

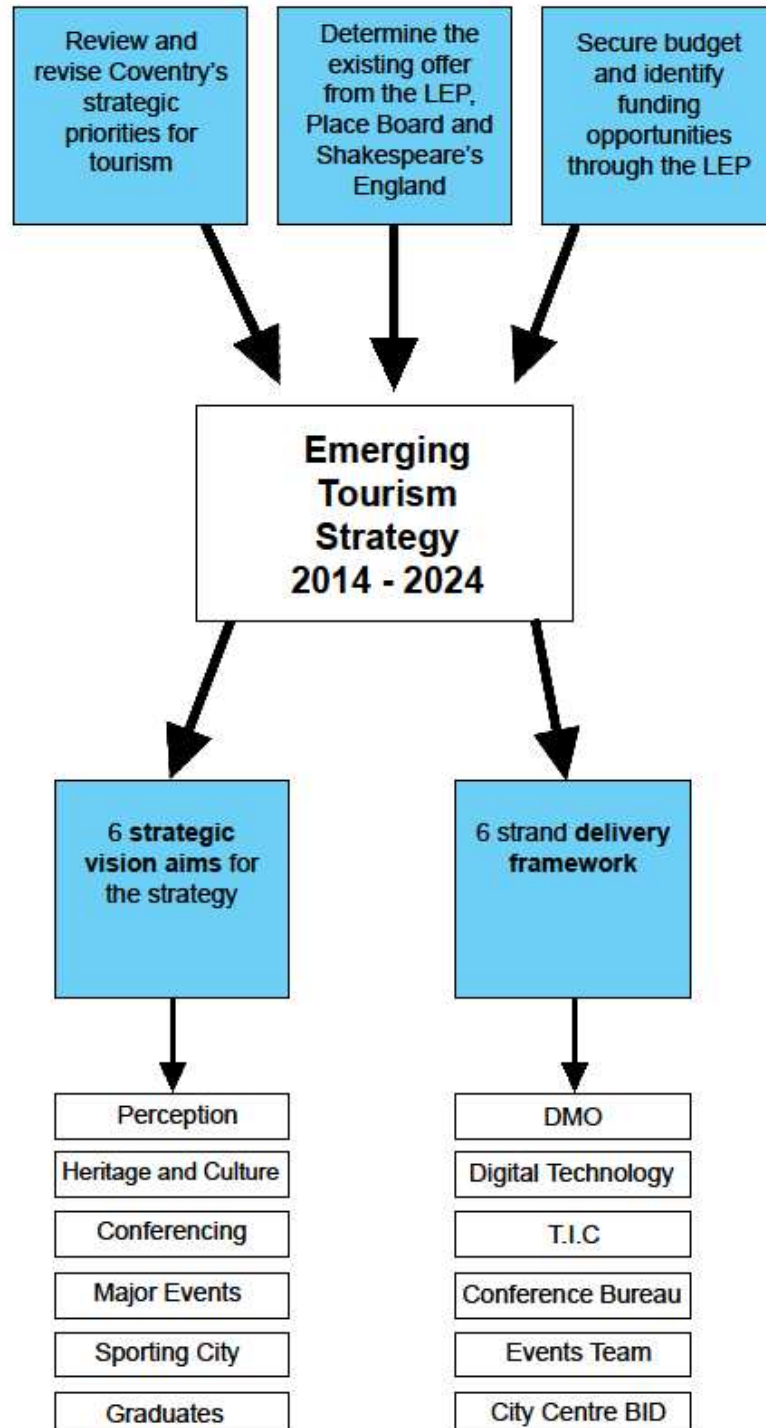
Coventry
2014 – 2024

An Emerging Vision for Tourism

DRAFT - FOR DISCUSSION

APPENDIX A

The following diagram outlines the proposed process to deliver an emerging tourism strategy for Coventry:



Our Vision for 2014 - 2024

“By 2024 Coventry will be internationally recognised as a compelling tourism destination of distinction; renowned for the quality and depth of its visitor experience across its diverse cultural, heritage, sports and events offer. Championing a successful and thriving tourism economy, Coventry’s approach will showcase effective and sustainable partnership working that combines to provide a rich and captivating experience, increasing visitor levels, spend and ultimately jobs.”

Planned outcomes by 2024 include:

1. Change the negative perceptions of Coventry, locally, nationally and internationally to that of the city which offers a vibrant, diverse and quality experience and that is open for business.
2. Solidify a strong network of private, public and third sector bodies to enhance the visitor experience and maximise on regional overnight trips, spend levels and job creation.
3. Coventry to establish itself in the Top 20 UK Towns and Cities.
4. Increase total visitor trips to Coventry by 2024 to 9,000,000, an increase of over 30% from the 6,867,000 reported in 2012.
5. Increase total visitor related spend in Coventry by 2024 to £447,533,000, an increase of 30% from the £344,256,000 reported in 2012.
6. Increase overnight business trips in Coventry.
7. Increase number of tourism related jobs in Coventry to 8,417, an increase of over 30% from the 6,324 reported in 2012.
8. Secure 10 major 4,000+ delegate conferences or events in Coventry by 2024.
9. Improve Coventry City Centre weekly footfall figures from 42% in 2013 to 60% in 2024 and monthly footfall visitor numbers from an average 1.4 million (December 2012 - December 2013) to 1.9 million by 2024.
10. Increase ‘Visit Coventry and Warwickshire’ website numbers to 200,000 visitors per month by 2024, an increase of over 40% from the 140,000 reported in 2012.

Headline Tourism Statistics

£97bn – the value of the visitor economy in England, supporting **2.7 million jobs**.

By 2020, expected growth of **£50bn**, supporting an additional **225,000 jobs**.

Tourism is the **third largest** employer in the UK.

July 2012 - June 2013 figures for Great Britain:

Trips - 0.6% Bed nights + 1.5% Expenditure + 3.7%

Business Trips - 5.4% Bed nights - 4.3% Expenditure - 6.8%

Top five markets for holiday visits to West Midlands: Ireland, France, Germany, Netherlands, Poland..

July 2012 - June 2013 figures for the West Midlands:

Trips + 5.8% Bed nights + 8.7% Expenditure + 15.2%

Business Trips + 5.8% Bed nights + 8.7% Expenditure + 15.2%

2012 Tourism Economic Impact figures for Coventry

- **6.9 million** trips undertaken in Coventry: **6.2 million** day trips and **0.7 million** overnight visits (**2.4 million** nights).
- Visitors spent **£344 million** in the city in 2012.
- This spend supported **8,718 jobs**.
- Spend for day trips was **£200,364,000**.
- Spend for overnight trips was **£143,893,000**.

| Purpose of overnight visits to Coventry (January – December 2012) | | | | | | |
|--|-----------------|-------------|-----------------|-------------|----------------|-------------|
| | Domestic | % | Overseas | % | Total | % |
| Total Holiday | 121,000 | 23% | 38,000 | 21% | 159,000 | 23% |
| Business | 182,000 | 35% | 82,000 | 46% | 264,000 | 38% |
| VFR | 201,000 | 39% | 46,000 | 26% | 247,000 | 35% |
| Other | 18,000 | 3% | 8,000 | 5% | 26,000 | 4% |
| Study | 0 | 0% | 4,000 | 2% | 4,000 | 1% |
| Total | 521,000 | 100% | 177,000 | 100% | 698,000 | 100% |

The above table includes rounding adjustments.

| Total Expenditure associated by Trip (January – December 2012) | | | | | | |
|---|----------------------|-----------------|-------------------------|--------------------|---------------|---------------------|
| | Accommodation | Shopping | Food & Drink | Attractions | Travel | TOTAL |
| UK tourists | £25,768,000 | £10,891,000 | £19,378,000 | £7,672,000 | £16,391,000 | £80,100,000 |
| Overseas tourists | £20,429,000 | £16,742,000 | £13,071,000 | £7,631,000 | £5,919,000 | £63,792,000 |
| Total % | 32% | 19% | 23% | 11% | 16% | |
| Total day visitors | £0 | £87,772,000 | £74,497,000 | £19,400,000 | £18,695,000 | £200,364,000 |
| Total % | 0% | 44% | 37% | 10% | 9% | |

The above table includes rounding adjustments.

Coventry in the Great Britain Tourism Survey 2011

Coventry **is not recognised** in the Top 20 Towns for All Trips. (Benchmark: Birmingham 3rd with 18% increase in spend, Nottingham 13th up 30% on spend).

Coventry **is recognised** in the Top 20 towns for Business Trips (ranked 13th) **BUT** with a 13% decline in spend (Benchmark: Birmingham 3rd with a 20% increase in spend; Nottingham 8th with a 63% increase in spend; Derby 20th with a 20% decline in spend).

Funding

Why important?

Funding is required in order for us to deliver on the strategic objectives outlined further on in the document. As an example:

- Liverpool LEP – Sector Development for Visitor Economy in Liverpool city region = £3,203,743 (ERDF), secured to help deliver a new tourist economy 2011 – 2012.
- Liverpool LEP Partnership – tourism growth £6 million (ERDF) 2011 – 2012.
- Regional marketing culture and heritage Cumbria tourism £2.5 million (ERDF) secured to deliver tourism strategy 2011 - 2012

Where are we now?

- Coventry and Warwickshire LEP: Tourism is not currently a key priority and the Partnership is not therefore geared towards securing tourism funding.
- Coventry does not have a recognised, official Destination Management Organisation (DMO) in its own right. Therefore:
 - There is no invitation to attend official national tourism steering groups (VisitEngland)
 - There is limited access to resources and no official industry status.
- Austere times are leading to many private sector partners having more limited finances/resources
- Business Relationship and Tourism Team – The team has no operational base budget for tourism. The approved budget for 2012/13 was £31k from central communication funds.
- ✓ SBRI Government Technology Strategy Board innovation application submitted for up to £100k feasibility stage grant for 6 months June-November 2014, with opportunity to apply for up to £1.2 million in funding to help reignite the Coventry high street using state of the art technology. Application submitted 5 March 2014.
- ✓ Increase in sponsorship support for C & W presence at International Confex (£19,000 partnership support for 2014).
- ✓ Partnership support in delivering a Visit Britain partner video all about key attractions in Coventry. The video has generated over 100,000 unique views online.

Coventry 2024 - Where do we want to get to?

- ✓ The Coventry and Warwickshire Local Enterprise Partnership to adopt tourism as a key priority sector. Work with Shakespeare's England to encourage support for local tourism bodies.
- ✓ Consortia established and processes in place to secure vital funding via Heritage Lottery Fund, Arts Council England, World Monuments Fund etc.
- ✓ Coventry and Warwickshire attending national and international steering groups alongside Visit England and Visit Britain as an official DMO.
- ✓ By 2015, representation on the LEP business group.

Key Objective 1: Perception

To change perception of the city and cultivate and communicate Coventry's unique identity as a compelling city break destination to visitors; increasing trips and spend and improving quality of life.

Why important

- ✓ Visitor numbers will not increase unless perception of the city is changed.
- ✓ Perception of a place matters a great deal. Visitor opinion forms the basis of all future decision making
- ✓ Capture visitors at the very beginning. Target pre-visit – Encourage getting here and getting around – Offer extended stay – Visit and enjoy – Post-visit.

Where are we now?

- Perpetual circle – If visitors don't visit and spend, economy does not grow.
- Post WWII architecture 'Concrete city' perception is now dated and tired.
- Visitors unaware of the close proximity of the historic heart of the city centre.
- Voted 7th in the Crap Towns Returns 2013 publication.
- 'Sent to Coventry' – lingering negative connotations.
- Limited relationship with Visit England/ Visit Britain due to the fact we are not an official DMO.
- Perceived as an underdog in the West Midland region.
- ✓ Major city centre developments creating new transformational spaces,
- ✓ Friargate development is the biggest regeneration development opportunity in the West Midlands.
- ✓ Produced a 'GREAT Britain' Visit Britain supported video to promote Coventry and Warwickshire – over 100,000 unique views already.
- ✓ Familiarisation trip (Fam) co-ordinated and hosted as a partnership with shared costs - feedback very positive
- ✓ New Coventry and Warwickshire App, Visitor Guide and Websites are all consistent with one brand – joined up unity/continual message of improving the look and feel of our marketing and communication offer not just the physical landscape which supports this tourism vision. Coventry is delivering!
- ✓ Tourism vision launch at Coombe Abbey Hotel March 20 inviting political leaders, tourism stakeholders and VIP's.

Coventry 2024 - Where do we want to get to?

- Recognised by Visit England and listed in the Top 20 Towns in the UK.
- Coventry to be strong enough to stand on its own as a city break destination.
- The perception and ideological expectations of Coventry to have changed from 'Concrete City' to 'City of Culture, Sport and Innovation'.
- Recognised as the most centrally connected city for inbound tourists coming to the UK from Europe, Americas and Asia.
- Coventry's diverse offer to be seen as an equal 'partner' to Warwickshire's established rural offer, with a fully-fledged city DMO.

Key Objective 2: Heritage & Culture

To strengthen the city's heritage and culture offers, unlock new visitor experiences and develop a contemporary cultural quarter that facilitates a greater engagement with inbound tourists from the UK and overseas.

Why important?

- ✓ 45% of overseas visitors to the West Midlands cite famous monuments and buildings as the main reason for their visit – Coventry has a fantastic offer.
- ✓ There are 400 listed buildings in Coventry alone.
- ✓ 9% of overseas visits to West Midlands include theatre going – the highest of any region outside of London.
- ✓ Warwick Arts Centre's economic value to Coventry alone is £27.7 million.
- ✓ Unlocking our rich and unrivalled history to inform and educate the world is vital to the economic stability of the city and region.

Where are we now?

- Many international and domestic visitors do not know where Coventry is located on a map.
- Coventry is not listed in the Top 20 Towns in England.
- Visitors are often unaware of the heritage and cultural offers in the city.
- Trails, building open days and heritage events are underused/undervalued.
- The current location of the Tourist Information Centre (TIC) is limiting commercialisation opportunities.
- ✓ Visitors are more aware of the heritage and cultural offer of Warwickshire.
- ✓ Lady Godiva and Coventry Cathedral are both internationally recognised.
- ✓ Heritage Lottery Fund has been consulted at national/regional level re the Charterhouse Initiative and is a funder of a number of Coventry's venues.
- ✓ Culture Coventry now operational – managing Coventry Transport Museum, Herbert Art Gallery and Museum, Lunt Roman Fort and Priory Visitor Centre.
- ✓ Coventry celebrates Heritage Open Days annually and heritage trails do exist.
- ✓ The Belgrade Theatre and Warwick Arts Centre are award-winning venues.

Coventry 2024 - Where do we want to get to?

- Coventry is recognised for its cultural offer, including the development of an established cultural quarter with cafes, bars, open visitor attractions and a thriving Tourist Information Centre
- Coventry's heritage and cultural offer has been 'unlocked and is thriving and being promoted internationally alongside recognised heritage treasures, trails and Fam trips.
- Coventry to be listed in the Top 20 Towns in England.
- The Coventry and Warwickshire Local Enterprise Partnership to adopt tourism as a key priority – in recognition of the importance and potential of the sector.
- Coventry to have secured significant external funding through consortia and partnerships.

Key Objective 3: Conferencing

Secure major conference and exhibitions for Coventry and gain competitive advantage over other UK cities, enhance the economic profile of business tourism and invest in new hotels and conference centres to attract larger political, academic and blue chip conferences.

Why important?

- ✓ West Midlands (2012-13) business trips up 5.8%. Bed nights up 8.7%. Expenditure up 15.2%.
- ✓ £55 million spent on overnight business trips in Coventry in 2012 (38% of overall overnight visitor spend).
- ✓ Current data shows less people stay overnight in Coventry, but those that do spend almost 6 times more than day trippers.
- ✓ The economic impact of one major event in the city (Plantworx 4,500 delegates) is £3 million.

Where are we now?

- ✓ CCC inherited an established Coventry and Warwickshire Convention Bureau.
- ✓ Bureau offers an online accommodation booking facility supporting major conferences and attracting larger events – key selling point for the Bureau.
- ✓ An established partnership enabling a Coventry and Warwickshire presence at International Confex 2014 (£19,000 sponsorship secured).
- Currently no CCC operational budget allocated to support business tourism.
- In Top 20 towns for Business 2010-2011, Coventry is 12th. However, the survey is recording trips are 19% down and spend is 13% down.
- No single event diary for the city and/or bidding document that is off the shelf.
- Tendency to be reactive and not proactive in bidding for conferences.
- No staff/resource to find new conference business.
- No consistent Economic Impact Assessment carried out on major conferences.
- No city centre conference and events centre close to the train station.

Coventry 2024 - Where do we want to get to?

- Coventry to be recognised as the UK destination for major international conference and exhibitions due to our central locality and experience in delivering successful multinational events.
- By 2016, Coventry to have established a conference ambassador programme that will help to procure new conferences and events.
- Coventry to collaborate with academics from both universities to win major association conferences to the area.
- Coventry to have established a consortia to win major conferences and events such as UKRC, Multiplay, Trade Only and Party Political Conferences etc.
- By 2015, the Bureau to have a dedicated resource to target and secure conferences.

Key Objective 4: Major Events

To attract, secure and maintain a regular high profile events programme for the city of Coventry, gaining competitive advantage over other destinations and enhancing the economic profile of the region with a variety of multicultural, historical and innovative cultural events.

Why important?

- ✓ Coventry Godiva Festival attracts over 125,000 visits in a weekend and is the UK's biggest free family festival.
- ✓ Economic impact of one major live event in the city such as Bruce Springsteen or Take That generates millions of pounds worth of investment for the city and region.
- ✓ Multiplier Effect – 'establish the destination as able to deliver'.

Where are we now?

- ✓ Coventry has prime venue space (Top Three of UK Live Venues).
- ✓ Developing a partnership approach to secure and deliver major events.
- ✓ Home to the Midlands largest free family festival – Godiva – 125,000 visits.
- ✓ Events such as the Coventry Peace Festival, Heritage Open Days and Festival of Motoring are regular events that boost the local economy.
- Coventry's retail offer perceived to be limiting the benefits realised from hosting events in the city centre.
- Trend of 'they come, they go, we never see them again'. Limited post-event data gathering or repeat communication to attract visitors back again.
- Ricoh Arena is undervalued as a venue for major events – primarily due to the perception of the city.

Coventry 2024 - Where do we want to get to?

- Coventry is recognised as the most accessible destination for major events in the UK.
- A consortium to be established and an event bidding process put in place to secure major events for the city.
- Coventry and the sub-region to be known for its collective international and culturally diverse events programme with international marketing campaigns (e.g. Coventry Godiva Festival, Coventry Peace Festival, Coventry Festival of Motoring).
- All major events have a linked programme of city centre and/or fringe events running alongside them to encourage spend and city centre footfall.

Key Objective 5: A Sporting City

Coventry to be known as a ‘City of Culture, Sport and Innovation’ by 2024, attracting high profile sporting events to the City and celebrating sporting achievement.

Why important?

- ✓ The West Midlands is one of the most popular regions for watching sport for inbound tourists according to Visit England.
- ✓ By attending Olympic Football in the city, 73,220 visitors in 2012 improved their view of the local area (estimated equivalent worth of £1.5million).

Where are we now?

- The current city centre sports facilities are out dated and not ‘fit for purpose’.
- Limited history of working collaboratively with National Governing Bodies of Sport to attract major sports events to the city.
- ✓ The Sports Strategy 2014-2024 has been launched for consultation, which would see a £36 million destination facility built in the city centre with a water park, 25m pool, gym, activity slides, indoor climbing wall etc.
- ✓ The economic impact of London 2012 on the city of Coventry generated £4million pounds to the local economy.
- ✓ Ricoh Arena, Sky Dome, universities and other venues continue to play key roles in hosting a wide range of international and sporting events.
- ✓ Solid track record for ability to host major events - Olympic Football, Davis Cup, Corporate Games, International Children's Games, Taekwondo World Championship, Heineken Cup, World Snooker Championships etc.

Coventry 2024 - Where do we want to get to?

- Sport to play a key role in the events and tourism strategies of the city.
- To establish a collective and collaborative sponsor package for key sports venues to attract major international sporting events to the city.
- An enhanced and revitalised Coventry city centre leisure offer.
- Secure and solidify major sporting events via consortia bids.
- Become a ‘City of Culture, Sport and Innovation’ and be recognised for delivering a legacy of international sporting achievements.

Key Objective 6: Graduates

Retain the skill base, maximise the contribution of spend to the local economy and cultivate innovation, enterprise and learning for the city.

Why important?

- ✓ Over 11,000 graduates live in the city, with a high level of disposable income.
- ✓ There are 58,000 students in Coventry across both universities.
- ✓ £351 million total expenditure in Coventry and Warwickshire - £222 million in Coventry.
- ✓ Future skills base - retaining graduate skills helps attract future organisations to the city and the region.
- ✓ Over 8,000 international students at the University of Warwick – strong buying power with international links and relationships.

Where are we now?

- Pull of rural Warwickshire to University of Warwick students, away from more urban Coventry.
- Limited track record of the universities and CCC working in partnership on joint marketing initiatives.
- ✓ University of Warwick is ranked 8th in the Russell University Group.
- ✓ Coventry University has a long and prestigious automotive engineering heritage.
- ✓ Coventry is The Modern University of the Year 2014.
- ✓ Example of spending power – Student Lock-In – £17,000 spent in three hours in one store in Coventry city centre as part of a national scheme.
- ✓ Study Inn attracts foreign students to Coventry encouraging spend with disposable income.

Coventry 2024 - Where do we want to get to?

- Coventry to create a combined programme offer to engage graduates from both universities to visit the city centre with incentivised packages/events.
- Retain the graduate skill base and maximise spend into the local economy.
- Create a sustainable infrastructure of targeted marketing activity.
- A renowned graduate ambassador programme to cultivate innovation, enterprise and learning and to inspire students and graduates to share their experiences of the city nationally and internationally.

Bibliography

England Tourism Fact Sheet 2012- VisitEngland

GB Tourism Survey June 2013

Regional Activities Report September 2013 VisitBritain

Coventry Tourism Economic Impact Assessment 2012

Most Visited English Towns 2011 VisitEngland

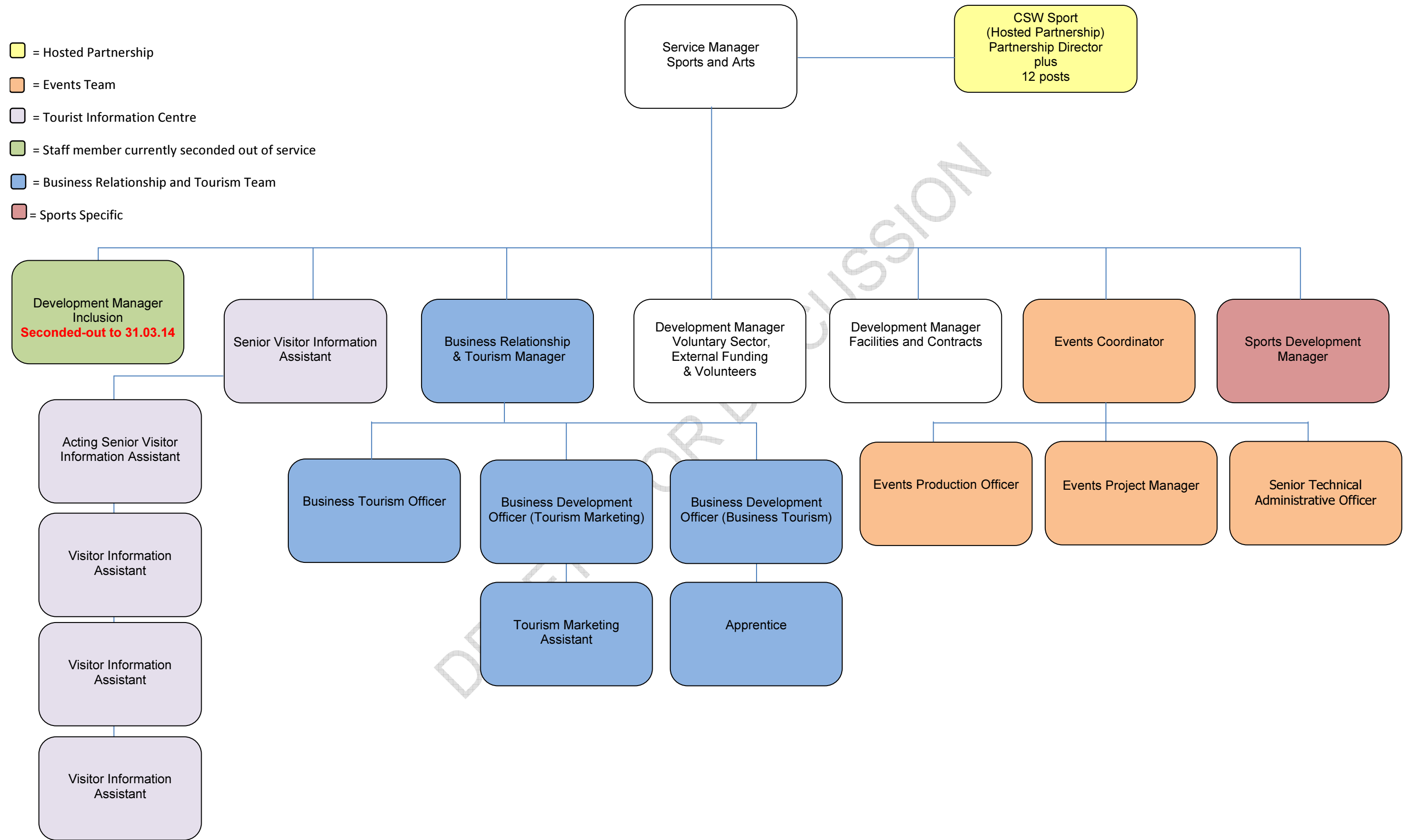
Sub Regional Trend Data Visit 2012 – VisitBritain

Coventry Tourism Economic Impact Assessment 2012

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Sports and Arts Service Structure

- = Hosted Partnership
- = Events Team
- = Tourist Information Centre
- = Staff member currently seconded out of service
- = Business Relationship and Tourism Team
- = Sports Specific



APPENDIX C

Memorandum of Understanding

Establishment of Coventry's Tourism Steering Group

To identify an appropriate steering group to inform and advise on:

- The development of a new Tourism Strategy for Coventry.
- The Council's overall approach to tourism and marketing of the City.
- Establishing a Destination Management Organisation for Coventry.

Considerations

1. To review and ascertain if one of the following two existing partnership groups can be the conduit of the above

(a) CW LEP Culture and Tourism Business Group

The CW LEP's Culture and Tourism Business Group was formed in January 2014 and is chaired by Catherine Mallyon, Executive Director of the Royal Shakespeare Company. The Group's purpose is to encourage businesses to compete nationally and internationally and to encourage cultural activity and tourists to visit. It brings together the former 'big eight' attraction group which includes the eight key attractions from the across the region.

(b) CW Place Board

A variety of businesses and organisations came together in 2012 to create an agenda for putting Coventry and Warwickshire on the map and drive growth locally. That initiative became the Coventry and Warwickshire Place Board, which is chaired by Les Ratcliffe, Head of Community Relations at Jaguar Land Rover.

2. To identify a new steering group

Coventry's Tourism Steering Group

To establish a public/private sector partnership with direct responsibility for overseeing a step-change in the way that tourism and City marketing services are delivered and to establish a Destination Management Organisation for Coventry.

Process

Commissioning of stakeholder workshops

- (a) Structured facilitated workshops to identify the strengths, weaknesses, opportunities and threats currently facing the city.
- (b) Shape the proposed tourism landscape for the city.
- (c) Encourage a partnership approach for bidding for events and funding opportunities.

Establish the vision

- (d) Consultation and engagement with stakeholders.

Establish Key Objectives

- (e) *Develop the DMO's key objectives, infrastructure and resources.*

Establish Structure

- (f) Establish a planned operational integration of new and existing resources to achieve economies of scale, with commensurate benefits to the tourism community. The industry and its partners/stakeholders.
- (g) Determine set KPI's to measure performance.

DRAFT - FOR DISCUSSION

APPENDIX D

What is a Destination Organisation - Visit England

Destinations are the places that people want to visit and experience; destinations are the heart and soul of England's Visitor Economy.

Destinations are multifaceted places containing a number of stakeholders with their own specific needs. Experience shows that without collaboration, coordination and a continued focus, places do not evolve with a common purpose. To create a successful and sustainable visitor economy in an area, all the components that make a successful destination need to be managed in an integrated and long-term way, with a clear focus on the needs of residents, businesses and visitors.

Those with responsibilities for tourism locally vary in form, function, governance and size but essentially take a lead role for the development of tourism in a destination. These may be a single organisation, such as a local authority; a legal entity, such as a community interest company or company limited by guarantee, or an informal partnership. These are England's Destination Organisations.

Destinations that are well managed will be more likely to maximise the benefits of growth in the long term including additional income and jobs. The best managed destinations are also likely to excel in attracting new investment, in keeping value-added jobs, in bringing in new talent and in stimulating innovation.

Effective management of the visitor economy at a destination level not only contributes to a positive visitor experience but can enhance and protect the environment while supporting the interests of the communities and businesses.

Successful destinations make the most of their appeal to deliver benefits to the whole community, and they do this by having a clear, strategic sense of why their place attracts visitors and what investment it needs to sustain or enhance that appeal. Successful destinations have a destination development and management plan, and mechanisms in place to deliver that plan.

Visit England's suggested steps to create a Coventry Destination Management Organisation

- Establish the vision.
- Establish a planned operational integration of new and existing resources to achieve economies of scale, with commensurate benefits to the tourism community. The industry and its partners/stakeholders.
- Establish the DMO's missions and objectives.
- Develop the DMO's infrastructure and resources to provide early benefits to members. Things like establishing a marketing plan including one single website (DMS) destination management system, develop a holistic tourism strategy, collate tourism statistics to set future objectives and create member packages that cross-promotes services.
- Detailed market research, business development and support, determine set KPI's to measure early performance and on-going performance.
- Establish a governance or structure for the organisation (e.g. Company Limited by Guarantee) that's administered by a Chair and Board of Directors and determines roles in the organisation.
- Relationship with core funders and other regional tourism organisations and bodies.
- Over the three years, outline the income and expenditure projection for the DMO.
- Next steps, timescales and vision for the future.

Example of a Destination Management Organisation

Shakespeare's England

Shakespeare's England is private public sector partnership and our board members include the following organisations; Shakespeare Birthplace Trust, Royal Shakespeare Company, Warwick Castle, Stratford-upon-Avon, More than PR, Bicester Village, Birmingham Airport, English Heritage, Menzies Hotels, Eden Hotel Collection and the National Trust.

Shakespeare's England is supported by Stratford District Council, Warwick District Council, Warwickshire County Council and Operation Footfall.

Shakespeare's England is recognised by Visit England and Visit Britain as the official tourism body for the area.

Source: <http://shakespeares-england.co.uk/about-us>

Oxford and Oxfordshire

The DMO would be a public-private partnership agency responsible for the development and delivery of the visitor offer across the county. It would provide strategic leadership for the sector, backed up with marketing expertise and resources to support and promote a sustainable visitor economy. Its scope would include not only UK domestic and international visitors, but also residents who spend and travel within the county and indulge in retail spend.

The DMO would play a leading role in tourism delivery and promotion, working closely with a wide range of partners and stakeholders. It would champion the sector and seek to influence all aspects of the visitor experience in order to nurture a thriving tourism industry; and it would employ tangible outputs to measure improvements in the value of the county's visitor economy.

Source: <http://www.oxfordpartnership.org.uk/PDF/OCTOBER/Paper6-DMO-Vision-Document.pdf>

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