

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

WILTSHIRE & SWINDON
DESTINATION MANAGEMENT & DEVELOPMENT PLAN
2015-2020

FINAL REPORT
FOR VISITWILTSHIRE

JANUARY 2015

CONTENTS

1	EXECUTIVE SUMMARY	3
2	INTRODUCTION	7
3	WHERE WE ARE NOW	11
4	WHERE WE WANT TO BE	15
5	OUR VISITORS	19
6	REASONS TO COME, THINGS TO DO & PLACES TO STAY	25
7	GETTING HERE, GETTING AROUND & MAKING IT EASY	41
8	PLACE MANAGEMENT FOR VISITORS	46
9	BUSINESS SUPPORT	50
10	DELIVERING THE PLAN	52
11	ACTION PLANS	56

1 EXECUTIVE SUMMARY

The Destination Management & Development Plan (DMDP) is a shared plan in Wiltshire & Swindon for managing and investing in the development of the visitor economy for the next 5 years.

The DMDP identifies a range of areas where Wiltshire & Swindon needs to invest in existing and new products and experiences. The size of the prize of delivering the Plan is significant. Delivering the recommended investment will create and support an estimated **3,600-4,750 additional jobs in the visitor economy in the five years to 2020**.

Tourism is a hugely important sector to Britain. It is also hugely competitive, with destinations across Britain constantly investing in the range and quality of their offer to meet the ever increasing demands of today's sophisticated visitor and investing in their destination marketing to ensure they stand out, reach their target audiences effectively and build loyalty and repeat visits.

In Wiltshire & Swindon the visitor economy is worth £1.4 billion and supports over 28,000 jobs – around 9% of Wiltshire & Swindon's employment. However, to maintain this level of economic contribution Wiltshire & Swindon cannot stand still and to accelerate growth requires all the stakeholders with an interest in visitor economy to work together to deliver this Plan.

Tourism is a complex sector made up primarily of small and micro-businesses that need support and guidance to achieve their potential and which individually cannot present the destination effectively in the marketplace. The visitor economy touches on nearly every aspect of the day to day life of a place. Visitors contribute to the local economy by using local transport, shops, eating places, cultural and entertainment venues, cycle routes and car parks. Visitors want to enjoy the public spaces in towns and the byways and the scenery of the countryside. Many of the services and facilities are the responsibility of local authorities and public sector agencies which need to take account of visitors' needs in their policy, planning and service delivery. All the elements that make up the visitor economy need to work together to create an excellent experience for visitors and to ensure the economic and social benefits of the visitor economy are fully realised.

The benefits of the visitor economy are recognised by the Swindon and Wiltshire LEP (SWLEP) and tourism is one its five priorities.

The Plan has been produced through consultation and research and covers those things that require action at a destination level. It sets out the challenges and rationale, guides the use of public resources and aims to help the private sector make sound development decisions.

Here is a summary of the challenges and priorities set out in the Plan. The Action Plan provides further detail on what needs to happen, the roles of different stakeholders, funding requirements and potential funding sources.

CHALLENGES & PRIORITIES

Wiltshire needs to attract more visitors, especially high spending short-break visitors. To achieve that Wiltshire needs:

- ▶ **A stronger identity for Wiltshire as a destination** - the image and reputation of Wiltshire are vital components in the destination's competitive positioning. The way in which Wiltshire is perceived has an impact on its ability to attract investment and visitors.
- ▶ **To improve transport services and connectivity** - seasonal congestion on main roads, limited rail access and poor connectivity between different parts of Wiltshire discourage visitors from stopping and exploring. In particular there is a need to improve road and rail links between the north and the south of the County.
- ▶ **More to see and do** - to encourage visitors to stay longer and visit more frequently, Wiltshire & Swindon needs to develop additional visitor attractions that create more choice and make more of the area's significant heritage and natural assets.
- ▶ **To create reasons to visit now** – to compete effectively Wiltshire & Swindon needs to provide reasons for visitors to select this County over other destinations. Festivals, events, food & drink experiences and shopping all provide opportunities.
- ▶ **More and better business partnerships** – there are opportunities to improve partnerships between businesses and sectors working across the County. Stronger collaboration between businesses and other organisations can build a stronger and more consistent offer for visitors and counter fragmentation of effort.
- ▶ **To address seasonality issues** - Wiltshire & Swindon attracts visitors throughout the year but there are seasonal peaks in the summer months, which lead to overcrowding at popular attractions and road congestion, bringing associated management issues. The Visitor Accommodation Study identified shortage of capacity during the peak season. Conversely seasonality creates under-use of assets at other times and that has adverse

impacts on business cashflow and employment. The business case for investment and expansion is stronger if the return on investment will be supported by stronger year-round trade.

- ▶ **To deliver a consistent quality of visitor experience** – Wiltshire & Swindon has some excellent visitor attractions, accommodation, shops and places to visit but some towns and villages would benefit from investment to their presentation, some museums and attractions need to refresh their exhibitions and interpretation and some visitor accommodation looks jaded and in need of investment. The visitor experience must be excellent in every way to encourage visitors to explore further with confidence.

The Plan addresses these challenges through the following areas of activity.

- ▶ **Reasons to come, things to do and places to stay** – this is about:
 - Enhancing the experience at Wiltshire’s most important sites - the World Heritage Site (WHS) and the natural heritage of the AONBs - and the network of footpaths and cycleways, the cathedral city of Salisbury and the historic towns and villages to provide more reasons to stay longer, explore further and spend more
 - Experiences that add to the range of things to do, appeal to higher spending target audiences and which help encourage longer stays throughout the year. Priorities include enhancing the museums and cultural offer and making more of Wiltshire’s food and drink experiences.
 - New visitor attractions to create further reasons to visit, to stay longer and come back and which will have a transformational impact on the visitor economy, accelerating growth and job creation directly and by creating hubs of visitor activity stimulating other business investment in the immediate vicinity
 - Festivals and events that provide a reason to visit now, offer opportunities to extend the season and showcase heritage, arts and culture, food and drink
 - Supporting Swindon’s conference and business tourism and help realise aspirations to develop a leisure and cultural offer for visitors.
 - More accommodation and a wider range to support the growth of short breaks – Wiltshire is ‘full’ at certain times of the year
 - Ways to make more of the independent shopping experiences and local food & drink offer – including significantly strengthening the Taste of Wiltshire initiative. Food and drink is an important part of Wiltshire’s economy; tourism provides an excellent way for the County to showcase its produce. Food and drink is one strand of the rural tourism experience and should be celebrated as part of local culture.

- ▶ **Getting here and getting around** - travel is an integral part of the visitor economy. Visitors need to travel to get to Wiltshire & Swindon and then to travel around the destination once they have arrived. It is recognised that *'Better transport would encourage tourists to stay longer, to travel around the county and to spend more in the local economy'*¹. The visitor economy has much to gain from supporting major infrastructure improvements and can help provide further reasons for that investment.
- ▶ **Place management for visitors** - all of Wiltshire's towns and villages that want to benefit from the visitor economy need to welcome visitors and ensure the infrastructure and visitor services of the place are in shape, the quality of the experiences is excellent and work together to create complementary experiences that encourage visitors to both spend time in towns and villages and explore more of them.
- ▶ **Business support** – there is a need to create groups and partnerships to foster stronger B2B collaboration to foster innovation, encourage investment and present joined-up experiences to target markets across Wiltshire & Swindon. Businesses need mechanisms for joint working and for business-to-business activity. Businesses need help in IT to ensure they can compete with the best and business advice and funding support to help grow and expand their businesses, especially in the accommodation sector.
- ▶ **Brand positioning** – practical tools and support to roll out the brand positioning as a key part of strengthening Wiltshire's market positioning and foster B2B and B2C activity.

The full Action Plans are set out at Section 11 (pages 56-70).

¹ Wiltshire Local Sustainable Transport Fund Bid Application 2012

2 INTRODUCTION

This is a Destination Management & Development Plan (DMDP) for Wiltshire & Swindon. It is a shared plan for managing and investing in the development of the visitor economy of Wiltshire & Swindon for the next 5 years. VisitEngland encourages and supports the development of Destination Management Plans throughout England as an essential tool in the delivery of a successful visitor economy². One of the criteria for a Destination Management Organisation (DMO) being part of VisitEngland's Destination Management Forum is to have a published destination management plan, or be in the process of developing one.

TOURISM AND THE VISITOR ECONOMY

Tourism is a hugely important sector. The visitor economy is now worth £106bn³ a year to England, employs in excess of two million people and accounts for nearly 10% of the entire UK workforce. It supports many thousands of businesses nationally, both directly and indirectly, and has an interdependent relationship with sectors including farming, transport, retailing, sport, museums, galleries and the arts. A successful visitor economy helps to create and support a high quality of life for local communities, sustains business viability and diversification, helps to shape places that are attractive for investment and attracts inward investment in its own right.

In Wiltshire & Swindon, the visitor economy is worth £1.4 billion and supports over 28,000⁴ jobs – around 9% of Wiltshire & Swindon's employment. These figures include spending from visitors on accommodation, food and drink, leisure and attractions and travel. The benefits of the visitor economy are recognised by the Swindon and Wiltshire LEP (SWLEP) and tourism is one its five priorities.

² Principles for Developing Destination Management Plans, VisitEngland

³ VisitEngland, 2013

⁴ 'Economic Impact of Wiltshire's Visitor Economy 2013' TSE Research

WHY HAVE A PLAN?

The visitor economy is made up primarily of small and micro-businesses, and it touches on nearly every aspect of the day to day life of a place. Visitors contribute to the local economy using local transport, shops, eating places, attractions and accommodation, cultural and entertainment venues, and car parks. Visitors want to enjoy the public spaces in towns and the byways and the scenery of the countryside. Many of the services and facilities are the responsibility of local authorities and public sector agencies which need to take account of visitors' needs in their policy, planning and service delivery. All the elements need to work well together for visitors to create an excellent experience.

The broad scope of activity that makes up the visitor economy, its wide-ranging impact on localities, the multiple agencies involved, the intense competition between destination 'brands', and the need for collective destination marketing (beyond the promotion of individual attractions or businesses), means that public intervention is needed to manage, develop and promote the destination effectively.

Destination management is a process of leading, influencing and coordinating all aspects of a destination. Each business and organisation contributes to success but individually they cannot manage the visitor experience or promote the destination and as a whole. This Plan covers those things that require action at a destination level. Produced through consultation and research, it identifies the needs and priorities, guides the use of public resources and aims to help the private sector make sound development decisions.

DELIVERING AND SUPPORTING JOBS AND GROWTH

Wiltshire & Swindon has ambitious targets for inward investment and growth. By 2026 it plans to create 47,000 jobs⁵ through innovation and business investment, through expansion of the military presence, new housing, higher education and infrastructure improvements (particularly to sustainable transport) that are needed to better connect the county and support the visitor economy. It recognises the pressing need for investment in several of the town centres to make them truly attractive places to live, work and visit.

⁵ In their emerging Local Plans, the two Unitary Authorities – Swindon Borough Council and Wiltshire Council - have set ambitious targets to create a minimum of 47,000 jobs.

The planned growth in population and business activity in Wiltshire and Swindon will create more demand for quality accommodation, eating and meeting places. The tourism and hospitality sector needs to respond by improving the range and volume of provision including new and better visitor accommodation across the County to prevent this higher-value business leaking to venues outside the area. A growing visitor economy can contribute to the quality of life by supporting and creating demand for cultural and leisure activity.

More visitors and higher spend will create jobs and growth. Tourism jobs can be created more quickly than in most other sectors and offers a range of employment opportunities from entrepreneurs running small businesses through to management jobs in the hospitality sector. It can also provide entry level employment and thereby contribute to overcoming the deficit in jobs for young people. The nature of the tourism sector means it can also offer flexible working hours and jobs that are accessible to a wider range of people. The visitor economy generates one of the highest levels of business creation both in percentage and absolute terms⁶.

CONNECTING THE VISITOR ECONOMY

The visitor economy impacts on a wide range of Wiltshire & Swindon's local authority policies and services including in planning, transport, environmental management, leisure and recreation, culture and the arts. It is important those policies take on board the specific needs of the visitor economy and recognise the contribution tourism can make to achieving the objectives in these plans. This DMDP identifies areas for policy alignment across a range of objectives and investments.

THE ROLE OF THE DMO

Wiltshire and Swindon's Destination Management and Marketing Organisation, VisitWiltshire, is the champion for the visitor economy and represents the interests of businesses in the tourism sector. It has a strategic role to play, working in partnership with Wiltshire Council, Swindon Council and Forward Swindon, the Swindon & Wiltshire Local Enterprise Partnership (SWLEP), BIDs, town groups and others to ensure the recommendations in this Plan are progressed and that the interests of the visitor economy are represented in relevant policies and plans. VisitWiltshire must secure commitment of the

⁶ The Economic Case for the Visitor Economy, Deloitte, November 2013

key industry players and lobby government and funding bodies to support the measures in the Plan. It will monitor the impacts and measure the outcomes to provide the evidence for continuing investment in the visitor economy.

ABOUT THIS PLAN

The DMDP was commissioned by VisitWiltshire with funding from the Swindon & Wiltshire LEP but its success will rely on everyone involved with the visitor economy getting behind the Plan and making things happen. It sets out the roles of the private and public sector and how different organisations and tourism businesses can become involved in its delivery. The Plan is part of the Wiltshire Futures Project which also comprises a Visitor Accommodation Study and a Brand Positioning Plan for tourism in Wiltshire. This Plan creates a destination framework for the Futures Project and its proposed actions are designed to work with branding recommendations and with the visitor accommodation investment opportunities.

The Plan has been developed through consultation, research and analysis. We have facilitated two Think Tanks with tourism businesses and undertaken one-to-one consultations with a wide range of businesses, Wiltshire and Swindon Councils, and public sector agencies involved in the visitor economy. In total 41 businesses and organisations involved in the visitor economy in Wiltshire & Swindon have been consulted. The needs and priorities identified in those consultations have contributed to shaping this Plan.

3 WHERE WE ARE NOW

TRENDS IN THE TOURISM MARKET⁷

Two out of three people in the UK have changed their holiday-taking behaviour since the economic downturn – switching, cutting back, or taking different types of breaks. New research shows a trend towards multiple trips per year, shorter holidays, more last-minute planning and growth in city and rural breaks. VisitEngland says “discretionary thrift is now deeply ingrained”.

Demographic and social changes are having an impact on the visitor economy. The ageing population is staying active for longer and the Baby Boom generation is moving into retirement. These people have more time and money. The changing shape of the family has implications for leisure trips and breaks. More single parent, single child families, more divorced and step-families means more multi-generation trips and a need to cater for the interests of a wide age-range travelling together.

People are also looking for their breaks to deliver special experiences – whether that means physical wellbeing, active challenges, emotional, spiritual or intellectual fulfilment. Wiltshire’s large attractors are already active in developing and delivering out of the ordinary experiences for their visitors but that commitment must extend to all businesses and across the destination to provide strong reasons to visit and to come back.

New technology means that people use multiple sources when searching for holiday ideas and planning a trip. The path-to-purchase is far more difficult to predict than previously, now often touching many different marketing channels. Referrals and peer reviews heavily influence many travel decisions – and consumers increasingly expect to engage with brands (including destinations) during the whole customer journey – from inspiration, through

⁷*Domestic Leisure Tourism Trends for the Next Decade*, VisitEngland, December 2013, *After the recession – what next for the Staycation?* Sharon Orrell, *Tourism – the Journal for the Tourism Industry*, Autumn 2014, *Staycation – what’s next?* Presentation by Sharon Orrell to Tourism Society/Tourism Management Institute, September 2014, *Delivering a Golden Legacy: a growth strategy for inbound tourism to Britain from 2012 to 2020*, VisitBritain 2013

planning and purchase, to the experience itself, and the return home⁸. Finding last-minute deals is easy and late booking, driven by discounted rates or added value, is the new norm. For DMOs and tourism businesses to survive and thrive they must understand and use the opportunities technology offers. In a sector that is dominated by small and micro-businesses it is important that Wiltshire & Swindon provide business support in this area.

Inbound tourism to Britain is flourishing. There is growth from the emerging markets, but VisitBritain says the current biggest mature inbound markets (such as the USA and Western Europe) will continue to dominate in value and volume to 2020 and beyond. The World Heritage Site is the main draw for international visitors to Wiltshire & Swindon.

THE VISITOR ECONOMY IN WILTSHIRE AND SWINDON

The visitor economy is worth £1.4 billion to Wiltshire & Swindon and supports over 28,000 jobs. Tourism jobs account for over 9% of Wiltshire & Swindon's employment.

In the 5 years between 2006 and 2010 Wiltshire slipped from 13th to 30th (out of 45) fastest growing English destinations in terms of visitor spend. By 2010 the continued loss of market share meant that Wiltshire was being out-performed by every other south west destination in the 5 years to 2010. However its performance has improved since 2011. An objective of VisitWiltshire and its partners is to win back market share and grow the visitor economy to match VisitEngland's target of a 5% per annum increase in the value of tourism.

Overnight visitors spend far more per day and per trip than day visitors, and are more likely to explore further and build a relationship with the destination, leading to recommendations and repeat trips. However most visits to Wiltshire & Swindon are day trips; fewer than 10% of

2013 Economic Impact

- ▶ 1.7 million trips by staying visitors
- ▶ 18 million trips by day visitors
- ▶ Average length of stay of 2.8 nights (domestic visitors); 6.1 nights (international visitors)
- ▶ Average spend per trip of £179 (domestic) and £335 (inbound)
- ▶ £1.4 billion total tourism generated turnover
- ▶ Over 28,000 jobs supported by tourism
- ▶ Tourism industries account for over 8% of GDP and 9% of total employment in Wiltshire

Sources: Economic Impact of Wiltshire's Visitor Economy 2013, SW Research Company

⁸ Google reports that "Gen C" behaviour is growing - originally a description of Millennials, it now refers to highly influential consumers across all age ranges, who are very active online, creating and curating content. Many DMOs are shifting focus to content creation and higher-engagement channels as a result.

visits to Wiltshire & Swindon are staying visits. More short breaks by higher- spending visitors are essential if the value of the visitor economy is to grow.

Day visitors are important repeat, year-round customers who support tourism businesses and services that are also used by local people. Some day trips to Wiltshire are made by people staying overnight in neighbouring destinations, and by people travelling through on the way to their holiday destination. Both of these are potential targets for Wiltshire & Swindon to convert to staying visitors. Some coach visitors stay overnight in Wiltshire but many visit Stonehenge and Salisbury and then move on to Bath or the Cotswolds to complete their day meaning an overnight stay is lost to Wiltshire. Travel trade feedback to VisitWiltshire is that Wiltshire needs another large attraction to create a day and a night offer.

The Stonehenge & Avebury World Heritage Site puts Wiltshire on the radar of international visitors. Some 14% of overnight visits to the County are from overseas and just over 6%⁹ of all trips made in Wiltshire & Swindon include a trip to Stonehenge. Despite the importance of large visitor attractions, shopping and eating out across the county represent the largest share of visitor spend.

Business tourism accounts for more than 20% of domestic staying visits to Swindon, and an estimated 15% to Wiltshire. Swindon – as a business centre and base for several of the South West’s largest companies – currently attracts the majority of the higher spend business trips. It has a concentration of larger, branded hotels, which are looking for weekend leisure trade.

CHALLENGES

Consultations, desk research and site visits have identified a number of challenges that Wiltshire & Swindon needs to address to grow and sustain the visitor economy:

- ▶ **The need for a stronger identity for Wiltshire as a destination** – Wiltshire’s brand identity is less strong than some of its iconic attractions. The image and reputation of Wiltshire are vital components in the destination’s competitive identity. The way in which Wiltshire is perceived has an impact on its ability to attract investment and visitors. Wiltshire has to compete against the well-established neighbouring destinations such as Bath

⁹ Stonehenge welcomed 1,241,296 visitors in 2013 (Visit England, Survey of Visits to Visitor Attractions)

and the Cotswolds and it needs to create stand-out from these and other long-established brands. The Brand Positioning commissioned as part of the Wiltshire Futures project addresses this and will help enhance the destination's competitive position.

- ▶ **The need to improve transport services and connectivity** – there is scope to improve Wiltshire's connectivity. Seasonal congestion on main roads, limited rail access and poor connectivity between different parts of Wiltshire discourage visitors from stopping and exploring. In particular there is a need to improve road and rail links between the north and the south of the County.
- ▶ **The need for more to see and more to do** - to encourage visitors to stay longer and visit more frequently, Wiltshire & Swindon needs to develop additional visitor attractions to create more choice and make more of its significant heritage and natural assets, e.g. night sky viewing, themed trails, themed attractions and special events.
- ▶ **The need to create reasons to visit now** – to compete effectively Wiltshire & Swindon needs to provide reasons for visitors to select this County over other destinations. Festivals, events, food & drink experiences and shopping all provide reasons for visitors to choose Wiltshire now.
- ▶ **The need for more and better business partnerships** – there are opportunities to improve partnerships between businesses and sectors working across the County. Stronger collaboration between businesses and other organisations can build a stronger and more consistent offer for visitors and counter fragmentation of effort. Local authorities, Town Councils, BIDs and other bodies charged with place management locally, also need to work effectively with VisitWiltshire and their tourism businesses to create welcoming places for visitors to spend time and money.
- ▶ **The need to address seasonality issues** - Wiltshire & Swindon attracts visitors throughout the year but there are seasonal peaks in the summer months, which lead to overcrowding at popular attractions and road congestion, bringing associated management issues. The Visitor Accommodation Study identified shortage of capacity during the peak season. Conversely seasonality creates under-use of assets at other times and that has adverse impacts on business cashflow and employment. The business case for investment and expansion is stronger if the return on investment will be supported by stronger year-round trade.
- ▶ **The need to deliver a consistent quality of visitor experience** – Wiltshire & Swindon has some excellent visitor attractions, accommodation, shops and places to visit but some towns and villages would benefit from investment to their presentation, some museums and attractions need to refresh their exhibitions and interpretation and some visitor accommodation looks jaded and in need of investment. The visitor experience must be excellent in every way to encourage visitors to explore further with confidence.

4 WHERE WE WANT TO BE

Wiltshire & Swindon wants to create a much stronger reputation in the marketplace as a short break, year-round destination.

To achieve this objective Wiltshire & Swindon need to:

- ▶ Make much more of the assets it already has, including optimising the potential of its iconic attractions, make more of the quality of the countryside – in particular make more of activities and local food & drink - and invest in Wiltshire & Swindon's cultural offer, particularly events and festivals.
- ▶ Make it easy for the visitor to explore and to get around
- ▶ Deliver new visitor attractions to provide more reasons to come and return
- ▶ Invest in new, quality places to stay to enable Wiltshire & Swindon to grow the short break market and achieve longer stays and higher spend
- ▶ Encourage and support businesses and others to work together to deliver special experiences that can attract higher spending visitors for short-breaks throughout the year
- ▶ Manage the major towns and villages to ensure they are attractive and welcoming to visitors, encouraging them to stop and spend time and money

The DMDP identifies a range of areas where Wiltshire & Swindon needs to invest in existing and new products and experiences. Delivering this investment will create and support an estimated **3,600-4,750 additional jobs in the visitor economy in the five years to 2020.**

WILTSHIRE POSITIONING

The new brand positioning for Wiltshire is 'Timeless':

Timeless builds on a powerful truth about Wiltshire. No other place in England can make such a strong case. Timeless is about history and provenance – time and place, past present and future. Literally it's time free, a place which calms, revives and is full of magic and wonder.

Timeless is highly campaignable with a powerful link to promoting products that encourage immediacy of travel, eg Time for Wiltshire, its Wiltshire Time.

The positioning is supported by 3 product values:

- ▶ Magical - Wiltshire fascinates, it's full of wonder, 'Our magic is natural; it's drawn others to the area for centuries'
- ▶ Elemental - Wiltshire is atmospheric. Here you feel closer to the land, the sky and the forces of nature
- ▶ Original - Images and stories that have helped shape England. Authentic, creative, innovative and individual experiences.

The positioning has 3 personality values

- ▶ Calming - Soothing, comforting, refreshing, the perfect antidote to overcrowded cities. Wiltshire gives back what life takes out
- ▶ Engaging - Human and humorous, open and welcoming
- ▶ Imaginative - Creative and resourceful. We stimulate ideas and take people away from the everyday.

These values will help the destination and the towns, villages, attractions and tourism businesses within it present their offer in a way that delivers those values.

WILTSHIRE BRAND ARCHITECTURE

Timeless is the central idea for Wiltshire.

The way we apply it changes depending on the audience.

For domestic audiences the focus is on the literal suggestions of timeless, time free, unhurried and the feelings of calm and refreshment this brings. This is supported by the rational benefit of proximity.

For international audiences we highlight the metaphorical associations of timeless – classical, historical, with provenance. Time and place. This is underpinned by the rational support of a concentration of character and history in one county.

The positioning recommends grouping products and experiences for marketing purposes as Timeless Wonders (iconic attractions), Timeless Pleasures (e.g. canal boating, visiting a local pub, arts and culture, food and drink, shopping, walking and cycling), Timeless Places (towns and villages, cultural and historic attractions), and Timeless Nature (the countryside). This captures the four product strands of Wiltshire and the brand presents opportunities to take these to market in new ways. The positioning creates a narrative for Wiltshire, suggests straplines and provides recommendations on photography and tone of voice.

This brand positioning has been developed and agreed with partners and businesses in the destination and it is essential that they buy into it and use it consistently. The action plan for this DMDP sets out practical ways that VisitWiltshire, individual businesses and Town Councils can use and help roll out the brand in Wiltshire.

MEASURING SUCCESS

The following indicators can measure progress in delivering the Plan. These headline indicators will be measured annually to enable Wiltshire & Swindon to identify the scale, nature and seasonality of growth.

- ▶ Growth in the volume and value of tourism - the numbers of visitors and their spend
- ▶ Growth in the number of jobs
- ▶ Growth in the number of overnight trips overall and as a percentage of all trips
- ▶ Seasonality of volume and value of visits
- ▶ Number of serviced bed spaces and room occupancy¹⁰ – Number of self catering units, camping and glamping pitches
- ▶ Numbers of visits to attractions
- ▶ Number of tourism establishments which are part of quality schemes and/or have achieved quality awards.

¹⁰ Assuming reliable data can be collected from a sufficiently robust sample.

VisitWiltshire will work with partners to track also:

- ▶ The strength of industry partnerships including the number of VisitWiltshire partners and engagement via tourism partnership groups – to demonstrate effectiveness of partnership working within the tourism sector between SMEs and micro businesses
- ▶ Awareness and perceptions of the Wiltshire brand positioning through visitor surveys, use of the brand positioning by towns and businesses, omnibus surveys to test consumer perception of the brand*¹¹
- ▶ Numbers of SMEs that participate in visitor economy training programmes
- ▶ Numbers of planning applications/approvals by tourism businesses for new developments and extensions to existing tourism businesses and number of applications for new attractions and accommodation
- ▶ Investment in visitor infrastructure – interpretation, pedestrian signing in towns and in the countryside relevant to visitors
- ▶ Economic impact of major events and signature festivals
- ▶ Overall investment in Wiltshire and Swindon’s visitor economy.

These indicators draw from new VisitEngland recommendations on measuring the impact of DMPs.

¹¹ Brand awareness is expensive to monitor and measure and will be subject to budget availability.

5 OUR VISITORS

The visitor economy of Wiltshire & Swindon should be developed and managed for all its visitors, but it needs a clear focus on markets that offer the greatest potential to deliver sustainable growth. Understanding growth markets is important to ensure destination development and place management delivers the right experiences and also to guide marketing communications.

TARGET MARKETS

Segmentation work conducted in 2010 for VisitWiltshire identified 4 Mosaic¹² profile groups as the customers who offer the best potential for future growth among UK residents. The Mosaic segments are 'Yesterday's Captains', 'Hardworking Families', 'Innate Conservatives' and 'Garden Suburbia'. These are predominantly middle-aged and older couples with quite mainstream and traditional lifestyles, living in suburban areas in Greater London and the Midlands and along the M4 corridor. Target international markets include Germany, France, Benelux, Italy, Spain, North America and Australia, travelling both independently and in groups. It is important that Wiltshire invests in relevant national marketing activity and campaigns, to retain profile in priority countries and exploit opportunities to attract visitors from other countries including emerging international markets.

The Mosaic segments remain relevant but for organisations and businesses unfamiliar with them, it can be hard to understand how to use Mosaic. In developing the DMDP, an analysis of current target markets, market trends and the destination offer has led to creating two priority leisure market segments, which are derived from the current target Mosaic segments. These segments were tested at the industry Think Tanks where businesses were positive about using them. VisitWiltshire should focus its main marketing resources on these two priority leisure segments. In addition, individual businesses may have specific additional market segments that are relevant to them.

The benefit of identifying a small number of bespoke priority market segments is that VisitWiltshire can develop a stronger, more targeted marketing approach that speaks strongly to these types of people. These bespoke segments are user-friendly and tourism-specific and will enable media buyers,

¹² Mosaic is Experian's cross-channel consumer classification designed to help understand the demographics, lifestyles, preferences and behaviours of the UK adult population. Experian is the leading global information services company, providing data and analytical tools to clients around the world.

graphic designers, website developers, photographers and others to identify the right distribution channels, media and collateral¹³. They are simpler to understand for businesses, which are therefore more likely to use them to inform their business investment and marketing. The more businesses that are working towards shared market objectives, the more consistent the experience and message will be. The new Wiltshire positioning provides the narrative to use with these markets.

VisitWiltshire should participate also in national campaigns to enhance Wiltshire's national positioning, especially in marketing activity that has a strong fit with Wiltshire's priority markets; a good example is VisitEngland's 2016 Year of Gardens, designated to coincide with Capability Brown's tercentenary, relevant to several Wiltshire gardens including Bowood House and Corsham Court.

Leisure Visitors

The bespoke leisure markets segments are 'Mature Mainstreams' and 'Experience Seekers'.

Both markets are staying visitors – those who will spend money on accommodation and in restaurants and shops, and will support investment in quality and independent visitor accommodation, visitor attractions and experiences. They take leisure trips throughout the year; therefore present the potential to extend the season, given the right offer. Year-round tourism is essential to get businesses on a firm footing, able to invest and to provide good quality year-round jobs.

Mature Mainstreams

Mature Mainstreams are part of the baby boom generation (born 1946-64), a large and relatively prosperous cohort that is 20% of the UK population and has 80% of the wealth. Baby boomers take 40% of all UK short breaks. Numbers of people in the UK aged 55+ will grow by 10% over the next 10 years.

This is a key lifestage among Britain's largest overseas markets. Mature Mainstream are most likely to be repeat visitors, looking to explore further afield beyond the honeypots, and seeking quintessentially English countryside, small towns and villages plus heritage. Therefore they present an opportunity to grow the number of visitors.

¹³ Media buyers usually use TGI segmentation but are experienced in selecting media based on a whole range of ways of describing target markets – from bespoke to e.g. Mosaic, Acorn, ArkLeisure, Culture Segments etc.

Wiltshire already has much of the offer Mature Mainstreams want. But it needs to attract more of them and provide more experiences to appeal to them. For leisure breaks, they enjoy a peaceful, leisurely pace and they are looking for:

- ▶ Quality attractions for 'grown-ups' e.g. historic houses, castles and gardens
- ▶ Good quality accommodation
- ▶ Good quality food – restaurants, pubs and cafes
- ▶ Attractive small towns and villages set in rural beauty
- ▶ Authentic experiences, interesting stories.

Mature Mainstreams are well-travelled, relatively affluent, sophisticated consumers. Marketing communications (including deals and offers) should be targeted appropriately, using aspirational images and experiences. Baby Boomers do not consider themselves to be “old” – marketers should think in terms of “grown-up” and “experienced” when communicating to them. Inspiration-seeking, information-gathering, planning and booking will be a mix of offline and online. This is a market that is confident online and increasingly using mobile devices including social media. They are increasingly using the internet, although they are more likely than some to consume print media and still like to use print (maps, leaflets, guide books) during the visit.

Overseas Mature Mainstreams should be reached in partnership with (and via) VisitBritain, marketing consortia, inbound travel trade, and providers with international awareness. It is important to lead with internationally-recognised tourism brands – both within Wiltshire and in neighbouring areas, for example Stonehenge, the Cotswolds, and Bath – and to position Wiltshire as part of West Country, to tap into the latter’s popularity, especially with northern Europeans.

Experience Seekers

Experience Seekers are high consumers of leisure trips. They are free to travel year round and are always looking for or planning their next break. They are relatively high spending adults aged 35-54 without children and have the highest spend per trip (by lifestage) for domestic holidays. As such, they offer good growth potential.

MATURE MAINSTREAMS – IN A NUTSHELL

- ▶ Older baby boomers – in their 60s, retired or approaching retirement
- ▶ Higher socio-economic groups ABC1
- ▶ Empty nesters with time and money to take several breaks each year
- ▶ Travelling as couples, friends and in groups
- ▶ Relatively prosperous, but also careful spenders – seeking quality and value
- ▶ Conservative values
- ▶ Interested in gardens, heritage, walking
- ▶ Could be from overseas as well as UK – in groups & independent

Sources: A bespoke segment identified from analysis of several sources, in particular VisitWiltshire’s Mosaic Profiling, and Blue Sail’s Boomer Tribes Research, plus VisitBritain’s Market Insights

EXPERIENCE SEEKERS – IN A NUTSHELL

- ▶ Independents, in their middle years
- ▶ Gen X and younger Boomers – aged 35-55
- ▶ Couples & groups of same-sex friends
- ▶ Childfree – DINKs, singles, empty nesters
- ▶ Busy, active people in well-paid careers
- ▶ Relatively affluent – high percentage living in London and South East England
- ▶ Frequent leisure break ‘treats’ as an antidote to busy lives – ‘Because I’m worth it’
- ▶ Travelling with a purpose – an activity/experience at the heart of their mini break
- ▶ Prepared to spend for the right experience

Sources: A bespoke segment identified from analysis of several sources, in particular VisitEngland’s Staycation research & market trends insights

There are significant numbers of childfree adults aged 35+ living in relatively affluent London and the South East. Wiltshire & Swindon is within easy reach – accessible for short breaks that can be squeezed into busy lives. They are visitors travelling with a purpose and often put an activity or experience at the heart of their mini break.

They are also prepared to spend for the right experiences and accommodation. Experience Seekers are looking for a chance to experience something together, for example to learn a new skill or simply to be pampered, which means they are looking for quality and interesting places to stay, great places to eat and new experiences which are VIP and unique in some way. To tap into this market effectively, Wiltshire needs more ‘character’ accommodation, (e.g. glamping, boutique hotels) and distinctive activities and experiences.

Partnership marketing will be key to developing this market, working with providers who are targeting these types of people and have appropriate offer and marketing resources. It will be important to develop strong online content around specific themes, activities and experiences – supported by social channels and online advertising. Experience Seekers include some “Gen C” consumers (as defined by Google – see footnote on page 8) who are

looking for engagement throughout their trip. Providing opportunities to connect, share, curate and create content will be a fruitful way to spread the brand story and promote the county’s distinctive experiences. Offline PR with lifestyle magazines would also be effective for this segment – especially offers and competitions.

Families

Families will remain an important sector for Wiltshire & Swindon, in particular for visitor attractions and for day trips throughout the year. VisitWiltshire should facilitate joint marketing activity to attract day family markets. This marketing should take into account new patterns in family composition and family travel trends. New patterns of visiting include the growing numbers of active boomer grandparents treating families – with or without parents – to leisure trips (there is some cross-over here with the Mature Mainstreams) and “vertical families” where several generations are on trips together. Other trends are increases in families with one child, single-parent families, same-sex parents, step families (often resulting in a family group needing to meet the needs of a very wide age range of children).

Swindon Leisure

In addition to the above two core leisure markets, there is a further potential niche opportunity for Swindon. The planned developments for Oasis Leisure combined with the McArthur Glen shopping and STEAM create an opportunity to attract younger groups of friends on a celebratory weekend, and for families with young and teenage children. This market could boost weekend occupancy and room rates in Swindon hotels and help strengthen the case for further hotel investment. Swindon as an emerging regional leisure destination needs to consider and develop a Swindon brand positioning.

Business Visitors

Business tourism is an important market for Wiltshire & Swindon. It is high value, takes place outside peak leisure times, and is year round. Swindon will continue to be the main business and conference destination, and the planned economic growth for Wiltshire will create demand for more meeting rooms and conference facilities across Wiltshire & Swindon.

Nationally, 68% of all business tourism is internal to the destination and more than two-thirds of meetings are for fewer than 15 people. Hotels and universities are the venues show the strongest growth¹⁴. Conferences are getting shorter with a trend from overnight to day events. National research also shows that the most important factors in choosing a venue for a business meeting or conference are access, location, value for money and capacity of conference facilities. The market is therefore increasingly dominated by large cities that can easily meet these criteria and offer a city leisure experience to complement the business offer. The Advito 2014 Industry Forecast suggests that demand for meetings remains strong, and will grow, but steadily rather than spectacularly in 2014. The Advito research also predicts moderate meeting price increases and rates will rise faster in first-tier cities than elsewhere, further reinforcing the dominance of the city in the conference and meetings sector¹⁵.

In a highly competitive market, Wiltshire & Swindon needs to provide an excellent service to its business customers. It needs to retain the additional business tourism activity stimulated by planned economic growth and avoid 'leakage' to neighbouring destinations. The planning system should support investment in new meeting and conference facilities in existing and new venues where demand has been identified. Hotels and other venues should be encouraged to upgrade their facilities and ensure excellent IT provision as this can be a 'deal maker' for venue selection.

¹⁴ Meetings & Events Industry Survey 2013/14, The Right Solution Ltd on behalf of CAT Publications and *British Meetings and Events Industry Survey, 2013/14*. This survey investigates the buying trends and characteristics of conference organisers, 300 from the corporate sector and 300 from the not-for-profit sector (national associations).

¹⁵ EIBTM 2013, Trends Watch Report, Rob Davidson, EIBTM Industry Analyst

There may be a case for a conference desk service for Wiltshire & Swindon to promote participating hotels and other venues for meetings, exhibitions, conferences and events. National research shows that venues are looking for conference services that create bespoke packages and offers for business and social event organisers¹⁶. Promotion can be online, in print, through exhibitions, PR and familiarisation visits for event buyers. The service would monitor demand and growth, helping to make a case for further investment in business tourism facilities and venues within the county. This is discussed below in Section 5.

¹⁶ UK Events Market Trends Survey 2014, Event & Visual Communication Association, TEAM Tourism Consulting and Tony Rogers Conference & Event Services, June 2014

6 REASONS TO COME, THINGS TO DO & PLACES TO STAY

Research, consultation and analysis identified some clear priorities - areas of activity that Wiltshire & Swindon needs to focus on over the next five years. Priorities for investment include:

- ▶ The experience at Wiltshire's most important sites - the World Heritage Site (WHS) and the natural heritage of the AONBs - and the network of footpaths and cycleways, the cathedral city of Salisbury and the historic towns and villages. The special significance of these heritage and landscape assets means that visitor growth must be planned with a duty of care to the environment. Visitors are more likely to visit, stay longer, spend more, come back and recommend if the environment is well-maintained, cared for and respected. The organisations charged with the care of these special environments will work in partnership with tourism, land management and other interests to ensure a balance is achieved between the needs of visitors, the environment and the local community.
- ▶ Support for the experiences that add to the range of things to do, appeal to higher spending target audiences and which help encourage longer stays throughout the year. Priorities include museums and the cultural offer and making more of Wiltshire's food and drink experiences.
- ▶ New visitor attractions to create further reasons to visit, to stay longer and come back.
- ▶ Festivals and events that provide a reason to visit now, offer opportunities to extend the season and showcase heritage, arts and culture, food and drink
- ▶ More accommodation and a wider range to support the growth of short breaks
- ▶ Ways to make more of the independent shopping experiences and local food & drink offer.

WORLD HERITAGE SITE

The Stonehenge and Avebury World Heritage Site (WHS) is a major asset to Wiltshire's visitor economy. Stonehenge is the most architecturally sophisticated prehistoric stone circle in the world and the flagship visitor attraction of the WHS which welcomed over 1.25 million visitors in 2013. Stonehenge brings international and national visitors to Wiltshire. The WHS includes Avebury, the largest stone circle in Europe, and in total the WHS comprises over 5,000 hectares of landscape - but many visitors to Stonehenge are unaware of the extent of the site.

There is an opportunity to develop and broaden the visitor experience of the wider WHS to support longer visits and provide reasons to come back. This growth needs to be realised in a way that is balanced with the WHS remit to conserve and protect this special landscape. One of the eight priorities of the draft World Heritage Site 2015-2021 Management Plan is 'to improve the interpretation and enhance the visitor experience of the wider landscape'.

The draft WHS Management Plan advocates a more strategic approach to realising the potential of the WHS as a major visitor economy asset for Wiltshire. It recommends partners develop a WHS Sustainable Tourism Strategy that is linked to this DMDP. Realising the potential means developing, marketing and managing the whole of the WHS as a single destination. It requires a joined-up approach to transport, quality of the offer and visitor information. English Heritage, the National Trust, Wiltshire Council and VisitWiltshire and local partners will need to work together to make this happen.

The objectives should include extending the length of stay of existing visitors, attracting visitors specifically to spend time in and around the WHS and to encourage visits out of season. These actions will support more visitor spend and support local tourism businesses and need clear visitor messaging. This is a high priority project for the visitor economy and to deliver it requires WHS and local partners proactively marketing with VisitWiltshire.

Specific opportunities are:

- ▶ To develop, interpret, sign and maintain a network of walking and cycling routes to encourage visitors to explore further, building trips around a visit to the WHS but in ways that do not add to the traffic congestion of the WHS and of Avebury. The support of Wiltshire Council through its Countryside Access Improvement Plan (CAIP) will be important to ensure paths in the WHS are managed, repaired and signed as a priority and gaps or deficiencies plugged.
- ▶ To improve visitor interpretation at Avebury and in the immediate area to enhance the visitor experience and manage volumes of visitors better by encouraging wider exploration and through the development of out of season activity, building on what the National Trust is already doing. The draft WHS Management Plan proposes creation of an Interpretation and Learning Framework for Avebury.
- ▶ To enhance interpretation to other parts of the WHS, prioritising areas that provide a destination for a walk or cycle ride, e.g. Fyfield Down National Nature Reserve.
- ▶ To ensure a high profile for the new displays about the WHS at the Wiltshire Museum and the Salisbury Museum to encourage visitors to visit these towns as part of a WHS trip

- ▶ To present the WHS as a unique visitor experience in Wiltshire; make it easy for visitors to book and plan a trip to explore the WHS and provide practical information like maps and itineraries
- ▶ To encourage sustainable visitor activity such as horse riding using existing bridleways and to look at glamping and barn accommodation development
- ▶ Develop and promote short break opportunities in the WHS and surrounding area, highlighting outdoor activities, museums and accommodation options.
- ▶ To explore the potential of a WHS branded bus that connects key locations, provides profile for the WHS and which may also help support the viability of local public transport services.

One of the major challenges to delivering this opportunity is the carrying capacity of the WHS, in particular traffic and car parking. Realising the growth potential of the WHS is inter-dependent on addressing transport issues. A WHS branded bus and park and ride scheme might go part way to addressing this. Transport and connectivity is considered in more detail in Section 6.

SALISBURY

Salisbury is the cathedral city of Wiltshire and there is a well-established relationship between Stonehenge and Salisbury as complementary heritage offers. Salisbury needs to make more of its cathedral city assets to lengthen the stay of day trips and increase the volume of short breaks. Currently, the visitor experience in Salisbury is focused around the attractions within Cathedral Close, the Cathedral itself and shopping. Yet, Salisbury could be a much stronger arts and cultural hub for Wiltshire.

Salisbury Vision provides a framework for coordinating and achieving the sustainable regeneration of five priority areas in the city - the Central Car Park and Maltings, Churchfields Industrial Estate, Salisbury Guildhall, the Market Place, and the Southampton Road. Considerable improvements are planned for the city's streets and other public areas through the development and implementation of a comprehensive public realm strategy. The city's transport infrastructure is also being overhauled putting the focus on the pedestrian and on public transport. Collectively these projects will enhance the presentation of the city and the visitor welcome, and create a quality city centre environment. This is a strong basis on which to grow the visitor economy in the city.

To realise its potential, Salisbury needs:

- ▶ To ensure that the public realm improvements deliver a city that is legible for the visitor, recognising that the signing, orientation and interpretation needs of people unfamiliar with a place are different to those of the local community. Cities including Bristol and Lincoln have taken the opportunity of investment in new public realm to incorporate interpretation, trails and public art. It is essential that the interests of visitors are represented in designing and rolling out these elements of the Salisbury Vision
- ▶ To ensure that signing and orientation within the Cathedral Close is clear and encourages visitors to explore other parts of the city. The cultural offer around the Close is fragmented and not easy for visitors to navigate or understand
- ▶ To encourage collaborative working between the city's museums and galleries to on a strong and joined up experience to extend the visitor day, exploiting its purple flag status, e.g. through Museums at Night (see below)
- ▶ To further strengthen the festivals offer – particularly in the shoulder season to extend the visitor 'year'
- ▶ To increase the number and range of places to stay. Visitor Accommodation Futures Study details a series of recommendations to create more bedspaces. Salisbury is a good location for a boutique hotel, for example, that will appeal to the higher spending independent visitors looking for a cultural short break but it needs to attract more hotels generally to realise its growth potential.
- ▶ To exploit the city's nationally significant opportunities e.g. home to one of the few copies of the Magna Carta, and its award as Lonely Planet 7th Best City, and use these opportunities for forging joint working between partners on themed campaigns.

TOWNS AND VILLAGES

Other towns and villages also need to review and invest in their offer to encourage visitors to see their town as a place to stay and as a base to explore the surrounding area. All Wiltshire's towns and villages should optimise their visitor potential through the presentation, good management and marketing of their place (see Section 7). Particular opportunities for development and collaboration are:

- ▶ To explore the opportunity to offer a Visitor Card that provides discounts at participating attractions, tours and entertainments as well as shops, eating and drinking places. Visitor Cards can be a useful mechanism to encourage visitors to stay longer and spend more and are particularly attractive to visitors where there are clusters of separate paid attractions, such as around the Close in Salisbury. Established examples include the York Pass and Bath Visitor Card. However, a pan-Wiltshire card would encourage visitors to explore the County's towns and villages further and local town partners should identify local offers and special deals to augment that opportunity, including out of season and other offers to encourage repeat trips.

- ▶ For towns to develop further visitor accommodation, realising the recommendations of the Visitor Accommodation Futures Study. Pub accommodation and boutique inns and hotels are particularly relevant to towns and villages. Town Councils, Business Improvement Districts (BIDs) and other local partnership groups should signpost local pubs and hotels to relevant business development advice and support on upgrading and expanding into providing visitor accommodation
- ▶ For towns to work together on themed marketing, local events planning and cross promotions to help present the towns and villages of Wiltshire as complementary offers.

OUTDOOR ACTIVITIES

Wiltshire is predominantly a rural county, with some outstanding landscapes and scenic beauty. Approximately 44% of Wiltshire is designated as an AONB and is testament to the county's scenic beauty and outstanding landscapes. It has over 20 long distance walking paths and the National Cycle Network (NCN) has several routes that are available to walkers and in parts to horse riders. The Kennet and Avon canal crosses the county, and comes close to several historic sites.

While walking and cycling activity in itself does not generate significant economic impact, the associated spend does, with an estimated £20 billion spent in England on visits to the natural environment during 2011/12¹⁷. The Kennet and Avon Canal alone was estimated to bring nearly £19m and 444 jobs into the economy of Wiltshire in 2009¹⁸.

Wiltshire has a particularly strong offer in rural sports – hunting, shooting and fishing. Visitors for country sports are an important short break market during the season for Wiltshire's accommodation. Wiltshire also offers a range of other ways to explore the countryside and outstanding landscapes including vintage car hire, 4X4 driving and hot air-ballooning. Taster and 'red letter day' experiences would have strong appeal to the Experience Seekers and provide opportunities for farm diversification and developing soft adventure itineraries.

The benefits tourism brings to the rural economy include:

¹⁷ Natural England 2012

¹⁸ British Waterways 2010

- ▶ Support for the viability of local businesses which also serve the local community - in particular pubs, restaurants, shops and post offices, transport and local events.
- ▶ Creation and support for local rural jobs – with the decline of jobs in farming and forestry, tourism employment is an important opportunity for rural areas. These jobs are particularly important to people without access to a car who find it difficult to access jobs in the towns
- ▶ Markets for local produce and traditional crafts – helping to support local small businesses and local skills
- ▶ Opportunities for farm diversification – farm shops, farm attractions and holiday accommodation.

However, the ability of Wiltshire to maximise these economic benefits is constrained by a lack of visitor accommodation. The designation of approximately 44% of Wiltshire as an AONB means that tourism activity can only be developed in ways that respect and enhance their special designation and this creates development constraints.

There is potential to develop more rural activity, adding to the ways visitors can explore Wiltshire's landscape. The following interventions will provide more reasons to spend time in the countryside and make visitors feel confident about exploring it.

- ▶ More guided events in the countryside and on the waterways – activities that add value to the visitor experience and create opportunities for visitors to explore the natural, historic and cultural environment in ways they would not otherwise do. These should include evening and night time activities connected with night skies and wildlife or which use the myths and legends of Wiltshire as inspiration
- ▶ Raising the profile of the range of activities available in the Wiltshire countryside, especially through opportunities for tasters and beginners to learn or try them out
- ▶ Volunteering holidays – working with the AONBs, National Trust and VisitWiltshire to develop and promote projects
- ▶ Creating art in the landscape – temporary or permanent installations that provide ways to celebrate the landscape, create a cultural trail and develop points of interest
- ▶ Development of cycle hire and repair businesses, e.g. along the Kennet & Avon Canal, to encourage visitors to explore the towns and villages in Wiltshire by bicycle, bringing more visitors and their spend to more places
- ▶ Encouraging provision of drying rooms and cycle lock-ups and encouraging towns to work towards the Walkers are Welcome standards and accreditation and encourage accommodation providers and eating places to achieve CTC Cyclists Welcome accreditation

- ▶ Establishing a task and finish group to develop night sky projects that encourage star-gazing events in dark skies (designated and others)
- ▶ Developing a mobile or permanent observatory of Wiltshire skies.

The planning department in Wiltshire Council will support appropriate applications for these types of activities.

The Melksham Link development presents specific opportunities to grow visitor activity and spend. It will be important for VisitWiltshire to work with the Canal and River Trust and other partners to identify and exploit commercial opportunities such as floating restaurants, boat and cycle hire, and to ensure there is good visitor information at the marina.

NEW VISITOR ATTRACTIONS

There are several reasons why investment in new high profile product would benefit the County's visitor economy.

- ▶ A new large attraction can have a transformational impact on the visitor economy, accelerating growth and job creation
- ▶ It will attract both new and repeat trips and encourage longer stays by building the critical mass of product to convert day trips into overnight stays within the coach and independent traveller markets
- ▶ It will create a new hub of visitor activity stimulating other business investment in the immediate vicinity
- ▶ If located to the North or central area of Wiltshire it can encourage visitors to explore further and spread the economic benefit across more of Wiltshire

There are already several large scale visitor attractions under discussion; these developments will need to be supported through feasibility and business planning stages and with site planning

TURNER CONTEMPORARY MARGATE

Turner Contemporary opened on Margate's seafront in April 2011. The gallery celebrates the town's association with JMW Turner, one of Britain's best loved artists, and presents the best of contemporary art practice.

The gallery's success has greatly contributed towards Margate's regeneration, helping to reposition the town in the minds of visitors and providing new reasons to come. Since the gallery opened:

- ▶ It has generated an additional £21m for the local economy
- ▶ Supports around 130 (full time employment) jobs in the county.

The success goes beyond the gallery itself. More than 35 new businesses have opened in the Old Town and Lower High Street, adjacent to the gallery, shops have reported takings double and business occupation rates have risen significantly.

The former Margate Renewal Partnership helped to promote and facilitate these improvements, which included c £2m of public sector investment which levered a further £2m of investment from the private sector to deliver arts space, galleries and enhancements to the public realm.

and fund raising by Wiltshire and Swindon Councils and by SWLEP. External funders will need to be confident not only of the business plan but that there is wide support for the concept by lead partners.

A public sector-led development such as a cultural attraction will require not only substantial capital funding, but also ongoing revenue support and resources for periodic refreshment of exhibitions and facilities to sustain the economic benefit.

Concepts will periodically come forward. VisitWiltshire has a key role to play in galvanising opportunities and advising on how the concepts will be tested. It is essential that ideas are owned by an organisation and partners with the skills, support and credibility to move the concept forward to planning and delivery. Current concepts under discussion that will make a significant contribution to economic growth include:

- ▶ A new military themed visitor experience – using the strong associations Wiltshire has with the military and Salisbury Plain to create an interactive exciting experience for visitors that also signposts other smaller specialist military museums.
- ▶ To attract a national museum to develop a 'branded' venue. There are many precedents for this - such as the Tate in St. Ives, the V&A in Dundee and the Science Museum Group's National Media Museum in Bradford. One national already present is the Science Museum whose large object store is at Wroughton near Swindon, currently closed to the public. A re-modelled venue able to display science and technology would be an attractive complement to Swindon's STEAM museum and, with the new Art Gallery, form a cluster of museum attractions. The Science Museum Group is currently having to reduce its budgets so such an expansion would require additional public and grant funding.

There are also major developments proposed for Swindon (see below).

LOCAL MUSEUMS AND ATTRACTIONS

Wiltshire's many smaller and specialist museums and attractions are an essential part of the visitor experience and of the cultural offer. By offering a consistent quality across venues they will strengthen the choice of things to do and help their towns and villages benefit from visitors. Wiltshire's museums should work with each other and with businesses at a local level to enhance the visitor offer, share good practice and drive more visitors, throughout the year and in the evenings.

One opportunity to help achieve those objectives is to develop a Museums at Night cluster for Wiltshire. Museums at Night is an annual UK-wide festival that takes place in May and seeks to encourage visitors into museums, galleries and heritage sites by opening their doors after hours and putting on

special evening events. The festival is coordinated and delivered by Culture24 and benefits from national PR and evaluation. There are several cluster projects across the country including rural examples in North Norfolk and Pennine-Lancashire. Areas looking to create a cluster can benefit from a briefing session that explains how to go about developing a cluster and other support that is available. Museum at Night projects are usually led by a local museum and can start in one part of Wiltshire and grow over time to cover a wider area.

A Museum at Night cluster offers the potential to deliver multiple benefits including:

- ▶ Raising the cultural profile of Wiltshire & Swindon
- ▶ Providing an opportunity to pilot evening economy initiatives beyond eating out
- ▶ Encouraging purposeful collaboration between cultural venues, shops and restaurants which can help drive additional trade to all the venues and businesses involved
- ▶ Helping cultural businesses co-curate creative activity
- ▶ Potentially accessing additional funding for the museum.

Kids in Museums is a project to make museums more friendly and relevant to families with young children and teenagers. The project has produced a manifesto for Kids in Museums and there is an annual Family Friendly Museum Award and resources available to participating museums. In Wiltshire & Swindon, seven museums are already part of the scheme – Chippenham Museum & Heritage Centre, Lydiard House, Salisbury Museum, STEAM in Swindon, Swindon Museum and Art Gallery, Trowbridge Museum and Wiltshire Museum. Although the scheme is aimed primarily at families rather than visitors, the manifesto is about providing a quality welcome and making museums relevant and accessible. The scheme provides a national and local platform for culture in Wiltshire and opportunities to attract more visitors year round.

MUSEUMS AT NIGHT: NORTH NORFOLK

The Victorian Nights Festival comprised 12 Museums at Night events across 9 venues in North Norfolk over a weekend in 2012. The project created a critical mass of activity and was marketed as a complete visitor offer because people are more likely to come if they can attend more than one event in the evening. The initiative helped improve partnership working between venues in the same location. The weekend project delivered the following benefits.

- ▶ **3,252** people attended the festival.
- ▶ **60%** of visitors were first time visitors to venues.
- ▶ **91%** of visitors said they would definitely return to participating venues in the future.
- ▶ **£50,000** was spent in the local economy over the festival weekend.
- ▶ **32** print and web articles with an AVE of **£28,651** were produced about the festival.
- ▶ **138** volunteers supported the festival.

Some of the smaller museums need to invest in the visitor experience and refresh their exhibitions. Small museums, frequently managed by Trusts and run by volunteers, do not always have the experience, contacts or information to do this effectively. They may be unaware of what funding is available to them to help them improve their museum experience. They may need business support to help the viability of their business.

HLF funding may provide funding opportunities to realise potential and the process of application will help museums think about audience development and access.

The Visitor Attraction Quality Assurance Scheme (VAQAS) is managed by VisitEngland and, through its network of regional assessors, has a good reputation for instigating and shaping change to the customer experience at visitor attractions. Membership of VAQAS is a good way for smaller museums to understand how they can enhance their experience and meet the challenges of access in older buildings. VisitWiltshire should continue to encourage its partners to sign up to VAQAS. It can encourage smaller museums to be involved in its networking activity, to strengthen peer to peer working, and to build a better understanding of the visitor economy, and of the business advice and funding that might be available and how to access it. Town Councils working with local businesses have a role in sharing that information through factsheets and supporting local museums with their development plans.

FOOD & DRINK

Food and drink is an important part of Wiltshire's economy; tourism provides an excellent way for the County to showcase its produce. Food and drink is one strand of the rural tourism experience and should be celebrated as part of local culture. It is also an essential part of visitor spend. Foodies will create a day trip or a short break around a destination restaurant or food experience. Around 9% of visitor expenditure in Wiltshire & Swindon is on food and drink compared with 13-23% in other Counties in the South West¹⁹. This indicates there is room for improvement and growth potential.

¹⁹ The Economic Impact of Wiltshire's Visitor Economy 2012, The South West Research Company Ltd, 2013

Wiltshire has some interesting independent brewers and food producers, award winning restaurants and some cookery experiences for visitors but the profile of food and drink and its importance to Wiltshire is not as prominent as it is many other rural destinations. The eating out experience is patchy across the County in terms of choice, quality and supply and local produce is not consistently profiled. There are opportunities to celebrate food and drink and make it a stronger part of the visitor offer.

The visitor economy offers both business to business (B2B) and business to consumer (B2C) opportunities for food and drink. Rural tourism and food and drink supply chain development are identified as SME Growth areas in the European Structural and Investment Fund Strategy (ESIF) 2014-2020 bringing opportunities for external funding assistance to development in these areas.

Actions are needed to stimulate business-to-business activity between food producers, suppliers and local tourism businesses and drive high standards of quality and service across all eating places. Collectively, these activities will deliver higher visitor spend. Every establishment that serves food and drink and welcomes visitors should aim to source locally, promote what they do and create special food experiences for visitors e.g. tastings, special menus. VisitEngland's new collaboration with The British Beer & Pub Association (BBPA) in advance of English Tourism Week 2015, is a good example of ways that the food & drink and tourism sectors are working together for mutual commercial benefit.

Several counties have developed a 'Taste' project as a way of bringing together and supporting the growth and promotion of quality local food and drink to visitors. Taste projects vary in their funding, projects and focus. For example Lancashire has introduced an annual 'Taste' award for cafes and restaurants and food attractions, and Cheshire has introduced a dedicated Taste website linked to the VisitCheshire website. Cheshire's site profiles places to eat, food trails and shops & producers. The site also provides information about food events and news, see [Taste Cheshire](#). Cumbria's Taste project has been established since 2009 and is now moving towards self-sufficiency. Cumbria's main objective is to get food producers and tourism businesses working closer together and using food and drink as a driver for visits as well as a key part of the visitor experience and expenditure.

TASTE CUMBRIA

Taste Cumbria began in 2009 with c. £600,000 funding over 3 years from Department of Environment, Food and Rural Affairs (DEFRA). The project originally focused on the development of an annual food festival in Cockermouth showcasing and celebrating local food producers. The main objective was to foster close working between food producers and tourism. The project included:

- ▶ Training for producers
- ▶ Concentrated work with a small cohort of medium range tourism accommodation providers to encourage use of seasonal food and buying from local producers

A dedicated Taste Cumbria website supports the event programme and PR is contracted out. Cumbria Tourism employed a full time manager to develop and coordinate Taste Cumbria.

The project required matched private sector funding on a sliding scale from 25% in Year 1 to 75% in Year 3. That matched funding was achieved through sponsorship from larger local producers and stall hire fees.

Taste Cumbria has now expanded to 5 annual festivals and is to be run as a commercial enterprise by CN Group. 2013 evaluation of the Cumbria Food festival showed:

- ▶ A total economic impact on the local economy by visitors to the event is estimated at **£1.9m**.
- ▶ **92% of those interviewed had made their trip to Cockermouth specifically for the Taste Cumbria Food Festival.**

There are opportunities to develop the Taste of Wiltshire project. 'Taste of Wiltshire' can become both a wrapper for existing food and drink projects and also a focus to create a single food and drink programme for the visitor economy to be built up over time, bringing food producers and tourism businesses together to collaborate on joint activity.

The Taste Wiltshire group should explore developing the Taste of Wiltshire project, drawing on best practice and customised to the needs of Wiltshire. Areas for inclusion are subject to achieving funding and are:

- ▶ To develop a food & drink festival of scale with the potential to attract visitors from outside Wiltshire, that provides a showcase for local producers, chefs and suppliers.
- ▶ To encourage hotels and B&Bs and the shops and cafes in visitor attractions to source and showcase local produce and facilitate more and tightly business matched Meet the Buyers sessions to encourage business to business activity in this area
- ▶ To develop a food and drink toolkit – an online resource to help tourism businesses understand how they can introduce local food into their businesses and the benefits of doing that
- ▶ To develop food and drink-led short break itineraries driven by strong collaborations between businesses in the tourism and food & drink sectors, potentially including behind the scenes tours and tastings
- ▶ To develop familiarisation trips for national and specialist food writers and publications to raise the profile of more and wider range of the food experiences.

Wiltshire will also explore the potential to create new food or drink themed visitor attractions and tours – led by a local producer, most likely a 'factory' tour supported by a visitor centre and visitor facilities that would deliver for Experience Seekers and for coach groups. The public sector may need to provide access to enabling grants and soft loans and provide business development support to ensure a quality attraction of scale.

SIGNATURE FESTIVALS AND MAJOR EVENTS

Major festivals, whether they are signature events rooted in Wiltshire and Swindon, or bought-in events, provide reasons to visit now and are valuable marketing and PR platforms. In key locations they are important ways to grow demand for overnight stays, including in the shoulder and off seasons.

Wiltshire should focus investment on a small number of festivals that have the potential to become signature festivals for the County, strongly associated with the place, reinforcing Wiltshire's brand positioning and with strong appeal to target markets.

Wiltshire and Swindon Councils should develop a Major Events Strategy to confirm potential and identify priorities for investment in existing events, development of new festivals and resources required to deliver this growth. A Major Events Strategy would explore in more depth the economic benefits and resources needed to realise the potential of festivals and events. Priorities are likely to include:

- ▶ Investment in existing events to help realise their tourism potential
- ▶ Using the special landscape of the County as inspiration for new festivals and spectacles
- ▶ Development of bought-in events which can bring excellent publicity and profile for Wiltshire & Swindon and help build capacity in event management skills. Typically, the costs of such events are high and often fall to the public sector to fund, though there will be sponsorship opportunities for some elements.

SWINDON

Swindon is a key business tourism hub, predominantly serving business generated by the town, Wiltshire and the immediate catchment. Swindon is also seeking to strengthen its cultural offer as part of its planned growth and repositioning. This provides opportunities for the visitor economy through the creation of additional visitor attractions to the North of Wiltshire & Swindon. Major new proposed developments that will have significant impact include:

- ▶ Oasis Leisure Centre, Swindon - a proposed £95m investment in a destination leisure experience including a state-of-the-art ski-centre, 6500 seat music and leisure arena, cinema, leisure retail, hotel and other accommodation
- ▶ Swindon Art Gallery – a new art gallery and museum to display the town's excellent modern collections, planned for the cultural quarter in the Kimmerfields scheme that will help regenerate the whole town centre.

Swindon has a concentration of large hotels, primarily serving business demand from Monday-Thursday but currently with capacity to provide good-value weekend accommodation for the leisure travel trade and independent visitors. New leisure, entertainment and cultural developments should increase that demand and interest in further hotel investment. A stronger offer in Swindon will encourage staying visitors and strengthen the tourism potential of the Northern part of the county as a whole, spreading the economic benefit. It is important that Swindon Borough Council and the LEP

continue to support those developments. Equally it is important that Swindon is positioned as part of the Wiltshire leisure tourism offer through partnership in the destination tourism marketing of Wiltshire through membership of VisitWiltshire

In terms of the town's business tourism growth potential, there is a significant leap between serving the current, mostly local market and proactively competing for discretionary MICE (Meetings, Incentives, Conferences and Exhibitions) business. For the latter it would be in competition with large cities with state-of-the-art facilities. The Visitor Accommodation Futures Report advised there is a need for further research on the potential for Swindon to attract conference and exhibition business to STEAM, (which can accommodate conferences of up to 750 delegates), and also to explore the potential for exhibition business at the planned Oasis indoor events arena. If research shows demand for discretionary MICE to these venues, then Swindon will need to develop a 4*conference hotel to realise this potential. The hotel could either be developed within the city centre as part of the development vision for Swindon or located at Oasis, creating a more self-contained MICE hub.

There may be a case for a conference desk service for Swindon and Wiltshire to promote participating hotels and other venues for meetings, exhibitions, conferences and events. The viability and effectiveness of a service will depend largely on the appetite of venue operators to work as a business tourism partnership, participating in activity and supporting it financially through membership and commission payments. This will need to be tested in discussion with the sector. Financial support from the public sector would be needed, in the set-up period at least and perhaps longer term. As the majority of the benefit would accrue in Swindon, the support of Swindon Borough Council or Forward Swindon would be essential.

A feasibility study and business plan is required, including consultation with private and public sectors. It should consider alternative business model options, both in-house in VisitWiltshire and out-sourced to an existing private sector operated conference bureau.²⁰

ACCOMMODATION

The Visitor Accommodation Futures Report, published July 2014, undertook a detailed audit of the volume and performance of visitor accommodation in Wiltshire & Swindon. The report recommends investment across all types of serviced and non-serviced accommodation to tackle under-provision and to

²⁰ As an example of outsourcing, Hampshire County Council is understood to be contracting a new conference service to the Destination Southampton Conference Bureau which is operated privately.

address capacity issues during the summer peak months, across the county, and year round at the weekends and during mid-week in Swindon. It sets out actions to realise the recommendations.

Growth in accommodation will be influenced by several factors. Hotel chains may be prepared to take more of a risk where they see longer term opportunity, assuming location, site and development costs fit their business model. Smaller independent developers do not have as much flexibility and will need to be convinced of year round demand and growth potential. Existing establishments may expand if their occupancy levels demonstrate there is sustained demand. Non-serviced accommodation and smaller B&Bs, for example rooms above a pub or restaurant, are easier to move forward quickly and the financial risk is likely to be lower. Existing small providers in rural areas should be supported to expand and upgrade their provision, where the provider can demonstrate a business case.

Therefore priorities for accommodation investment are driven by a mix of need, aspiration and commercial realities. The priorities for the lifetime of the DMDP and which will need support to help realise are set out in the Visitor Accommodation Futures Study. The agreed priorities for action are:

- ▶ The identification of specific sites and properties for hotel development and larger scale accommodation schemes
- ▶ A clear strategy for hotel investment in Swindon town centre
- ▶ The development of a pub accommodation initiative
- ▶ Development of a 'glamping' offer
- ▶ Tailored business and quality improvement support for the accommodation sector
- ▶ Improved communication with the sector about latest accommodation trends
- ▶ A business support and training programme across the county.

In addition, it is critical that local town councils and other town groups identify suitable sites to meet the demand identified in the report.

Wiltshire and Swindon Councils need to develop more positive planning policies for hotel and visitor accommodation to attract investment and to identify and promote specific hotel sites. New build chain hotels are more likely to come forward as wider regeneration and growth occurs across Wiltshire & Swindon. Even when site development briefs identify particular types of hotel, there are often compromises which can lead to an over-provision in

budget hotels, which while important in the mix should not dominate supply. Over provision of budget hotels could lead to the County achieving bedroom capacity at the expense of variety and choice.

7 GETTING HERE, GETTING AROUND & MAKING IT EASY

Travel is an integral part of the visitor economy. Visitors need to travel to get to Wiltshire & Swindon and then to travel around the destination once they have arrived. It is recognised that *'Better transport would encourage tourists to stay longer, to travel around the county and to spend more in the local economy'*²¹. At the moment, neither getting to Wiltshire nor travelling around it seems as easy as they should.

The Transport Vision 2026 for Swindon and Wiltshire outlines 10 Strategic Transport Objectives to deliver the goals set out in the SEP. Priorities for road and rail investment in Wiltshire & Swindon are set out in Local Transport Plans and the Strategic Economic Plan of the SWLEP and in most cases depend on funding from external sources or by transport providers. Infrastructure and services are typically provided for a range of different users. Visitors are just one set of users but their needs ought to be considered carefully. Visitors are the life-blood of an important local industry and can support the viability of public transport services by creating demand for rail and bus services out of commuter travelling times and at weekends.

VisitWiltshire should therefore articulate the need of visitors and tourism businesses for a well planned and integrated transport system, and join forces with others lobbying for improvements. Transport planners and transport providers should consult VisitWiltshire to ensure they understand what visitors need and what barriers and obstacles they face, so that the visitor perspective is recognised in the planning processes. Towns should communicate their issues, opportunities and priorities for transport to VisitWiltshire, e.g. by circulating their Neighbourhood Plans. That will ensure VisitWiltshire has the information to support visitor-related transport issues.

GETTING THERE

The majority of visitors travel to Wiltshire & Swindon by car or coach. Wiltshire's rural areas ought to be easy-to-reach and the driving experience a positive one. Unfortunately capacity problems on the strategic road network can make the journey a challenge at certain times. They create a poor experience, may dissuade visitors and can hold back the competitiveness of the local visitor economy unless they are addressed. Specific issues for the visitor economy needing resolution include:

²¹ Wiltshire Local Sustainable Transport Fund Bid Application 2012

- ▶ Congestion, delays and flooding issues on the A303 main cross-county route from London to the South West, and a principal route to Stonehenge; the road also affects the setting of Stonehenge – this Plan supports improvements to the A303
- ▶ The A36, main route north to south, with very heavy traffic through Salisbury causing delays, air quality concerns and environmental detriment
- ▶ The A350, through Cotswold character areas and towns, leading to main attractions at Longleat and Stourhead, is mostly single carriageway and heavily trafficked.

The rail network has challenges too. Limited capacity on the network, together with poor rolling stock and infrequent services make some routes unattractive and impractical for visitors. The higher spending international visitors travelling independently (14% of visitors to Wiltshire are from overseas) are more likely to rely on rail travel. Fast and frequent services out of London could make Salisbury and Stonehenge more accessible to people living in and visiting London. Encouraging more visitors to arrive by train can help reduce road congestion during the peak summer months. Areas for improvement of particular benefit to visitors include:

- ▶ Improved services and rolling stock from London to and beyond Salisbury
- ▶ Improved, more frequent direct services from Swindon to Westbury via Chippenham, Melksham and Trowbridge, providing an alternative to the congested A350
- ▶ More frequent trains on the line from Westbury through Pewsey helping to open up the central rural section of the County and provide connection with the Avon and Kennet Canal, its walking and cycling route and archaeological sites
- ▶ Electrification and speeding up of all lines to help visitors get to Wiltshire faster and travel around the County more easily.

There is also a need to improve first impressions, welcome, orientation and information at many rail stations. VisitWiltshire, towns, local groups can join the lobby for rail improvements and encourage the companies responsible for stations to work with their local towns on delivering a joined up visitor experience by providing welcoming stations, good orientation and information.

In the longer term, opening more stations to provide additional points of access and make it easier for visitors to explore Wiltshire without a car has the potential to make a significant additional contribution to the growth of the visitor economy.

GETTING AROUND

Once they have arrived in Wiltshire & Swindon visitors want to explore and travel from place to place; they need good connectivity between towns, villages, visitor attractions and services, with well-integrated transport provision. Local transport policy encourages promotion of more sustainable transport, such as walking, cycling and public transport. But there are several obstacles to this such as the poor rail connectivity between the south and north of Wiltshire and the lack of dedicated bus services from towns to major attractions.

Getting visitors to use local public transport

A survey has shown that 39% of potential visitors to the south west region listed cycling, walking and hiking as a main attraction that they were seeking²². Reliable and timely information is essential to enable visitors to access public transport, integrate services by different providers and modes, and locate services en route. Web-based information, optimised for mobile access, is rapidly becoming the most practical and expected form of provision. Visitor websites including VisitWiltshire, the WHS site and the sites of major attractions that welcome large volumes of visitors should include links to Connecting Wiltshire, the online transport information site, which will need further development to optimise its functionality on mobile devices.

Cycling and walking

A number of measures will make it easier for people to get around on foot or by cycle. Clear and consistent waymarking of pedestrian and cycle routes is essential, with particular attention to signage to visitor attractions and places of interest. Maintenance of route surfaces and vegetation control is also important. Provision of car parks for walkers, secure cycle parking and information and maps about off-road and quiet road routes instils confidence in visitors to get into the countryside. These services are often the responsibility of the local authorities, but increasingly there is a role for other organisations and groups to play. Wiltshire Council has developed a Countryside Access Improvement Plan 2014 and as part of the Council's successful Local Sustainable Transport Fund (LSTF) bid, has commissioned a wayfinding strategy for Wiltshire. Sufficient resources should be provided for these plans to be implemented to enable tourism businesses and VisitWiltshire to confidently promote walking and cycling across Wiltshire.

²² Wiltshire Local Transport Plan, 2011- 2026

Local transport in towns and villages

On arrival in a town or village, visitors need clear directional signing to car parks. Each town needs a clear approach for where they want to encourage visitors to park. The objectives are:

- ▶ To get visitors quickly and safely to preferred car parks that reduce competition with local residents and businesses for parking
- ▶ To encourage maximum length of stay through car parking charges and preferably payment on exit – if visitors pay on exit they do not curtail their visit because of a pre-paid length of stay
- ▶ To minimise impact on the local environment, e.g. encourage use of park and ride, appropriate parking etc.
- ▶ To provide good pedestrian signing to attractions, shopping areas and other visitor facilities and visitor orientation at the car park exit and good lighting to make visitors feel safe.
- ▶ In towns that welcome coach parties, coach parking arrangements should meet the needs of coach drivers, their passengers and local people. Road and pedestrian safety should be paramount in planning provision.

Towns Councils need to seek advice from Wiltshire Council and VisitWiltshire on these matters.

The World Heritage Site

The issues of access and connectivity are exemplified by the challenges for the WHS. To develop the growth potential of the WHS and make Stonehenge, Avebury and the WHS more widely accessible to visitors, the WHS has to strike a balance between meeting the needs of visitors, the environment and community interests. The draft of the new WHS Management Plan recommends the development of a Sustainable Transport Strategy for the whole site. Visitor-related issues which this Plan supports, include:

- ▶ Plugging of gaps in the off-road network where no paths exist, such as between adjacent villages and Stonehenge and Avebury
- ▶ Provision of safe road- crossing points for pedestrians and cyclists in the WHS, particularly on the A303 and A4
- ▶ Waymarking and interpretation further away from the honeypot sites to support dispersal and exploration of satellite sites
- ▶ Research and review of the feasibility of different ways to move visitors between the individual sites within the WHS and to other parts of Wiltshire.
- ▶ Options for further exploration include:

- ▶ The development of a commercial visitor bus service to link the WHS to the museums that have invested in WHS exhibitions in Devizes and at Salisbury
- ▶ Improved weekend services from Marlborough to Avebury and a service linking Stonehenge and Avebury
- ▶ Branding regular service buses that go to the WHS to make it easy for visitors, improve visibility of the service and by encouraging visitors to use these services help support their viability. (A branded bus has been used successfully at the Jurassic Coast WHS).
- ▶ Consideration of feasibility and impacts of park and ride provision for Stonehenge and Avebury, in the longer term.
- ▶ Identifying ways to improve access for disabled visitors; in a rural landscape this is likely to include virtual access.

8 PLACE MANAGEMENT FOR VISITORS

Attractive, welcoming, well-presented towns and villages encourage visitors to stop and spend time and money, bringing additional trade to local businesses and helping the economic viability and vitality of rural places. This requires good place management. The principles of place management may be universal but the action has to be local. All of Wiltshire's towns and villages that want to benefit from the visitor economy need to welcome visitors and ensure the infrastructure and visitor services of the place are in shape.

Good place management requires coordination, leadership and planning. The Town Councils, tourism and economic groups and BIDs are variously responsible for developing and managing tourism locally and many are active in that process. Some towns have undertaken audits and worked to create tourism action plans for their towns.

Visitors want to experience variety and difference in each town but they expect to find the same quality of facilities, welcome, service and information wherever they go. That means there needs to be a common understanding of standards and the priorities for action across all the towns in Wiltshire. All towns need to understand how their objectives relate to this DMDP and what is happening elsewhere in Wiltshire. Local town action plans need the support of Wiltshire Council and the AONBs and should align with the local planning framework and ultimately may influence it. VisitWiltshire has a key coordination role to support the Town Councils in achieving these objectives, and can provide expert advice and ensure that each locality benefits from county-wide collaboration and initiatives.

Towns, villages and other areas should undertake an audit through the eyes of a visitor looking at:

- ▶ Access and parking
- ▶ Arrival and first impressions
- ▶ Visual quality of the townscape and its management e.g. maintenance of buildings and open spaces, shop front design and maintenance, window and floral displays, de-cluttering of signs and other street furniture where appropriate
- ▶ Product offer – museums and attractions, independent shops, events and festivals,
- ▶ Visitor information and interpretation

- ▶ Other services including accessibility.

Towns that already have plans should ensure they cover all these areas and review their plans periodically. In undertaking these audits, towns need to be clear about what is special about their town which has appeal to visitors and what investments are needed to sustain and make the most of that appeal. Action plans need to consider ways in which they can reduce existing duplication and exploit existing distribution and marketing channels.

Towns, villages and other areas need to:

- ▶ Produce a tourism plan or make sure tourism is included in local plans
- ▶ Develop a clear identity with consistent messaging
- ▶ Develop a marketing and communications plan
- ▶ Develop, manage and promote local events and activities that add to the visitor experience, e.g. farmers markets, craft fairs and collaborate with other towns to present a complementary offer
- ▶ Manage parking for visitor cars, motorcycles and coaches including clear signing to the parking and consistent pedestrian signing to attractions and places of interest from the car and coach parks. VisitWiltshire should advise in particular on planning for coach visits and how towns can achieve 'coach-friendly' status
- ▶ Provide safe cycle parking especially in villages close to national cycling routes
- ▶ Ensure consistent and up to date pedestrian signage and waymarking designed to meet visitor needs
- ▶ Provide interpretation and information about the place
- ▶ Take part in the programme of activity to help individual towns use the new Wiltshire brand positioning effectively in their place, piloted in Calne.
- ▶ Work to reduce duplication, improve quality, encourage businesses to be active in their town and exploit visitor marketing distribution channels, e.g. VisitWiltshire
- ▶ Consider the local benefits in achieving Purple Flag status - Purple Flag is an accreditation scheme for excellence in managing the evening and night-time economy. The process includes research, training and a development programme which can complement other local town audits.

Action plans need to be realistic, practical and deliverable. Each town or village needs to be clear how local partners will work together to deliver the plan and should nominate a local tourism lead to provide clear channels of communication and ensure the support and advice of VisitWiltshire. Town Councils have local budgets to manage their towns and this provides core funding for some activity. Business Improvement Districts (BIDs) and LEADER programmes provide additional funding sources that may boost local delivery funding.

VISITOR INFORMATION

The world of information and communications is changing very rapidly. It is a challenge for towns and villages to provide visitor information locally in an effective and affordable way that meets visitor expectations.

In 2011, Wiltshire Council withdrew its funding of Wiltshire TICs. Swindon Borough Council now operates a small TIC service only out of its library.

Wiltshire's visitor information services are increasingly aimed at providing information only on the local town in which the service is operated; often combining tourist information with local and community information.

Some Wiltshire information services have, or are looking at establishing themselves as membership organisations where they charge businesses a fee to be promoted. Other fees being charged by VICs include booking fees, advertising fees and referral fees.

Several town councils in Wiltshire provide or support a Visitor Information Centre (VIC). Locations are constrained by cost and availability of premises and so are not always in a place that visitors will readily find; opening hours vary, with some closed at times such as weekends when visitors are most likely to be in the destination. Some traditional functions of a VIC are now carried out elsewhere; most visitors do some or all their trip-planning and booking online before or during their stay and increasing numbers use mobile devices to find information once on their trip.

It is therefore timely for town councils to review whether a stand-alone VIC is still the most effective way to provide information and the best use of limited resources. Larger towns may warrant a VIC but elsewhere the case may be hard to sustain against a range of alternative ways of visitors obtaining information. The key asset of the VIC services now is their knowledgeable staff (including volunteers) rather than their buildings and these staff can ensure information is delivered effectively by alternative means. VisitWiltshire should support the town councils to review their services:

- ▶ Consider alternative lower cost locations for visitor information points, such as a café or bookshop, to be promoted by signs and branding and supported by materials and training by VIC service staff - this option can provide additional trade for the local business where the VIC is located
- ▶ Consider a visitor information 'cart' or mobile unit that can be taken to busy locations or events, to be managed by VIC staff or volunteers
- ▶ Ensure good information panels at key arrival points supported by town maps widely available in local cafes, hotels and attractions
- ▶ Provide a 'Museum on the Street' - information about the buildings and features of interest, either by traditional information panels or through QR codes and Augmented Reality.
- ▶ Provide information through a network of existing businesses, e.g. in Devizes
- ▶ Combine the delivery of visitor information with other local information sources, where location and opening hours are likely to meet visitor needs, e.g. weekend opening.
- ▶ Exploit existing VisitWiltshire channels for providing visitor information, including via social media and digital content

9 BUSINESS SUPPORT

The visitor economy is largely made up of small and micro businesses that need to be equipped with the skills, knowledge and information to be competitive and to thrive through offering a consistent quality of facilities and service for visitors. Business support comprises several interwoven strands that include training, business advice, networking and peer support.

The Wiltshire Education, Employment and Skills Strategy 2014-2020 cites tourism as one of the important employment sectors and identifies a series of strategic objectives, the following being particularly relevant to the visitor economy.

- ▶ To drive business development and economic growth
- ▶ To co-ordinate collaborative partnership working to achieve common goals.

The report states that in tourism the main job growth at an occupational level in tourism will be in managers, directors and senior officials. The continuing shift in the occupational profile of the accommodation and food sector in the area over the course of the decade towards higher-order occupational groups will have a significant impact on the required qualifications profile of the workforce.

TRAINING

VisitWiltshire undertook an in-house members' survey in 2013 to identify training needs for tourism businesses and their staff. This survey identified three training priority areas for SMEs working in the visitor economy - marketing, online marketing and business management. Marketing was identified as the most critical area of need particularly training on how to use online, digital and social media.

Trends in information and technology are also identified as one of five priority areas for attention by businesses in the report '*Domestic Leisure Tourism Trends for the Next Decade*', prepared for VisitEngland in 2013. An increasing proportion of all holiday dreaming, planning and booking is done online, customers use peer reviews on social media channels to inform their decisions and an increasing number of people use their mobile devices both before and during their stay. Technology is transforming the industry. Tourism businesses unable to offer online booking and purchasing and who do not know how to use, manage and monitor social media are unlikely to thrive over the next decade. It is essential that Wiltshire & Swindon's SMEs are provided with the information and support they need in the digital era.

At a strategic level the skills strategy needs to make sure tourism needs are identified, prioritised and incorporated into future funding. There would be considerable benefit in streamlining funding and training programmes to present a clear and joined up offer that helps tourism businesses access training now. Wessex Chambers support services need to run appropriate courses to meet the needs of tourism businesses and Wiltshire and Swindon Councils need to ensure tourism needs are included and tourism businesses are able to access funds where available. VisitWiltshire has a role to play in signposting businesses to training opportunities, encouraging uptake and monitoring future needs.

COLLABORATIVE BUSINESS PARTNERSHIPS

Wiltshire & Swindon does not have a strong tradition of collaboration between tourism businesses. That is needed to foster innovation, encourage investment and present joined-up experiences to target markets across Wiltshire & Swindon. Businesses need mechanisms for joint working and for business-to-business activity. VisitWiltshire has already established themed groups to undertake tactical marketing activity. There is the potential to develop more groups, with a wider remit and for the groups to be themed on areas where collaboration will bring most benefit. However, there are challenges in getting businesses from the north and south of the County and Swindon to collaborate as a single group. So any new groups must be able to demonstrate clear benefits to businesses and provide strong incentives for collaboration to help overcome these barriers. Food & drink is one area where this is likely to be possible and is a priority growth area for the DMDP. In that instance the group can bring together tourism businesses and food producers to identify ways to use tourism to boost the food & drink industry and attract more visitor spend. There is also an opportunity to develop existing partnerships, e.g. with groups like Wiltshire Arts Promoters.

The objective is to build the capacity of these groups over time. That means channelling business support through them and providing pump priming funding to realise specific projects. This will give the groups real power, provide incentives for businesses to join them and attract some of the larger tourism businesses to the table. VisitWiltshire would play a key role in setting up and steering these groups initially, help shape ideas generated by the group into projects and liaise with public sector funding partners to identify channels of funding. Successes of existing groups, e.g. the travel trade group, should be developed further.

10 DELIVERING THE PLAN

This Plan is for the whole tourism sector in Wiltshire and Swindon. It will require many organisations and businesses to contribute to its successful implementation. The Action Plans that follow indicate who should lead and who should assist with individual actions. But there must also be coordination, consistency and expertise in delivery, so that the destination is developed and marketed as a coherent whole, and resources are applied to the priorities that will create most value.

VISITWILTSHIRE

It is the policy of both Central Government and VisitEngland that destination management organisations (DMOs) should provide strong, focused and effective leadership for tourism development at the local level. It should coordinate delivery of some aspects of the Plan through its partners; additionally there is a range of actions it should lead because it is uniquely able or best placed to do.

It is also important that VisitWiltshire engages with VisitEngland and VisitBritain and other national bodies to secure their support and assistance in the implementation of the DMDP, and to influence the policies and priority frameworks of these organisations to recognise the needs and potential of Wiltshire and Swindon.

Destination marketing : to consumers and the travel trade in accordance with the VisitWiltshire Marketing Strategy and Business Plan. A critical task is to raise the profile of the County; development and roll-out of a new brand positioning, and online and social media activity and PR are crucial. By extension this will help raise the quality of tourism businesses and the integration of Wiltshire as a destination. The coordination and expertise required to market the destination as a whole makes VisitWiltshire's role essential, and this area will remain a priority for the company.

Providing marketing channels for businesses and organisations: this has always been a key role for DMOs - through visitor guides, advertising, PR and more recently through websites and other digital channels. DMOs are increasingly becoming content curators - providing inspiration and information for potential visitors and signposting them on - rather than acting as booking agents themselves. The rise and dominance of online accommodation booking agents such as booking.com calls into question the value of the Eviivo room booking facility suggesting that VisitWiltshire should keep it under review, in consultation with its partners. A new development to consider is the 'Fair Booking UK' initiative (currently coordinated by Visit Cornwall) which aims to

provide SMEs with a well-publicised online channel as an alternative to the online agents, avoiding their booking commission while guaranteeing customers the best rates, best rooms and a contribution to a charity in the destination.

Building collaboration and networks: the tourism product and experiences are provided by a multitude of organisations and businesses across Wiltshire & Swindon. VisitWiltshire can bring together organisations, and by establishing and working with existing groups and networks develop and 'bundle' experiences together and take them to market effectively. Business networking activity can help build capacity, build skills and reinforce quality standards.

Support and advice for local initiatives: Town Councils, BIDs and others need advice and support on how to manage local towns and places for visitors. VisitWiltshire has a role in helping these local groups, e.g. to develop a plan, define objectives and priorities, and should also help them achieve consistent standards, provide guidance on the use of Wiltshire branding, and encourage them to collaborate with other towns and villages to increase the impact of their activities in the county as a whole.

Lobbying and influencing: VisitWiltshire should articulate the interests of the visitor economy in major decisions on infrastructure such as roads and rail and on the shape of economic development programmes and funding. It should ensure that the growth of the visitor economy is central to the priorities of the LEP and other strategic partners. It needs to maintain key relationships with local authorities, major private sector operators, the National Trust, English Heritage, the World Heritage Site and others.

Leveraging national and other opportunities: VisitWiltshire can pursue opportunities for external public and European grant funding. As a recognised DMO it can and does participate in initiatives led by VisitEngland, VisitBritain, the Arts Council England and other national bodies and this continues to be essential for the strong positioning of Wiltshire.

Improving quality and fostering skills: VisitWiltshire has a role in advising and mentoring on the quality of marketing by tourism businesses and identifying opportunities for product improvement and gaps in skills and knowledge, helping to secure relevant training provision and encouraging participation.

Research and intelligence: VisitWiltshire should track the performance and value of the visitor economy and monitor trends, and also measure and evaluate the impact of its own activity. It should encourage others to track activity and outcomes that contribute to the successful delivery of the DMDP.

RESOURCES FOR VISITWILTSHIRE

VisitWiltshire needs sufficient resources to fulfil these roles and to be effective. The assertion of Government's Tourism Policy is that destinations need strong and independent local tourism bodies led by and, increasingly, funded through partnership with the tourism industry. It envisages 'commercial partnership marketing and sponsorship deals with tourism industry firms' will provide support but recognises that DMOs will require match funding from local authorities or LEAs. Since publication of that Policy in 2011, in an era of continuing austerity, many DMOs have been under pressure to reduce reliance on public funding by increasing the contributions of businesses. Some, including VisitWiltshire have made progress. VisitWiltshire must continue to develop a broad financial base through membership, partnerships and marketing opportunities, as set out in its company Business Plan.

Generally, however, it remains the case that businesses are prepared to contribute to marketing and campaigns that directly lead to business for them, but are very reluctant to fund wider destination marketing and management activity.²³ One has to conclude that core public sector funding for the work of VisitWiltshire, will continue to be essential for its survival; it appears that no substantial DMO undertaking a full range of activity operates without significant public support. DMOs that have had significant budget cuts in the last few years are now able to do little other than short-term tactical marketing activity. Public funding is also an essential 'match' to attract business contributions to marketing and other activity.

VisitWiltshire currently has no core funding from Swindon Borough Council. The case for it to contribute is an economic one. Its visitor economy has potential to grow significantly with the development of the new Arena, the Art Gallery, town centre improvements and the extension of its shopping offer, while its hotel stock has the larger hotels that are in short supply elsewhere in Wiltshire. To realise this potential as a leisure and entertainment centre, to increase business tourism, and to maximise broader place objectives it needs effective destination marketing. There are linkages to be made between Wiltshire attractions and Swindon hotels and packages of activity to be developed through collaborations. These are things that individual businesses and attractions will not achieve without public sector support but they are exactly the tasks that VisitWiltshire is designed to undertake. Swindon Borough Council should therefore consider funding VisitWiltshire as an important strand of its economic development activity.

²³ There are academic studies that explain why businesses are unwilling to fund broader destination management and development activity; one consideration is that if some businesses collectively promote the destination there is every temptation (unless such support is compulsory) for others to free-ride on those businesses' contributions. See *The Economic Rationale for Government Intervention in Tourism*, Adam Blake and Thea Sinclair, Christel DeHaan Tourism and Travel Research Institute, University of Nottingham

LOCAL AUTHORITIES

Local authorities have a vital role in managing and shaping the places which visitors frequent, and in providing services that visitors need. Local authorities and the AONBs should consider and embed the needs of visitors in the full range of policies and services in planning, transport, environmental management, provision for leisure and recreation, and culture and the arts. By facilitating good destination management in this way, local authorities will encourage visitors to stay longer and spend more. Local authorities can help support growth through the planning process. Local authorities also have to balance the environmental and community needs of places with those of visitors. Well-managed tourism should help sustain transport services, shopping, culture and recreation facilities; and be a spur to the preservation of the built and natural environment. Visitors' appreciation of the built and natural environment is a powerful economic argument for its continued conservation. Town Councils can be advocates for tourism and coordinators of the presentation of the town and the provision of welcome and information.

TOURISM BUSINESSES AND ORGANISATIONS

Many types of businesses and organisations contribute to the visitor economy and benefit from it. The fortunes of tourism businesses and also of some independent shops and places to eat are tied in with the popularity of the destination. That means rather than needing to promote their own business they require the destination to be promoted and improved. Individually they cannot do this and their self-interest should drive them to collaborate with each other and to be members of VisitWiltshire. The same is true of the smaller attractions in Wiltshire, including museums, galleries, theatres which are predominantly run by small charitable trusts. While not for profit, they have an interest in increasing the volume and value of visitors and should align themselves with VisitWiltshire.

There are a few bigger players, such as the National Trust, English Heritage, together with the privately owned Longleat, which have the scale, memberships and resources to promote their own attractions effectively. As major attractors of visitors into Wiltshire, they can play a very important role in marketing the destination and in building the value of the visitor economy as a whole though participating in VisitWiltshire's promotions and in working with smaller attractions and other businesses as part of industry groups recommended in this Plan.

11 ACTION PLANS

Actions are grouped as follows:

- ▶ Reasons to Come, Things to Do and Places to Stay
- ▶ Getting Here and Getting Around
- ▶ Place Management for Visitors
- ▶ Business Support
- ▶ Branding
- ▶ Delivery of the Plan

Priorities

Priority has been given (indicated by shading in the tables) to those actions that:

1. Have most potential for significant impact on the visitor economy, particularly in the creation of jobs but also in improving the visitor experience or the management of places and the environment
2. Which are also likely to be most achievable - are within the remit of VisitWiltshire and partner organisations to deliver, are aligned with policy frameworks, and are affordable or have realistic prospect of external funding.

Summary of impacts

The actions in this Plan are estimated to generate, or in some cases safeguard, between 3,600 and 4,570 jobs over the 5 year period. They include between 1920 and 2280 jobs identified in the accommodation study. This represents job growth of around 13% to 16% on the current employment in the visitor economy of 28,000.

This does not include all the growth that can be generated in Wiltshire and Swindon through business investment to improve or extend accommodation and hospitality, attractions and activities.

Note on estimates of jobs

In considering actions for development of the product, experience or places, the number of *additional* visitors that could potentially be generated for Wiltshire have been estimated. The estimates necessarily require subjective judgement informed by experience elsewhere and tempered by a conservative approach. This figure of additional visitors has been multiplied by an average spend per visitor (based on Wiltshire county proportions of day and staying visitors and their respective average spends). A multiplying factor of 1.5 has then been applied to take account of indirect and induced effects (based on economic impact calculations within the TSE Research report, 'Economic Impact of Wiltshire's Visitor Economy 2012'). Job estimates have been calculated by dividing this resulting additional spend by £69,000 (the amount of direct, indirect and induced spend necessary to support 1 full-time equivalent job, the figure again based on TSE impact calculations)²⁴. Actual job numbers equate to approximately a third more than full-time equivalent jobs.

Impacts for training are estimated as jobs safeguarded by the upskilling of the workforce enabling their businesses to remain competitive. Festivals and events have been widely subject to economic impact assessments and the method applied to a comparable event (Taste Cumbria Festival) has been used to assess the likely impact of a Taste Wiltshire Festival.

Abbreviations

Here are the abbreviations used for each of the tables. S = short term (12-18 months) M = medium term (18 months – 3 years) L = long term (3+ years)

ACE = Arts Council England

AONB = Area of Outstanding Natural Beauty Authority

BID = Business Improvement District

DCMS = Dept for Culture, Media and Sport

EAFRD = European Agricultural Fund for Rural Development

EIA = Economic Impact Assessment

ESIF = European Social and Investment Fund

HLF = Heritage Lottery Fund

RDPE = Rural Development Programme England

SBC = Swindon Borough Council

SWLEP = Swindon and Wiltshire Local Economic Partnership

TC = Town Council

VB = VisitBritain

VE = VisitEngland

VW = VisitWiltshire

WC = Wiltshire Council

WHS = Stonehenge and Avebury World Heritage Site Partnership Panel

²⁴ The Deloitte and Oxford Economics report *Tourism: jobs and growth*, 2013, estimates by a different method the marginal revenue to create a new full-time job in tourism as £54,000.

REASONS TO COME, THINGS TO DO & PLACES TO STAY

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
World Heritage Site						
Develop WHS Sustainable Tourism Strategy as part of the management plan	WHS	VW, WC, businesses	S	May be undertaken by partners	Partner time	Better visitor experience & promotion; increased visitor stay and spend.
Interpretation plan for Avebury and other parts of WHS	WHS	EH, NT, VW, WC	S	£20,000+ – depends on agreed activity	NT, EH, WC	
Develop and promote short break opportunities in the WHS and surrounding area, highlighting outdoor activities, museums and accommodation options.	WHS	VW, businesses	M	£20,000	WHS, VW, businesses	c.100 jobs
Salisbury (Also see attractions & museums and festivals below)						
Pedestrian signing, interpretation etc accommodating visitor needs, reducing clutter	WC	Salisbury BID, SCC, Salisbury Vision, VW	S	Included within existing budgets	n/a	Better visitor experience & promotion; increased visitor stay and spend. c.50 jobs
Devise and promote thematic campaigns to draw together and add value to the Salisbury visitor offer	BID, SCC, Cultural and historical attractions	VW	M	£25,000 a year	VW and budgets of participants, sponsors	
Towns and villages (also see place management below)						
Examine feasibility and appetite of a Visitor Pass for the towns and villages of Wiltshire	VW	Attractions, tours, eating places, shops etc , TC	M	Set-up costs £20,000	VW and partners	
Outdoor activity						
Develop programme of themed, guided tours e.g. night sky, wildlife	VW	AONBs, WHS, TCs	S	Volunteers to deliver £1000 for promotion	ESIF + tour fees	See below

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Walking: Town councils work towards 'Walkers are Welcome' standards and accreditation; Cycling - encourage provision of drying rooms and cycle lock-ups. encourage accommodation providers and eating places to achieve Cycle Touring Club Cyclists Welcome accreditation	TCs, VW	Accommodation and food providers	M-L	Individual initiatives at relatively small cost	Private sector to fund, variable costs	Improved opportunities and offer. And see actions for Getting Around, below. Potential c.70 jobs
Establish task and finish group to develop night sky projects that encourage star-gazing events in dark skies (designated and others) Develop and deploy a mobile observatory	AONBs	Forestry Commission, EH, NT WC	M	Indicative cost of mobile observatory £50k	Private sector	
Explore potential for volunteering holidays	NT/AONBs	VW	L	Will be determined through partner opportunity	Developed as part of exploring potential	
The Melksham Link. Extend the Kennet and Avon canal into Melksham and to potential new marina Work with Canal Trust and partners on Melksham link to identify and exploit commercial opportunities on and around canal, such as floating restaurants, boat and cycle hire, and provide visitor information. Possibility to extend this to become a larger integrated project with additional accommodation and attractions.	WC	Melksham TC, Melksham Trust, Wiltshire and Berks Canal Trust, VW, WWT	M confirm opportunities L implement	Core elements £14m, additional for marina	Canal Trust, fund raising e.g. Big Lottery and charitable trusts, S106, SWLEP	20-75 fte jobs (Source: Arup Feasibility study) Additional jobs likely if expanded project goes ahead

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
New visitor attractions						
Engage with organisations that have new attraction concepts or expansion proposals to encourage development in Wiltshire e.g. Hill Brush visitor attraction, through appropriate planning policy, assistance with site and infrastructure procurement, support for funding applications	VW	WC and SBC, SWLEP, private sector	M/L	variable	variable	Potentially 100+ jobs at attractions; 250+ in visitor economy
Engage with food and drink producers to develop at least one new food and drink attraction to include visitor centre, with capacity to accommodate coach parties as well as independent visitors	Food producer company	WC, VW	S – identify M - develop	Will depend on scheme - £250k -£1m+	ESIF food and drink programme Private sector	10+ jobs at attraction; 35+ in visitor economy
Secure and implement Swindon Art Gallery project	SBC	ACE, HLF, private sector	L	£15m capital	SBC, HLF, private sector sponsors	20+ jobs at Gallery + visitor spend
Local museums and attractions						
Develop Museum at Night/Light Night cluster project: Roadshow presentation to gather interest/explain Establish relationship with Culture24; appoint coordinator; determine yr 1 area and develop programme; use as trigger for other joint working opportunities especially in the shoulder months	VW/WC	Museums, cultural venues, restaurants, tourism businesses Culture24	Plan to be part of 2016 event – allows full year for planning	Core and project budget £70k	ACE, HLF, sponsors for specific events , Cultural Destinations Fund	1 post of Coordinator + additional visitor stays and spend

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Food & Drink						
Develop Taste of Wiltshire	VW	Food and drink producers, cafes and restaurants, accommodation	S – plans & initial activity M-L – delivery	£150,000+	ESIF + industry	Increased business turnover ; potential c. 35 jobs
Food and drink business support toolkit, itineraries, familiarisation trips for food writers etc	VW	Food producers, restaurants, accommodation	S - ongoing	£10,000	ESIF	See above
Food & drink festival as part of Taste of Wiltshire	VW	Festival organisers, cultural partners, WC, SBC, TCs, markets, food producers, restaurants, attractions	S – establish group M – develop event L – build into bi/annual	£ variable – aim to grow support overtime	ESIF + food producers, retailers + local companies/ sponsors	Potential 10 jobs
Signature Festivals & Major Events						
Develop Major Events Strategy	VW	WC, SBC, Salisbury International Arts Festival, Chalke Valley History Festival	S – strategy M – deliver	£20,000 – strategy. Events delivery will vary	Sponsorship for events - local companies. ACE, HLF	EIA assessment to be undertaken for the agreed strategy

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Swindon						
Establish a clear strategy for hotel development in Swindon town centre to support its regeneration, the expansion of its economy and its development as a regional centre for conferences, exhibitions, entertainment and leisure. (And see Accommodation actions below).	Forward Swindon	SBC, VW	S	One-off costs £12500 for research and strategy development	SBC, SWLEP, FS	200
Accommodation²⁵						
Lobby for and develop planning policies that more positively support the development and improvement of hotels and visitor accommodation	VW	SBC, WC	S	£5000 p.a.		
Develop a pub accommodation initiative to support the upgrading and expansion of existing pub and boutique inn accommodation businesses and the addition of guest bedrooms to pubs not currently providing accommodation, through advice, training, marketing, help to identify funding and grants	VW	Breweries (Wadworths, Arkells etc) Pub is the Hub Local authorities and AONBs	M: 3 year programme starting 2015/16	One off cost start-up £6000 £20,000 a year for 3 years. Grant funding as available	ESIF (EAFRD) RDPE LEADER Pub cos	400
Pursue development of Glamping through a development guide, suppliers' exhibition, training workshops and marketing support	VW	AONBs	M: 3 year programme starting 2015/16	One-off costs of £7,000 in 2014/15 £14,000 p.a. for 3 years 2015/16 on	ESIF (EAFRD) RDPE LEADE	70-80

²⁵ Actions on accommodation are taken from the Wiltshire and Swindon Accommodation Futures report which provides the rationale and more detail.

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Provide tailored business and quality improvement support for the accommodation sector. Develop a grant aid scheme (if it can be funded) to accelerate accommodation development and employment growth	VW (to facilitate)	Business support agencies	Ongoing from 2015	£40,000 p.a. Grant aid £250k p.a.	ESIF (EAFRD) RDPE LEADE	150-200
Identify sites and properties with potential for hotel development and larger scale accommodation schemes, and match them to interested hotel and accommodation developers and investors	WC, Forward Swindon	VW	S for study, plus ongoing dialogue with developers	One off cost £10,000	SWLEP, WC, SBC	1100-1400

GETTING HERE & GETTING AROUND

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Major Infrastructure investment						
Support and lobby for transport improvements: to key trunk routes for visitor traffic, especially the A303, A36, A350 Support improved, quicker and more frequent rail services especially for better service on the Swindon to Westbury service, East-West line through the Vale of Pewsey, quicker services on the southern line. Reinstatement of station at key locations across the county	SWLEP	VW	M-L	covered by SWLEP	SWLEP	Improved competitiveness of visitor economy. Job impacts included in Strategic Economic Plan
Getting Around						
Implement measures in Wiltshire Council's Countryside Access Improvement Plan 2014, particularly: Review and improve access by cycle and on foot to significant visitor attractions and locations Implement the wayfinding strategy Designate and provide information and maps on off-road and quiet road access Provide safe crossing points on major roads in the WHS	WC, SBC, AONBs	Connecting Wiltshire, VW, attractions, Town Councils	Ongoing	To assess on a case by case basis	Local Sustainable Transport Fund (LSTF) Attractions	See outcomes relating to cycling walking actions, above
Connect visitor-facing websites to Connecting Wiltshire travel planner Continue development of Connecting Wiltshire and optimisation of compatibility on mobile devices	WC	Transport providers, VW	Ongoing			Better public transport options Increased visitor stays. c.140 jobs
Research feasibility of improved service bus links to WHS locations from towns	WC	WHS, transport providers	Ongoing			

PLACE MANAGEMENT FOR VISITORS

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Place Management						
Develop a tourism action plan in each town, or tourism objectives as part of broader town plan <ul style="list-style-type: none"> • Undertake an audit • Agree priorities for investment and development of tourism product and services • Set targets and take action on presentation and management of public spaces used by visitors 	WC, SBC or TC	VW AONBs WHS BIDs, businesses and residents bodies	S	N/a for plan - implementation budget will depend on measures adopted	Will depend on measures adopted. Possible BID funding	Package of Place Management measures to generate over time an estimated 1% to 5% increase in visitor volume and value - equating to 140 -700 jobs
Set policy and objectives for events promoted for visitors; make connections with event activity in the proposed Wiltshire major events strategy	TC WC, SBC	VW Cultural and arts bodies; BIDs and businesses	S to review M-L to implement	N/a for plan - implementation budget will depend on actions adopted	Will depend on action adopted. Possible BID funding	
Provide car parks for walkers and secure cycle parking Develop a plan to manage car parking for visitors Plan for coach visits and achieve 'coach-friendly' status where possible	WC, SBC	Town Councils; VW to advise	Ongoing	To assess on a case by case basis	Transport funding sources	

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Review pedestrian signage and in-street information with a visitor's eye for clarity and avoidance of clutter; new installations follow Wiltshire style and branding guidelines	WC, SBC	TC; VW to advise on style and branding	S to review M-L to implement	To assess on a case by case basis	Transport funding sources	Contribution to visitor orientation and understanding of the County, leading indirectly to longer stays and greater spend
Expand number of towns undergoing process of achieving Purple Flag	TC or BID	VW, WC, local businesses	M	£1,500 per town	TC/BID	
Review provision of visitor information (including VICs) and adopt alternative methods as appropriate, including <ul style="list-style-type: none"> Information points in cafés, hotels, attractions Ensure there are welcome, maps and orientation at all key arrival points e.g. rail stations, bus stations, coach parks and car parks Publish free maps of the town and vicinity 'Museum in the street' interpretation by traditional or digital means 	TC	WC, BIDs Businesses	S to review M-L to implement	Review use of existing budget for information and VIC; BID and business contribution via advertising to maps and websites	Town Councils ' BIDs and businesses, transport providers	
Nominate a local tourism lead or contact person to liaise with VisitWiltshire	TC	BID, VW	S	n/a	n/a	

BUSINESS SUPPORT

Actions	Lead Agency	Partners	Timescale	Indicative budget	Funding Sources	Jobs & other outcomes
Business Support						
Assess gaps in skills and knowledge and identify where product quality and marketing can be improved through customised training and advice Ensure strategies and funding take account of training needs for tourism sector Ensure training provision is joined-up and clearly signposted Give particular support for online, digital and social media marketing skills	Chambers of Commerce LEP	VW, WC, SBC	S - ongoing	£15,000 based on 15 events with up to 20 people at each event	ESIF, LEADER, RDPE, SWLEP business fees	300 safeguarded, i.e. one per SME
Establish themed business groups	VW	Businesses	S - ongoing	Generated by group + route to channel delivery of specific activity for other programmes	n/a	n/a – jobs safeguarded/ new accounted for elsewhere
Examine the feasibility, support from businesses and business model for a conference desk service for Swindon and Wiltshire	VW	Businesses	M	£12500 for study	SWLEP, Forward Swindon/ SBC	Additional conference business; 20 jobs

BRAND POSITIONING

Actions	Lead Agency	Partners	Timescale	Indicative budget		Jobs & other outcomes
A programme on how to use the brand positioning in towns and villages. Target 5 towns over 2 years.	VW	TC	S-ongoing	£60,000	Town Councils	Stronger identity for destination.
Develop online Wiltshire Brand Toolkit with downloadable copy, images, videos – for individual businesses. Include commissioning new image library and possibly new series of video shorts	VW	Business associations & agencies; TC, Local Tourism Partnerships	S-M	£20,000	SWLEP, Chambers of Commerce, business support agencies	Consistency in presentation of marketing communication
Apply the new Wiltshire Brand Positioning to all VisitWiltshire’s destination marketing collateral – i.e. print, website, digital channels including identifying opportunities to involve ‘Gen C’	VW	n/a	S	£15,000	VW (Marketing budget)	Business Plan target of additional £20m visitor spend generating 375 jobs
Plan & implement a programme of content creation and distribution to disseminate Wiltshire Brand Positioning via VisitWiltshire’s owned media and via partners/multipliers	VW	Place partners in Wiltshire/ neighbouring areas, e.g. Cotswolds,	S	£30,000	SWLEP; VW (Marketing budget);	
Plan & implement a long-term (minimum 2 years) core B2C campaign with strong creative designed to communicate the new Wiltshire Brand Positioning to target markets – distribution principally via owned media (digital & print), earned media (PR, social) & partners	VW	‘Wessex’ Big brands, e.g. EH distributors, e.g. VE, VB rail operators	M	£30,000	Partners’ distribution channels	

Actions	Lead Agency	Partners	Timescale	Indicative budget		Jobs & other outcomes
Commission a brand positioning plan for Swindon	VW	SBC, Forward Swindon, SWLEP, private and cultural sector	S	£20,000	SWLEP	Stronger identity for destination. Consistent presentation of marketing communication leading to improved destination performance/ employment

DELIVERING THE PLAN

Actions	Lead Agency	Partners	Timescale	Indicative budget	Source of funding	Jobs & other outputs
Coordinate implementation of the Plan and assist partner organisations and businesses to fulfil their actions	VW	All partners/ members of VW	Ongoing	From existing resources	VW	Plan outcomes achieved
Engage VE, VB, DCMS, Tourism Alliance and other national bodies to secure their support and assistance for the Plan and Actions, and to influence their policies and priority frameworks to recognise the needs and potential of Wiltshire and Swindon	VW	VE, VB	Ongoing	From existing resources	VW	Plan outcomes achieved
Monitor progress on delivery of the Plan	Board of VW	All partners/ members of VW	Ongoing	From existing resources	n/a	Progress maintained
Secure funding track the volume and value and other performance indicators relating to the Visitor Economy, including awareness and perceptions of Wiltshire brand (as far as budget allows)	VW	All partners/ members of VW	Ongoing	From existing resources	VW	Information for planning and external funding
Research and review the performance of VW - marketing effectiveness, membership levels, and other activities	Board of VW	VW and industry partners	Ongoing	From existing resources	VW	Continuous improvement
In consultation with businesses review the booking systems including Eviio on VW website; retain or adjust as necessary. Evaluate the Fair Booking UK initiative	VW	Industry partners	S/M	n/a	VW	Effective website
Continue to develop a broad financial base through partner activity, marketing opportunities, external project funding	VW	Businesses SWLEP; European funding bodies	Ongoing	With existing resources	VW	VW activity sustained/extended
Continue contribution to core funding	WC		Ongoing	£500,000 a year	WC	VW activity sustained
Consider new core funding contribution	SC		S	To be assessed	SBC	VW activity extended

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is done in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument.