proposed budgets (from 2011/12) represent a radical change in direction away from TIC operations (i.e. communicating with visitors already in the County) towards more strategic marketing and membership development aimed at bringing in more visitors and getting them to stay longer and spend more. The budget projections for the four years 2010/11 to 2012/14 are set out in the attached Source and Allocation of Funds table. In summary the budget:

- Reduces from £935K this year (2010/11) to under £800k a year
- Switches all the effort into marketing and member development

VisitWiltshire is keen to start making the change towards its new structures and organisation, but recognises that the timing for these will need to be discussed with Wiltshire Council. As it is not possible to predict, at the time of writing this Plan when this might occur, the budget for 2010/11 does not reflect any of the proposed changes.

## **2010/11 Budget**

Wiltshire Council has confirmed that in the current year it will provide funding of £788,641. However, the Council is subject to Central Government directives and if budget cuts are imposed upon them this may affect the funding of VisitWiltshire. If this occurs VisitWiltshire will have to cut its costs/spend accordingly.

All the costs for the TIC's are in the 2010/11 budget and when the responsibility for the running of the TIC's is transferred to Wiltshire Council the budget for the TIC's will also transfer over.

## **Budgets to 2013/14**

Appendix 1 shows VisitWiltshire's budget proposals for the subsequent three years to 2013/14. These figures have been agreed by the Board and will now be presented to Wiltshire Council. The Council's contribution cannot be confirmed until the September 2010 Cabinet meeting but initial discussions have resulted in Visit Wiltshire being told they are likely to be broadly acceptable.

In summary the figures show a continuing reduction in the Wiltshire Council contribution – from £550,000 in 2011/12 to £500,000 in 2013/14 but, as a result of bringing in more members, an increase in total funding from £740,000 in 2011/12 to £780,000 in 2013/14. This will enable VisitWiltshire to sustain a steady increase in the amount it spends on marketing from £396,000 this year to £690,000 in 2013/14

## **VAT**

As an independent company limited by guarantee VisitWiltshire will need to account for VAT.

# **11. Corporate Culture**

## **Performance driven**

VisitWiltshire will be customer focused, results driven and sales and marketing orientated. We will apply management by objectives and the performance of the Executive Director and the management team will be judged against the achievement of measurable key performance indicators. A proportion of their remuneration will be linked to their success in achieving those objectives. We are people orientated and believe in developing our staff. We want to generate a sense of fun in the company. We want our staff to feel part of a team and proud of the work they are doing.

## **Environmental sustainability**

Given the impact which tourism has on the environment, it is increasingly important that environmental sustainability is embedded in all that we do. VisitWiltshire will act responsibly itself, as well as encouraging visitors and businesses to adopt a similar approach.

## **Improvements in the public realm**

Visitors as well as local residents use the roads, public transport, car parks, public toilets, street furniture, tourism signage etc. Often they will have experienced these facilities and services before they arrive at their final destination. It is important for VisitWiltshire to encourage the relevant local authorities to invest in these facilities and to make sure that they are of a good standard. Feedback is critical on these issues.

## **11. Conclusion**

This Business Plan sets out clear and radical proposals for the long term development of tourism in Wiltshire.

The key objectives are based on an analysis of the needs of the principal stakeholders. The activities outlined link to a budget which sees a realignment of resources from an inherited position to one which targets activity on increasing the profile of Wiltshire and attracting higher levels of spend within the local economy, while building a growing, committed membership.

The management and Board structures are designed to maximise the effectiveness of the organisation and to enable it to react quickly as market conditions change.

**Appendix 1: - VisitWiltshire source and application of funds summary (see separate document)**

## Appendix 2: - VisitEngland strategic framework

### ***The Vision:***

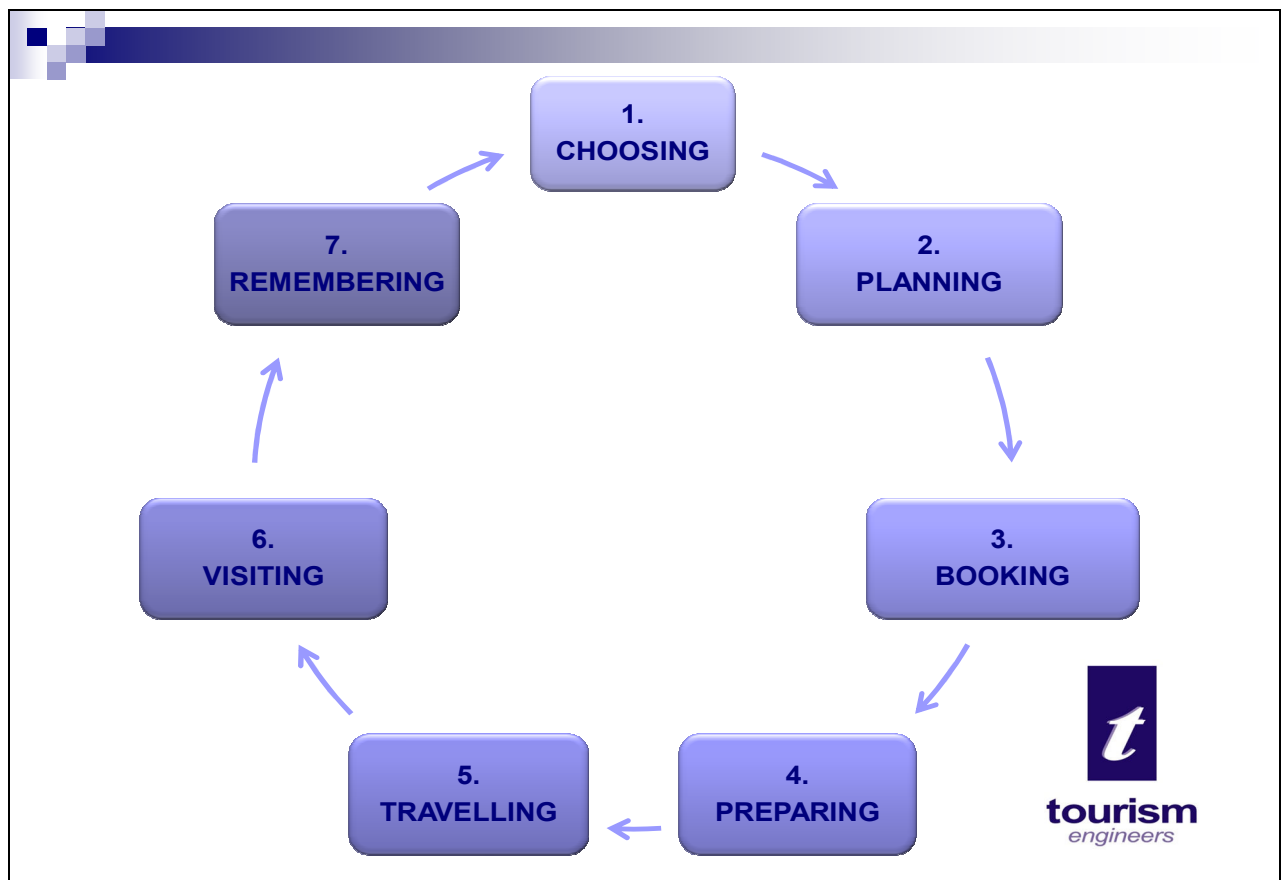
To maximise tourism's contribution to the economy, employment and quality of life in England

### ***The objectives:***

1. To increase England's share of the global market
  - a. Develop an English national marketing strategy for domestic and international markets giving priority to the most attractive destinations and themes
  - b. Organise the opportunities of the London 2012 Olympic and Paralympic Games and the cultural Olympiad through a coherent national plan
  - c. Develop a major events plan, including HM The Queen's Diamond Jubilee and an English 'Decade of Sport' and identify opportunities to cross-promote destinations and experiences
  - d. Develop a Business Tourism Action Plan to advise on the best opportunities for growth in business tourism
2. To offer visitors compelling destinations of distinction
  - a. Commit to a Regional Tourism Framework Agreements which will provide a consistent approach in support of the visitor economy across England
  - b. Establish a benchmark of best practice in destination management and organisation
  - c. Implement the reviewed approach to quality assessment programmes in England
  - d. Create an England satisfaction survey which provides a national benchmark and greater consistency of data at regional, destination and local levels across England
3. To champion a successful, thriving tourism industry
  - a. Deliver a National research and Intelligence programme to better understand the performance of the industry and the market conditions which affect it
  - b. Maximise the value of seaside resorts to the visitor economy through a Seaside Resort Action Plan
  - c. Develop a Rural Tourism Action Plan to ensure the importance of tourism to rural communities is better understood and optimised
  - d. Establish a Sustainable Tourism Action Plan to build on current practice; engage the industry and future proof tourism's development
  - e. Develop a communication and engagement plan to promote greater industry effectiveness
4. To facilitate greater engagement between the visitor and the experience
  - a. Develop and implement a programme to modernise visitor information and e-tourism platforms
  - b. Identify key priorities for the tourism industry in England's transport infrastructure and develop a Tourism Transport Plan
  - c. Review of tourism infrastructure including signposting and access at key 'gateway' points
  - d. Implement the Welcome to England Programme to ensure visitor's reception at key points on their journey is of a consistently high standard
  - e. Develop and implement a programme to improve accessibility for disabled visitors



## Appendix 3 – The Visitor Journey



## **Appendix 4 – SWOT (strengths, weaknesses, opportunities and threats) analysis**

### ***Strengths***

- A wealth of attractions, especially with an archaeological/historic/heritage theme, including internationally known attractions such as Stonehenge & Avebury, Salisbury Cathedral, Longleat, Stourhead, Bowood and STEAM
- An attractive rural environment (46% of the county is classified as an 'Area of Outstanding Natural Beauty') especially for walking and cycling
- Attractive market towns such as Bradford on Avon, Devizes, Malmesbury, Marlborough, Salisbury offering both local, individual shops and well known high street stores
- Britain's most visited retail outlet (The MacArthur Glen Factory outlet in Swindon)
- A range of quality accommodation providers right through to 5 star country house hotel, although the predominance is with smaller B&Bs
- Good examples of Britain's industrial heritage, including STEAM, Kennet & Avon Canal and the woollen industry
- Proximity to the large, densely populated areas of London and the South East, Bristol, South Wales (Newport & Cardiff), and the Midlands.
- Central southern England location making it a good base to visit Bath, the Cotswolds etc
- Higher than average number international visitors linked with visits to Stonehenge, Salisbury and Bath (18% of staying visitors)
- An emerging destination management partnership which is developing a strong partnership between the public and private sectors, and with its membership
- A newly developed and agreed, clear, positive brand
- Improved co-ordination across the county in the production and distribution of annual brochures
- Main road transport arteries running through or near the county (M4, M3/A303, M27, A36)
- Rail connections from London Paddington, London Waterloo, Cardiff, Bristol & Portsmouth

### ***Weaknesses***

- Lack of awareness of Wiltshire as a county
- Currently only able to work with 50% of the accommodation providers (i.e. those that have been inspected by VisitEngland or the AA) through the marketing restrictions imposed by VisitBritain/VisitEngland. This restriction is expected to be lifted by the end of 2011.
- Lack of consistent high quality service across all providers
- Limited stock of self-catering accommodation, especially camping and caravans
- Lack of competitively priced accommodation for groups
- Not enough wet weather attractions
- Not enough high profile events
- Under exploitation the wealth of Wiltshire's historic heritage
- Unequal spread of visitors across the county
- Proximity to national and regional airports and to the cruise port of Southampton
- Lack of a major visitor attraction in the north west of the county
- Lack of up-to-date intelligence and research
- Perceived as a "gateway" rather than a "destination"

### ***Opportunities***

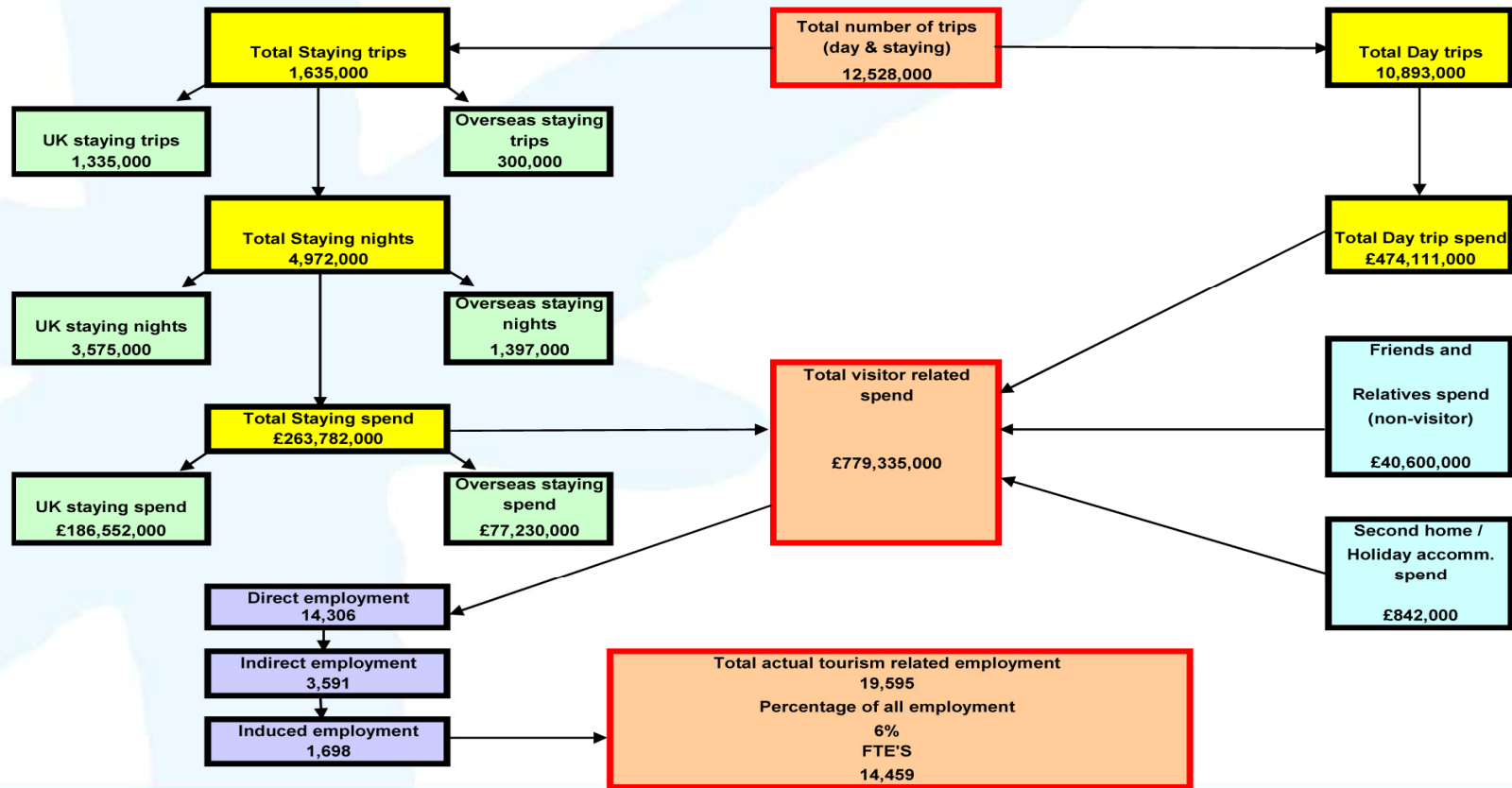
- The growing membership of and activity within the VisitWiltshire Tourism Partnership
- Develop more buy in from a wide range of stakeholders
- Raising the standard of the accommodation stock, though encouraging participation generally and especially recognition through national accreditation schemes
- Availability of hotel capacity in Swindon at weekends and in many of the rural areas of the county during the week
- Improvement in the visitor facilities at Stonehenge linked to the 2012 Olympic Games and closer working with other museums/attractions across the county
- Capitalise on the attractive rural environment for walking, cycling and canal based pursuits to promote longer stays
- Encourage greater environmental sustainability
- Raise the profile of events generally and seek to encourage more high profile events
- Celebrate and promote the distinctiveness of local food and drink products
- Greater use of the Wiltshire website for on-line bookings and information 24/7
- Build and embed the new *VisitWiltshire* branding
- Proximity to national and regional airports and to the cruise port of Southampton

### ***Threats***

- Shortage of trained staff
- Increasing visitor numbers impair the key attributes of the Wiltshire product
- Reduced Government funding leading to lower levels of investment in the public realm in those areas which affect tourism
- Natural disasters and the effects of climate change
- Unequal funding of tourism between regional development agencies across the UK
- Rise in the popularity of short breaks overseas especially through budget airlines
- Increasing cost of petrol and travel affecting particularly the day trip market
- Political, economic, social, technical and environmental factors

# THE VALUE OF TOURISM 2008

## Wiltshire – Facts at a glance



## Appendix 6 – Tourist Information Centres in Wiltshire

Location	Operated by	Staff	FTE	Volunteers	No of visitors	Official Partner	Estimated origin of visitors		
							Local	Other UK	Overseas
<b>Operated and funded via VWTP</b>									
Avebury	Wilts Council/VWTP	4	3	0	27,000	Yes	5%	35%	60%
Devizes	Wilts Council/VWTP	5	4	Yes	39,000	Yes	35%	55%	10%
Marlborough	Wilts Council/VWTP/Libraries	1	1	0	9,000				
Salisbury (2)	Wilts Council/VWTP	15	7.6	0	162,000	Yes	40%	30%	30%
<b>Independently operated</b>									
Bradford on Avon	Bradford on Avon Tourism Association	6	1.5	38	37,000		25%	65%	10%
Chippenham	Town Council	7	3.3	0	38,000	Yes	75%	15%	10%
Corsham	Corsham Development Trust	2	1.6	Yes	18,000	Yes			
Cricklade	Town Council				3,500				
Malmesbury	Town Council	1	0.6	4	19,500	Yes	55%	40%	5%
Melksham	Company Ltd by guarantee	1	1	16	17,500		80%	13%	7%
Swindon	Swindon Borough Council				115,600	Yes			
Trowbridge	Town Council	4	1	16	13,500				
Warminster	Local Trust	2		Yes	13,200	Yes	87%	9%	4%
Amesbury	Wilts Council/Customer Services								
Calne	Town Council								
Mere	Wilts Council/Customer Services								
Wotton Bassett	Town Council						50%	25%	25%

## Appendix 7 – Wiltshire's top twenty visited attractions

### Wiltshire's top 20 attractions

		Approximate visitor numbers for 2008
1	Stonehenge	883,603
2	Longleat	773,000
3	Lacock village	330,000
4	Stourhead	329,169
5	Salisbury Cathedral	233,021
6	STEAM (Swindon)	125,000
7	Lacock Abbey	104,392
8	Bowood House & Gardens	100,632
9	Fox Talbot Museum (Lacock)	97,633
10	Barbury Castle Country Park	72,519
11	Brokers Wood (Westbury)	66,236
12	Old Sarum	51,266
13	Wilton House	40,000
14	Avebury	44,285
15	Mompesson House	41,628
16	Cholderton Rare Breeds	40,000
17	The Courts (Bradford on Avon)	40,000
18	Salisbury & S Wilts Museum	37,000
19	Old Wardour Castle	26,038
20	Abbey House Gardens (Malmesbury)	24,443
<b>Total visitors</b>		<b>3,459,865</b>

**NB** The above list is based on those attractions which report their visitor admission numbers